Client: Shred-it

Summary: Upgrade to CRM 6.0 and Mobility Solution Implementation

Shred-it is a global document destruction service company based in Oakville, Ontario. Shred-it's primary customer base are companies with a large amount of secure data and confidential documentation that need to ensure secure destruction of that data. We initially met with Shred-it shortly after Shred-it's VP of Business Systems, Dan Snider, purchased a copy of "Discover SAP CRM," written by iServiceGlobe CEO, Srini Katta.

At the time, Shred-it was running SAP CRM 5.0 with web enablement using PCUI. Performance was slow and there were growing complaints from their users (SOC's). SOCs are the central point of contact for both customers and field service agents. Response time from the user interface was slow and negatively affecting the SOC's ability to carry out such tasks as accessing customer data and inputting contracts into the system. As a result, SOC's experienced challenges delivering timely customer service.

Shred-it was also experiencing problems with tracking prospects. Shred-it had national accounts but did not have a reliable sales force automation tool. Since national accounts typically take about 6 months to move from prospect to customer, the lack of automation tools made it difficult for sales managers to gauge the entire sales process, identify which reps were working on particular accounts and predict the probability of success.

In an effort to find a solution to these issues, Dan reached out to various SAP Partners, including iServiceGlobe. We conducted a series of workshops covering CRM 6.0, sales quota, and pipeline performance management tools. Impressed by our workshop and our solution suggestions, Shred-it decided to utilize our services to upgrade to SAP CRM 6.0 and implement pipeline performance management tools for national accounts. Though Shred-it is a Canadian based company, we started the SAP CRM upgrade and implementation of the sales automation tools for their user base in the UK. With a smaller number of overall users in the UK, this strategy insured that any issues with the implementation could be fixed without affecting the entire company. In this case, the IT would remain in Canada, but the users we would bring live were in the UK.

Ultimately, we successfully assisted Shred-it with the technical upgrade to SAP CRM 6.0 and the implementation of the opportunity management tools for users in the UK. The user interface was a success and the speed improved.

When we started the upgrade to 6.0, Shred-it was already a year and a half into a side project on mobility. Shred-it's field agents utilized Motorola Symbol devices to get updates on their route order for client visits and other time sensitive needs. Up to that point, they used traditional SAP XI to interface with their devices. The development of the interface between SAP CRM and the mobile tools was complex and time consuming. The company had an immediate need for an integrated mobile service solution.

In an effort to address this problem, Shred-it asked us to help with the middleware integration. Having formed a partnership with Sky Technologies to develop a specific mobile solution for SAP CRM, we provided a solution that removed the need for XI and still supported Symbol mobile devices. We handled the implementation and it was a success. With our mobile solution their mobile devices are synced up with the CRM system whenever they go to a client site and perform work. If there is an update in the CRM system, it is updated on the device which works both online or offline. The data gets synchronized automatically. If service orders are not serviced, the SOC can see why. In past, the SOC would have to call the field agent and get insight into each and every service order if a customer called.

Most recently, we started work to remedy a variety of business process issues embedded within the functionality of the CRM system. We are currently working on fixes to the functional gaps as well as planning for a North American roll out of mobile sales and service tools.