

## Global Computer Company's Executive Briefing Center

Business Transformation and Implementation of a Customized CRM Solution

### Business Challenge

A leading global computer company has an Executive Briefing Center (EBC), located at its headquarters managed by the field marketing organization. This center hosts over 1,500 visits every year with customers representing billions of dollars in revenue. A primary function of the EBC is to connect the client's senior management customers in their largest accounts. The process for scheduling executives involves sales reps, presenters, briefing managers, a front desk operations team, and a master scheduler. With 30 full-time staff, the facility houses 12 high tech conference rooms with displays for audio and video conferencing.

The company recognized that it needed more from its EBC management system to optimize the use of this critical sales tool and the company's executive resources. The client wanted custom reporting mechanisms built into the application to allow reporting on the ROI of briefings. They required a solution that their developers could easily support going forward, a system that could scale to meet future needs and a solution that would integrate with the client's customer relationship management system (Siebel CRM).

### The Solution

The Acumen Solutions team re-engineered the EBC management system using an integrated Salesforce.com and custom application. A major component to this architecture was an EBC portal; a client-branded web application designed for the needs of Sales Reps and Presenters. The goals of the new solution were to:

- Create better efficiency in the 'Briefing Lifecycle', and improve utilization of EBC resources
- Invite better Sales Rep participation and collaboration by presenting a branded and easy to use web portal for non EBC-staff to manage their briefing activities
- Measure the outcome of briefings in terms of sales generated by each client engagement

Leveraging Salesforce.com as a hosted platform via the Web services API, the team designed a core application which enabled EBC staff to manage the briefing lifecycle from request through closure. To meet the needs of sales representative, executives, presenters and other employees with EBC responsibilities, the team's Web developers designed a client-branded portal which provided employees a personalized view into their EBC activities. Among the

#### Executive Briefing Center Project Feedback

*"Very professional, easy to navigate and informative!"*

- Executive Briefing Center Sr. Director

*"Outstanding work. We've truly 'gone global' with this new format, which includes many cool new features, and now becomes the go-to site for all folks wanting to book a briefing, or understand why they should."*

- Executive Briefing Center Director

*"A-W-E-S-O-M-E!"*

- Scheduling Manager MPK

advantages the Salesforce.com platform provided was the ability to extend new applications quickly with its Web-based administration tools, and extensibility to incorporate custom-developed Web applications programmed in Java, AJAX, and APEX.

### **Business and Technology Expertise**

- Business Analysis and Process Engineering
- Java
- AJAX
- Salesforce.com Programming and Configuration Expertise
- Data Architecture
- Website Portal Design
- Systems Integration (Salesforce.com with Siebel)

The Acumen Solutions team used LDAP Directory integration for employee authentication. Custom ETL Web applications allowed salesforce.com to provide all critical reports, dashboards, and EBC metrics to the client's executive team. Custom client-side Web applications (S-Controls) supported all room booking, briefing manager assignments, email notifications, custom summary reporting, and batch process monitoring. The application was designed to scale to incorporate new EBC locations, with minimal setup and no custom development required.

Building the EBC portal required expertise in various areas including, business intelligence, enterprise data management, enterprise application integration, application development and customer relationship management. Its creation also supported automation and business process design for increased productivity and a focus on the user experience.

### **Return on Investment**

This Executive Briefing Center portal has become an invaluable tool for field sales, executive presenters and the briefing center staff. The customized extensions of their CRM system have reduced the man hours required to support this function by eliminating manual reporting and made a significant difference to how this client manages their customer interactions. Additionally, using Salesforce.com as a platform improved the ability of the EBC staff to customize the system themselves in the future.