



CRM application selection and configuration

A Global Petro-chemical company (a joint venture of two Fortune 100 companies) was seeking a CRM application that would support the major account activities of more than 300 users distributed across more than 100 countries. The joint venture specialized in oil refining and refining technology, engineering designs for their processes, and producing key mechanical equipment for many of the processes. The Company had created high-level requirements and had identified five potential vendors.

Technology Consulting Associates, LLC (TCA) was engaged to review five identified CRM packages, align the packages strengths against the Company's requirements, identify the two best possible solutions, create a negotiating strategy and support the final contracting process.

vision

TCA's approach was the following:

1. TCA reviewed each product proposal and capabilities with a focus on the company's unique requirements
2. Narrowed the field to two products and refined the selection criteria
3. Created the final negotiating strategy and procedures
4. Supported the company's Purchasing department through the final contracting process
5. Documented the high-level implementation plan to ease the organization's adoption of the new technology

results

The project produced a final report that identified:

- A baseline evaluation of each product
- An objectively selected pair of finalists
- The criteria and strategy to support final selection
- An implementation plan

value

Our client completed the product selection process and reduced their software expense by an additional 25% over previously negotiated prices.

Within nine months our client successfully developed and deployed a CRM application to support their users worldwide.