

Risk Management Firm Transition to Salesforce

Service provider: ForceBrain.com

Project type: Software development

Industry: Business services

Project cost range: \$10,000 to \$49,999

Project completion date: 2012-11-22



Project description:

The client is a San Francisco-based risk management firm. ForceBrain was referred to provide expert implementation of best practices. This included inside sales and direct interface implementation.

Feedback:

The client was pleased with ForceBrain's performance and would recommend them to others. Forcebrain brought in the technical skill set and delivered on all front.

"We were impressed by the level of expertise, quickness, and responsiveness. They were everything we expected, very fast and furious."

Interview transcript:

Please provide me a brief description of what on your company does for some background information?

Yes, I work in the supplier risk and performance management space. We're a cloud provider that helps buyers and suppliers to kind of collect information, collaborate, share information, but ultimately, for the buyers to evaluate the risk and performance of the suppliers.

What city do you operate primarily in?

South San Francisco.

What is your position within the company?

I'm a Vice President of Network Services.

What was your company's business goals or reasons for undertaking the project with ForceBrain?

So when I joined the company, they were using Oracle CRM fairly poorly across the organization and pretty quickly got a review of all the constituencies and they seemed like everybody wanted Salesforce, but no one was willing to make the decision. So I basically brought Salesforce in and had done so at previous companies. And basically, I can do a lot of stuff myself, and I had a colleague who, actually a guy who worked for me, he's the Director of Inside Sales, who could do the work fairly well, but I wanted an expert implementation of best practices. And so I just wanted to use a service provider to help with that. Essentially, the brains, expertise, knowledge, but not necessarily business process, because I think business process, we could provide ourselves.

So initially, we were implementing for Inside Sales. It's a high transaction organization and we had leads and opportunities, accounts. We had never done direct interface with our system. That was the initial goals to get them going. ForceBrain was brought in by Salesforce as a potential service provider. And then we did a quick evaluation of two or three options and we ended up going with ForceBrain.

Why did you decide to build on Salesforce instead of some other platform?

Primarily because it's the leader, it has a huge, what's it called, application-rich -- there's a word here. You know the AppExchange, the ability to get additional apps that would interface pretty quickly. It's configurable. It doesn't require a lot of development. It's familiar to almost everybody that we hired. And quite frankly, they're the leader.

And so we knew that the user adoption would be easy. We knew that getting some of the additional functionalities that we wanted like interface between our systems would be easy. And in addition, like subscription management, that they'll be able to purchase the subscription management system that cannot only work for our backend, but also work directly within Salesforce.

Can you provide me a little bit more about the scope of the project?

Yeah, we initially want to get 25 licenses, grow to 50, and then grow to 75. And that's what we did. For the first 25, it was primarily my Inside Sales Team that had a director for and had a team of about 15 people at the time. And I wanted to implement an object, I mean, customize the opportunities and the lead flows specific to our subscription services and D-types, the additional custom-fields. In addition, I want to bring everything we knew about the 20,000 people on our network into Salesforce as accounts, so that we could quickly reference the information within Salesforce.

Previously, the team had been using Google Workbooks, Excel spreadsheets and had been essentially just living inside of our network looking at specific customer records. And then even when they would do the subscription pricing and whatnot, they would have to reference Excel, talk to each other and have various solutions. It was very unautomated, very difficult to manage. Everybody had their own Excel spreadsheets. And closing the quarter and giving out sales commissions was next to be impossible because everybody's claiming the same opportunities. As soon as you distribute the Excel spreadsheet, someone would call in and they would add that to their Excel spreadsheet. And then at the end of the month, three people were pulling the same opportunity due to this nature. So it was essentially the Inside Sales Team which was the subscription team that was doing roughly 1500 transactions a month.

What technologies were used, specifically, for this Salesforce project?

As I've said, we've worked with CRM before.

We didn't do any programming whatsoever. The Salesforce application, at this point, it's fairly mature when it comes to opportunities and leads. We did use Jitterbit as a technology to interface the tables inside of our application and to bring it into Salesforce. And Jitterbit application worked really well for us. That was the only major piece of technology. Other than that, most of it was creating custom fields, a couple of triggers, a couple of formulas, but we did no coding whatsoever, no Visual changes. It's all drag and drop.

I would say that's again another reason why I wanted to use an implementation partner. I knew it was going to be easy, but I wanted to find somebody that could actually do it very, very quickly under expert direction.

In essence, I have managed a previous company, Salesforce automation teams and sales operations, and so I'm used to dealing with the admins directly. I just really wanted an expert admin that could do this stuff for me. I didn't need very highly specialized skills, other than the Jitterbit stuff, that was a little bit trickier.

Can you provide the size of the initiative, in dollar terms?

Yeah, you know, it's pretty small. It's a \$25,000, \$35,000, it was in that range. It's a pretty small implementation. We had a very little budget.

When was the project finished?

I think it initially started around June. I want to say it went on for a couple of months. And then essentially, they got the project done well under budget and really quickly. So they continued to work with us – probably stopped in around November. We basically finished the implementation of the next thing, which was the Enterprise Sales Team. We upgraded from, I think it's Professional to Enterprise. I think that's all right, with Salesforce in the fall, and then that enabled us to have two record types, one for Enterprise Sales and one for the Inside Sales team. We did use them a little bit to finish off our contract.

The systems then, I've implemented the rest of the application, all the service systems we're using now. We've gone from 25 to 75 users on the system.

Do you have any stats or metrics that you can share about the results of the project?

