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CRM Transformation – salesforce.com
Make it easy

In many ways, adopting a cloud-based customer relationship management (CRM) software application is a no-brainer. For the sales team, CRM software applications can provide an intuitive, easy-to-use tool that delivers an experience on par with polished consumer applications, plus a ton of powerful functionality. For the technology team, web-based CRM software-as-a service (SaaS) removes a lot of headaches – no need to buy hardware, perform routine maintenance and upgrades, or manage hosting.

While some organizations are intimidated by the effort required to switch from existing systems to a cloud-based CRM software application, in reality it's often not as hard as it looks. After committing to a CRM SaaS solution, the key is working to make the transition as seamless as possible.

Strategy – and speed

The work and planning required to make the switch to a cloud-based CRM solution such as salesforce.com can definitely be worth it – if you do it right. That means implementing the CRM software application in a way that makes it a strategic resource, not just a tactical tool. What are your overarching business goals? What will your technology portfolio look like in three years? Do you have a cloud strategy? Companies that can answer these questions are better positioned to achieve transformational benefits from a CRM solution, including industry-standard process improvements that will serve the organization for years to come.

Speed is also a key factor in a successful salesforce.com transition. It's important to collaborate with everyone who will be affected by the new system at key steps along the way. That's the way to remove time-consuming drama that can accompany any new implementation – especially one involving your salespeople. A thorough understanding of the legacy environment is also a key factor in efficient, speedy transitions.

How we can help

There are many providers that can help organizations make the transition to salesforce.com from a technical point of view. However, this isn't a technology issue as much as it is a business issue, and that's where Deloitte excels. We make sure that your salesforce.com transition strategy accounts for all of the surrounding business issues that will determine whether the implementation succeeds or fails in the long term, helping your organization squeeze every bit of value out of your investment. Just as importantly, we know our way around the intricate details that make up the technical side of the implementation, from the application itself to the legacy systems that it typically replaces.

What's more, we have developed specific processes and applications that use the Force.com platform and other related salesforce.com applications.

Here are some of the areas where we can help:

- Cloud computing planning and risk assessment
- Strategic assessment and architecture services for cloud computing migration
- Cloud computing implementation assistance including:
  – Salesforce.com's Sales Cloud and Service Cloud applications
  – Chatter collaboration cloud
  – Force.com deployment platform
  – Business case development
  – Global process alignment

Bottom-line benefits

- Realize faster return on investment through rapid deployment
- Free up "business as usual" budget for new initiatives
- Reduce cost of entry for new technology services
- Increase revenue through more effective business processes
- Gain competitive advantage through innovative applications
- Increase collaboration across the organization

Five ways to get more value now

Deloitte has helped hundreds of companies through successful transitions to salesforce.com. Here are some practical tips we've learned along the way:

Start small. It's usually best to limit the scope of the rollout at the beginning. Follow a pilot approach that allows your team to master its capabilities and show early results before expanding outward.

Measure the value. Plan, measure and evaluate the costs and benefits at every step of the way – before, during and after the implementation. You might be surprised at what it reveals and where you can improve.

Plug into the network. Today, salesforce.com exists at the center of a web of related applications designed specifically to extend its core functionality. Some of these applications are very good and offer a better option for companies that might otherwise create their own extensions. Make sure to take advantage of them.

Account for the risks. Are your current approaches to risk management and controls enough to meet the challenges of a distributed services environment? Make sure you aren't considering this question after the fact.

Borrow best practices. Tools like salesforce.com have evolved to reflect best practices at the industry level. Make sure your organization is open to the possibility of adopting the processes and approaches that are built into salesforce.com, rather than forcing the application to fit your current model which may be outdated.

CRM Transformation in action

- When a large insurance firm wanted to improve sales efficiency and create more effective relationships with customers, we helped implement a salesforce.com pilot that eventually expanded to 1000 users. The company benefited from higher-quality RFP responses in less time and improved visibility and management capabilities in the sales opportunity pipeline. Salesforce.com ultimately awarded Deloitte the "Sales Cloud Deployment of the Year" award for this initiative.

- A Fortune 500 financial services company needed to increase sales activity and improve its customer relationship management practices. By implementing a salesforce.com solution to serve a population of 4800 users, we helped the company deliver a 28% increase in sales activity. This project was awarded the "Large Enterprise Deployment of the Year" award from salesforce.com.

- A major U.S. bank engaged us to provide a centralized system for lead capture, serving more than 300 telesales call center representatives. The bank chose as their platform a salesforce.com Sales Cloud solution to help them consolidate customer loan information to give sales representatives a single, integrated view of customer data. It also gave upper management the ability to track lead status in real time throughout the lead life cycle.

- A leading global technology company's Sales Force Automation (SFA) solution had outgrown its current deployment due to the company's rapid growth. The company decided to move to a unified platform for partner relationship management and SFA capabilities using the Force.com platform in order to improve the level of collaboration between partners and customer-facing teams. We helped the company implement salesforce.com to improve the quality and efficiency of partners' and customers' interactions with their organization; improve the user experience for the sales team; streamline global sales and marketing processes; and drive increased sales revenues. We handled every phase of the project – from scoping and project management to implementation, user testing and rollout. Today, the new solution has been adopted by more than 25,000 partners, 150,000 partner users, and roughly 3500 internal users.

Related offerings

• Cloud Computing

• IT Strategy and Effectiveness

• Package Selection and Application Strategy

For additional information

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