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## **BENEFIT CASE STUDY**

### **RINGDNA**

### **APPIRIO**

#### **THE BOTTOM LINE**

Appirio deployed RingDNA to automate the capture of activity data and marketing campaign data in its Salesforce.com CRM application. Nucleus found RingDNA enabled Appirio to increase data capture for management decision making and coaching, gain a better understanding of individual campaigns' effectiveness, and drive greater sales productivity.

- **Increased CRM data capture by 25 percent**
- **Eliminated one step from the sales call preparation process**
- **Gained visibility into what marketing spending actually led to closed business**

#### **THE COMPANY**

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Appirio Inc. is an information technology consulting company headquartered in San Francisco, California that offers technology and professional services to companies wishing to adopt public cloud applications. Founded in 2006, Appirio has more than 600 employees.

#### **THE CHALLENGE**

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Like any inside sales organization, Appirio's sales team was challenged to enter information about every sales activity in Appirio's Salesforce.com CRM application. While sales management wanted more data on activities, particularly around named accounts, so it could have greater visibility for forecasting and coaching, it also needed its sales people to be selling, not just entering data into CRM.

#### **THE STRATEGY**

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Appirio's sales manager was meeting with a member of his sales team that had installed the free version of RingDNA on his laptop and was using its softphone to capture calls and call data and append them to the right object in Salesforce. After further investigation of the solution, the manager decided it would be an effective tool for the entire sales team

and, in the spring of 2013, decided to buy an enterprise license for the inside sales and marketing groups. The cloud application took a few minutes to install and training took approximately 10 minutes. Today, Appirio uses RingDNA in two main areas:

- Sales. Many members of Appirio's sales team use the RingDNA softphone to initiate outbound sales calls, so they are automatically logged and captured and appended to the right object at an account, opportunity, or role level in Salesforce.
- Marketing. Appirio is rolling out RingDNA's smart phone number provisioning to tie specific phone numbers to specific marketing campaigns so they can close the loop on marketing campaigns and understand very quickly which campaigns are generating inbound calls that lead to deals.

## KEY BENEFIT AREAS

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Using RingDNA has helped Appirio to increase data capture and marketing accountability across the organization while providing managers with greater visibility into sales and marketing effectiveness. Key benefits of the project include:

- Increased sales productivity. Automated capture and appending of outbound call data has increased sales productivity while dramatically increasing the amount of data captured in Salesforce. Additionally, because RingDNA's softphone automatically displays publicly-available social network information about the call recipient, sales people can spend less time preparing for sales calls.
- Increased marketing profitability. RingDNA allows Appirio to better gauge which marketing efforts are turning into qualified leads, so Appirio can quickly ratchet up or down a campaign based on its results, and use the insights gained for future campaign planning.
- Improved manager visibility. Because managers have richer, more complete data about outbound sales activities, they have better visibility for coaching and forecasting purposes. For example, for named accounts, the sales manager can rapidly see how many times different contacts were called each week and use that knowledge for coaching or firing purposes.

*"RingDNA has probably increased our data capture by 25 percent. It's super easy for the sales guys to use and I get the side benefit of all that data being in Salesforce in a structured way."*

– Chael Banks, Vice President of Sales, Appirio

## BEST PRACTICES

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One of the biggest challenges to user adoption in CRM is in the sales force automation space, where sales people are asked to enter data that is not useful to them and is only useful to management (Nucleus Research *n110 - Five strategies for successful CRM adoption*, July 2013). In fact, Nucleus has found that if sales people are spending more

than 8 percent of their time entering data into CRM, they're not optimizing their profitability because they're not spending enough time actually selling. RingDNA obviates the need for aggressive change management or other approaches by automating the capture of data within CRM.

Moving forward, RingDNA will be able to deliver even more value by providing analytics capabilities that enable managers to gain not just insights into the volume of activities but the actual content and outcome of individual sales calls in a scalable way.

## **CONCLUSION**

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In the case of Appirio, RingDNA has helped to solve two nagging CRM challenges that are common to many companies: capturing sales activities and closing the loop on marketing spend. Although RingDNA is only available for Salesforce.com users today, its benefits would be broadly applicable to any CRM user, and especially to sales management.