

## Case Study: Business Enterprise North East

### Business Enterprise North East

Business Enterprise North East (BE-NE) delivers the Business Link service for the North East of England under a contract with One North East. It was formed in 2007 from the merger of four different Business Link companies.



### Key Issues

The Business Link merger and subsequent radical changes in structure and objectives provided a challenging environment that drove Business and Enterprise North East's (BE-NE's) decision to appoint a Strategic IT Partner with responsibility for the creation and delivery of BE-NE's software strategy. After a lengthy procurement process, Perfect Image was selected to fulfil this key role.

The first application to be implemented as part of the IT strategy was a CRM system. BE-NE selected the Oracle/Siebel OnDemand CRM package that is provided through a Software as a Service (SaaS) model.

The system had to address a number of key business requirements including:

- Providing a single view of all of BE-NE's customers, rather than the fragmented view presented by multiple, inherited applications.
- Delivering only the relevant information required to each of the varying user roles in the organisation.
- Supporting new, unified business process that were being rolled out across BE-NE.

- Allowing BE-NE to provide a more tailored, efficient service to all of their customers.
- Creating a platform for the future that could be integrated to other key applications to provide online services, business intelligence and back office efficiency.

### The Requirements

BE-NE had a clear remit for Perfect Image; to take ownership of the CRM project and work closely with BE-NE to achieve a high quality implementation that could be delivered as rapidly as possible.

Some of the specific tasks that had to be delivered as part of the project were:

- Requirements gathering and documentation.
- Streamline and improve existing processes.
- Project management.
- Customisation of OnDemand.
- Integration to an online website.
- Creation of a data warehouse for reporting.
- Migration and cleansing of data from four separate CRM databases.
- Managing deployment and go-live.
- User training.

## Our Approach

Perfect Image and BE-NE staff members worked closely together as a team to ensure the rapid specification, development, testing and deployment of a complex and far reaching system. This teamwork was a necessity to ensure the delivery of a system that met business needs and complied with the changing processes being used by BE-NE.

During the project we had to coordinate and manage multiple third parties who were involved with various aspects of the work. They included Oracle, an off-shore development company, a third-party website provider and BE-NE's managed services supplier. We strove to use each company's skills to best effect to provide BE-NE with the best possible value outcome.

The number of people and organisations involved meant that we had to ensure that there was frequent, clear communication throughout the entire project. Our proven project methodology, which stresses close working and clarity of communication, was key to the project's success.

Skills transfer was also an important consideration during the project to allow BE-NE to provide their own training to staff members and to support and maintain the day to day operations of the solution after its deployment.

## The Solution

OnDemand was customised extensively to accommodate BE-NE's specific data and process requirements. It required the use of OnDemand's 'custom objects' to model BE-NE's customer journey and project entities.

Integration with OnDemand was achieved using web services and these were also used to create a Microsoft SQLServer based data warehouse which is automatically refreshed every night. In future, BE-NE intend to move to a full Service Oriented Architecture (SOA) and OnDemand will be a key component in this.

## The Results

BE-NE has been delighted with the outcome of their CRM project. A demanding set of requirements has been delivered by a multi-organisational team, headed by Perfect Image.

We continue to work with BE-NE to examine ways to improve their CRM system, take advantage of features in new releases and integrate it with their other new applications as they are implemented.

