CRM Migration Case Study
Customizing Salesforce to Meet a Telco's Complex Needs

Client Profile

The client is one of the largest telecom providers in the US and has been in business for 120 years. Their offerings include voice, internet, data, wireless, wiring and cabling, security, monitoring, automation, computer network service and digital video.

Selecting Salesforce for CRM

The overall goal of the client's CRM vendor evaluation was to choose a platform that would increase the productivity of their internal teams, improve process quality and enhance their customer's buying experience.

The client performed a standardized vendor evaluation process to compare the competing offerings. After completing their evaluation, the client determined that Salesforce's CRM platform would be the best fit for their organization.

Selecting RadixBay as Their Implementation Partner

They continued the project by evaluating Salesforce implementation service providers. The client understood that selecting the correct provider would be the single most critical factor to the success of the project.

Like all organizations, the client wanted a vendor that would offer the best combination of quality, value and ability to execute. In addition, they wanted a vendor that would be willing to share ongoing support with their team and act as a long-term partner and trusted technical advisor.

After reducing the vendors to a short list of competitors, the client asked the remaining service providers to present their offerings to the evaluation team. The organization compared the vendors and selected RadixBay as their implementation partner.

"We demonstrated that we had the talent, project management expertise and a strong commitment to our clients. They understood that the RadixBay team was willing to do whatever was necessary to produce a high-quality product."

Hal Hawisher, RadixBay COO

Initial Analysis

RadixBay's Salesforce implementation team used the information learned during the sales process to identify the client's high-level needs:

- Easily customizable - The client wanted the platform to be easily customizable to meet their complex business needs and wide range of B2B and B2C products and services.

- Highly flexible – To allow them to accelerate new offering time-to-market and quickly modify the system to meet changing business requirements.

- Robust UI, dashboards and reports - To improve their end user experience and facilitate decision making.

- Strong task management, workflow and automation components - To improve sales team productivity and performance and enforce business process best practices.

Developing Detailed System Specifications and Project Documentation

The RadixBay team conducted a series of needs analysis discussions and generated a set of detailed system specifications. The team's analysis activities covered all facets of the new system – from legacy data migration to UI, workflows, security, documentation requirements and end user dashboards and reports.

The team also created a set of project management documents that defined roles and responsibilities, general project requirements, communication procedures as well as timelines, milestones, deadlines and due dates.

Helping the Client Fully Leverage Salesforce Features and Benefits

Throughout the analysis process, RadixBay analysts educated the client on Salesforce features that would help them improve internal operations and better interact with their wide range of clients.

> "A critical part of every project is to educate the client on the Salesforce features they can leverage to improve their internal business processes, increase sales team productivity and enhance their customers' buying experience."
>
> Christen Sisler, RadixBay Salesforce VP

Adhering to Agile Development Best Practices

RadixBay followed a traditional agile development process to build the new system and customize it to meet the client's needs. The team scheduled a series of 2-week sprints, held demos to generate client feedback and met daily to discuss project activities. Additional specification meetings were held with the client on an as-needed basis.

Migrating Legacy Data

The RadixBay team performed an extensive evaluation of the client's legacy system to identify the data elements and map them to the Salesforce platform. RadixBay quickly built an automated ETL process to cleanse, transform and load the data into Salesforce's data store.

Organizing Complex Offerings

Like most Telecom providers, the client's offerings consist of a wide range of products, services, hardware components and packages. In addition, the public infrastructure dictates what products and services are available for a given location. The implementation team designed a set of Salesforce price books to enable the client to easily customize an offering to meet each of their customer's unique needs.

Customizing Salesforce to Multiple Teams

To better meet the needs of their diverse customer base, the client organizes their sales personnel into separate units. Each sales team has its own unique set of customer interaction workflow, documentation and dashboard/ reporting requirements. The RadixBay team worked with each team to customize the system to meet their specific business requirements.

Auto-Generating Business Documentation

From initial customer contact to on-boarding and ongoing CRM, the client's line of business requires that they generate a diverse set of financial, contractual and operational documents. RadixBay worked with the customer to analyze the competing offerings and selected Ninetex's Drawloop Docgen to automatically generate documents from Salesforce data.

The client also wanted to replace its current geo-location application with a more capable platform.

RadixBay generated a shortlist of vendors and worked with the client to evaluate the competing products. The teams agreed that Salesforce Maps, previously known as MapAnything would best meet the client's needs.

integrating Third-Party Applications

The RadixBay team deployed and configured Nintex Drawloop Docgen and scheduled a session with Salesforce Maps, which requires that it work with the client to configure its product offering. After the installations and configurations were complete, RadixBay provided demos of both products to the client.

User Training and Testing

Throughout the development process, RadixBay worked with client personnel to build UAT test cases. The team also created a robust set of administrator and end user training guides and held several training sessions to educate client personnel on the Salesforce platform.

Minimizing Go-Live Downtime and Post-Implementation Support

RadixBay's goal for the implementation was to minimize the migration's impact on the client's end user community. The client has a very active sales force and a high number of daily interactions with their customer base.

After the end user community completed the UAT process, a traditional GO/NOGO meeting was held and a decision was made to move forward with the migration. RadixBay asked the customer to switch their legacy platform to read only on Friday and performed the production migration over the weekend. The production system was 100% available on Monday morning.

The RadixBay team held several Q&A sessions during the first week to answer any questions and discuss potential system modifications.

Additional adjustments to the system were prioritized, tested, approved and scheduled for implementation.

Ongoing Support

Although RadixBay turned over the new system to the client's internal support personnel, our Salesforce Managed Services team continues to support their organization. The RadixBay managed services and implementation teams work together to act as the client's technical advisor and perform system modifications via traditional work request procedures.

Wrap-up

Migrating from any legacy CRM platform to Salesforce is a complex project that requires an implementation partner that has a strong combination of technical skills, project management expertise and commitment to quality. RadixBay's dedicated team of Salesforce experts are ready to help you migrate and fully leverage the competitive advantages that Salesforce provides.

About RadixBay

From application development and packaged application support to around-the-clock cloud and on-premise data infrastructure monitoring and administration, RadixBay provides a wide range of enterprise-grade IT solutions.

RadixBay's rural shore model combines the cost benefits of offshore services with the security and simplicity of onshore support.

RadixBay clients are able to leverage the combined skills and experience of an entire company of cloud and on-premise IT experts.

Focus on Your Business.

Let RadixBay Handle Your IT.