

**How we developed
an Integrated Sales
Information System**

The illustration features a man in a dark suit and red tie, pointing his right hand towards a white cloud. The cloud contains the text 'How we developed an Integrated Sales Information System'. Surrounding the man and the cloud are various white line-art icons: a bar chart, a document, a folder, a laptop, a mobile phone, a shopping bag, and a computer monitor. Arrows indicate a flow of information or process between these elements and the central cloud.

ruSSmedia

Some Questions?

Data, Information 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

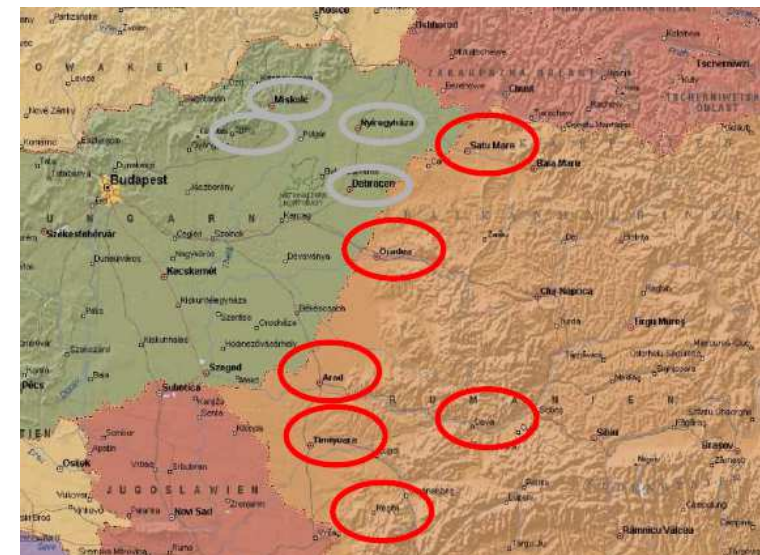
Sevral isolated systems without any data exchange

