

EXECUTIVE QUESTION AND ANSWER

Presented by Innoveer Solutions
and Suffolk Construction

Q&A

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JY: When did you begin evaluating CRM strategies and applications, and why?

CC: For many years, Suffolk had no CRM system in place, and all leads and opportunities were tracked through Excel and MS Outlook. This is very common in our industry, as there has never been a significant focus on CRM because business development efforts have previously been based on relationships, reputations and contacts.

However, as Suffolk grew and experienced growth within its sales team, we recognized the need to collect our customer information and understand their past and future needs, to ensure ownership and management of data on a regional and corporate level. Beyond collecting and tracking contacts, projects and business development efforts, we also wanted to ensure that Suffolk had a true customer master and one central view of customers, so that salespeople do not call the same contacts or miss opportunities because they are unsure of who owns various relationships.

On top of these needs, our ongoing business plans include significant growth, and we knew that in order to grow and scale our company, projects and revenue, we needed a 'true' CRM solution to better manage contacts, leads and opportunities. We also wanted to increase our pipeline and forecasting accuracy and management, and replace many of our manual processes with automated reports. As a result, we began evaluating CRM.

JY: What sales and marketing objectives and business outcomes did you want to achieve?

CC: From an efficiency perspective, CRM enables us to remove many manual and silo'd processes, reduce the amount of time that business development spends on administrative tasks and better manage contacts and opportunities. From a reporting perspective, CRM automates – in real-time – many of our executive reports that track leads, opportunities, pipeline and customer wins, which reduces our time to cre-

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ate reports from one full day to a few hours. These reports also help focus our sales team on the most profitable opportunities or those that require attention.

Beyond these gains, we are also using our CRM system to house historic project information. This allows our marketing team to utilize this data when writing proposals, to ensure up-to-date and accurate information and the most appropriate references and examples.

JY: Why did you select an Oracle solution and the On Demand product, and why did you partner with Innoveer to plan and implement your solution?

CC: We chose an Oracle product because Oracle is our platform of choice at Suffolk, and an Oracle front-end application is much easier for us from an integration perspective, which is part of our future plan. We selected the On Demand model because we did not require much customization, our team found the product easy-to-use and intuitive and it met the majority of our sales and management needs out-of-the-box.

We wanted to work with Innoveer because of its team's understanding of our business and processes, complete focus on CRM, onsite presence, partnership mentality and project management style. It was important to not only find an expert within the Siebel family, but also a company that follows a Methodology that focuses on ensuring high levels of user adoption. Innoveer was able to help us with the complete solution, from planning to implementation to follow on training.

JY: What was your implementation approach and timeline?

CC: We used a phased approach to implement our CRM solution, which we believe is crucial – to give our team the time and focus necessary to understand the system and its benefits, address their concerns and focus on adoption. A phased approach is especially necessary for CRM projects, as many people are not used to the processes, tools or organizational aspects involved and affected.

Phase one for Suffolk included an implementation to enable contact, lead, opportunity and historical project information management, and streamlined reporting. Phase two includes campaign management, to track and manage hard copy and email campaigns and ensure a closed loop from leads to opportunities to closed deals. This will be followed by a phase three focused around integration with our ERP system, to remove duplicate entry that occurs from entering contact information in multiple systems, and improve overall order management. Following phase three, Suffolk will have one 'information flow' with real-time data, a 'one stop shop' and an end-to-end, streamlined process – improving overall productivity and reducing administrative work from multiple people collecting and 'chasing' data.

JY: How is your overall CRM strategy aligned with your business?

CC: We are using our CRM system as the base for standardizing our business development process. We now have a national sales program that the entire company recognizes and follows. Our CRM system enables us to review our business development efforts on a national level, and helps us create national and tiered account plans – increasing teamwork and collaboration.

JY: How is overall user acceptance, and what do you recommend other companies do to ensure high levels of adoption?

CC: To help with buy in, we spent time gathering our sales team's data in any file type, formatting it and 'cleaning it' by filling in all inaccurate and missing information – prior to importing it into our CRM system. We wanted to ensure that we started with good data, so that our team would trust the data. We also made sure that our sales team took ownership of the system, to try and ensure accurate data moving forward. Lastly, we focused on training – both from a process and technology perspective. This included small group and 1-on-1 trainings. I am happy to say that our user acceptance is quite high.

To achieve high levels of user adoption, it is important to have goals for how to use the system, and timelines for when information will be exported from the system. Informing people that reporting originates from the data within the system and is viewed by management helps encourage adoption. It is also critical to ensure that the goals for CRM are enforced by management, and that users understand the message, 'garbage in is garbage out.'

JY: What advice can you offer other organizations embarking on or enhancing their CRM programs?

CC: It is important to first understand your overall process and then select a tool to support that process. If people are

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using different processes, without uniformity and clear definitions for lead, opportunity and probability, among others, the information and reports pulled from the application will not be accurate. In the end, no one will trust the data within the application.

Organizations should spend time discussing what they must report on, and ensure that they collect the required data and that everyone involved understands the business needs for implementing CRM. It is also critical to clearly understand how your CRM system can help increase other business groups' success, beyond sales and marketing. If organizations understand the potential for their CRM systems, spend time on the up-front planning and have dedicated resources focused on the goals of the program, it will have a higher likelihood of success.

ABOUT INNOVEER SOLUTIONS

INNOVEER SOLUTIONS, an award-winning customer strategy and solutions consultancy, provides advanced customer management services to high-technology, life sciences and insurance companies, among others, in the areas of planning and strategy, technology implementation and optimization. The company's deep industry knowledge, broad technical skills and Multishore Methodology enable organizations to address their critical customer-facing issues and achieve an integrated view of all customer information. With an exclusive focus on customer management since 1998, Innoveer has worked with more than 300 organizations to increase their overall business growth, improve internal efficiency and enhance the customer experience.

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ABOUT SUFFOLK CONSTRUCTION

Celebrating more than 25 years of transforming city skylines, Suffolk Construction Company, Inc., is one of the leading privately held building contracting firms in the country, with main offices on the East Coast, Mid-Atlantic, Southeast and West Coast regions of the country. Suffolk provides preconstruction, construction management, design/build and general contracting services and has a strong reputation for delivering challenging building construction projects in the assisted living, commercial, education, entertainment, government, healthcare, hospitality, residential and retail sectors. Suffolk employees are experienced construction professionals and are committed to client service and relationship building. They are influencers in the construction industry and in their local communities, and consistently lead by example while striving to exceed expectations with clients, partners and the people and businesses in surrounding neighborhoods.

For more information about Suffolk, please visit the company's Web site at www.suffolkconstruction.com