

SAP Customer Success Story Professional Services – IT Services



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Steve Niesman, President and CEO, itelligence Inc.

AT A GLANCE

Company

- Name: itelligence AG
- Location: Cincinnati, Ohio; Bielefeld, Germany (global)
- Industry: Professional services
- Products and services: SAP® consultancy, systems integration, licensing, outsourcing, hosting, and customer support and education
- Revenue: US\$ 205 million (worldwide)
- Employees: 200 (United States), 1,100 (worldwide)
- Web site: www.itelligencegroup.com

Challenge and Opportunity

Global visibility into revenue, profitability, customer pipeline

Objective

Roll out software worldwide, tailored to each individual country, to integrate time entries and sales-force reports with enterprise system

SAP® Solutions and Services

SAP for Professional Services solution portfolio, including the SAP® Customer Relationship Management application, the SAP ERP Financials solution, and the SAP Mobile Sales packaged solution

Implementation Highlights

- Installed software in just 5 months
- Met deadline to install by end of Q3
- Configured software to each country's business practices
- Synched laptops worldwide with corporate server

Why SAP

- Easily tailored to match business practices in each country
- Comprehensive reporting capability
- The best solution for company's needs, demonstrated by itelligence's own experience selling and deploying SAP software
- Decision to make SAP software the standard platform for the company

Benefits

- Ability to view consultant hours on a timely basis to estimate monthly revenue
- Ability to track costs and analyze project profitability
- Automatic preparation of client invoices using consultant billing times
- Ability to track fixed assets, with automatic posting of monthly depreciation
- Smoother consolidation of financial reports
- Global visibility into opportunity pipeline
- Ability to match sales against campaign effectiveness and analyze competition during sales cycle
- Faster closing
- Improved transparency
- International standardization

Existing Environment

Non-SAP accounting software

Third-Party Integration

- Database: Microsoft SQL Server
- Operating system: Microsoft Windows

itelligence

Global Company Links Field Consultants and Sales Reps with Back Office for Real-Time View into Financials and Customer Pipeline

itelligence AG provides small-to-midsize companies with SAP® consultancy, systems integration, licensing, outsourcing, hosting, and customer support and education services. As a professional services firm, road warriors are the heart of its business – field consultants and sales reps who roam Europe and the Americas serving clients or selling them those services. itelligence identified its must-have – integration of consultant time and expense entries and sales-force progress reports with the enterprise system for real-time global visibility into revenue, profitability, and opportunity. That's why itelligence is rolling out software from the SAP for Professional Services solution portfolio to 34 offices in 15 countries worldwide. The rollout includes the SAP® ERP Financials solution and the SAP Customer Relationship Management (SAP CRM) application.

One of the first implementations for the Bielefeld, Germany–based company was in the United States, where the branch offices were using rudimentary software for financials and customer relationship management. Consultants turned in spreadsheets monthly, and itelligence never knew how many billable hours to expect. The CRM software didn't support pipeline tracking or win/loss analysis. The systems couldn't communicate with each other or generate meaningful reports.

Enabling Change with the SAP for Professional Services Solution Portfolio

SAP for Professional Services changed all that. Field consultants now enter billable time against project elements – right from their laptops. The financials software assigns expenses to cost centers so department managers can see their overheads. “We can now view consultant hours on a timely basis, estimate monthly revenue, and analyze costs and profitability,” says Ken Golisch, CFO with itelligence Inc., which is based in Cincinnati, Ohio. “Capturing time by client lets us automate invoice preparation. We can analyze nonbillable hours, archive recurring journal entries, create monthly fixed contracts with a touch of a button, and track fixed assets with automatic posting of depreciation. And since we are now on the same system as our parent company, financial consolidation is much smoother.”

Managing financials is one thing – tracking opportunity and making money is another. That’s where the CRM software comes in. itelligence uses SAP CRM to run campaigns and to manage the sales pipeline. Leads are input into the system as opportunities with all associated information, including industry code and prospective revenue. Account executives are notified and have 48 hours to accept or reject a lead.

“I use the software to track the leads and the conversion rate of leads to pipeline,” says Laure Poquette, director of SAP marketing services at itelligence Inc. “Once the account executive determines there is demand and begins the sales cycle, the opportunity hits our pipeline report. Sales reps use the SAP Mobile Sales packaged solution for CRM to input notes on calls, outcomes, changes to forecast, and progress. We track movement from pre-sales through presenting. We track multiple touch points, such as sending literature if the prospect came to events or attended Webinars. We track who we’re competing against and why we’re winning or losing. I also track campaign progress and can tag revenue to specific campaigns.”

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Reporting for Global Transparency

Reporting is key. Says Poquette, “Our management team runs the business off reports. We have four lines of business, and we track their pipelines, forecasts, and revenue separately. SAP Customer Relationship Management enables us to identify opportunities specific to each business unit and extract the relevant data. I can call up a pipeline report for each unit to view quarterly and year-to-date status. This has helped sales and marketing concentrate on the things we need to do, rather than trying to put reports in place. The CEO and VP of sales in the United States pull a report whenever they want. The chairman, CEO, CFO, and controller for our parent company have full visibility into the pipeline at any time.”

That was the big driver for the project – worldwide transparency. “We may be working with a company in the United States with locations in Spain and Germany,”

says Steve Niesman, president and CEO of itelligence Inc. “If corporate has visibility into the project, it can contact the other sites about opportunities. This helps us run our global business more effectively.”

The sales group is running more effectively too. Says Niesman, “The sales reps adapted quickly to the software and used it right away; I was very impressed with how we could tailor the SAP software to the way each country operates. Sales reps now respond to leads faster than before. It also helps them manage their pipeline – they always know where they are at quarter and year-to-date and where the gaps are.”

The reps also have a new built-in demo. “SAP software is the only thing we sell,” Niesman says. “Our account executives in the field can now open their laptops and say, you know what? We’re a midmarket company, and we run SAP CRM. Here, I’ll show you how we did it, how we use it, and how easy it is.”