? Clients

? Big clients

? Relationship with clients

? Client histroy



THE PROBLEMs

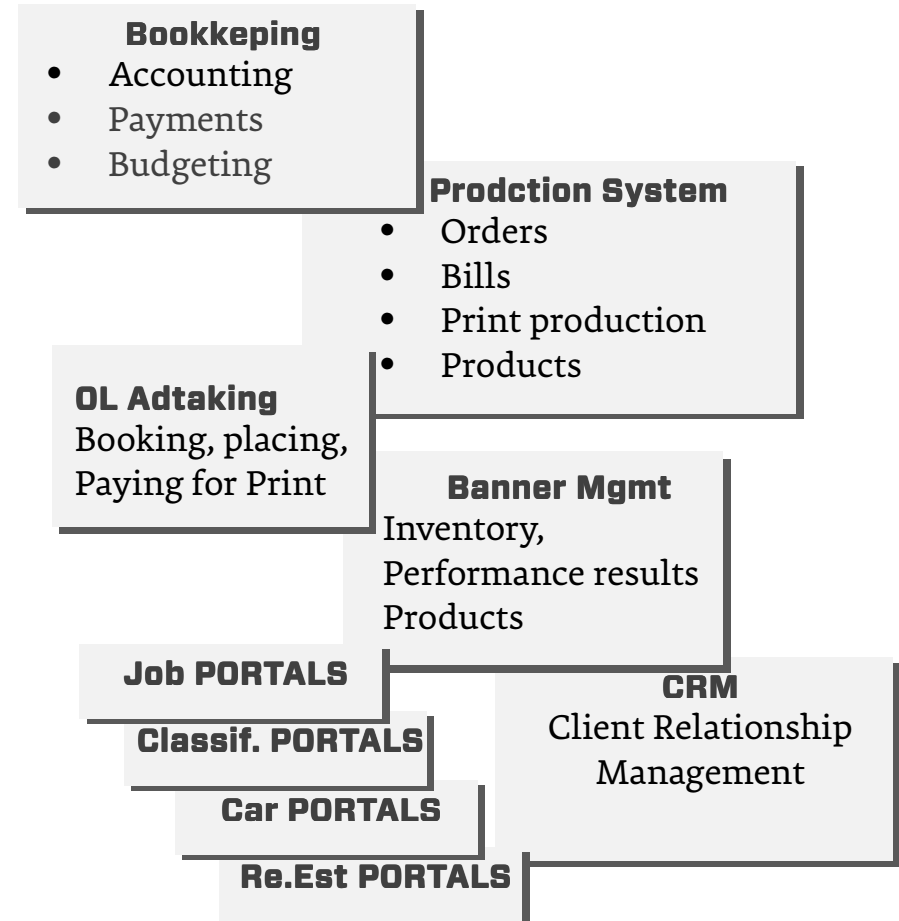


1) Different Systems

... for different departments - isolated without information exchange

System for

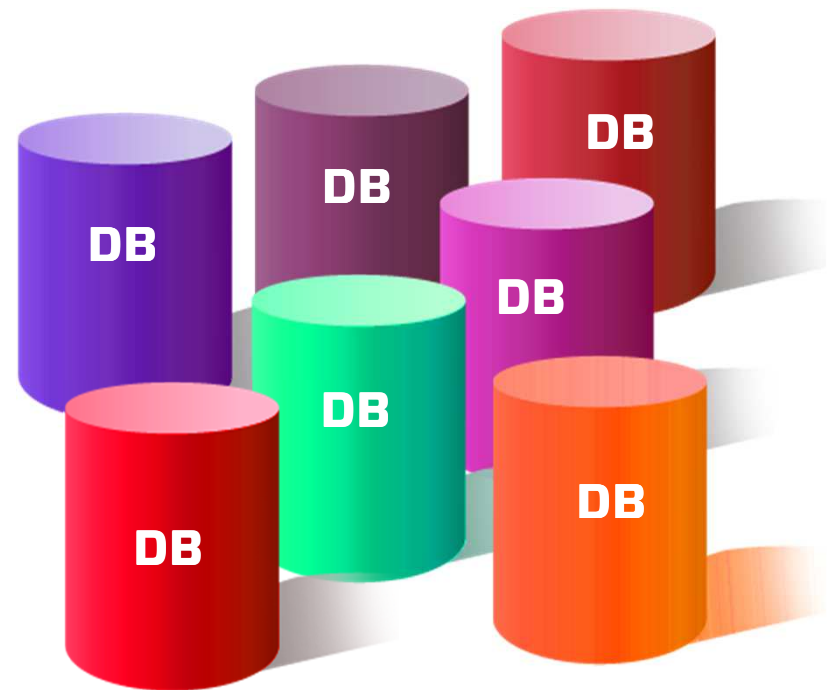
- Accounting / Bookkeeping
- Printproduction
- Online Adtaking for print products
- Bannermanagement
- Portalmanagement
- Customer Relationship Management



