

Phoenix Technologies Standardizes on Salesforce to Achieve 360-Degree View of Customer



Industry

Hi-Tech Software & Services

Geographies

Asia, Europe, and the United States

Challenges

- :: Provide tech support staff with a faster on-demand contact center application
- :: Enable data sharing between sales and tech support, to grow support contract up-sell opportunities
- :: Track and transition product issues from tech support to QA engineering in an accurate, timely fashion

Solution

Phoenix deployed **Salesforce Call Center**, in addition to **Salesforce SFA** and **Salesforce Marketing** to ensure real-time information access and data sharing across sales, tech support, marketing, and engineering.

Results

- :: The integrated Salesforce SFA/service and support solution improved agent productivity and adoption with 10-fold increase in application performance
- :: Phoenix tech support achieved an approximately 20 percent increase in tech support contract revenue and about a 30 percent improvement in the accuracy of its revenue recognition after migrating to Salesforce Call Center
- :: With high global adoption rates and tight integration, the system provides Phoenix with a true 360-degree view of its customers

“At the end of the day, our support team saw a 10-fold increase in application performance, our sales team realized a 20 percent increase in tech support contract revenue, and our senior management gained a 360-degree view of the customer for the first time.”

— Cliff Bell, CIO

Many companies talk about a 360-degree view of the customer, but very few achieve it. Phoenix Technologies, the global market leader in device-defining software, is one that did.

After four years of effectively selling multiple product lines through indirect and direct channels across the globe using Salesforce SFA, Phoenix senior management saw the imperative to move its tech support operations from RightNow Service 6.0 to Salesforce. At a high level, combining sales and tech support on a single application platform would correlate the company's account data with customer satisfaction levels, standardize processes companywide, and provide a consolidated view of the customer.

With the decision to integrate its sales and tech support operations came the realization that Phoenix's existing RightNow contact center application would not work on three fronts: First, RightNow didn't meet the basic sales force automation features required by the company; second, tech support staff working in remote international regions failed to use the system because of its slow application performance; and last, Phoenix required a solution vendor that was more responsive to its needs.

Jump in Agent Productivity Across the Globe

Phoenix has a three-tiered technical support team dispersed in four contact centers in the U.S., China, Japan, and Europe. Each tier plays a different functional role within Phoenix with different levels of technical expertise. To support its international customer base, Phoenix deployed Salesforce in six languages, including English, Japanese, traditional and simplified Chinese, Dutch, and German.

“Salesforce is an excellent option for any company that has a global, complex tech support operation, because it is flexible enough to handle customized processes, performs great even in remote parts of the globe, and seamlessly integrates multiple languages using a single database,” says Cliff Bell, CIO of Phoenix. “While it's hard to estimate the productivity gains in dollars and cents, we know the user experience has improved tremendously since moving to Salesforce.”

Phoenix support representatives also gave rave reviews of Salesforce's easy-to-navigate search functionality and the single sign-on feature, which automatically logs the support representatives into Salesforce after they log on to their desktop Microsoft Windows operating system.

Hit with “Blended” Support Engineers

In the support organization, Phoenix has “blended” support engineers who double as account managers as well as tech support leads for large accounts located in Taiwan and China. For these managers, having access to both sales and support information is critical to their job. Salesforce provides a single view of the customer and a perfect solution for “blended” support engineers that require insight into both sales and service information. Consolidating customer data and processes in a single, integrated application means more effectiveness and productivity in selling as well as support.

Background

Phoenix Technologies Ltd. (Nasdaq: PTEC) is a global market leader in core system software and applications that assure endpoint confidence. The company first established dominant industry leadership 26 years ago with BIOS software, currently has more than 1 billion products deployed, and continues to ship in more than 100 million new systems each year. From this unique foundation, Phoenix has created a portfolio of innovative software products that simply and easily identify and restore devices, thereby ensuring unparalleled endpoint security and availability. For more information, visit www.phoenix.com.

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Before Salesforce, however, these “blended” support engineers weren’t logging their cases because of the slow performance of their RightNow system. These support cases were tracked using spreadsheets on individual desktop computers, rendering the data inaccessible to rest of the organization. The “blended” support engineers embraced Salesforce because it was a high-performance tool with the familiar interface and ease of use they already enjoyed with Salesforce SFA.

“RightNow was so slow that it became a show-stopper for our tech support staff located in remote parts of Asia. With Salesforce Service & Support, we were able to bring our support engineers in Asia into using the same application to track all customer cases,” says Bob Kennedy, director of customer support at Phoenix.

Tight Integration Drives Tech Support Success

After migrating to Salesforce, Phoenix saw a marked improvement in tech-support contracts and about a 30 percent improvement in the accuracy of support revenue recognition. Since sales representatives can now make one stop for all customer-related data, they can easily determine if a customer has purchased a tech support contract and propose an appropriate tech support offering. Similarly, the tight integration between contract management and tech support operations enables more accurate tracking of tech support services rendered against the existing contracts, helping Phoenix recognize tech support revenue in a more timely fashion.

Customer Service & Support + Bug Tracking System = Better Products

Phoenix has integrated Salesforce with its homegrown bug-tracking system to accurately track and transition product issues from tech support to QA engineering in a timely fashion. As an added benefit, the integration of the two systems allows product development engineers to be aware of any presales product issues that might prevent the closing of sales.

In regards to application integration, Bell notes a key benefit of going with Salesforce: “With salesforce.com’s extensive Apex Developer Network, we can easily find a developer to build a bridge between our bug tracking system and Salesforce’s API. This is a huge advantage, because we don’t have to pay premium professional services fees required by most software vendors.”

“360-Degree View” is Not an Empty Phrase

Kennedy believes there has been a fundamental shift in the role of the Phoenix tech support organization after migrating to Salesforce. “Our tech support staffs are talking to our customers every day of the week,” he notes. “By standardizing on Salesforce, we are able to effectively share the customer insights we gain with all the key stakeholders within the company, including senior management, sales, marketing, and engineering.”

“A 360-degree view of the customer might be overused words, but they are not empty words,” concludes Bell. “At the end of the day, our support team saw a 10-fold increase in application performance, the company gained an approximately 30 percent improvement in the accuracy of support revenue recognition, and our senior management gained a 360-degree view of the customer for the first time. These are not empty results.”

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