



How we developed  
an Integrated Sales  
Information System

**RUSSmedia**

# Some Questions?

Data, Informatin and Knowledge about you and your customers?

- 1. *Who is using CRM already?***
- 2. *Who has a sales team?***
- 3. *Who has more print products to sell?***
- 4. *Who has online portals?***
- 5. *Who has all of them?***
- 6. *Who has not an exact information about the performance of the sales team?***
- 7. *Who could get immediately the companies top 10 clients?***

# **THE Situation**

# The Situation:

## The Structure

**25 Salesmanagers**

**16 print products**

**13 online portals**

**150 sales reps**

**10 offices (production, accounting,...)**

**2 countries**

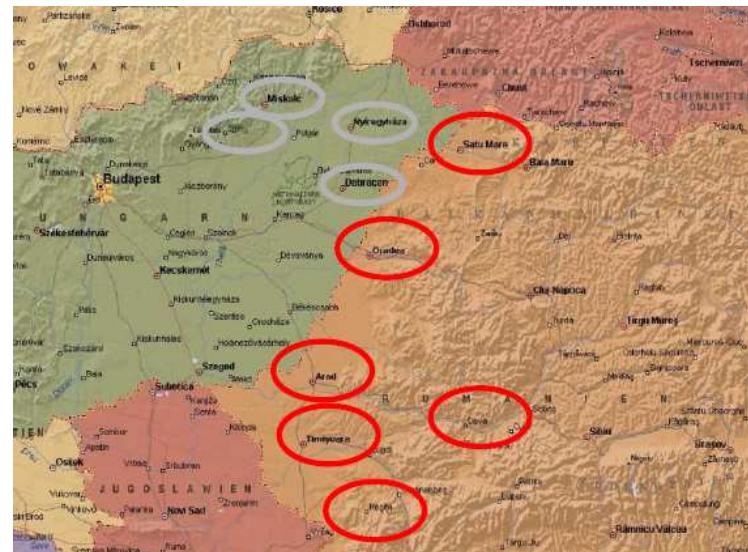
**Several isolated systems without any data exchange**