2) Different Data Bases

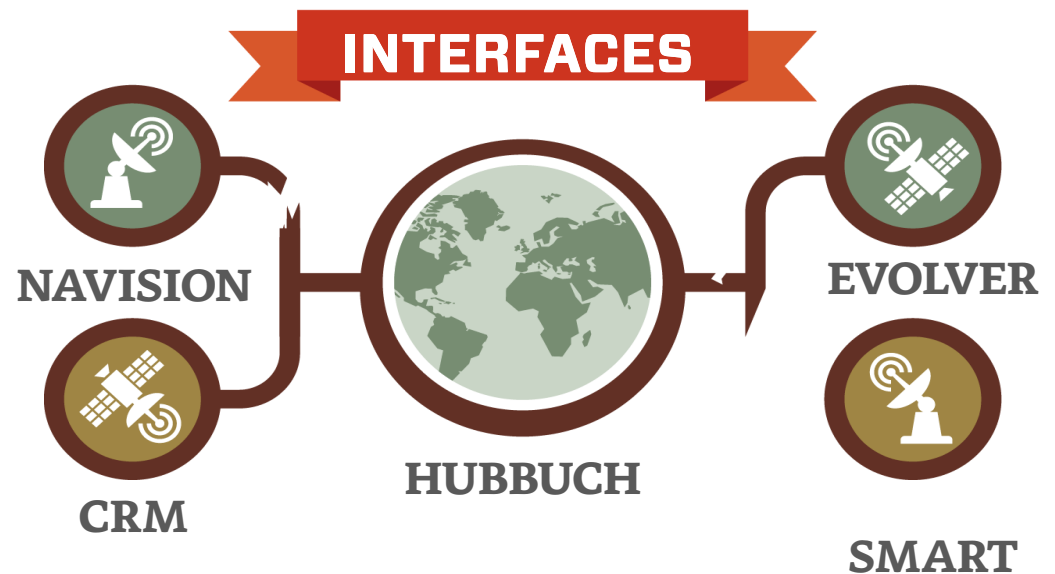
... no single place to generate important information

- **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 changing?
- Where do you have to change it ?
- Is everything 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

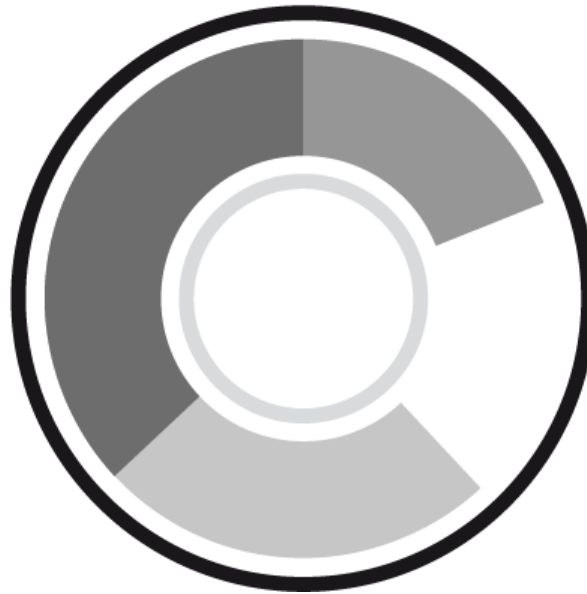
- **What has to be done until a product is sold and money comes?**
- **How has this do be done?**
- **Who has to talk to whom?**
- **What are the internal responsibilities?**
- **Who is using what system?**



