

Case Study

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ShareMethods and JMJ Associates

INTRODUCTION

It has been said that a company's business processes are its "secret sauce" and if a company's processes are constrained, so is the business. Various solutions such as document management and workflow have been used to help reduce the amount of paper that moves through a business thereby improving the throughput of paper-based processes. But, traditionally, these solutions were only found in conventional software solutions that installed behind the firewall and organizations that preferred newer on demand solutions were out of luck.

ShareMethods is an innovator in the on demand document management space, offering solutions that can be used in stand alone mode or in concert with other applications such as Salesforce.com. ShareMethods is a member of Salesforce.com's partner ecosystem and many of its customers also use Salesforce.com.

Many organizations that sell consulting and other services — like JMJ Associates profiled here — rely on Salesforce.com for SFA but their specialized requirements include document management capabilities to help manage proposals and other large documents. The combined solution that ShareMethods and Salesforce.com have delivered has changed the internal business processes at JMJ for the better by reducing time and effort as well as the potential for mistakes. This Beagle Research Group Case Study provides an example of the growing sophistication of on demand solutions — and their users — and justifies our selection of ShareMethods for a 2006 WizKids Award.



CUSTOMER AND BUSINESS

PROBLEM

Bob Allbright, Americas Regional Sales Manager for JMJ Associates, describes JMJ's business as helping companies reach a higher level of performance. "Our clients are organizations that aspire to world-class performance and they realize there is work they need to do in the domains of organizational culture and individual attitudes, values and alignments to complement their existing systems, processes and training," he says.

Despite using Salesforce.com to help automate its own sales processes, JMJ Associates still found

itself operating manually whenever it created a custom proposal for a customer — which was often. JMJ tailors its services to help clients to reach their goals and each proposal is one-of-a-kind. Consequently, each proposal must be reviewed and edited by many subject matter experts located at various locations globally and approved by regional managers in JMJ operations and finance before it is ready for submittal to the customer.

The company's manual process involved a lot of duplication and sometimes chaotic paper handling in generating a custom proposal. As Allbright put it, "It worked but you got 30 emails to look through on a light day and maybe 100 on a heavy day." More importantly, he went on, "You might get into a document and not easily discern who else had reviewed it, if this was the most recent version or find that changes were made but the 'MS Word track changes' functionality had not been utilized by some reviewers,

which created significant confusion and delays.”

To streamline and rationalize the process, JMJ wanted a document management system with the capability of integrating with its on demand SFA so that the company could easily access all sales information during the creation and approval process and to give the company a common and easily accessible repository of proposal documents by users anywhere in the world. JMJ found what it was looking for in ShareMethods, a company that is part of the Salesforce.com partner ecosystem.

The consulting and services vendor’s process required detailed proposal development and approvals from sales, operations, finance and executive teams. In order to get all four approvals, proposals would routinely bounce back and forth as new ideas were added or additional information became available. Although only four departmental approvals are required, the process could be quite convoluted. It took a great deal of vigilance to ensure that proposals worked through the system without slow downs; sometimes work would be lost or performed out of sequence, resulting in rework by various members of the team. A better method had to be found.

THE SOLUTION

As a company that provided consulting to its clients on best practice business processes, JMJ executives knew that reducing the potential for error and improving throughput in the proposal process were of critical importance to their business. Not surprisingly, finding a document handling solution was a top priority at JMJ but the company had one requirement — any document handling solution had to integrate well with Salesforce.com.

JMJ had worked with Salesforce.com for over three years customizing their instance of the SFA product with over 240 custom fields to support their unique business processes. According to Allbright, the company had always received great service from

Salesforce.com and they would not contemplate changing SFA vendors. Said Allbright, “We could not have done what we’ve done without Salesforce.com. They’ve helped us maintain a ‘sold out’ status for a year and a half. We’ve hired a lot of people, our executives have confidence in our sales pipeline numbers because of our ability to produce reports and respond to ‘What if?’ questions without any difficulty. It’s a major benefit.”

