

CUSTOMER SUCCESS STORY

EPICOR®



► THE CHALLENGE:

OPTIMIZING ACCESS TO AND USE OF ALL REFERENCEABLE CUSTOMERS

In 2014, Epicor Software Corporation, a global leader in business software solutions for manufacturing, distribution, retail and services organizations, launched a strategic initiative to reinvigorate the customer reference program inside their ERP Americas business unit. This organization is responsible for approximately 50% of Epicor's 20,000 customers. The company was not effectively leveraging its robust customer base to support growth. To achieve its objectives, Epicor hired a new program manager, Tony Burton, to lead the customer reference programs for the Americas.

Epicor positions itself as a partner that inspires customers to view their business from a fresh perspective by leveraging software solutions to integrate and run fundamental business processes. Burton applied the same approach to restarting the customer reference program. To avoid the pitfalls of being chronically reactive and bogged down in tactics, Burton and his technical counterpart, Jim Maher, Director of Sales Enablement, determined they needed to automate as much of the process as possible.

One of the main issues Burton's program faced was that salespeople thought the business unit didn't have enough referenceable customers because it was too difficult to find the accounts and customer content they needed. Most reference information was either tracked in an Excel spreadsheet or held in the heads of various sales people. According to Burton, "Institutional knowledge determined whether or not a sales rep could find an appropriate match." Additionally, sales representatives weren't effective and consistent in using the breadth of reference resources the company already had including video testimonials and case studies.

► THE SOLUTION:

STATE-OF-THE-ART TECHNOLOGY COMBINED WITH A CONSULTATIVE APPROACH

Epicor was already using Salesforce.com as its CRM application. As the IT team leader, Maher focused Burton on solutions with the tightest integration to Salesforce. After an in-depth evaluation of several solutions, Burton and Maher began eliminating alternatives. The IT team gravitated to Point of Reference because the advantages of a native Salesforce application became increasingly clear with each conversation and demonstration. "Everything from the seamless integration with Salesforce to the ability to extended functionality with workflows and triggers identified ReferenceEdge as the best technology fit," says Maher.

While the technology and capabilities of the application were critical, Maher and Burton wanted a company with which they could work well. Getting to know the key members of the Point of Reference team made the choice easy:

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Jim Maher,
Director of Sales Enablement, Epicor

THE RESULTS:

- Increased knowledge and consistent use of existing customer references
- Influenced \$2 Million in revenue in first quarter
- Alleviated 80% of routine administrative tasks for Reference Manager
- Decreased time sales representatives spend to find and process references

“We needed a partnership, not a vendor. I can trust Point of Reference to engage in a consultative way and grow the solution together,” explains Burton.

According to Burton, the Point of Reference account managers were, “eager to solve our problem and able to adapt ReferenceEdge to address our needs.” Epicor had some unique scenarios that required functional modifications. For example, Sales representatives often own the accounts that they want to use as references for their own opportunities. Burton wanted the reps to record the use of these reference accounts in the system just as they would if the account belonged to a peer. Point of Reference found a creative modification to meet Epicor’s needs. Burton also had some specific reporting needs. “The Point of Reference team leveraged Salesforce’s snapshot report capability to represent just the metrics that the Epicor leadership team needed to track the program’s progress.”

Because ReferenceEdge is literally part of Salesforce, user adoption was straightforward. Ease-of-use mitigated pushback from the sales team.

“Because ReferenceEdge leverages existing Salesforce.com functionality, our sales team quickly adopted the new app.” Another key was early success. Burton reports, “the first three requests that came in on the first day after implementation were quickly filled. Two were approved within 15 minutes and all were cleared within 30 minutes. Not only is ReferenceEdge quick and easy to use, it produced the needed results while streamlining internal processes. Today, most requests are resolved within 48 hours.”

“We now have 2,000 referenceable accounts, dispelling the concern that we were short on customer references,” explains Burton. His team has produced video testimonials of customers with high net promoter scores and added them to the library of reference materials; the sales reps can curate and deliver to prospects via customized microsites using ReferenceEdge.

▶ THE RESULTS:

The automated search and peer-to-peer request/approval via Salesforce Chatter (or email) takes between 80-90% of routine matchmaking off of the Customer Reference Manager’s plate. “Selecting ReferenceEdge has made the tedious part of my job easier,” explained Burton. This frees me up to manage and monitor special or unique requests as well as those for Epicor’s newest products. One of the great parts about using ReferenceEdge is enabling sales to self-service search to find the best references for their needs. I love my job and it lets me be more strategic in my efforts.” Working to identify new and expanded reference opportunities for existing customers also allows Burton the time to develop deeper connections with customer advocates, and uncover new opportunities. For example, on a recent call, Burton was able to identify a great reference contact that had never been asked about being a conference speaker, but was eager to be involved.

In the first quarter of use, the ERP sales team has successfully processed 100 customer reference requests that have influenced \$2 million in revenue with many more deals in the pipeline. In addition, ReferenceEdge has eliminated a lot of clutter that was unproductive. “Narrowing scope of focus is far better than throwing darts in the dark,” said Burton. The value has been noticed company-wide. Easily customizable dashboard functionality allows Burton to deliver impactful reports to executives. In fact, the unit’s success has spurred other units to get involved and the initial program has gone well enough that CEO wants everyone to have similar programs.

“ReferenceEdge has made the tedious part of my job easier. It frees me up to manage and monitor special or unique requests.”

Tony Burton, Manager,
Customer Reference Program, Epicor

point of reference[®]
Transforming Customer Reference Management

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