If you’ve concluded that Customer Relationship Management is a strategic priority for your business, you’ve no doubt started to evaluate CRM solutions and service providers. Which means you’ve heard the over-promises and you’ve read the blogs about under-delivery.

So with hundreds of CRM service providers vying for your attention, why should you select OSF Global Services as your partner?

In the next few slides, we share with you our approach to CRM implementation and integration, and the business value we bring to small and medium businesses. After you’ve scanned these slides, please contact us so we can discuss your specific business needs.
Implementing a CRM system is a bit like living in your house while the kitchen is being remodeled. Your business must continue to operate on a daily basis while changes are taking place. You have a limited amount of time and resources that you can apply to the implementation. And interim results must be tangible in order to keep your users engaged during the process.

That’s where our technical, functional and project management expertise comes in, offering you a true holistic CRM implementation strategy. We focus on your business requirements and look across all of your customer touch points. We evaluate your objectives and the quality of your data. We look at your work flow, business processes, associated functionality and documentation. Then we map those requirements and processes to the CRM’s technical capabilities. We develop an in-depth project management plan that details requirements, potential issues, milestones, budgets and tangible success criteria. We apply a proven, rigorous implementation methodology that gives you flexibility and control. We actively engage your end users throughout the process. And we configure a CRM solution that is rolled out in short, meaningful phases that can be tested and evaluated by your end users. This proven implementation methodology helps to significantly reduce costly rework, ensures you always have full visibility into the project, and keeps the implementation on track and on budget.

Equally important, our phased execution provides functionality that helps you quickly achieve business benefits from the CRM; simplifies user training because they become
familiar with the solution in manageable stages; and promotes user adoption because they are involved throughout the implementation process.
Quality Management

- Proven process
  - Agile frameworks
  - ISO 9001:2008

- Stringent SLAs
  - Tailored to your requirements
  - Accomodates your dynamic needs

Quality management is often the defining factor between success and failure in CRM implementations. That’s why we follow an iterative implementation process that adheres to the Agile frameworks. Through this process, requirements and solutions evolve through close collaboration with your users. We test each stage ... make adjustments based on your user’s feedback ... test again ... stabilize the application .. and than scale to the needs of your organization. This iterative process ensures the entire implementation is customized to meet the specific needs, budget and timeframe of your company.

OSF Global Services is ISO 9001:2008 certified, which means we adhere to standardized processes that ensure our customers’ needs and expectations are met. Your requirements are documented and promoted throughout the team; and your feedback is included in management reviews.

Stringent Service Level Agreements are a leading factor in our history of successful CRM implementations. These SLAs define costs, timelines, commitments; and they provide a formal process for any adjustments that might be required to accommodate your needs as the CRM implementation progresses. All terms are explicit, clearly communicated and agreed upon to ensure your implementation proceeds according to the highest quality standards.
Customer relationship management is among the most frequent search queries in Google’s Applications Marketplace. And with so many CRM platforms available, it is easy to be confused about which system is best suited to your business.

OSF is vendor neutral so we help you sort through the hype. We specialize in servicing small to medium-sized businesses, so we offer intimate knowledge of implementations with similar applications, scale, technology environments and integration challenges as yours. And we are subject matter experts in the leading CRM software solutions – from Salesforce.com and Microsoft Dynamics to NetSuite and SugarCRM. That means we can help you identify the CRM solution that best meets your requirements and determine whether an on-premise CRM or SaaS option is most suited to your needs. Or we’ll build an on-demand CRM solution leveraging the most reliable cloud technologies.

CRM software out of the box should provide between 80% and 90% of what you need. But every company is unique, which means we customize the CRM to align it with your business processes – and even your specific industry. Over time the product’s technology upgrades will need to be incorporated without negatively impacting any previous customization. We work with your users to provide the updates, configurations and enhancements that ensure your CRM solution continues to deliver the greatest business value over the long-term.

But we do more than configure the CRM to your specifications. We seamlessly integrate
the CRM solution with your other essential enterprise applications, such as ERP, to multiply the value of your technology investments. And we show you how to fine tune your business processes and work flow, transforming technology into assets that propel your business.
CRM implementation goes way beyond technology. It’s an opportunity to define specific business processes that allow you to deliver a consistent customer experience and sustain your competitive advantage.

Our mission is to deliver a CRM solution that helps you transform your business and deliver strategic business benefits for many years to come. When you choose OSF Global Services, you avoid a long, cumbersome implementation. We get you up-and-running quickly with minimal disruption and minimal burden on your IT staff. We combine our functional knowledge and transformational expertise to help you achieve the maximum benefits from your CRM while greatly improving your work flow. And we apply standardized methodologies that help you deliver measurable business results and predictable costs.

Beyond cost efficiencies, we are committed to showing you how to improve your business process in both the short-term and the long-term. Because your success truly is the foundation of ours. Like you, OSF Global Services is an SMB. We are passionate about our work, fixated on quality, and obsessed with maximizing the business value of each client’s IT investment.
This client provides online backup solutions for file storage and protection. They wanted to deliver better service management for their subscription plans while also integrating payment processes. So we:

- Developed a website that serves as a marketing interface and portal for customer data;
- We customized Netsuite as their CRM;
- We developed a unique Facebook-dedicated application so their end customers can access their files from their Facebook account;
- And then we integrated all of the components with their service management platform.
This client is a provider of remote services and support. They needed a CRM solution to efficiently manage customer support activities for their business partner – a leader in fiber optics and provider of Telecom and Internet services.

We built a desktop agent that monitors the health of PCs, and then we integrated it into their CRM. The desktop agent assesses customer issues upstream before the case actually reaches a service agent. Workflows are triggered, which sends time-sensitive information to the appropriate service agent. By managing the workload more efficiently, the tool has successfully reduced agent workload by 10%.
CRM is a complex system that touches all departments across your company and impacts your customers. Teaming with the right CRM implementation partner with the right level of expertise can mean the difference between the success and failure of your entire CRM initiative.

OSF is a trusted advisor and technology integrator for small and medium sized businesses around the world. We can help you select the CRM system and delivery approach that adds true business value to your organization. And we can help you increase the lifetime value of your customers with our full suite of CRM implementation, customization and consulting services.

To learn more about our CRM expertise, or to request a complimentary, 1-hour consultation, please visit our microsite: www.crmintegrator.com. While there you can also request a complimentary copy of our recently published book, CRM for Dummies.

Thank you very much for your time today!