

## Salesforce® CRM implementation



I wanted a single view of the customer and a single portal for my team and the rest of the organisation to use and contribute to. Salesforce was our technology of choice and we chose Methods as our implementation partners. We have a very productive relationship with Methods.

Through team work and knowledge transfer we have implemented a solution for our needs and are confident in our ongoing development.

- Nicole Pethybridge, Customer Service Manager, Innovate UK

### Challenge

Innovate UK is the UK's innovation agency. The organisation is business-focused and drives disruptive innovation. It funds and connects pioneering businesses so they can create the products, processes and industries of the future. Innovate UK boosts productivity, increases exports and helps the UK economy grow. In fact, for every **£1** it invests in research, it generates **£8** worth of revenue.

But Innovate UK's customer service team, led by customer service manager Nicole Pethybridge, was being held back from efficiently managing its **45,000** email and phone enquiries a year because of unsuitable legacy back-end systems.

With different data sets of customer records resulting in duplicate records, it was challenging for Nicole's team and the wider business to keep track of customer interactions throughout their journey from funding application all the way through to assessment and funding award.

## The solution

Innovate UK wanted to use an out-of-the box solution with minimal amount of code, that could provide them with a single view of the customer and allow the customer service team to share customer interaction information.

Innovate UK evaluated several Customer Relationship Management (CRM) solutions and decided that Salesforce was best placed to meet their requirements.

Innovate UK selected Methods as its Salesforce implementation partner and the project started with a Discovery phase to research the exact user needs to inform the implementation and delivery phase.

Although intense (24 meetings in a fortnight!), the process generated great engagement from the teams involved and resulted in a clear roadmap.



**Phase 1** quickly ensued to allow the support and claims teams – dealing with the highest volume of enquiries – to benefit from the Salesforce platform first.

**Phase 2** saw the Salesforce platform being rolled out to field workers (the technologists meeting with clients) with a remote access to log into the platform and input updates straight away. That entailed implementing the Salesforce1 mobile app which field works use to create new accounts and contacts, log notes etc.

## Inclusive approach

The Methods team fostered an inclusive and skills-sharing approach. To facilitate knowledge transfer, a member of the Innovate team was involved in the sprints and with the Methods development team.

In addition, Methods delivered training to Innovate UK's staff to make sure employees were comfortable with the new Salesforce solution and to facilitate successful adoption.

## The results



This transformation project was part of a large intricate business improvement programme. The approach of taking small incremental steps and rolling out Salesforce to a pilot group first – the customer service team – and iterate along the way, Innovate UK was able to make steady progress and Methods was able to deliver a stable implementation.

Other departments soon asked if they could adopt the same system. Salesforce is now being rolled out and adopted out across the **300+** organisation delivering a new way of interacting with the Innovation Landscape.

Getting rid of its old data silos and bringing all the customer data onto one platform has enabled Innovate UK to improve its communication with customers and its service delivery. Innovate UK is now able to operate more efficiently and this transformation project is anticipated to deliver over **£100K** of savings in the future and allows the team to scale up to deliver the government's Industrial Strategy.

Nicole made sure that upskilling the staff was part of the transformation project and that yielded dividends immediately when changes were required. Two of Innovate's IT staff are now Salesforce trained which means Innovate UK can continue managing the application and fully realise the investment it made in Salesforce through regular support, maintenance and development.