

Case Study: Service Desk Institute

www.sdi-e.com

Customer Overview

The Service Desk Institute is the leading professional organisation for everyone working in the IT service and support industry.

Dedicated to setting the standards for the industry, SDI delivers knowledge and career enhancing skills for IT service professionals and enables you to deliver exceptional results for your organisation.

Background

The Service Desk Institute (SDI) had been using GoldMine since the late nineties and although they were still using it everyday they knew that the database had become “Bloated” with dead leads and prospects and needed a real clear out. Over the years many processes had been implemented in GoldMine but had now been forgotten about but the fields, screens etc were all still there. Various SQL triggers were sitting in place but nobody could remember what they were for and after the departure of the person who took day to day responsibility for GoldMine the frustration that SDI were not getting the functionality out of GoldMine that they required rose sufficiently for Tessa Troubridge (Commercial Director) to decide that action needed to be taken. GoldMine was to be given one more chance or SDI would invest in a different CRM system.

Selection Process

SDI reviewed proposals from various GoldMine partners but were drawn to use Iain Wicks for the personal service that he provided. All the GoldMine partners came across as being very professional but Ms Troubridge realised that if she selected one of them she may end up talking to someone different at the company every time she wanted to ask a question. “I liked the way Iain came across and seemed to understand our needs from the start and I felt his company was small enough to care about a customer enough to put in the extra effort required to keep them happy” (Tessa Troubridge)

GoldMine Restoration

Because of the large amount of work required initially SDI arranged for Iain to work with them for Three days per week for the first month, Two days per week for the second Month, 1 Day per week for the third month and after that 1 day per month was all that was required to keep things going in the right direction.

Full design Service - A detailed analysis of SDI’s business processes was undertaken. Iain interviewed all of the staff and stakeholders, and based on his experience and best practises set to work mapping the various business and sales processes of SDI into GoldMine.

Implementation and Training – A series of training videos were created for SDI to cover the various SDI business processes so that users could “refresh” their memory after the initial training sessions. All training was done in a bespoke fashion using SDI terminology and references.

Reporting – Crystal Reports was used to create a suite of sales reports, activity reports and marketing reports.

Ongoing Support – SDI have a dedicated UK-based consultant (Iain Wicks) who knows and understands their business as well as their GoldMine implementation

Results

- Every person in the company now uses GoldMine and therefore information updates are shared amongst ALL users instantly
- Accurate reporting “arms” managers and users with the ability to make good decisions
- Processes are streamlined and so time is saved that was previously spent looking for data
- Through SQL querying the Marketing team can now identify new sales opportunities
- Morale is improved

“Having Iain in every month relieves us of the burden of worrying about training new users, or creating new processes in GoldMine plus I don’t even have to think about GoldMine backups.” “... His amenable manner means that he fits right in with everyone here.”

“...I wouldn’t hesitate to recommend Iain to anyone in similar situation to us.” (Tessa Troubridge)