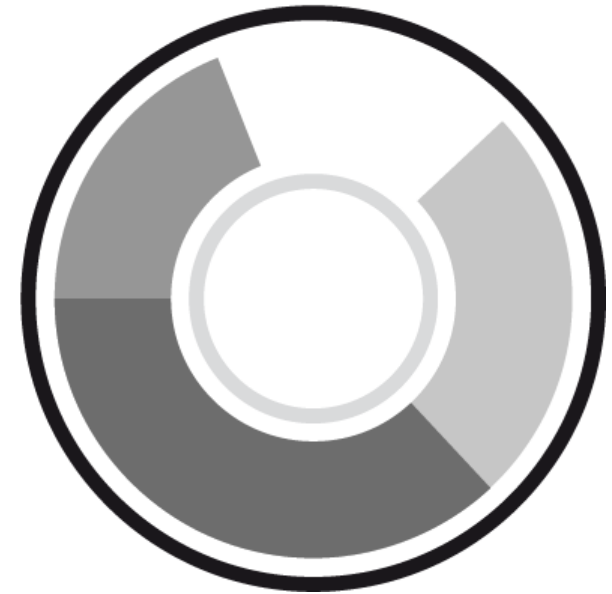
7) Reports Incomplete And Unsufficinet



**Daily report
incomplete**



**Weekly report
incomplete**



**Monthly report
incomplete**



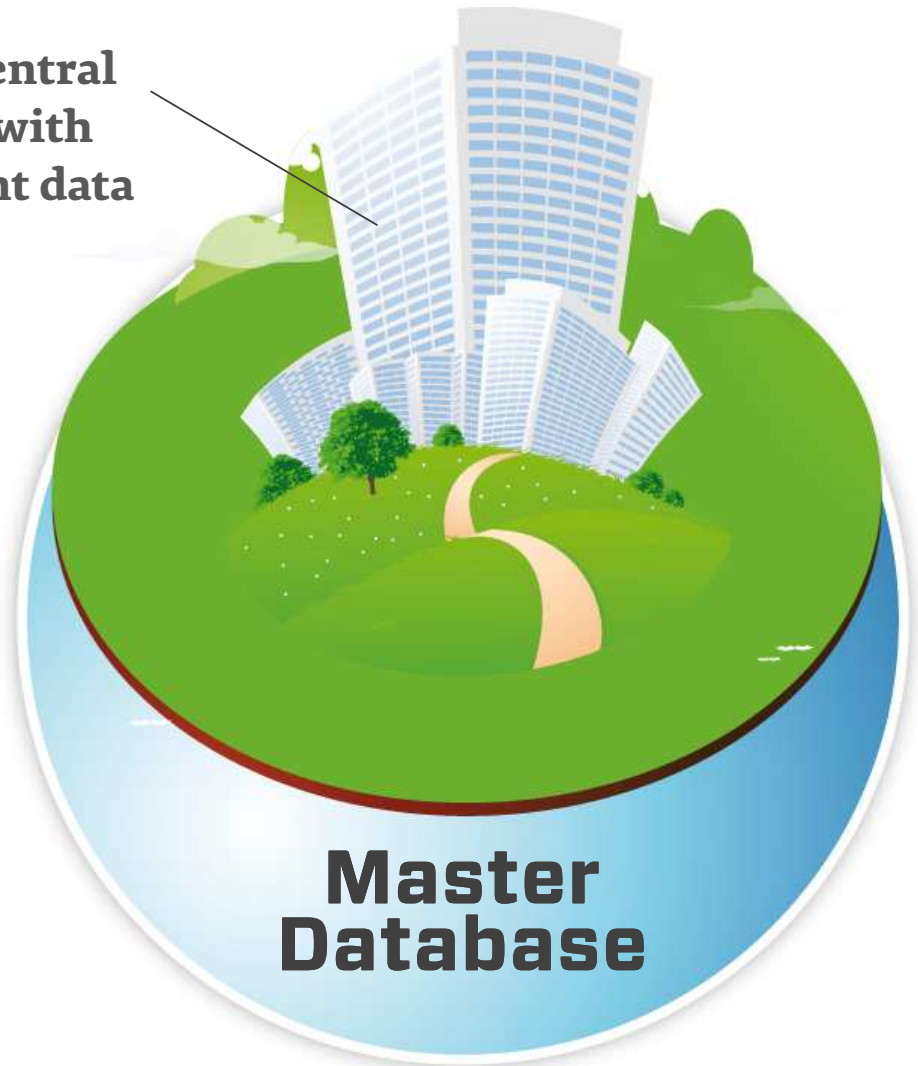
THE SOLUTION



1) Build Up One Master Database

Only ONE central
