

TEAMAUTOMATION

Connecting Software, Technology and Knowledge for Business Growth

CRM, Helpdesk and Business Intelligence Consultants

The CRM World has changed and changes can bring confusion

In today's marketplace there are so many Customer Relationship Management (CRM) systems and services available, how do you make sense of which is the best for your company and what does all this terminology mean?

CRM systems are usually represented by "Hosted", "SaaS", "On-premise" and a multitude of other "types." Well these aren't really types but more a description of where the software resides, who owns it and how it is accessed.

- "Hosted" means the software and your data resides on someone else's servers, usually owned by another company, and somewhere out there in "internet land".
- "SaaS" means - Software as a Service – essentially the same as hosted with exception in many cases due to updates, upgrades and other legalities.
- "On-premise" means on your premises, in your building or in your control from the plug in the wall to the output on the monitors – yours to handle, yours to own and yours to keep functional.

There are pros and cons of each and we will attempt to clarify a few of the pros and cons for you in this article. For more information visit our website at <http://www.teamautomation.com>

Hosted/SaaS: In this incarnation of CRM we hear about SageCRM Online, Salesforce.com, NetSuite and others like these. There are many good reasons to utilize a hosted solution for some companies. But, there are also some major drawbacks of purely hosted/SaaS products. We find that many businesses actually prefer an environment where access is provided to the CRM system like a hosted system but where the actual product is an on-premise installation (see "best of both" in this article). Those businesses appreciate that the company data is held by the company on company premises on company owned servers.

Hosted/SaaS brief considerations:

A few of the Pros:

- You do not have to own a server which can cost anywhere from \$3000 to \$10,000 and more.
- The hardware maintenance is performed by someone else at a different location, and you don't pay for it.... Want to wager that?
- The data is regularly backed up by professionals who have a vested interest in your data.... Well....
- Your team will be able to get to the data from anywhere in the world... when internet access is available.

Just a few of the Cons:

- No internet, no data, no business....
- No hardware, no capital, no asset for the company, no ability to run other applications
- No expandability or interconnectivity to other business critical applications and data
- No ability to have a local backup so business can go on in an emergency or internet outage

These pros and cons all feel negative to me as a business owner/leader. Yes, there are some cost savings visible on the surface and in many cases those savings are absolutely necessary. But, in all cases where continuation and viability of a business is concerned, its leadership and operations teams must have the ability to operate successfully at all times.

If Hosted/SaaS is in your future, we would like to recommend that you review at least two of these hosted/SaaS solutions. Wherein the cost issue is addressed upfront, the ability to have local backups is a standard option, and finally the application AND the data can be brought back to the companies facilities at any time. There are 2 products we recommend for companies whom need to keep the front-end costs lower and need that ability to take control at a later time.

The 1st product we would like you to review SageCRM Online. This is a world class product that gives your company and team the “best of the best”. It is backed by one of the world’s largest software companies, Sage Software. Sage Software owns many products we see as common daily names like Peachtree Accounting, ACT!, SalesLogix, MAS90/MAS200 and many others.

You can start with the hosted model and migrate to the on-premise model without any losses. In fact, 50% of the rental fee is applied to the purchase of the on-premise product if such purchase is completed with a 12 month period. We have found that this allows our smaller, and larger, clients to get started immediately with NO software costs upfront, thereby allowing the customization and business process and business intelligence needs to be addressed early on while enjoying the benefits of a CRM systems immediately.

For more information on SageCRM Online, visit <http://www.teamautomation.com> and start a demonstration account today – FREE and fully functional for 30 days.

The Wheel of Business v4 (WoB) is another quality product offering SaaS services as well as on-premise abilities. WoB has been around for a number of years and has recently undergone significant changes. WoB was conceived as a templated system riding atop GoldMine. As many CRM users know, GoldMine’s feature set is a very difficult feature set to beat. GoldMine has the depth that most CRM systems dream of. WoB has beat GoldMine, hands down.

WoB is now a standalone product line which excels among the best CRM products available today. WoB provides its users with features and connectivity that any small to medium business would want or need. This is one of the few CRM systems that include quoting and billing directly within the product, not as an add-on. Imagine the workflow efficiencies that WoB provides if you are a service company, tracking service contracts, time and materials contracts, and labor details within the CRM system. You will be directly connecting the services to the project or service ticket without secondary software or double keying. Approval and processing directly into the accounting system are standard features. Let us show you more by contacting us at 805.522.3875

On-Premise CRM Systems

In short, On-Premise means you have the software installed on your servers in your possession and you are responsible for all aspects of the operation. You control who accesses it and what rights they have to change it. These systems are the traditional systems we have come to know over the years.

