

The Upgrade Discovery — Updating Your Siebel CRM Investment

IT'S TIME TO TAKE YOUR SIEBEL SYSTEM TO THE NEXT LEVEL

With the release of Siebel 8, there are even more capabilities to satisfy virtually everyone's growing wish list, and budget priorities for many organizations are now including those long awaited upgrades.

In version Siebel 8, Siebel has maximized the efficiency and productivity of sales, service, marketing, and sales operations with several key enhancements. The list includes advanced order-management capabilities, embedded analytics, streamlined navigational features, and an even richer set of industry applications, to name a few.

Now the question is, "are you ready?" Many companies have started upgrading to Siebel 8, unaware of the requirements and unprepared for the challenges — resulting in long delays and increased costs.

However, with the right preparation and the appropriate planning, the upgrade to the Siebel 8 environment offers organizations substantial business outcomes that far exceed expectations, including improved customer insight, optimized sales and marketing operations, and enhanced service and customer satisfaction.

SMALL STEPS TOWARD A KEY INVESTMENT

To help organizations ensure the greatest return from a Siebel 8 upgrade, Innoveer Solutions offers the *Upgrade Discovery*, a one-week accelerated engagement designed to rapidly uncover the requirements for moving toward a seamless upgrade. The *Discovery* is designed to examine the business strategy, process compatibility, skill and motivational factors, data and infrastructure needs, and budget expectations — resulting in a clearly articulated set of requirements for a successful upgrade.

SIEBEL UPGRADE SUCCESS STORY

One leading services provider — using Siebel to track all orders and requests, as well as all customer and event information — partnered with Innoveer to perform a Siebel 8 upgrade assessment, and then following the assessment, complete the upgrade.

Due to upcoming expansions, the IT department wanted to ensure a zero footprint application by replacing its current system with a Web-based architecture, so that it could support all of its locations — without maintaining desktop clients.

Following the upgrade, this organization is achieving even greater benefits that far exceed expectations, as Siebel 8 offers increased overall functionality that enables all business units to become more effective.

Overall, this company was able to ensure a successful upgrade because of Innoveer's assessment, which enabled the correct planning, as well as an accurate understanding of the environment and overall configuration.

WHAT DOES THE DISCOVERY INVOLVE?

The *Upgrade Solution Discovery* will focus on the following areas:

- **Strategy Validation** — Clarify what the business needs to achieve in terms of business outcomes as a result of the upgrade
- **Organizational Readiness** — Identify critical actions required to ensure a successful project, including process and people components
- **Technology Audit** — Gain a high-level understanding of the existing technology infrastructure and determine principle technology requirements
- **Business Case** — Estimate the business benefits of upgrading to justify the investment costs

The results of the *Upgrade Discovery* will include a set of requirements necessary to move forward with a Siebel 8 upgrade, an action plan for next steps, and a business justification for the investment.

At a fixed price*, the *Upgrade Discovery* will lead to tangible benefits such as the following: (*The fixed price fee does not include possible travel expenses or additional areas of scope, which are available by request).

- Create the necessary management sponsorship to move forward with the upgrade project
- Set correct expectations regarding the investment requirements
- Develop a business case for justifying the investment
- Build an initial plan for moving toward the benefits of an upgraded Siebel application
- Identify the common and unique risks likely to challenge the upgrade project, and plan for their mitigation

ABOUT INNOVEER SOLUTIONS

INNOVEER SOLUTIONS, an award-winning customer strategy and solutions consultancy, provides advanced customer management services to healthcare and high-technology 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.

PAST SIEBEL UPGRADE CLIENT SUCCESSES INCLUDE:

- PTC
- Circles
- Group Health Incorporated
- QAS Limited
- Network Engines
- Bose Corporation

BUSINESS OUTCOMES:

- Reduced cost of ownership an average of 39%
- Decreased cost of service an average of 12%
- Improved sales operations an average of 16%
- Increased marketing campaign success an average of 12%
- Enhanced order-management capabilities and simplified pricing structures an average of 18%

CONTACT US

For more information about how Innoveer Solutions can help you profitable business outcomes from a Siebel upgrade, please contact Jennifer Yanoff at jyanoff@innoveer.com or at +1 617-225-7914.