DATABASE with
CLEAN client data

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



**Master
Database**

2) Clean Up Duplicates

We had to

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

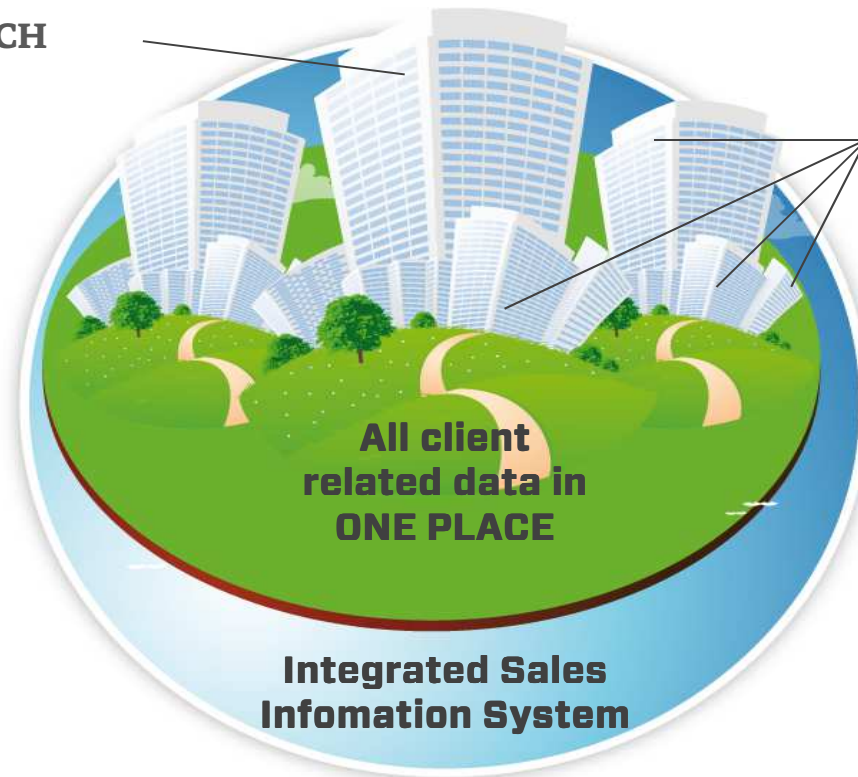


3) Complete Client Data

