

CASE STUDY



Unified CRM Solution for Multiple Lines of Business

Abstract

Our customer is the industrial products arm of a multi-billion dollar giant. The company is a conglomerate of different organizations focused at delivering integrated waste stream solutions in the solid waste management industry and a leading provider of Environmental, Energy and Industrial Services throughout North America.

The parent company was targeting high annual organic sales growth, which meant more contribution in sales from the four LOBs of our customer. With disparate CRMs, lack of comprehensive visibility for executive teams, and no opportunities to increase cross-selling, the business challenges were daunting.

Vertex stepped in as the strategic CRM advisor to iron out these challenges and provided a comprehensive CRM Solution.

VERTEX

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Business Challenge

Our customer is a conglomerate of different organizations focused at delivering integrated waste stream solutions in the solid waste management industry. They had four major lines of businesses (LOBs). Being the parent company, they were targeting 6-8% annual organic sales growth, which meant more contribution in sales from all the four LOBs. Our customer had four different CRMs (result of acquisitions at different points of time) and two different ERP systems. Each organization was following their own way of managing sales, customer support, and marketing across territories and business lines.

With disparate CRMs and lack of comprehensive visibility for executive teams, they did not have holistic and comprehensive insight into what was or was not working. The challenges included –

- Same customer profiles and data being tracked in separate ways with no inter-relation across different lines of business
- Lack of 360 degree visibility inhibiting the options to cross-sell and tap into bigger markets or opportunities
- Multiple sales teams from different territories and different business lines with no visibility into each other's customer relationships only added to the chaos.

Our customer was losing on the opportunity to cross-sell, tap into the existing relationships from a different LOB and having an overall view of the customer needs and issues at the customer

Vertex Solution

Vertex conducted a comprehensive analysis of the existing setup and identified that though the order management and billing were more centralized, based on JD Edwards, the opportunities and orders were fed from different CRM systems; resulting in each line of business (LOB) representing the same customer uniquely inside JDE just like their CRM systems. This created not only

in duplication but also disparate records of the same customer information. Taking into account the different LOBs with different product lines, sales processes, and sales territories, Vertex implemented a CRM solution.

Solution Highlights

The key solution aspects are as follows:

The Balancing Act–

- Pushed standardization while factoring in unique processes of each LOB
- Formulated the Customer Lifecycle from starting in the CRM, and ending in the ERP and Billing System at appropriate time
- Consolidation and Scalability factored in CRM design
- Leveraging Salesforce standard features like Permission sets, Sharing rules, APEX sharing, Account teams, Case teams to control security and visibility

The Data Sanitization Act –

- Single Data definition for Accounts, Contacts, Leads, Opportunities and Cases
- Checks and balances to weed out bad data before exporting to Salesforce
- Creating Account and Case Teams from a Territory Management System which existed outside of Salesforce

Extending CRM to entire spectrum of Customer Relationship –

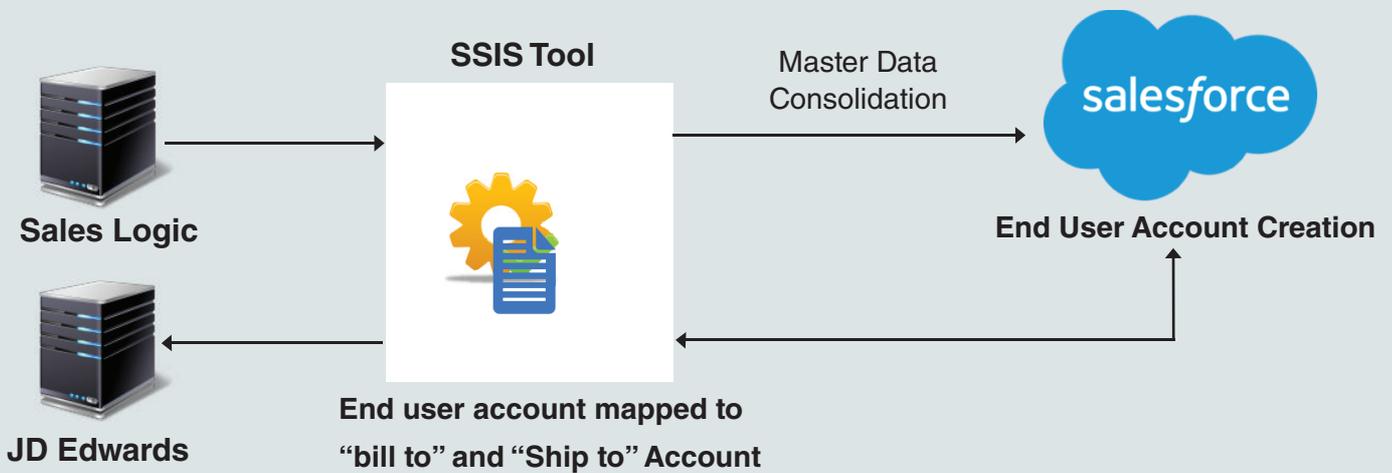
- Complete spectrum of managing customer relationships from lead to service
- 360 degree view of the customers for the first time

Integration of CRM with existing ERP –

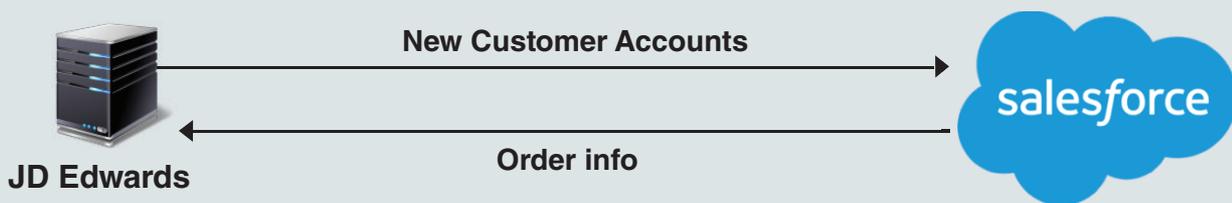
- Integration with JD Edwards Systems for Customer Accounts, territory data (each LOB having their own territories), opportunities and orders to reconcile information and reporting at one place
- Simplified and comprehensive CRM as one Data Source
- Complete insights into billing and orders at account level across territories and opportunities

Migration

Migration of Lines of Business Data



Integration between JD Edward System & Salesforce



Ability to update mass data to reflect changes in Territory data



Example:

RSM(i.e Regional Sales Manager) Changed for a postal code in Territory data.

Our solution updates Account Team Member, Account Share, Opportunity Owner ID & Activity Owner ID field values at one go for the Updated postal code.

BUSINESS VALUE

- Consolidation of customer data to create synergies between different lines of business' sales, customer service, and marketing teams.
- High level visibility at Executive level to enable better decision making
- Opportunities to explore cross-selling and accelerate business growth of the conglomerate
- Less means more – One version of truth. One Customer, One CRM.

About Us

Vertex is a CMMi Level-3 IT consulting organization that engages with its customers at a strategic level and provides 'thought leadership'. Vertex's team of Solution Scientists craft innovative solutions, with a holistic view, that make businesses smarter. Vertex acts as an advisory partner, aligning its offerings with the business goals and objectives of its customers.

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