BMC Software

salesforce einstein analytics

Who is BMC Software?

BMC is a global leader in innovative software solutions that help businesses gain a competitive advantage and transform into digital enterprises. BMC serves over 10,000 customers with about 6,000 employees, across 30 countries.

Sales Cloud
Service Cloud
Einstein Analytics

BMC encourages a data-driven sales team with easy-to-use analytics

Sudheer Sura, IT Director, SFDC Platform, has been working with Salesforce for 14 years and is passionate about helping businesses solve challenges to make their teams more productive.

BMC is a digital enterprise management services and solutions provider and has a large technology portfolio with a variety of tools that serve different needs of their business. With BMC having an abundance of data, at times it was a big challenge to streamline data processes. Sudheer, a five-time Salesforce MVP, was ready to start the journey of bringing relevant data to the right audiences.

In order to achieve this goal, it was important to democratize the data and provide a holistic view of accounts and pipeline to the sales teams.

"By pulling in Salesforce data natively, we give our sales teams the power to report across all of these different items, and that shows extreme value."

-SUDHEER SURA, IT DIRECTOR, SFDC PLATFORM

BMC is a Trailblazer and provides innovative solutions to 10,000 customers.

BMC has been utilizing Sales Cloud and Service Cloud for several years in order to centralize its data and pull relevant reports. However, BMC was ready to take its reports and dashboards to the next level and provide sales teams with a comprehensive view of account health.

BMC began its Einstein Analytics journey with the goal of helping sales teams better understand their accounts and prospects. Its existing method for sales teams to see a holistic account view included a combination of various reports such as Excel. However, there was no single report that provided all of the data in one place.

Data democratization expands past sales teams.

In addition to Sales Cloud data, Service Cloud data is also represented in Einstein Analytics. By including case data, information from multiple departments is showcased in one single view, for the first time.

"By pulling in Salesforce data natively, we give our sales teams the power to report across all of these different items, and that shows extreme value." -Sudheer Sura, IT Director, SFDC Platform

In addition to the sales teams, executives are also using Einstein Analytics to help run their business. Rachel's team worked closely with the executive team to understand what type of data is most important for their day-to-day business. Now, executives can go into Salesforce and see the status of their business, and then apply business context to the findings.

Einstein Analytics helps BMC reduce manual analysis processes.

BMC first started its Einstein Analytics journey by enabling sales leaders with relevant data to help understand pipeline movement and stage history. Historically it was challenging to pinpoint what factors contributed to movements in the forecast. Within the sales organization, there is a software consulting team that assists the sales reps during the deal cycle. The software consultant (SC) organization was looking for a way to optimize and enable its limited resources and needed a tool that would help the team maximize its time by quickly understanding account health. With Einstein Analytics, the team is able to dive into account data on the go and answer questions quickly.

Before having real-time analytics, identifying relevant findings was a long, manual process. With Einstein Analytics, teams can analyze and take action in real time.

BMC enables employees to maximize time and prioritize efforts.

With Salesforce, BMC has been able to provide employees with the ability to quickly drill down into waterfall charts and see the exact status of specific deals. Managers can ask their reps questions about specific findings from Einstein Analytics and can provide coaching efforts when needed.

"It helps our employees do processes better and make better decisions by showing relative performance." -Sudheer Sura, IT Director, SFDC Platform

In addition, the software consulting team has been able to address the challenge of how to service the same number of accounts with less manpower. By empowering SCs to have a holistic view of accounts, they are able to cover twice the amount of accounts they were able to previously.

Salesforce Customer Success Story: BMC Software

CHALLENGE

Current reporting capabilities could not show a holistic view of an account's health.

Software consultants have limited manpower but need to serve more accounts.

By the time critical findings were discovered, the data would be out-of-date and not useful.

Manual quarterly business review preparation included analyzing data and exporting it into PowerPoint.

RESULTS

Software consultants have a holistic view of account health, allowing for twice the productivity.

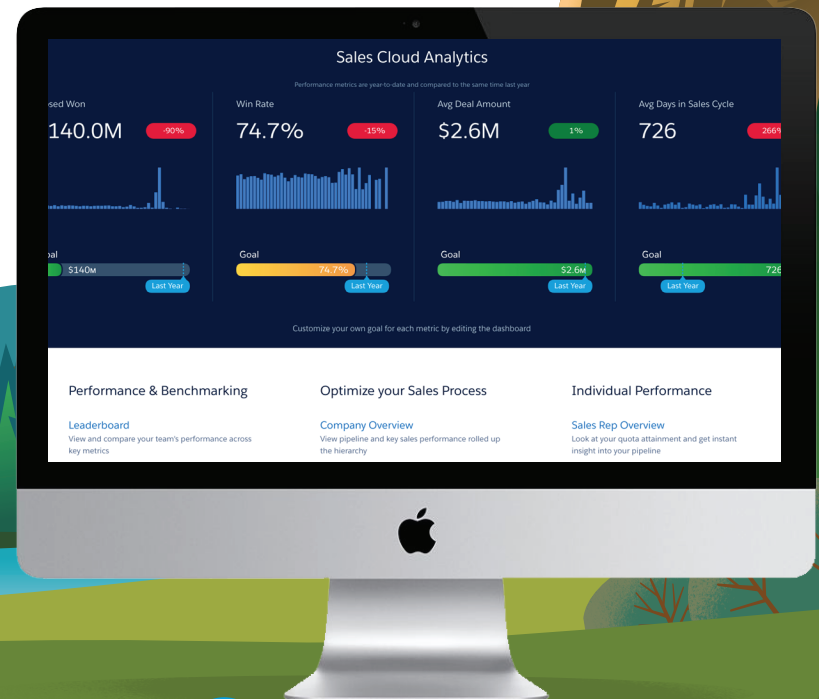Time saved on review preparation; meetings are run on Einstein Analytics.

SOLUTION

Sales reps, managers. and executives are using Einstein Analytics for real-time insights.

Quickly understand waterfall charts and the "why" behind pipeline movement.

PRODUCTS

Service Cloud
Sales Cloud
Einstein Analytics

Salesforce is the leader in enterprise cloud computing. We help companies connect to their customers in a whole new way with our sales, service, marketing, community, and analytics apps. All of these apps run on the Customer Success Platform, so you can manage all your information in one place. To learn more, call us at 1-800-667-6389.