We had to

- **Complete core data**
- **Adressss, names, ..**

HUBBUCH



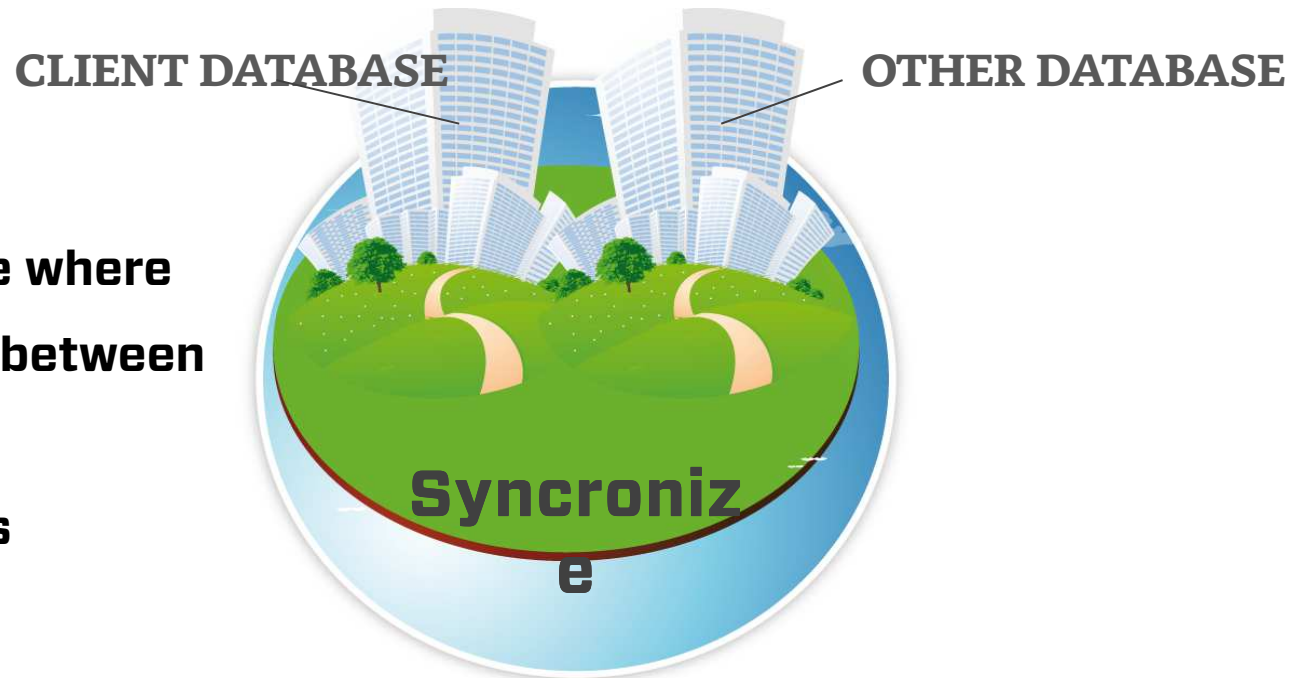
NAVISION
SMART
EVOLVER
PORTALS
CRM

Integrated Sales
Infomation System

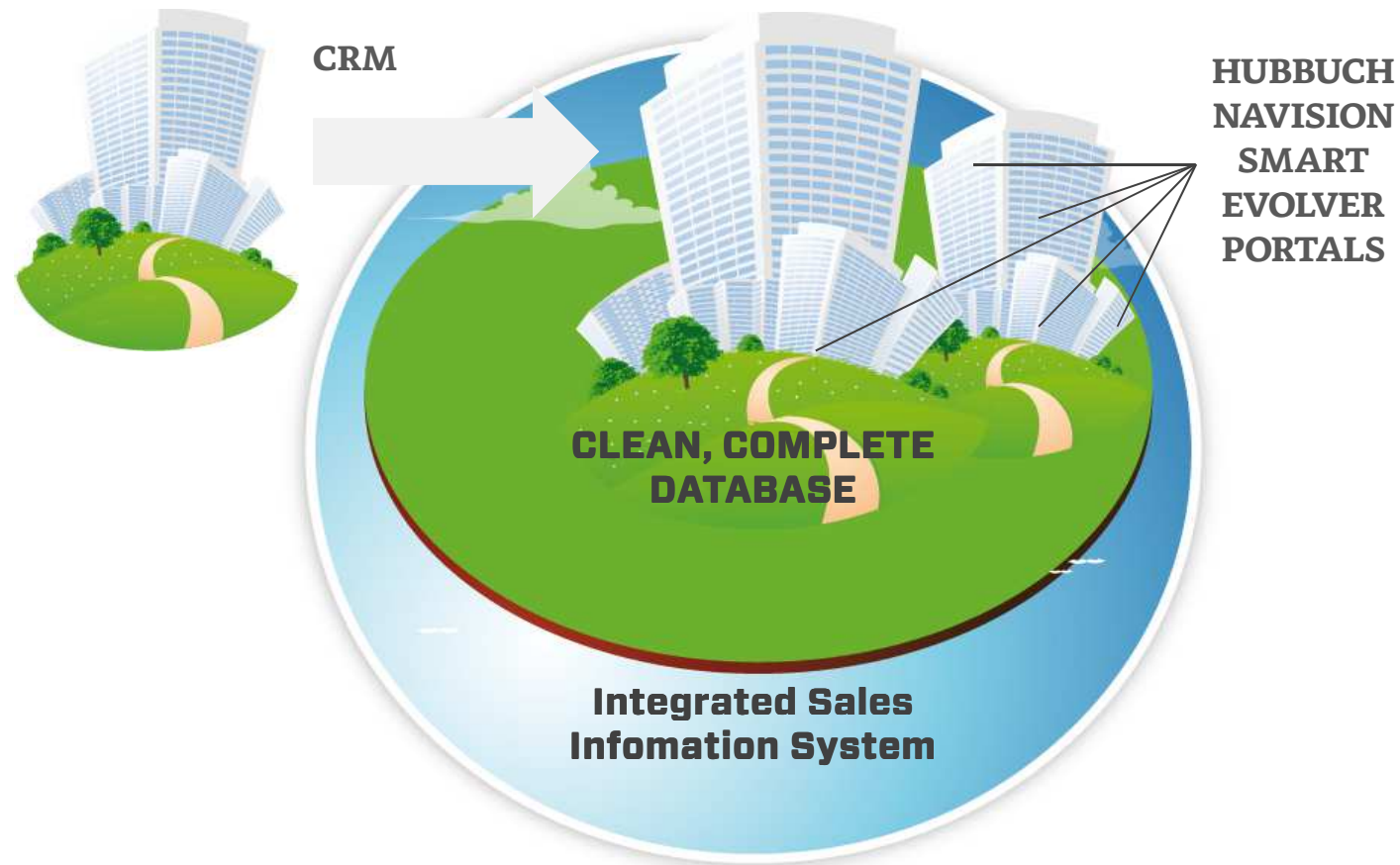
4) Synchronise Master Client Base With Other Data Basis

