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RESEARCH NOTE **SAGE ADVICE FOR SAGE SALESLOGIX:** **PARTNERS ARE KEY TO SUCCESS**

THE BOTTOM LINE

Deploying CRM applications requires both technical expertise and a strategic vision. Often, a deployment's success hinges on the implementation partner. In its analysis of Sage SalesLogix customers, Nucleus found partner selection and management was critical to success.

CRM deployments often require as much change management and industry experience as they do technical skills, so it's not surprising that many companies turn to partners to guide them through CRM implementations. When CRM vendors such as Sage follow an indirect model where partners are driving implementations, the skills and guidance of partners are even more critical to their customers' success.

Nucleus Research recently conducted in-depth analyses of a number of Sage SalesLogix customers as part of its development of two publications:

- *H77 Guidebook — Sage SalesLogix*
- *H81 Sage SalesLogix ROI case study — Mortgage Lenders of America*

The analysis included companies in the US and Europe from a number of different vertical markets including manufacturing, financial services, publishing, and business services.

Through in-depth interviews with these companies, Nucleus found those that were the most successful with SalesLogix chose a Sage business partner with both industry experience and positive references. Further success was achieved by leveraging the knowledge and expertise of the partners to plan, implement, and train users on their CRM solution.

In addition to implementation support, key areas where customers used partner advice included:

- Technical troubleshooting
- Technical decisions such as planning for needed server capacity and configuration
- User adoption and training
- Business process change and customization decisions
- Recommendations on effective integration of other applications and data sources

RELATED RESEARCH

- H98 ACT! ROI case study – UCSC
- H95 ACT! Guidebook
- H81 SalesSalesLogix ROI case study – Mortgage Lenders of America
- H77 Sage SalesLogix Guidebook

SalesLogix customers cited industry expertise, confidence in partners' ability to support a rapid deployment, partner guidance on handling integration challenges, and the availability of partners for ad-hoc support on an ongoing basis as key reasons for selecting a partner.

The Sage SalesLogix customers analyzed in the Nucleus Guidebook engaged the following partners to support their deployments:

- Ascendix, www.Ascendix.com, Dallas, Texas
- Castle CRM, www.acastle.com, New York, New York
- Corum Corporation, www.corumcorp.com, Ontario, Canada
- CPIO Limited, www.cpio.co.uk, Birmingham, United Kingdom
- FD Systems Inc., www.fdsystems.co.uk, Cardiff, United Kingdom
- Strategic Sales Systems, Inc., www.sssworld.com, Saint Louis, Missouri.

CONCLUSION

There is no such thing as a bad CRM application — only a bad implementation of CRM. Partners play a key role in the success of many implementations, whether it's in guiding the delicate balance between customization and process change, recommending best practices for integration and technical implementation, and guiding training efforts to support successful user adoption.

As Nucleus found in its analysis of SalesLogix users, the partner often plays a key role in the company's success. Companies looking to deploy SalesLogix or other applications today should carefully evaluate their partner strategy to ensure the partner has a track record, references, and relevant experiences for the CRM strategy. Finding a partner with the right blend of expertise and leadership is clearly a key factor in maximizing ROI from any CRM deployment.

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