



SalesFix



TICKS ALL THE BOXES FOR TRADE AND INVESTMENT QLD

KEY BENEFITS

CENTRAL

Trade and Investment QLD (TIQ) now use one system to record client data which is immediately available across the entire organisation - 11 countries - reducing duplication of efforts and the burden of training.

CONSISTENT

One source of information across the organisation has streamlined data maintenance. It provides a single reference point, a single place to correct inaccuracies and a single source for facts.

SECURE

Staff no longer have to travel with spreadsheets of their contact lists and supporting information. It is available in whichever office they are working from, in a centrally managed, highly secure system – reducing the risk of information being lost or stolen.



“We now all work in one system, the same way, with the same source data across all 11 countries where we operate. The benefits were apparent from day one.”

Carmel Lawson, Project Manager - Corporate Services, Trade and Investment QLD

CLIENT

With a mission to boost business in Queensland by attracting investment, assisting exporters, facilitating high-profile inbound visits from Ambassadors and trade delegations and outbound ministerial visits and trade missions, Trade and Investment Queensland (TIQ) has high stakes attached to the success or failure of its Customer Relationship Management (CRM) system.

TIQ has 160 staff in 11 countries. While the organisation communicates internally in English, the staff are multilingual and communicate outside the organisation in the local language. All these communications need to be recorded and stored.

THE SITUATION

Although TIQ is one organisation, sharing of information was limited by an inadequate CRM application. Staff were recording client details on spreadsheets with not only many duplicates but also inconsistent duplicates. Key Performance Indicators (KPIs) and quality measures were stored in a separate system altogether and reporting of KPIs was poor and inconsistent across the organisation.

Senior management recognised the need to improve their CRM activities by gutting what they had and implementing a completely new system. An earlier attempt to plan and document processes with another consulting firm was also not entirely satisfactory, resulting in processes that did not work and could not be easily mapped across to the CRM.



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THE CHALLENGE

TIQ needed an integrated system that could work with email and Citrix, as well as being able to train overseas staff easily.

Functionally the new CRM system had to record and classify new clients and manage the existing client base so that staff could retire their contact list spreadsheets.

Clients needed to be tagged with multiple data elements including business sectors, subsectors, country and region.

Opportunities for export and investment needed to be recorded, managed and updated with progress reports and records of success or failure. Quality measures and KPIs needed to be stored so that they could be retrieved and updated easily – without having to go to a separate system.

As a top priority the system needed to be simple, provide full visibility of activities across the organisation and support the storing of key data in languages other than English.

The initial goal was to implement a single CRM across all 11 countries so that all 160 staff could use the same system instead of disparate systems and methodologies. The next project will encompass the implementation of an event management and mass email systems with the long-term goal of including other aspects of the business to drive business improvement.

RESULTS

"The simple result is that the entire organisation now uses one system – Salesforce® – to record all client information and interactions. It also means that we can share information across all our offices about business opportunities.

For an organisation tasked with promoting Queensland and Queensland businesses, the simple ability to disseminate opportunities across our entire organisation was immediately available following implementation and is a huge improvement on how we worked before.

The success of the implementation has consolidated buy-in across the organisation and given us the confidence to start work on our medium-term goal of implementing event management and mass email functionality. Our long-term goals of implementing the system for other organisational functions and to use it for business improvement are definitely looking achievable," said Carmel Lawson, Project Manager - Corporate Services, Trade and Investment Queensland.



"SalesFix quickly grasped our business requirements, researched and recommended solutions ensuring our requirements were met."

THE IMPLEMENTATION

"SalesFix implemented Salesforce Sales Cloud on the Salesforce1® platform and integrated email and Citrix to deliver a working system for all staff – that's all 160 staff in 11 countries.

Buy-in from key senior executives was a key factor in the success of the implementation.

"Because Senior staff were on-board from the beginning and could see the benefits of an improved system, things happened really quickly. SalesFix responded very quickly to our requests whether it was sample data, to observe processes etc. The process wasn't slowed down by having to wait for resources.

Senior management could see that Salesforce® was making their jobs easier - particularly having one source of reporting for all KPIs allowing them more time to managing their teams and improving performance rather than spending lots of time reporting on performance," said Carmel Lawson.

THE SALESFIX SOLUTION

Knowing that the earlier work with the systems analysts had not resulted in processes that supported a CRM implementation, SalesFix provided TIQ with additional business process improvement consultancy and a proof of concept to meet their business requirements.

"SalesFix quickly grasped our business process requirements, and then investigated and recommended solutions to ensure that they were met," said Carmel Lawson.

TIQ had its own project team that worked alongside SalesFix throughout the project. The TIQ team scheduled tasks and milestones – a moving target due to reporting requirements and business planning changes - and used a project management system for consistent and continual communication between TIQ and SalesFix.



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