

Making Siebel Work

CRM software is effective only if it supports an organization's business rules and processes. In this case, it didn't.

“When we hired Adroit, we had a software package. When they were done, we had a solution.”
– Client Program Manager

Business Issue

A government agency had selected a CRM software package and a vendor to perform the related systems integration work. As the vendor configured the software and rollout approached, the agency realized that many of the business process rules that would be affected by the software had not been documented. This created a significant disconnect between what the software was intended to do and how the business operated. The issue facing the agency: how to roll out the Siebel application to its locations and six user groups without spending more time and more money on modifying the technology to fit the business.

Adroit's Role

Adroit Consulting was engaged to represent the interests of the business users at the agency in understanding the capabilities of the software and creating 'out-of-technology' workarounds that would enable the technology to work for them. This meant clearly defining the business rules, creating new processes where gaps existed, capturing the knowledge of how the business worked from people's heads and turning that knowledge into documentation. Where the software would not automate a process, we developed job aids and tools, or modified training, to close the gaps.

Our second role was to help determine the support structure after the roll-out. This included a governance structure for handling bug reports and logging needed modifications; defining the funding and training required to adapt the technology in the future; and empowering internal staff to address additional processes.

Outcome

- The agency was able to roll out the software modules on schedule with minimal modifications and costs.
- Due to the implementation of recommended workarounds and job aids, the client was able to go live without any significant investment in systems changes, thereby avoiding budget overruns and shortening the user adoption cycle.
- Establishing a proper governance structure for the project resulted in significant cost savings which completely funded on-going maintenance costs on an annual basis.
- The client established a defined plan for postimplementation support that covered the prioritization and resolution of 'critical care' issues, system upgrades, maintenance, operational availability, prioritization of functional enhancements and software vendor support.