We had to

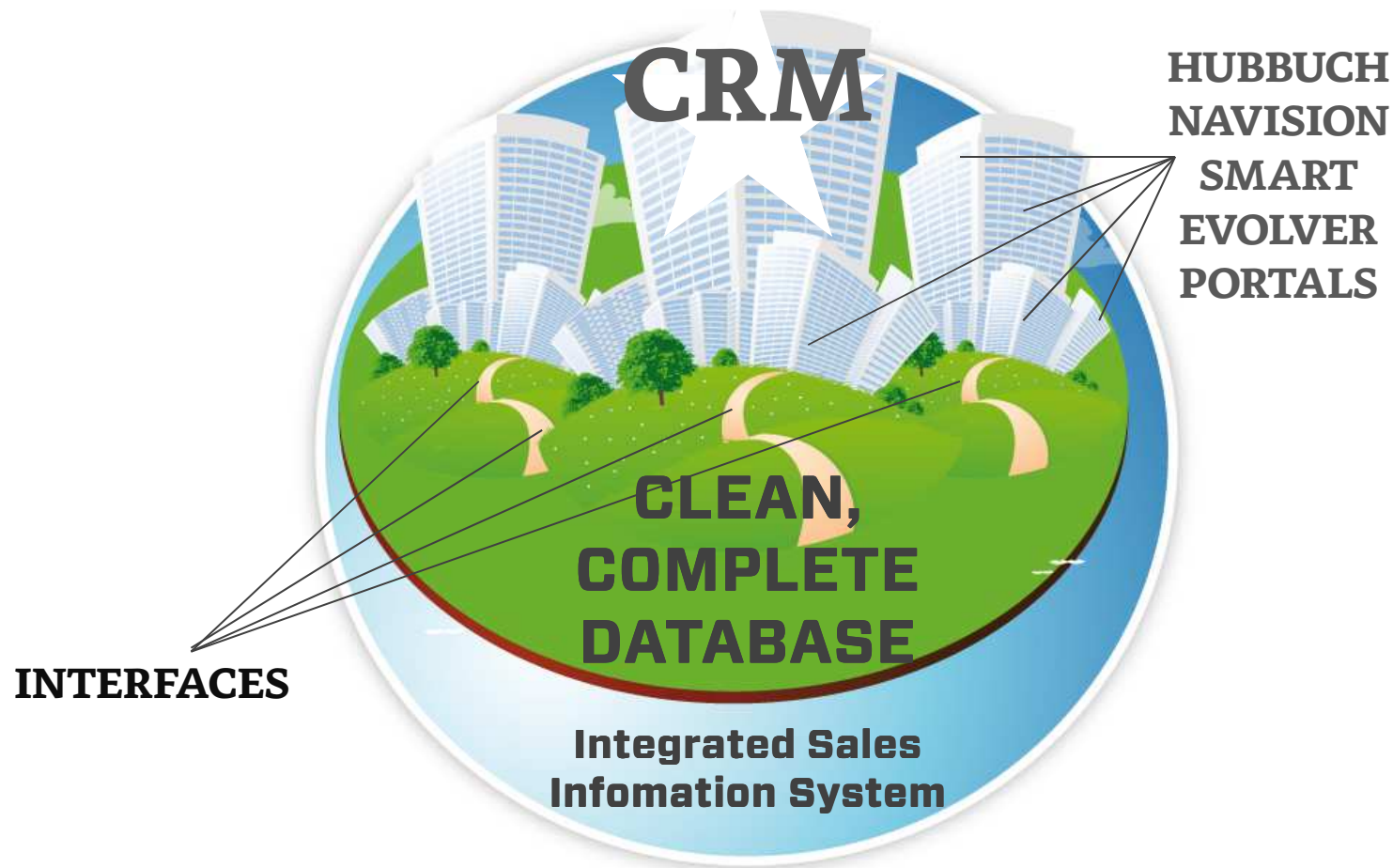
- **Decide what to store where**
- **How to synchronize between the systems**
- **How to do interfaces**



