

At Harris Interactive, Salesforce Boosts Forecast Accuracy and Delivers ROI

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— Dan Chiazza
Director, Global Sales Operations



Industry

Business Services

Geographies

North America, Europe, Asia

Challenge

- ∴ Poor global communication
- ∴ Inaccurate sales forecasting
- ∴ Lack of common system integrating key business functions in support of sales
- ∴ Inability to cost-justify marketing campaigns and track them to sales outcomes

Solution

Harris Interactive implemented **Salesforce Enterprise Edition** in the U.S., Canada, Europe, and Asia, and leveraged the **Force.com** platform to maximize ease of use, drive adoption, and enhance the value of integrating sales with marketing, finance, research, and other key business functions. Apps from the **AppExchange** marketplace extend the value of Salesforce at Harris Interactive.

Results

- ∴ Avoids \$250,000 per year in administrative costs typically associated with traditional CRM offerings
- ∴ Significant improvement in forecast accuracy, which is as high as 90 percent one month out in some divisions
- ∴ Forecast creation time has decreased by an estimated 50 percent
- ∴ ROI achieved within the first month in the U.S. and U.K.; immediate ROI in France, Canada, Germany, Hong Kong, and Singapore
- ∴ Doubled supply-chain efficiency

At the time, it was simply an idea. A strategy that had never been executed. That was eight years ago, when Harris Interactive decided to create an official sales organization. Since its inception in 1975, the market research company had never seen its industry adopt a proactive sales model. Traditionally, researchers assumed a great deal of the responsibility.

But in 2000, Harris Interactive broke tradition. The Rochester, New York-based company, best known for *The Harris Poll*, created a sales organization to improve global communication and instill what one VP called a "sales culture" or new business-focused mentality.

Once a sales team was established, Harris needed to manage it, as well as its operations, more effectively. The company also needed to scale resources to contain costs and improve cross-functional support. This required improving communication. To achieve this goal, Harris Interactive required a common system that everyone in the company—from sales and marketing to research and finance—could use to access client information. "To have a world-class sales organization, we knew we needed a world-class CRM system," says Dan Chiazza, director of global sales operations at Harris Interactive.

Creating a Customized, Sales-Focused Business

At first, Harris deployed Siebel's on-premise, client/server CRM solution in hopes of attaining that vision. However, the company found it difficult and expensive to implement. It also found that the Siebel interface had a steep learning curve that took users weeks and sometimes months to adjust to. Siebel's complexity resulted in poor user adoption, and the company's investment turned sour.

"Siebel was counterintuitive to our requirements," Chiazza explains. "Our goal was 'no IT support.' We needed something user-friendly, something that anyone in the company could use self-sufficiently."

After a couple of years, the company pulled the plug on Siebel and looked for a cost-effective, on-demand system with flexible customization capabilities. Harris evaluated Salesforce and SalesLogix, eventually choosing the former for its high reliability, easy-to-use interface, and quick customization with built-in, easy-to-use tools. Without infrastructure and other administrative costs to worry about, Chiazza estimates he is saving \$250,000 a year with Salesforce.

With Salesforce, Chiazza's team integrates sales with back-office functions such as marketing and finance, creating the one common system the company coveted. Harris also tailors Salesforce for each department's needs. Since deploying Salesforce, the company has customized over 250 fields for managing contacts, opportunities, leads, marketing campaigns, accounting, and reporting. Take marketing, for example. Synchronizing sales and marketing is a major priority. Using Salesforce, the company ensures a solid Web-to-lead process, enables mass e-marketing, and launches campaigns that are cost-justified through accurate sales tracking.

"In most companies, sales and marketing don't understand each other," says Chiazza. "We've integrated them and leveraged the secret sauce behind Salesforce—the Force.com platform—to customize the system so both groups work in harmony. We've been able to get more aggressive and analytical with our marketing. Every month we launch several campaigns across numerous vertical markets globally. We track their progress and justify the campaigns that pay off, and marketing adjusts its focus accordingly. With Salesforce, sales and marketing work collaboratively as one."

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Operations

Intelligent Workflow Streamlines Approvals

The Force.com platform has also enabled Harris Interactive to streamline its commission approval process. In the past, a salesperson closing a sale would fill out an Excel spreadsheet that resided outside of the Salesforce environment. The salesperson would then email that spreadsheet to appropriate people to get credit for the sale.

Taking advantage of intelligent workflow capabilities with the Force.com platform, Chiazza automated the entire approval process within Salesforce in less than a week. By incorporating workflow rules and hierarchy, the system knows who the approver is for each of Harris Interactive's 75-plus salespeople. With this new process, Harris was able to inject a second approval on all requests based on product offering. If the first approval request is denied, then the system automatically knows not to request a second approval. If the first request is approved, the system automatically knows who should receive the second approval, all the way up the chain until the system notifies Centive's Compel compensation management application to process the commission.

Extending Salesforce with the AppExchange

Harris Interactive's use of Salesforce will continue to evolve as the business grows, and will do so by employing a wealth of solutions found on salesforce.com's AppExchange marketplace. The AppExchange marketplace allows Harris to pick and choose additional applications as the company's business needs change. Currently, the company is using applications such as Compel, as well as ExactTarget for email marketing and DemandTools 2.0 for data cleansing. The company also utilizes the Miller Heiman Sales Access Manager tool to map out strategic opportunities directly within Salesforce.

Harris Interactive also built its own application, a competitive profiles database, using Force.com Builder. The application, which allows users to link opportunities and post comments and feedback on particular deals where a specific competitor has been involved, took Chiazza less than a week to build.

ROI, Cost Avoidance, and More

With increased efficiencies and synergy between groups, Harris can protect its bottom line. With the Salesforce software-as-a-service model, the company contains costs while improving efficiency. In the United States, implementation finished within 30 days. Shortly after, it was implemented in the United Kingdom and France. Both the U.S. and U.K. achieved ROI in the first month. In France, the investment paid for itself immediately. In 2007, Harris Interactive acquired companies in Canada, Germany, Hong Kong, and Singapore and has successfully deployed Salesforce in these areas of the world incorporating not only native currency, but also local business practices. Chiazza expects the ROI from those deployments to be immediate, as well.

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While administrative costs have gone down, user adoption has gone up. With Salesforce, Chiazza says Harris Interactive has over 90 percent user adoption among users who have logged in during the past 30 to 60 days.

Since the rollout, global access to sales information has also enabled better forecasting. For example, forecast creation time has decreased by an estimated 50 percent. And sales forecasting accuracy, which Chiazza says used to be “highly unpredictable and near impossible,” has improved “100 percent thanks to advanced pipeline management,” and is in the 90 percent range one month out in some business units.

“We brought in Salesforce for the big picture,” Chiazza says. “Salesforce has allowed us to reinvent the way we think about our business. Our challenges are unique to our industry and we have customized Salesforce to make it the most important application in our company.”

For More Information

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