Improving a Contract Research Firm's Customer Intelligence Capabilities

Client Profile

With 58,000 employees in 100 countries, the S&P 500 client is a US based, multi-national biopharmaceutical contract research organization.

The client provides a complete set of outsourcing, consulting, laboratory, and development services for Phase I-IV biopharmacuetical clinical trials.

Business Challenge

Like many large, multi-national organizations with diverse business units, the client was experiencing difficulties collecting, coordinating, and correlating customer data from the different departments.

A common problem for many rapidly growing organizations is that customer information becomes scattered across the enterprise. These pockets of information often cause a wide variety of CRM issues including disjointed customer communications, duplicate marketing efforts and a lack of visibility into the overall customer relationship.

Leveraging Data to Improve the Customer Experience

The client wanted to improve its customer relationship capabilities by identifying, collecting, and consolidating customer information at an enterprise level. The goal of the project was to provide a single source of trusted customer information to sales and management personnel across the organization.

> "RadixBay was able to provide a complete staffing solution for the client's needs including project management, business analysis, and Salesforce development."
>
> Christen Sisler VP, RadixBay Salesforce Practice

RadixBay Solution - A 360 Degree View of the Customer

RadixBay and the client began by developing the overall project goals and assigning the roles and responsibilities to each organization. The client would assign a project sponsor to interact with executive management and assemble a team to help identify the various sources of customer information. RadixBay would provide a project manager, business analysts, and Salesforce developers.

RadixBay's project manager developed a 6-month project plan that included overall project goals, detailed action items, timelines, milestones, and deadlines.

Project Goals and Deliverables:

- Perform analysis to identify the data needed to create a 360 degree view of the customer
- Identify existing data sources
- Build processes to collect existing data
- Develop processes to create new data
- Provide a mobile-friendly mechanism to display customer informaton
- Create a 1 page customer tearsheet for sales

Identifying Data Needs

RadixBay's business analysts worked with client personnel to identify the information that would best capture the customer persona and provide insights into the existing relationship.

The client's project team identified current sources of customer data and RadixBay's business analysts performed a traditional gap analysis to identify missing information.

Data Collection and Creation

An important part of the data collection and creation strategy was to ensure that the client information could be easily kept up-to-date. The goal was to provide customer information that was both timely and accurate.

RadixBay's Salesforce developers created the data collection mechanisms using Salesforce's Lightning interface.

Leveraging a Third-Party Tool to Reduce Development Time and Costs

One of the benefits of the Salesforce platform is the wide variety of third-party applications available. RadixBay's Salesforce team understood that presenting the data to the client's end users could be more quickly and cost-effectively accomplished by leveraging a third-party tool from Salesforce's AppExchange.

RadixBay performed a traditional third-party product analysis by developing a set of robust evaluation criteria, identifying viable competitors, and completing a thorough vendor comparison.

Conga Composer Document Automation

The evaluation team selected Conga Composer to present and deliver customer information to the client's personnel.

Conga's document generation application for Salesforce would allow the client to quickly create customized documents in a wide variety of formats and deliver the content to desktops, tablets, and mobile phones.

Developing Custom Reports and Tear Sheets

RadixBay's reporting specialists collaborated with the client to design a set of reports that would provide critical insights into their customer relationships.

RadixBay developed a one-page digital Customer Tear Sheet to display the most important information sales team members would need when meeting with a client. The goal of the Customer Tear Sheet was to provide a summarized but complete view of the customer relationship across the organization.

Benefits Received

Upon project completion, the enhanced and consolidated customer relationship data and historical interaction information allowed the client to quickly leverage the following benefits:

- Improved client communications and more coordinated customer touchpoints across the enterprise.
- All customer-facing business units are able to easily access an enterprise-wide, single source of trusted information about their clients.
- Digital Customer Tear Sheets provide sales team members with up-to-date, accurate and pertinent information about each customer.
- More personalized customer engagements which leads to improved customer satisfaction and increased retention.

About RadixBay

From application development and packaged application support to around-the-clock cloud and on-premise data infrastructure monitoring and administration, RadixBay provides a wide range of enterprise-grade IT solutions.

Focus on Your Business. Let RadixBay Handle Your IT.