The one thing that I really liked about them was their level of expertise in the quickness and the responsiveness. We never saw them resolve. They basically stayed in their desk and we worked remotely. So that worked out really well. I would say they were everything I expected. And there weren't any surprises. Once things were tricky, they were clear when things were clear and when things were tricky. And I should say that we built like two or three custom objects for some tricky situations. And those custom objects worked really well. We since then have developed a couple additional custom objects.

Since building on Salesforce, how do you feel about its performance and you feel you made the right decision?

Yes, absolutely. Adoption was fast and furious, going from Google Docs and Excel spreadsheets and being able to close commissions in a couple of clicks and having no fights anymore was a big success. The whole company now has adopted Salesforce. And since then, I also got the company to buy Zuora. So we have implemented Zuora for our subscription management system. And that's proven to be very

effective. We bought a couple additional apps as well. ClearSlide, we use for integration or tracking. It's called – I'm blanking on about tracking, but we're doing integration with it that's standard as well. Yeah, it was the right decision at the right time. It was quickly and effectively picked up by the users.

The other thing I'll say that was really helpful that ForceBrain did was – I mentioned that I wanted expertise and I wanted strong knowledge and experience. They actually did a fantastic job at documenting not only the technical aspects of things and how it was done. They also put user documents together that we continue to use today. Be it on the data loader, be it on adding custom fields beta, on adding reports on the dashboards. It's really been great– their augmentation of bit information has been pretty good.

We don't really have a need for them at this point. We would use them again. We're a pretty knowledgeable user, and we had a pretty great lead– my biggest need was I needed it done very quickly. And that was accomplished.

And just a little bit more about the performance, do you feel like their deliverables were on time and within the budget?

Yes, definitely. For me, they were under budget and they were in front of schedule. I'll say, again, it's because my ability to give them the project, the timeline, the expertise to make decisions on the fly in an authoritative way. I would say for guys like myself, they were fantastic and they came way under budget.

When I tried to introduce them to the enterprise sales team, which is really just the Vice President for sales, and you probably know this... I mean, the reason we have operations in sales is because the operations people can typically do these kinds of things whereas sales, they don't know what they want all the time. It was harder for a VP of Sales who's unfamiliar with Salesforce and its paradigm and its use to interface with directly with ForceBrain as we had and the developers we had. And so they didn't find ForceBrain to be that useful which, as I found out right afterward, it was primarily because they were asking the wrong questions and they needed basic education and that's not really why we chose ForceBrain.

Yeah, they came under the budget and they closed the project down really quickly. And I had 30 percent of the budget still available when I was done. And that's why I used them for some support stuff for the Enterprise Team.

Did you find anything unique about them in comparison to others that you may have worked with in the past?

Mainly flexible and nimble, I mean, they were really flexible and nimble. I've dealt some with the other guys. They weren't real sales oriented. They were really just nuts and bolts, more like a services team, and I'm talking about their sales. ForceBrain was active, effective, and efficient. They didn't try to sell me. So I found it refreshing, because I knew what I wanted. I knew that I could do things fairly inexpensively. And I just wanted them to handover a couple, really quality system admins to work with.

We did, for example, one thing we needed their expertise on is we had no idea how to do the interphase between our application and Salesforce. But we expected them to give us a solution and to evaluate the solutions out there and give us one that would be the lowest cost and give us the right bang for the buck. And you know what? They were quick, very quick at coming up with Jitterbit and two other alternatives.

We selected Jitterbit. So I was really pleased when I pushed them to come up with the solution, so we didn't have to do the research.

Do you think there was anything that they could have improved on or that you would like to see them do differently?

Yeah, I think the thing that they could improve on was recognizing the different audiences they're talking to. As I would say, their implementation consultant, when they would talk to me was extremely quick, bright, fun, and energetic. But when he would talk to a sales executive in our company who's very unfamiliar with Salesforce, I just don't think the level of communication was strong. But again, it wasn't my expectation. If the person who made the decision and brought them in, but when I did come over to another team, I published it, they'd evolved. Of course, I'm an executive as well. So it's based upon another executive

Please continue.

Well, yeah, it does on a certain level. Because I think when people present themselves in sales as saying, oh, yeah, I know Salesforce really well. I've been using it for eight years. What you find is that they don't really use Salesforce, and they have an account for years, but they only go occasionally into it. There's a difference in knowledge when somebody says they've been using it and they know it. When I say I know it and I've been using it, like I actually implemented custom objects. I have actually rolled it out to multiple teams where in the case of our VP of sales, he didn't do any of that. I know him personally. He basically just had other people do all that. And he just saw the results. So I usually look into that nuance. I mean, it's okay. It's a minor knit, I would say. On a scale from one to ten, what I'll give ForceBrain for what they needed to have done, I needed have done, I'll give them nine out of 10.

Great. To sum up, please rate ForceBrain on a scale of 1-5, with 5 being the best.

What would you give them out of five for their quality of their work?

Quality was five.

For being on time and meeting deadlines?

Five.

For cost as in value for your money and sticking with the original estimates?

Five.

For professionalism as in responsiveness and communication?

Yeah, that's probably where I'll give them probably between a three and a four. I like a 10-point scale, personally. I'll give them four.

And just overall rating?

Overall, I'll give them a five. Again, very knowledgeable in what I needed them to do for me.

And you said overall you'd give them a four or five?

Five.

Would you recommend them to others?

Yes.

Thank you, do you have any further comments about ForceBrain?

I would say that I chose ForceBrain to augment from knowledge, experience and to basically bring to bear the technical skill set. And they delivered on all fronts associated with that. I also wanted them to be low cost and to be highly flexible and to be able to deploy very quickly. And they delivered on that as well. I'm extremely pleased.