Carlyle Group

Project Highlights

- CRM best-in-class assessment of business needs and requirements of investment firm with 20 users
- Custom configuration and implementation of salesforce.com Enterprise Edition (EE)
- Data extraction and migration integrity
- Development of custom training curriculum

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The Challenges

Carlyle's investment sales teams did not have a central repository for account and sales activity information. Customer information was kept by individual account owners and was not visible to other individuals within Carlyle. Gathering sales and marketing data to produce reports was time consuming and required a tremendous amount of manual effort.

Need for single CRM system with standardization

Sales teams within Carlyle were using a combination of systems to manage customer and sales information. The data residing in these systems was not consistent, as it had been tailored to individual needs over time. Data aggregation was labor intensive and highly manual.

Need for increased visibility and usability of customer and sales data

To increase effectiveness, efficiencies and cross-selling opportunities, the sales teams required a "common" platform for selling with increased visibility to aggregate customer and sales information. Sales teams needed to see sales and pending deals to build their opportunity "pipeline".

Need to improve selling process

Carlyle needed to automate and add improvements to their selling processes. They needed: more sources for leads and a central place to store them, more robust and real-time sales reporting to react more quickly in the market, and better management of the customer "touch points".

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The Solution

Carlyle chose salesforce.com Enterprise Edition as their CRM platform and CoreMatrix was the consulting partner who oversaw the implementation, roll-out, and training.

Customization of salesforce.com

CoreMatrix worked with Carlyle to understand their business needs and drivers and customize salesforce.com to meet these needs. CoreMatrix customized the Account, Contact, Opportunity and Lead information within salesforce.com to optimize the efficiency of Carlyle. Customized dashboards and reporting were also developed.

Workflow optimization

To increase sales efficiency and effectiveness, CoreMatrix added custom objects to the workflow process for "reminders" that would send emails and create tasks when certain triggering events occur (e.g., proposal issued, due diligence, won, etc.)

Data migration

CoreMatrix assisted Carlyle in migrating to salesforce.com and performed the initial load of data into salesforce.com of Accounts and Contacts. Carlyle stored their customer data in Outlook and CoreMatrix performed data mapping and cleansing to ensure the highest level of data integrity during the migration.

Training

Usage and user acceptance and adoption were key components of the CoreMatrix solution and a measurement of success by Carlyle. CoreMatrix developed and delivered a custom curriculum to Carlyle to ensure their user adoption and success.

The Results

- **Increased visibility and usability of account and sales information through a single, centralized system**
- **Streamlined customer and account management processes with additional value-added functionality**
- **Faster and easier reporting**