**? Clients**

**? Big clients**

**? Relationship with clients**

**? Client history**



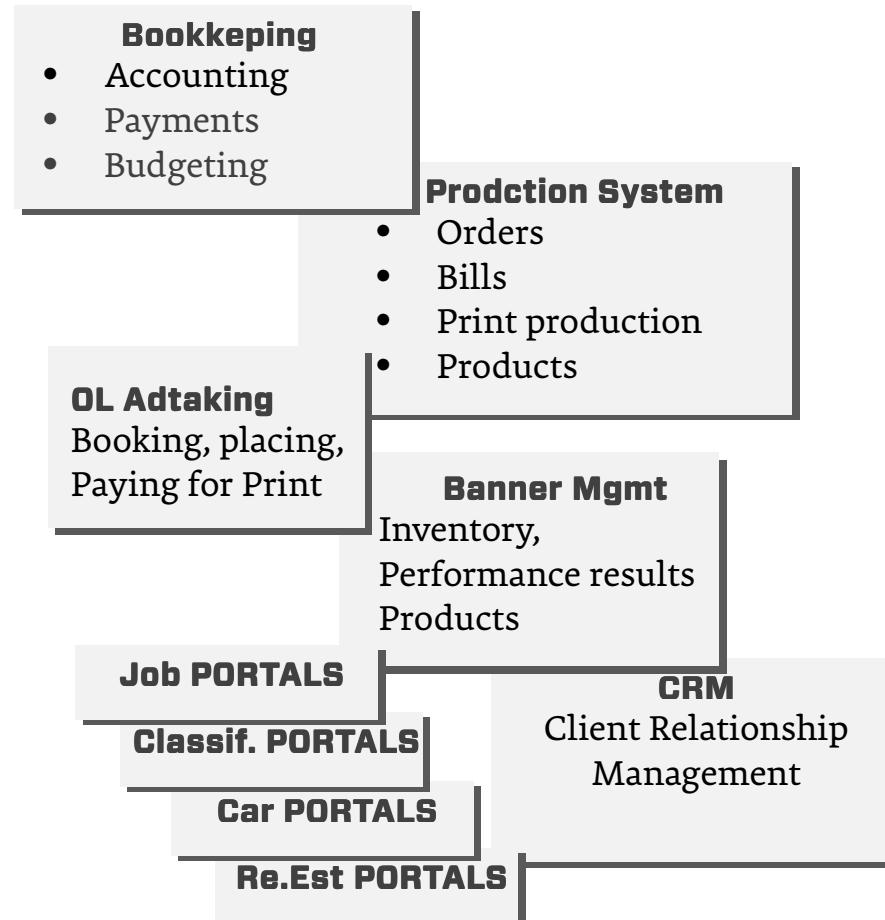
# THE PROBLEMs

# 1) Different Systems

... for different departments - isolated without information exchange

## System for

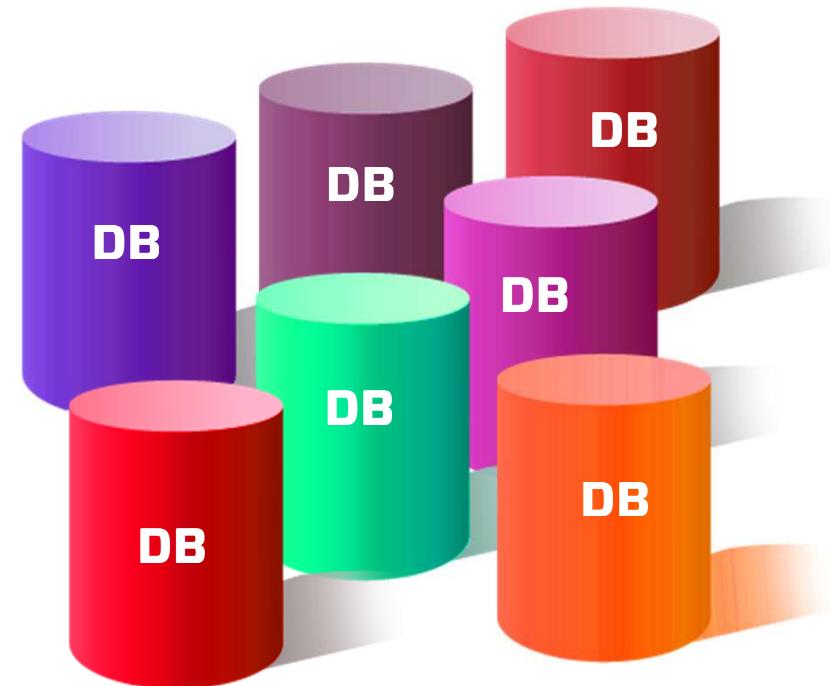
- Accounting / Bookkeeping
- Printproduction
- Online Adtaking for print products
- Bannermanagement
- Portalmanagement
- Customer Reationship Management



## 2) Different Data Bases

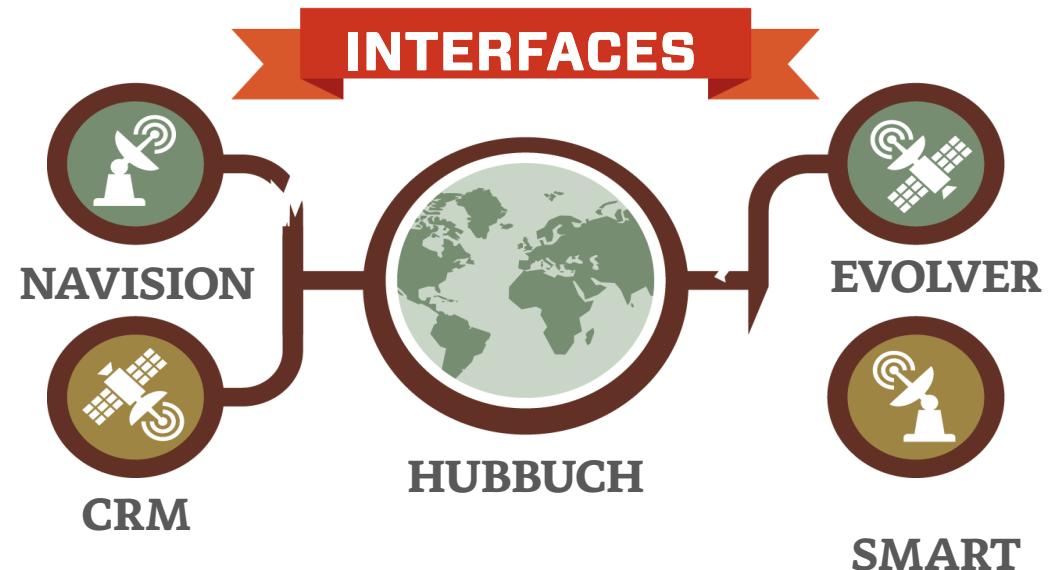
... no single place to generate important information

