



***P2-Technologies Engagement Profile
Industry: Business-to-Consumer Services***



Client Business Problem: Client whose business involves specialized, high-end sports training spent over \$100,000 and several years building a made-to-order customer relationship management (CRM) platform. The objectives of this platform were to integrate the following critical aspects of the business:

- Executive visibility to internal utilization and profitability
- Shared calendaring
- Accounting functions
- Application access outside of corporate offices
- Repurposing of client data for marketing initiatives

The custom application had failed in almost every regard. Compounding the issue, the application was based on the Apple platform, making support of the application difficult to accomplish without its original designer.

The Solution: P2-Technologies initiated a rapid evaluation effort of off-the-shelf CRM applications that were web-based or easily accessed through a corporate VPN. Business objectives under-achieved in the initial CRM development effort were used as the guiding principles for new platform selection. Ultimately, a quickly customizable, cost-efficient, web-based platform was selected. Implementation time from design to full replacement of the legacy application occurred over a span of 4 weeks.

Business value realized from this project recovery effort:

- Allowed client to significantly improve client retention rate
- Immediate visibility to corporate managerial “dashboard”
- Complete re-structuring of sales and compensation practices
- New CRM application provides a platform for easily adding new product offerings and tracking their profitability
- Shared calendars provide visibility to trainer utilization and allow for efficient scheduling with clientele

Tools Deployed in this Effort:

- Dynamic data-driven web site updates (content management)
- Client and business partner “Extranet”
- Client Survey Toolkit