



SECURITY ORGANIZATION: CRM SALESFORCE SOLUTION ORGANIZATION

Red Hawk Fire and Security is an organization built from a series of acquisitions, which has led to disparaging data sources and inconsistent business processes across the business units. These business units contain elements of sales, installation and service of their respective products. The key consolidation that was occurring simultaneously within Red Hawk to address many of the technological inconsistencies was the implementation of a single ERP system; which is inherently driving the organization to deliver a "Clean" Database into this single system.

CHALLENGE

Within the foundation of a single ERP system, Red Hawk identified the necessity for an additional system to better maintain sales processes and drive accountability throughout the organization. For this purpose, Salesforce CRM was selected and the intended purpose of the implementation was to deliver a configured and customized instance of Salesforce to address the key business challenges.

Prior to the implementation of Salesforce, the visibility of sales opportunities and resulting pipeline was inconsistent and often inaccurate. This information was manually managed and reported by each sales rep in local copies of Microsoft® Excel. The challenge was to take the different lines of business and formulate checks and balances that could be utilized across these multiple lines. The achievement of this goal was delivered through tighter lead qualification criteria, the implementation of a complex approval process to mitigate underselling and losses, and enhanced accountability through consolidated reporting metrics.

The visibility of sales activities was non-existent. This information was being managed in each users Outlook calendars, with no association to sales performance or other metrics. Through proper configuration of managing the multiple levels of relationships to one account or prospect, Red Hawk can now truly see the influence of their strategic partnerships across the organization. The additional element to this was the investment in proper coaching and instruction around utilization best practices for their entire sales team. User adoption was and always is a significant hurdle, but through a clear demonstration and training on these processes there was a consensus that Salesforce would be a value-add for the daily life of the sales representative.

The disparaging data sources carried through to an individual level where account and contact data was maintained in local copies of Excel spreadsheets and personal Outlook contact lists, resulting in no data sharing and inconsistent information.

SOLUTION

XTIVIA delivered profitable results to Red Hawk Fire and Security through their consulting engagement and implementation of Salesforce as the sales and sales management application tool.

A clear focus on system architecture and a properly configured data model in Salesforce, mitigated the change to a centralized database. Furthermore, certain integration points to Outlook were established to provide a consistent view of their world, regardless of where the data was entered.

RESULTS

Following a consistent implementation, Red Hawk was able to standardize on Salesforce reporting for sales, activity and pipeline data within six months. This standardization has led to more efficient decisions and increased accuracy of information. Information that took hours, even days, to assemble for key stakeholder and investor meetings is now available in real time.

SUMMARY

The process continues. As the organization continues to evolve, Salesforce evolves. Through a carefully orchestrated change management process and ongoing consulting arrangement, Red Hawk will continue to grow by adding functionality, expanding utilization into new departments and finding new ways to attract, retain and sell to their customers.

KEY COMPONENTS

SOFTWARE

SALESFORCE





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XTIVIA OVERVIEW

Since 1992, XTIVIA has established a proven, global reputation as a company delivering cutting-edge professional solutions to our clients' specific requirements, regardless of the complexity of the projects. XTIVIA's success has stemmed from a proven ability to deliver quality professional services, allowing the client to leverage technology successfully, competitively, and profitably. XTIVIA has received additional awards this year from Liferay, CIO Review and Inc. 5000. XTIVIA has offices in Colorado, New York, New Jersey, Missouri and Texas.

CRM OVERVIEW

XTIVIA's knowledgeable CRM team has more than 90 years of combined experience in customizing and integrating CRM systems for companies of all sizes, crossing all industries. We offer multiple CRM systems, an extensive list of enhancements and superior integration skills—all the necessary ingredients to empower your organization to dramatically improve the customer experience. Our industry-leading live support and certified CRM training add another dimension of excellence to our CRM offering, expanding our ability to deliver effective solutions and drive outstanding results for your organization.



**Salesforce
Administrator**



**Force.com
Developer**



**Force.com
Advanced
Developer**



**Salesforce Sales
Cloud Consultant**



**Salesforce Service
Cloud Consultant**