- **Where is the Information about your client?**
- **Where is the complete information about your client?**
- **How do bring these together if it is not on one place**
- **What, if the information is different?**



### 3) No,- Or Insufficient Interfaces

- **What if data is chaning?**
- **Where do you have to change it ?**
- **Is everyting synchronized ?**
- **What is automatically synched?**
- **What is manually done?**
- **What if key people behind each system change?**



## 4) No Client History

- **What did the client order in the past?**
- **Responsibilities changed on client side?**
- **Constant receivables?**
- **Revenue per Client in the past?**
- **What was communicated?**
- **Who communicated?**



## 5) Problem To Analyse

- **Who are your best 10 clients ?**
- **Who are your best 10 internet clients?**
- **How much revenue was generated ?**
- **Who generated with what?**
- **Is a print subscriber also having other products?**
- **Which industries are in,- or decreasing?**

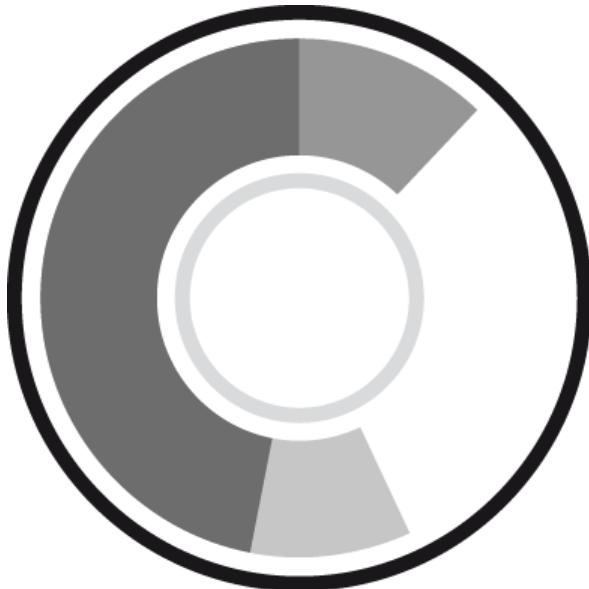


## 6) Workflow incomplete - interrupted

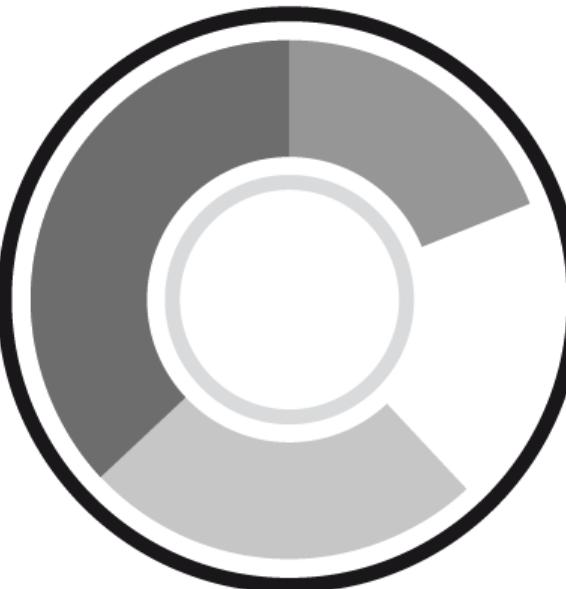
- **What has to be done until a product is sold and money comes?**
- **How has this to be done?**
- **Who has to talk to whom?**
- **What are the internal responsibilities?**
- **Who is using what system?**



