

Tight Integration Between Salesforce and Internal Systems Makes a World of Difference



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CTO & SVP of Operations

Industry

Hi-Tech Software & Services

Geographies

The United Kingdom, North America

Challenges

Globix needed a CRM solution that could easily tap into the valuable customer and employee data stored in their internal systems. An internally built system was eventually abandoned due to low adoption and maintenance headaches.

Solution

Globix selected Salesforce and easily integrated it with Globix’s ERP system via the AppExchange API. “Salesforce is infinitely easier to use, maintain, and extend,” according to Trond Wuellner of Globix.

Results

The integrated systems have created many efficiencies in Globix processes, and data integrity and productivity are on the rise. The company is also experiencing improved customer service, increased revenue, and easier identification of the most effective marketing activities.

Replaces Home-Grown CRM System with Salesforce

Now more than ever, companies are attracted to the performance advantages and cost-efficiencies that can be gained by outsourcing their IT infrastructures. That’s why enterprises increasingly are turning to companies like Globix Corporation, a leader in complex hosting, network services, and advanced Internet applications.

With offices in New York, California, and London, Globix recognized its need for a single, integrated CRM system for its global sales force and spent a year developing its own proprietary application. Problems surfaced right away—Globix had trouble getting its salespeople to adopt the system, and ongoing maintenance became a huge headache. Eventually, the system was abandoned, and Globix went without a CRM system for a full six months before the new head of operations suggested Salesforce based on his previous experience using the on-demand CRM solution.

“We needed something that could tightly integrate with our existing internal systems so that we could easily leverage the valuable customer and employee data stored there,” explains Trond Wuellner, a Globix product manager who was involved with the Salesforce rollout. With its Web services-based API and low-maintenance, on-demand, Internet delivery model, Salesforce was the perfect solution to help support Globix’s end-to-end business processes. “Salesforce is infinitely easier to use, maintain, and extend than our previous system,” says Wuellner.

Integration Creates Efficiencies and Ensures Data Integrity

Using in-house resources and guidance from salesforce.com, Globix used AppExchange—the on-demand platform on which Salesforce is based—to integrate with its internal ERP system, Remedy’s AR System, and its Oracle database. “By integrating with these critical systems, Salesforce has become invaluable because it is the easiest and most efficient way for us to get information to our sales force,” says Henry Holcombe, CTO and SVP of operations at Globix. “It also makes it very easy for us to track sales activity and do forecasting—for individual sales reps and for sales teams, as well as for the business at large.”

The integrated solution has dramatically impacted and streamlined many of the business processes at Globix. For example, the integration allows HR to complete several employee management tasks simultaneously. Employees who are salesforce.com users are tagged in Remedy so that new employees who need CRM access can be added automatically to Salesforce. Conversely, when HR changes an employee status to “terminated,” that employee is automatically shut out of Salesforce as a security measure.

The ERP system also houses customer and contact information, which—due to the integration—maps perfectly to Salesforce, eliminating the need for double entry and ensuring data integrity. For example, should a salesperson change roles at Globix, her contacts and accounts transfer to her manager in Remedy; the integration allows that transfer to be mirrored in Salesforce. The

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manager's subsequent redistribution will also be completed in Remedy and reflected automatically in Salesforce. Similarly, when customers update their contact information via the Globix online customer portal, those changes are rolled into the ERP system and then into Salesforce, so that everyone at Globix always has the most up-to-date customer information.

Salesforce's integration with Remedy has also eliminated most manual steps in the sales quote generation process. From the Salesforce opportunity screen, Globix salespeople can select products and solutions, set-up fees, recurring revenue, and other elements and add them to that individual opportunity. The selections are tied into their respective product codes and related pricing data in the ERP system. When the salesperson saves the pricing information for the opportunity as a quote, Salesforce automatically updates the forecast numbers, so that up-to-the-minute forecasting data for the six types of revenue that Globix tracks are always available. Next, the salespeople can use Salesforce to instantly create a standardized, professionally formatted quote as a PDF document that is ready to send to the customer.

CRM Helps Identify Revenue-Generating Sales and Marketing Activities

In addition to a significant impact on the company's efficiency and on the accuracy of forecasts and other data, Salesforce has generated ROI in several other areas as well.

Globix is using Salesforce to improve customer service and generate additional contract revenue by quickly alerting the sales team to upsell opportunities. When internal data systems identify customers who will likely exceed the amount of usage in their current monthly service plans, an opportunity is added into Salesforce. A sales rep then promptly contacts customers to encourage them to upgrade their service plans rather than pay large overage fees at the end of the month. The result: customers see Globix as being responsive and helping them get more value out of their service, and Globix has the opportunity to upsell customers into a larger monthly service plan.

With Salesforce's campaign management functionality, Globix is now better able to track marketing campaigns and quantify the ROI. "Previously, we had no idea which marketing activities were effective—we were just flying by the seat of our pants," says Holcombe. "Now, Salesforce empowers us to identify the campaigns that deliver good leads and those that don't. This insight allows us to spend our marketing dollars on the activities that we know will have the greatest revenue impact."

For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

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