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These software packages are normally sold by a dealer channel and are not off-the-shelf at the office supply or local computer store. If they are available off-the-shelf, those are usually the starter versions.

In this class of CRM we hear about GoldMine, ACT!, Microsoft CRM (Dynamics), SalesLogix, SageCRM, and others. These products range from a few hundred dollars per user to tens of thousands to implement and rollout. With that said, it is important to clarify that Hosted/SaaS products and On-premise products are cost competitive when evaluated over a 3 year period. There are some of the Hosted/SaaS products that look low cost to start, but after 2 or 3 years they actually cost more overall than the equivalent on-premise system. But, in the on-premise system, you continue to own and use the product without the continued costs.

On-Premise CRM brief considerations:

A few of the Pros:

- You will own a server which can be used to support your daily business operations, more than just CRM
- Hardware maintenance has become negligible and should be relatively low cost if done regularly. In most cases, services are performed by a contract provider at a low cost.
- Your mission critical data is regularly backed up and verified by you or a staff member who really do have a vested interest in your data. You control your data!
- The correct CRM system will provide your team the ability to use the data from anywhere in the world.
- Expandability, inter-connectivity to other business critical applications and data mining can be used to increase business intelligence and profits for years to come and at the “drop of a hat”.

A few Cons:

- The costs of hardware, software, consulting and implementation are generally incurred at the beginning but leases and other financial vehicles are available to allow most businesses access without major setbacks.
- From time-to-time the system will have to be brought down for short periods (seconds to minutes) to allow major maintenance to occur such as adding capacity to storage, increasing memory and similar system improvements.

Let's review a couple of On-Premise products:

GoldMine CE/PE— one of the best known and respected products of yesterday still available today: GoldMine began as a Sales Force Automation (SFA) product in the early 1990's. It has been rewritten from time-to-time in order to add functionality as the computer platforms have changed. Think about it, GoldMine was originally a DOS program; there was no Windows other than those that glaziers dealt with. There was no internet as Al Gore was probably preparing for something else.

GoldMine provides contact management, marketing management, internet connectivity, e-mail distribution, document management, automated processes (self design business rules), group calendaring, telephony integration and most functionality needed in today's businesses. As with any product there are areas that could be stronger such as inter-connectivity to the mobile world and Microsoft Exchange/Outlook. That is not to say it is not there, but that it has had those types of

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functionality before Windows and Office product existed and therefore resources have been limited in operating with those technologies.

GoldMine is aged but it is respected and valuable in today's environment; the big name and big advertisers are always up against GoldMine and they many times are kicked out of the park by GoldMine. GoldMine is "the survivor, the old faithful" in this world of drive-bys and dot bomb companies. If your company needs solid functionality and a generally an on-premise product, this is the product. It can be internet accessible by add-on products such as Go-Global, Citrix and others. Using the Go-Global product, remote systems using MAC and Sun workstations will be able to access most functionality.

SageCRM 100/200 on-premise – this is the same product discussed in the Hosted/SaaS models above. SageCRM provides a CRM system which is hosted at your own server, using your Internet Information Services (IIS) system. IIS is built into your Windows 2000/2003 server operating systems. IIS is what allows all of your users to access the CRM system via a web browser such as Internet Explorer, Firefox, and others. Oh, let's not forget that since SageCRM is browser accessed, your users with Mac's will be able to access and utilize most of the features as well.

SageCRM has a full suite of competencies and capabilities from contact management to proposal/quote generation, product tracking, customer service case management and connectivity to the Microsoft Outlook/Exchange and mobile worlds. This is the product of today and the future backed by a strong company with long term viability.

This is a world class product that gives your company and team the "best of the best". For more information on SageCRM, visit <http://www.teamautomation.com> and start a demonstration account today – FREE and fully functional for 30 days.

As you may have noticed from above and in the news, in most cases as a company grows there are many reasons that it becomes necessary to bring the information & data systems, CRM and operational pieces together under one roof and under the control of the company team. Even when the needs dictate internet access, the infrastructure can and usually is brought internal. Therefore, the need for on-premise CRM products will continue to exist and grow.

TeamAutomation has provided On-Premise CRM systems and solutions for the past 19 years. Our years of experience installing and customizing CRM systems for our clients have brought us too many business critical ventures and special challenges. We have found that there is no one system that fits all, therefore we represent and service a number of CRM and HelpDesk software manufacturers. Our specialty is Connecting Technology, Software, and Teams for Sales Excellence. Many factors dictate what will be success for each client. Some require accessibility from anywhere, some need only in-office access, and others want access from anywhere on any device. Our Team will make your Team a success. Contact us at 805/522-3875 or E-mail: info@teamautomation.com

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