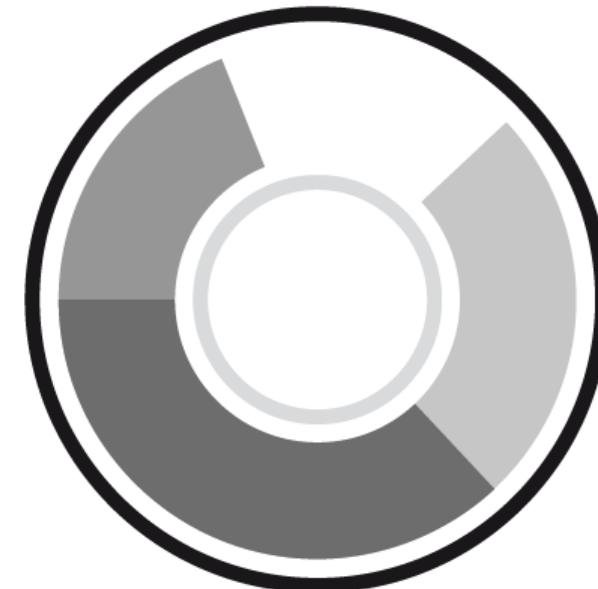
## 7) Reports Incomplete And Unsufficient



**Daily report  
incomplete**



**Weekly report  
incomplete**



**Monthly report  
incomplete**

# THE SOLUTION

# 1) Build Up One Master Database

**We decided to have Sugar  
CRM as central master  
database and core system**

Only ONE central  
DATABASE with  
CLEAN client data



## 2) Clean Up Duplicates

**We had to**

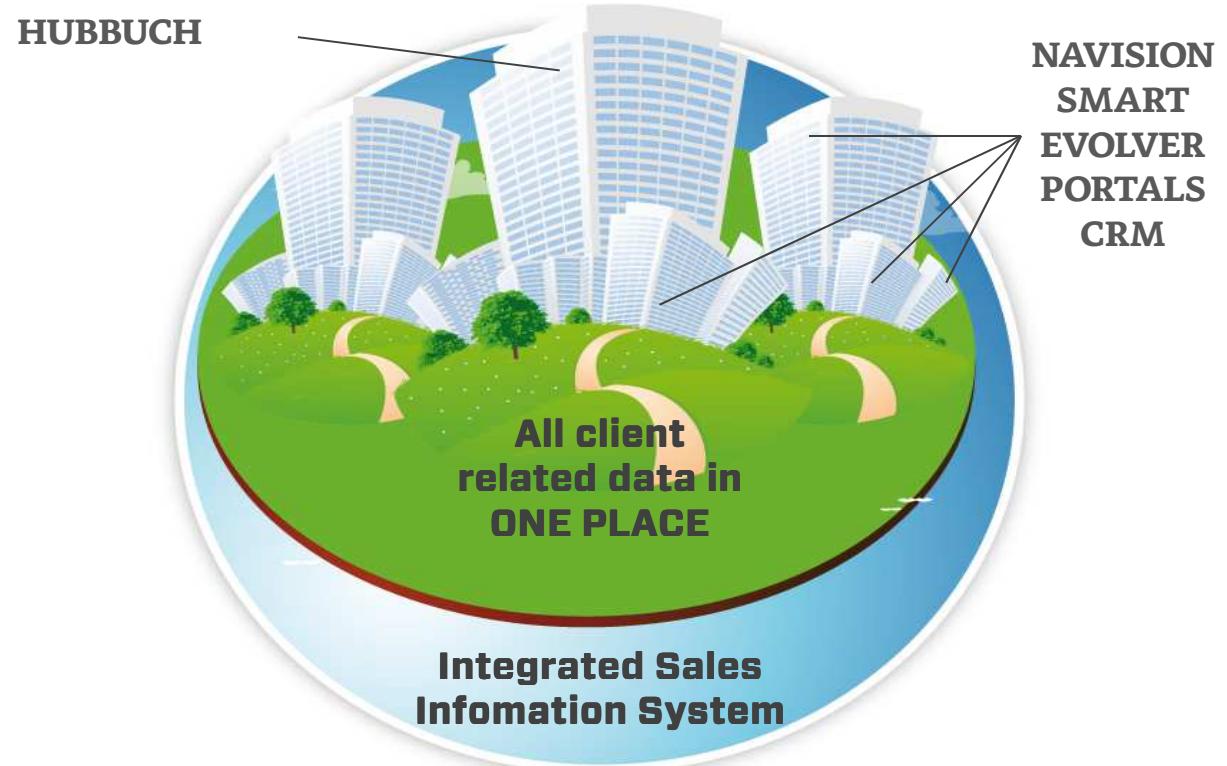
- **clean up the database**
- **Eliminate several thousand duplicates**
- **Have one single id for each client**