Luckily, at a Salesforce.com user meeting, Dreamforce, Allbright noticed ShareMethods — one of the many ecosystem partners demonstrating its solution. Unlike traditional software solutions, or most on demand services, the Salesforce.com and ShareMethods solution had been pre-integrated by virtue of the ecosystem partnership. Thus, with a few modifications, JMJ could begin using it as soon as its people were trained.

The new business process is much like the manual process it replaced but with the added benefit of a smooth, efficient operation. A JMJ proposal actually consists of two or three documents, the proposal itself a work plan spreadsheet, and possibly an expense estimate worksheet. When the initial draft is uploaded to ShareMethods all the people involved in the approval process get an alert that there’s a document in the ShareMethods inbox. Each team member then reviews and approves documents following a specific sequence. According to Allbright, “Using ShareMethods has really streamlined and taken the confusion out of our proposal review process. It’s saved us a tremendous amount of inefficiency in terms of duplication of effort and rewrites.”

Results

The ShareMethods-Salesforce.com integrated solution enabled JMJ’s Americas Region to not only to sell more consulting days but to close more high-value consulting projects. As a private company, JMJ does not share its financials with the public so actual revenue numbers are not available. Nevertheless, Allbright said that JMJ’s Americas region sold about 20% more consulting engagements in 2005 as it did in 2004, and

the total value of the transactions was up by almost 27%, a huge productivity boost for the company.

Allbright also recognizes the efficiency gains provided by this solution, "Without this process, we would have needed another person." So it's clear that JMJ has increased revenues and saved money using this solution.

Future considerations

There are additional features of the ShareMethods solution that JMJ wants to put to good use. For example, the company tracks a lot of customer specific information in the SFA database and often there are supporting documents to maintain such as engagement documents, clippings, and testimonials. JMJ intends to use a library feature in ShareMethods to collect this documentation, possibly making some documents available to prospective customers during the sales process. That project will get underway in 2006 and JMJ is very happy to continue working with ShareMethods. "They've been very interested and oriented to supporting us to make our processes work well. I've been really struck by the level of attention they've given us," Allbright says.

CONCLUSION

This case study is interesting for what it lacks. Because the solution is delivered in a hosted environment, there is very little to report on the deployment issues common in other forms of software. And that point is highlighted by the fact that both Salesforce.com and ShareMethods were actively working together before JMJ Associates discovered the solution. This really underlines the power of on demand computing — the fact that even disparate software companies can combine to deliver an integrated solution in short order, without many of the irritations of traditional software deployment and integration.

Document management is not new technology but there are significant costs associated with it especially where document storage and retrieval are concerned. But with

the on demand solution the complexities and expenses of managing documents are hidden from the customer. What the customers see are the documents they need when they want them for a low monthly fee. This combination of low cost and easy startup demonstrates the power of on demand computing and shows why it is becoming such a popular option for many organizations that need sophisticated computing solutions but have small budgets.

The results are impressive; on demand computing including document management has enabled a small company, JMJ Associates, of just over 100 people, to leverage solutions that have enabled it to boost the value of its transactions by about 27%.

VENDOR BACKGROUND

ShareMethods was founded in 2003 and is located in South Orange, NJ. The company was an early proponent of the on demand business model and an early entrant into the on demand document management market. ShareMethods helps sales and marketing organizations to streamline their document centric business processes while leveraging the benefits of on demand computing. The company's founders have played leadership roles in Apple QuickTime patents / technology and held key positions at AT&T, Bell Laboratories, Apple Computer, SONY, Magnifi, and NASA. The group holds more than eleven patents and has published widely.

About Beagle Research Group

Beagle Research Group is a consulting and market research organization focused on emerging technologies and companies that will have an important impact on the way business is conducted in the years ahead. Our work is based on professional standards of quantitative and qualitative research which informs all of our publications.

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