

TRILLIUM SOLUTIONS GROUP

Case Study: Health Care Information Company

Integration of CRM Systems

Our client is a market leading information products company serving the healthcare industry.

Major organizational and procedural issues were putting a third attempt at implementing a major enterprise initiative in jeopardy

Trillium professionals assessed the situation, clarified requirements, and secured senior sponsorship which paved the way for the system to be implemented successfully.

The Client:

Our client is an information products company serving the healthcare industry. They are a market leader in providing the tools and vital insights that healthcare managers use to improve the performance of their organizations. The firm maintains one of the nation's largest healthcare databases, containing data on more than 25 million discharges per year from nearly 3000 hospitals - representing over 75 percent of all discharges. Our client provides data products to more than 2000 hospitals, as well as to most of the largest pharmaceutical manufacturers in the United States.

The Challenge:

Having grown through merger and acquisition, our client had multiple, disparate sales and CRM systems. They were in the middle of their third attempt to internally implement an enterprise-wide On-Demand CRM application and were again encountering roadblocks primarily due to the lack of executive sponsorship. The effort was falling dangerously behind schedule.

To exacerbate matters, the primary user group (sales) and the IT organization were at odds. IT was driving the effort but sales had little confidence in IT's ability to successfully implement the project. Executive leadership was unenthused to act as an intermediate as they did not have a clear understanding of the scope, budget, timing or impact of the initiative.

The Results:

Trillium Solutions Group sent a team to identify and address the root cause issues that were hindering progress

for our client. Trillium provided senior management and its board of directors a clear project picture and comprehensive project plan outlining the scope, approach, communications, project governance, budget and timing for the initiative.

Under Trillium's guidance, the project was delivered under budget and within a week of our proposed project plan. Additionally, Trillium was able to bring, sales and IT together to work effectively for the first time.

This was the first successful enterprise-wide initiative completed by our client.

How We Helped:

Trillium discovered that the project lacked appropriate sponsorship, was improperly defined, and did not have the financial resources needed to guarantee success.

Our team worked across business units to clarify business requirements and solidify the project's scope. The result of this effort was a comprehensive picture of the proposed project including benefits and risks.

Having secured executive sponsorship, we completed an implementation plan that included a view of the existing issues, why they were occurring, and what could be done to resolve the issues.

Our client also engaged Trillium to supervise the implementation plan we presented. Working with the client, our team used our implementation approach and processes to resolve issues. Our implementation approach's emphasis

Our client had their first successfully implemented, enterprise-wide initiative.

The new CRM system better positions and enables our client to meet its strategic and financial goals.

Organizationally, our client is better positioned and skilled to successfully implement future enterprise-level initiatives.

on regular cross-team communication brought to light potential roadblocks and ensured their rapid resolution. To guarantee continued client support throughout the initiative, our team initiated regular inter-department collaboration which allowed the implementation team to challenge, discuss, review, and agree on recommendations as a group.

The Benefits:

By the end of the implementation, our client had their first fully integrated, enterprise-wide CRM system. This enabled the Sales organization to plan, execute and manage their sales efforts more effectively.

In conjunction, the client was able to turn off and cease support of two legacy sales force automation systems.

Perhaps most important to our client, the implementation gave them the capability to manage and report activity in their sales pipeline through a single system of record.

Organizationally, our client benefited from vastly improved communications between the business and IT organizations.

About Trillium:

Trillium Solutions Group is a professional services firm devoted to helping our clients realize more profitable and efficient operations. We leverage our extensive experience in operations, business analysis, program management and technology services to help our clients solve problems and implement viable business solutions. Our work helps clients generate new revenue streams, reduce operating costs and optimize

processes and technology to keep them competitive in rapidly changing markets and sectors.

Trillium Solutions Group drives results by providing solutions and guidance in

- Business Analysis
- Operations
- Program Management
- Technology Services

Our mission is to help you focus on your business- to drive top and bottom line results. Call us today at 847.272.2202 to find out how we can deliver results for you.

Visit us online at www.trilliumsg.com.

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