### 3) Complete Client Data

We had to

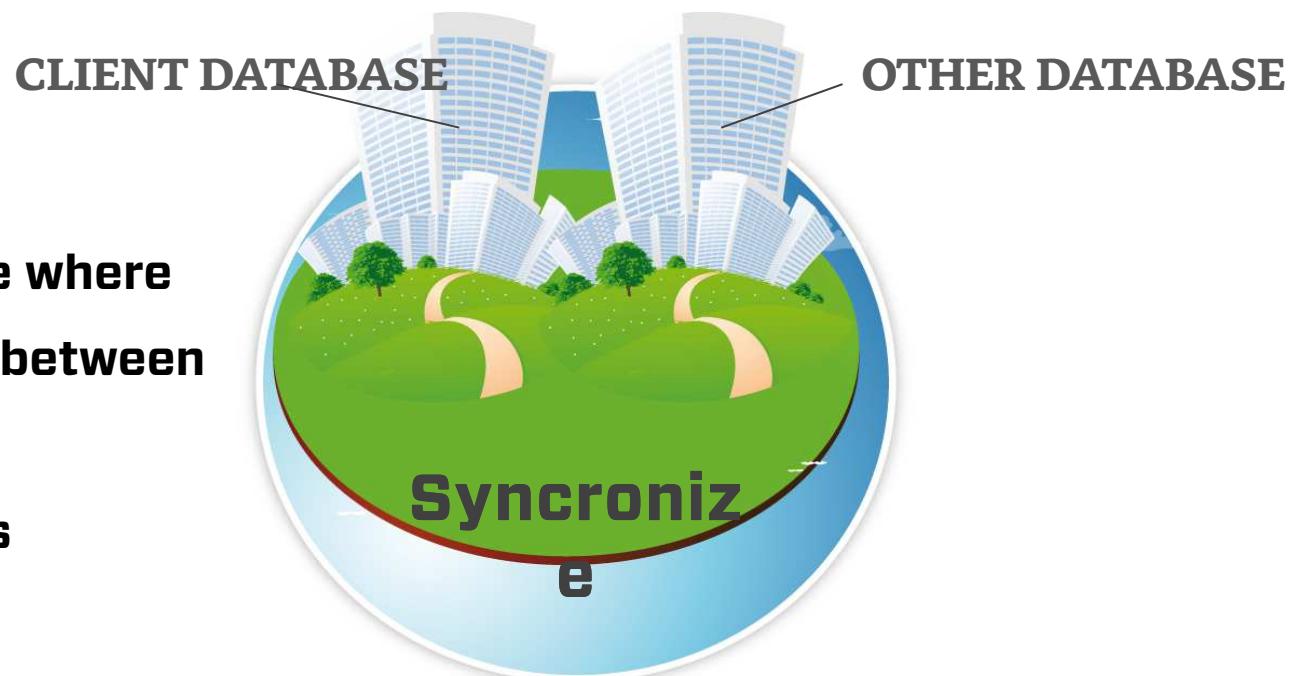
- Complete core data
- Address, names, ..



