

# National Media Company uses SharePoint 2010 to replace Salesforce.Com

## Replacing 700 seats of Salesforce.Com with SharePoint 2010

### Situation

A national media company focused primarily on newspapers has had its margins cut and its customer base of advertisers severely

Their ability to deliver news first has also been challenged by news aggregators like Google and bloggers who compete with them for readers of breaking

*“Salesforce.Com is bloated and overloaded with features we don't use or need. SkyLite built a SharePoint 2010 solution saving us over \$50,000 per month that we no longer have to spend on Salesforce.Com fees. Thank You SkyLite Systems”*  
– CIO – National Media Company

challenged by the rapid growth of internet-based alternatives. Companies like eBay and Craigslist have severely cut into the consumer advertising segment and job sites like Monster and Dice have cut into the employment listings.

news and in-depth information.

To counter this pressure, Salespeople are expected to re-double their efforts to help the company survive these threats. The media giant relies heavily upon advertising for the bulk of



SkyLite Systems is focused on developing commercial and custom solutions that leverage Microsoft office products running on-premise or in “the cloud”. We are constantly looking how you can leverage your investment in Microsoft in new and innovative ways.

We were on the beta of SharePoint 2007, Office 2010 and are currently participating in the TAP and beta of Office 365.

We believe the best solutions are simple, easy to use, and intuitive. We also believe that our solutions should be able to run on a wide assortment of platforms, from PC's to MACS and even the iPad.



their revenue, and it employs a national sales force with over 700 field and inside sales people who acquire and retain advertisers.

To remain competitive, salespeople need a powerful and easy to use CRM solution that allows them to track their sales and compare their projected bookings with actual billed revenue.

Tracking the actual revenue billed versus the projected revenue is now a top priority to help manage cash flow. CRM is a mission critical application for this company.

Like many others in the industry, the company grew through acquisition of smaller properties. Not surprisingly, each acquisition came with its own accounting system. Rather than convert and consolidate each accounting system into a single, unified ERP, the company chose to continue to operate and maintain over 20 legacy accounting systems that were in place as each property was acquired.

## Time for a change

The sales team and management were using SalesForce.Com with limited success. Many of the features it offers were not used and integration with existing line of business accounting systems and reporting tools was difficult. The system also required 3 staff full-time to maintain it and manually upload and match accounting data using a manual process. The difficulty of manually uploading and uploading revenue data resulted in a single upload of revenue data into the CRM system once per month.

The company had also begun to contracting with outside consultants to develop an automated way to match revenue data using pattern matching techniques and a lot of custom software development. The overall cost for SalesForce including the fees for using SalesForce with 70 sales people, and the staff required to support it was quickly approaching over \$800,000 per year.

Given the extreme competitive and cost pressures on the company, senior management brought in a new CIO to analyze how IT spend could be reined in, efficiencies increased and productivity raised. The high cost surrounding SalesForce.Com and the difficulty of integrating accounting data into it quickly raised it to the top of the list of systems that needed a closer look and a fresh approach.

SkyLite Systems was contacted by the CIO of the media powerhouse to review the functionality of what sales people actually used in SalesForce.Com and gather requirements of what was missing from a truly useful CRM solution to see if there might be a better, more cost effective way to track sales activity and integrate with existing accounting systems.



[www.SkyLite Systems.Com](http://www.SkyLite Systems.Com)

## Solution

SkyLite Systems worked closely with IT and the sales management to define business requirements and then closely match these against capabilities that could be found in the upcoming release of the upcoming SharePoint 2010 in “the cloud” offering owned and operated by Microsoft called Office 365.

After careful consideration of requirements and the upcoming feature set of SharePoint 2010 in Office 365, the decision was made to move forward with building a replacement of SalesForce.Com in Office 365 in the cloud and parallel development of a data mart in SQLServer 2008 for the accounting data to be housed on premises. The new solution would be designed to support the robust security requirements included with an enterprise-class CRM solution reassuring salespeople that their data would only be seen by authorized and appropriate users. The new solution would also include tight integration with Outlook

2007/2010 allowing users to save emails into accounts, leads and opportunities as needed and deep integration with the calendar functions so that one calendar could be integrated within CRM and the users exchange and outlook accounts.

The SharePoint 2010 CRM solution was developed in 4 months and all data was migrated from SalesForce.Com to SharePoint 2010 over a 6 week period. Each salesperson only required 30 minutes of training to become familiar and productive with the new system. Development also included the development of nightly batch job running on Windows Server 2008 allowing import of revenue data from the accounting data mart into the new CRM solution on a daily basis.

The system has been in production for over 6 months and has never been “down” at any time. Users like the simplicity and power of the new system and the timely import of near real-time revenue data from the 21 accounting systems. All data

from the CRM system is “dumped” into another data mart and SQL Reporting Services is used to create dashboards for executive management.

## SideKick365-xRm



SideKick365-xRM is a full featured CRM solution built entirely in SharePoint 2010. It was designed to run on premises or in the cloud using Office 365 ([www.office365.com](http://www.office365.com)). SideKick365-xRM leverages all of the capabilities of SharePoint 2010 including search, document management and workflow.

SideKick365-xRM has deep integration with Microsoft Outlook 2007 or 2010 and Office allowing users to save files, emails, appointments, tasks, and contacts directly into Leads, Opportunities, Projects ( cases), Contacts or Account records.



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## Benefits

The new system has many benefits. These include:

- Real and quantifiable savings of over \$500,000 in year one of operation by eliminating 3 internal salesforce.com support positions and over \$600,000 in annual Salesforce.Com fees
- Automated, daily updates of revenue data from 21 accounting systems into the CRM account items – it used to be a manual process that required a full-time headcount and only occurred once per month
- Tight integration of appointments and schedules within a single calendar in Exchange
- Ability to save and search emails and attachments into the CRM system leads, opportunities and accounts
- Ability to search on all items in the CRM system including the content documents and files
- Strong security allowing support for many thousand users to safely and securely enter information knowing that only authorized users can view or edit data.
- Ability to run the system “in the cloud” or on premises
- Simplified and lower cost support utilizing off-shore resources
- Ability to create executive dashboard allowing faster trend analysis and business decision-making
- Simplified and more abundant access to staff who can update or change the system as needed since there are thousands of highly skilled SharePoint 2010 developers.

## Fast Forward

SkyLite Systems recognized the viability of developing a full xRM solution using SharePoint 2010 in Office 365. A full year of development and testing was invested in building a CRM solution that has now been released as SideKick365-xRM. The solution is available for immediate use and can be deployed within Office 365 in less than 1 hour. It is listed in the Office 365 Marketplace

<http://office365.pinpoint.microsoft.com/en-US/applications/sidekick-365-xrm-12884913763>

## SideKick365-xRM Pricing and Info

If you are Microsoft partner, we want to partner with you. If you are end user, SideKick365-xRM is priced between \$9.95 - \$19.95 per user per month and it can be installed and up in Office 365 or on-prem in less than 1 hour. Want to know more? Contact Dave Chennault at [DaveC@SkyliteSystems.Com](mailto:DaveC@SkyliteSystems.Com) for more info today.



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