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



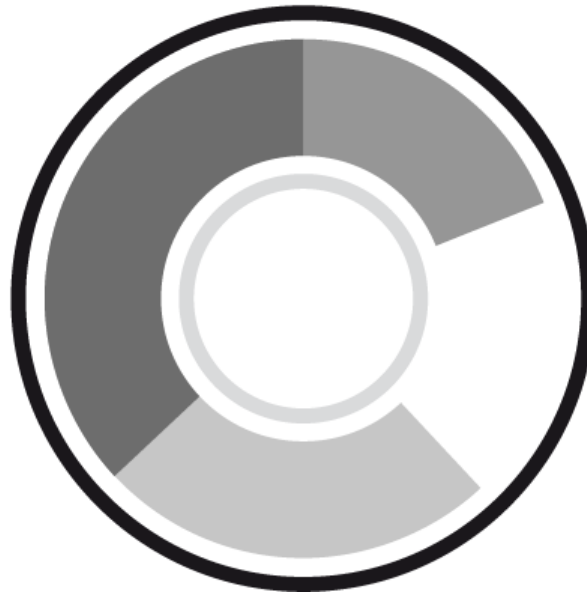
8) Sales Reps use CRM as 100% working tool



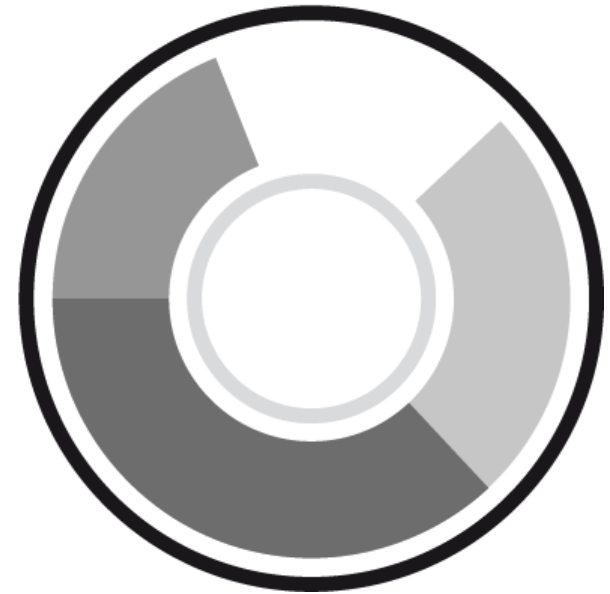
8) Be Transparent



**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.**
 - **Starndardizing 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 works 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**