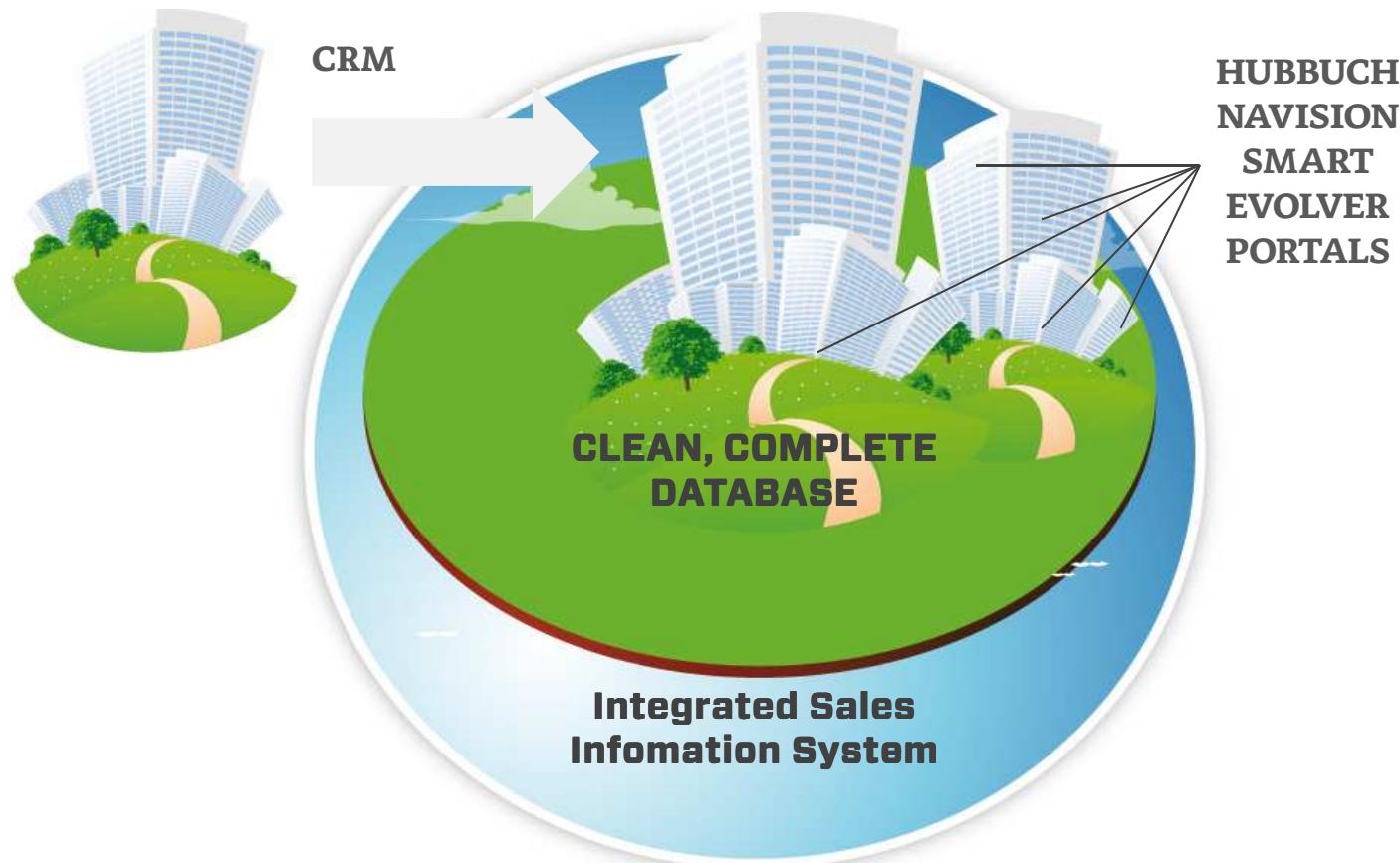
## 4) Syncronise Master Client Base With Other Data Basis

