

Perceptive Software deploys Salesforce to every user for company-wide success

perceptive software

“There are a hundred reasons to use Salesforce, and ‘360’ visibility of customer information to all employees is just the beginning.”

— Perceptive Software

Challenge

- :: Leading enterprise content management (ECM) software development company wanted a single, scalable, company-wide CRM solution
- :: Company growth had outpaced the performance of Lotus Notes and other custom-built legacy solutions
- :: Required the ability to customize the application platform to rapidly address business needs while reducing development, support, and maintenance costs
- :: The staff of 11 that had been maintaining the Lotus Domino/Lotus Notes platform was reallocated and reduced to 4
- :: Needed to complement disaster avoidance/recovery strategies

Solution

Sales Cloud

- :: Phase 1: Chose Salesforce for its cloud computing model, easy customization, and proven performance, and deployed the Sales Cloud for sales automation to the worldwide sales team
- :: Upgraded to an enterprise license agreement (ELA), providing access for all 600 employees, and extended Salesforce to include the Service Cloud and Force.com
- :: Replaced Lotus Notes as the new company-wide CRM solution
- :: Integrated Google Apps Premier components for employees to communicate and collaborate in the cloud
- :: Future plans include integrating Perceptive Software’s enterprise content management (ECM) solution—ImageNow—with Salesforce’s integrated content library and using its ideas community, marketing, and mobile features
- :: Also planning to use Salesforce Chatter to provide employees with complete snapshots of customer accounts that are updated in real time

Service Cloud

- :: Phase 2: salesforce.com partner Appirio optimized the Service Cloud to create a worldwide product support platform for internal and external support agents at two primary call centers plus remote locations
- :: Imported and replaced multiple customer databases with this single, company-wide system
- :: Replaced a help desk application and a heavily customized application for tracking custom coding services with the Service Cloud cases module
- :: The agent console supports case management, solutions, automatic workflows, and collaboration
- :: Deployed the customer portal for more than 6,000 users; the portal includes self-service features like the Service Cloud knowledge base and access to the content library
- :: Added the ideas community feature to capture customer feedback
- :: Integrated with Softrax and Great Plains software for license and service revenue management with help from Cast Iron Systems

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Force.com

- :: Phase 3: deployed custom-built apps on the Force.com cloud platform, including:
 - A professional services automation tool built by Appirio on Force.com, which replaces a legacy professional services tool
 - An events management application built in 2 weeks by one full-time employee to replace two Lotus Notes applications
 - A collateral inventory management application built in less than 1 week by one full-time employee that replaced a time-consuming manual process of tracking collateral on spreadsheets
 - A product configurator built by Appirio on Force.com, which tracks the metadata around each product release
 - A training application, built by Appirio, which lets users enroll in classes at the customer portal, pay fees, and track their registrations
- :: Integrated with a SQL Server data warehouse
- :: Planning to integrate all applications used by the company with the Force.com cloud platform

Results

Sales Cloud

- :: Completed an extensive pilot demonstrating the capabilities of the Sales Cloud in just 3 weeks
- :: Standardizing on Salesforce reduces costs and makes it easy to add new functionality and features company-wide while maintaining change control methodology standards
- :: The Sales Cloud centralizes critical customer information, providing a 360 view, and easily integrates with other systems
- :: Dashboards effectively summarize important information that was previously getting lost in email
- :: Combined with reports, dashboards help employees better organize their time, increasing productivity

Service Cloud

- :: The self-service portal combined with the knowledge base helps deflect calls, reducing staffing needs and improving customer satisfaction
- :: The cases module has replaced multiple Lotus Notes/Lotus Domino applications, eliminating the need for ongoing maintenance
- :: Increased call volumes and quicker handling of cases as a result of employees having tools like solutions or the knowledge base at their fingertips
- :: Employees report greater job satisfaction

Force.com

- :: The ELA means new company-wide apps can be easily built and deployed at no additional technology cost
- :: Four employees replaced more than 20 Lotus Notes applications and several dozen databases with applications built on the Force.com platform in less than 4 months
- :: Completion of the deployment by a small internal team saved hundreds of thousands of dollars in fees to an outside vendor
- :: During the rollout, no bugs were reported and less than 15 cases were created to address problems employees encountered with the new platform
- :: Replaced heavily customized applications that were hard to maintain with a highly scalable, easy-to-use cloud platform for building multiple custom applications
- :: Complete views of customers, employees, partners, and alliances are easily accessible via dashboards and reports, providing real-time analytics to monitor performance and improve planning