

Oracle CRM On Demand



Eagle Creek Software Services & Oracle CRM On Demand Quick Reference Guide

Leveraging the On-Demand characteristics of Oracle CRM On Demand works well for some customers. Oracle CRM On Demand is a complete, cloud-based solution that connects sales and marketing processes to provide a unified revenue pipeline, better forecast visibility, and better ROI from sales and marketing budgets.

In order to take full advantage of this world class technology & its functionality, selecting a capable professional services partner is crucial. Implementation, integration, migrations, enhancements, support, testing and custom development are some of the tasks that need to be performed in order to enable the full use of these new and existing technology investments.

Background

Eagle Creek Software Services is a 13 year old consulting company that helps its customers maximize their software investments so they can improve efficiencies and quality, while managing price and risk. We do this by leveraging our onshore "Dakota Model" project center delivery platforms, in conjunction with onsite consulting services.

We're unique in our offsite, onshore approach, our three tiered model, our understanding of the complexities of enterprise software deployments, and the cost savings and qualitative improvements we deliver to our customers.

Eagle Creek Deliverables & Services

▶ Project Management

All of our On Demand implementations have dedicated project management resources to drive project deliverables, keep the customer informed of the project status and validate that the team is following industry best practices. It is our job to identify potential issues that would have long term impacts on the system.

▶ Focused Resources

With our "Dakota" model, we have the ability to staff experienced resources based on team member's specific skill sets.

▶ Business Analysis

We partner with our customers to identify, understand and document the business requirements needed to make the project successful.

▶ Testing

We complete thorough testing for all configuration, integration and custom development. Testing is an important (sometimes overlooked) step in successfully delivering a defect free, useable solution.

▶ Data Import

We understand the complexity of migrating one of our customers most valued assets, their data. We have developed a number of custom tools to facilitate the import and validation of data.

▶ Custom Development

There are times that our customers have specific business requirements that call for custom development. We have done extensive custom development utilizing tools specified by the customer.

▶ Documentation

Our Configuration Design Document is a living document and is the focal point throughout the engagement. It contains and maintains all functional and technical elements of the project and is updated as the team moves through the projects stages.

Engagement Models

▶ Project Team

- Staff all positions and own Deliverables & Schedule
- Full Life Cycle Methodology

▶ Shared Staffing Model

- Collaborate with Customers internal team or provide expertise in specific areas

▶ Complete Managed Services. Continuous Enhancement & Support

- Help Desk L2 / L3
- Hosting

▶ Delivery Flexibility

- Onsite at client location
- Offsite at Eagle Creek's "Dakota" Technology Centers

Example Eagle Creek CRMOD Enhancements

- 360 Order View - External Portal Middle Ware - Real Time Address Verification
- Automated Sales Staffing - Books of Business Assignment Rules with External Logic - Outlook Integration

▶ Integration Examples

- Oracle EBS - Siebel On Premise - JD Edwards - In House Developed Applications - Eloqua

▶ Intranet Portals

- Retrieve Multiple Sourced Single Record Type Data

▶ One Off Application Development

- Advanced Account Sales Rollup - Appointment Site Visit (non standard reoccurrence) - Automatically Create Activities based on Record Criteria - Opportunity and Pipeline Enhanced Processes

TEREX Case Study

▶ **Environment: CRM On Demand**

- Multiple Instances
- Multiple Regions

▶ **Business Objectives:**

- Reduce Time to Implement
- Sales Force Automation
- Track Opportunities to Close
- Integrate with Back-end Solutions
- Track Dealer Inventory Requirements

▶ **Eagle Creek Delivery Solution**

- ▶ Use Eagle Creeks US based Project Centers to reduce effective hourly rate
- ▶ Developed Multiple integrations to meet the Requirements
 - Foreign Key Uploads
 - Web Site Product Locator
 - Dealership Revenue Roll Up
- ▶ Support Multiple Regions from Project Center
- ▶ Additional Initiatives
 - Custom Call Center Implementation
 - Multiple Business Unit Implementation

Emerson Case Study

▶ **Environment: CRM On Demand**

- Multiple Instances
- Multiple Regions
- Multiple Phase

▶ **Business Objectives:**

- Reduce Time to Implement
- Standardize on Single CRM Tool
- Integrate with Back-end Solutions
- Custom Processes

▶ **Eagle Creek Delivery Solution**

- ▶ Use Combination of Eagle Creeks On-site Resources along with Project Center
- ▶ Complete Configuration of Instances
- ▶ Developed Multiple integrations to meet the Requirements
 - Live Chat
 - Web Site Inquires
 - Vendor Integration (digikey)
 - Integrations to EBS (Accounts, Contacts, Assets, Products)
 - Data Cleansing
- ▶ Quote Process
- ▶ Support Multiple Business Units from Project Center

TKE Case Study

▶ **Environment: CRM On Demand**

- Single Instance
- Multiple Regions

▶ **Business Objectives:**

- Improve System Performance
- Maintain Global Oversight
- Integrate with Back-end Solutions
- Rapid Deployment

▶ **Eagle Creek Delivery Solution**

- ▶ Use Eagle Creeks US based Project Centers to reduce effective hourly rate while preserving quality
- ▶ Performance Issues Addressed
 - Single Instance to Multiple Instance
 - Modified OOB Forecasting
 - Evaluation of Custom Reportable Fields
- ▶ Developed Multiple integrations to meet the Requirements
 - Cast Iron Integration
 - Web Services used for Opportunities/Opportunity Products
- ▶ Initial Engagment was 4 Week Cycle from Start of Project to Completion

Representative List of Eagle Creek On Demand Engagements

AGCO	Bluetech	BPM	Behlen
Culligan	HVL	Fred Weber	PCG
Eaton	Genuine Health	Human Tech	IVR
Language Logic	Novatel	Peoples Bank	Specialty Minerals
Terex Corporation	Valspar	Thompson West	Land O Lakes
Cardio Net	Agilysys	School Specialty	Emerson
Bentley Prince Street	Reflexite	Interface Flor	TKE