**We had to**

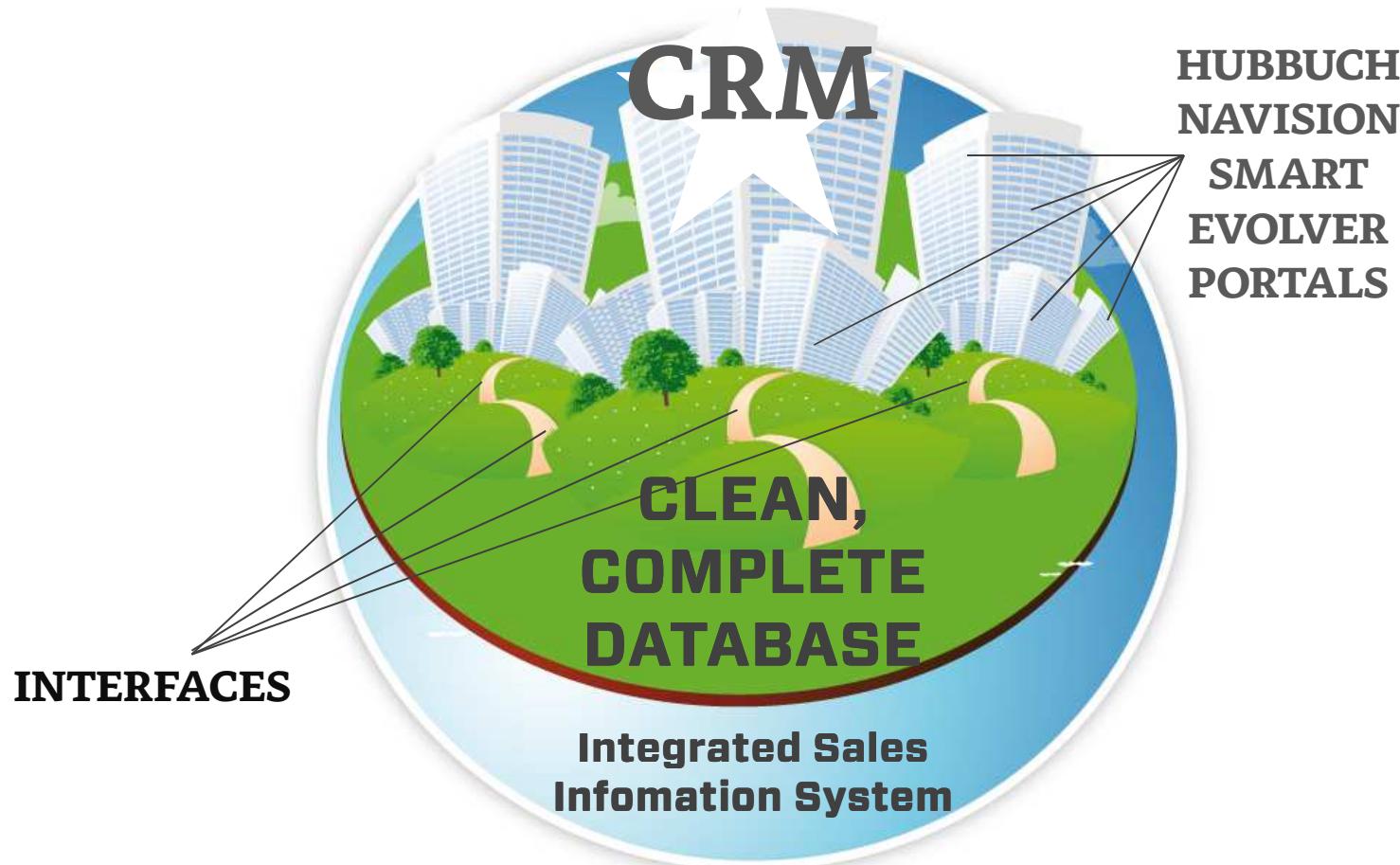
- Decide what to store where
- How to synchronize between the systems
- How to do interfaces



## 5) Implement CRM System on a clean and complete database



## 6) Define the CRM as The Core System With Interfaces To All Other Systems



## 7) Train Sales Managers and Sales Reps

### Workshops

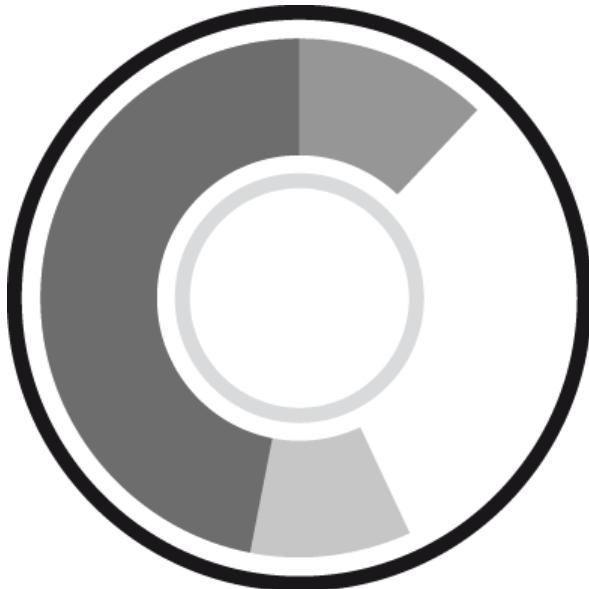
- **Workflow**
- **CRM usage and Reports**
- **Reps Training and Managers Training**



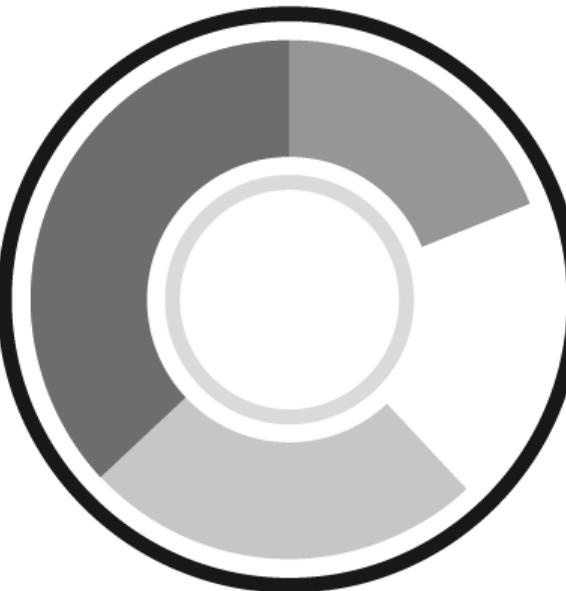
## 8) Sales Reps use CRM as 100% working tool



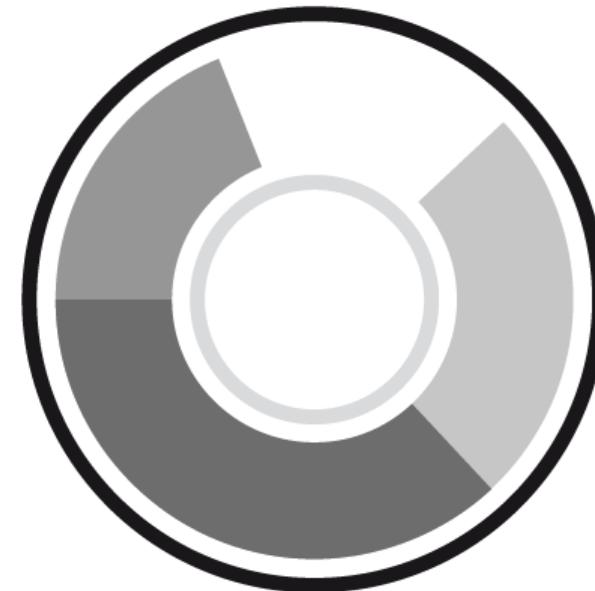
## 8) Be Transparent



**Daily report  
incomplete**



**Weekly report  
incomplete**



**Monthly report  
incomplete**

# THE PROJECT

# Phase I

- **Decided for sugar and did the first customizations**
- **Change existing CRM in Job Portal Team department - 2010.**

## **September**

- **CVO team became the role model and test department**
- **Further customizations on Sugar**
- **Q4, 2010 we installed sugar in 4 other OL departments - HU and RO, classic CRM features**

# Phase II

- In Q2 2011. we decided to build up a CRM driven sales organization
- We set up a project team, project organization, assigned a project manager for CRM implementation
- Cleaned duplicates
- Started to develop the first interfaces between production system and CRM - Q3 2011.
- Continuously Sales Manager Workshops - During 2012.
  - Standardizing workflows
  - Defining rules,...
- Start to automatize workflows - Q3 2012.

# Phase III

- **Q1 2013, Implemented in other departments - Advertisement sale, Automated Receivable management**
- **Q1 2013, Decided to use Sugar CRM for the whole group.**
- **Plans for 2013**
  - **Implement in Distribution - AT, HU, RO**
  - **Implement in Austria - Advertisement sales**
  - **Automatize as much workflows as possible**
  - **Integrate with phone center**

# General Learnings

- **It is a top management project**
- **It is not a technical project**
- **It is not a sales project**
- **It is an operations project**
- **Biggest challenge is user adaptation**
- **Technical solutions only work if it is properly integrated in the organization**
- **Sales needs to be involved in development – two way planning, implementation**
- **Involve people from different departments – different point of views**
- **Project takes much longer than expected**

## **Effective Tools**

# Tools sent to all creating transparency

- **Reports at the beginning**
- **CRM Usage**
- **Sales Rep Evaluation**
- **Training, Coaching and Training Material**
- **Sugar Dashboard**



# Workshop questions

**A) strongly agree      B) neutral      C) strongly disagree**

- 1. To me/our organization, working with CRM does make that much sense**
- 2. To me /us beeing completely CRM and Data driven does make sense**
- 3. Managing sales also works quite well without CRM**
- 4. CRM is just another pain in the neck for our organization**
- 5. CRM is the one of the best way to measure sales perfomance**
- 6. CRM is too hard to implement**
- 7. CRM is just a tool for controlling/monitoring the sales reps**
- 8. There are easiers ways to get the benefit of a CRM system**