



Relationship
UNLIMITED

Knoware – Relationship Unlimited Case Study

The background of the lower half of the page is a low-angle, upward-looking photograph of several modern skyscrapers. The buildings are rendered in a blue-tinted, wireframe style, with their grid-like structures and curved facades clearly visible against a clear blue sky. A diagonal white line cuts across the image from the top right towards the bottom left, adding a sense of dynamic movement and depth.

**From
growing
pains – to
a platform
for growth**

About Knoware – *The Knowledge Warehouse*

In business for over 20 years, Knoware is a wholly New Zealand owned IT Consultancy with clients across New Zealand and Australia.

The core areas of Knoware's expertise are:



Analytics involving statistical analysis and data mining



SAS Consulting and Education



Business Intelligence and Data Warehousing



Enterprise Information Management

An ISO certified company, Knoware engage with both government and private sector organisations of all sizes and work closely with their clients to ensure maximum knowledge sharing, with a commitment to quality and continuous improvement.

The Problem

Knoware had been using a legacy CRM for almost 7 years. As a business in significant growth mode over the last couple of years, Knoware's growing pains had been particularly highlighted and acute when it came to their use of their old CRM system.

The incumbents' Lead Management was ok for the business in the early days, but lacked the depth of features and functionality that the growing business required.

As a business with data in its DNA, one of the biggest frustrations for Knoware was the quality of data out of their CRM. A prime example of this being field validation, where addresses were often recorded in phone number fields and vice versa.

The common issue of multiple instances of customer records and no true single view of the customer, or "one source of truth" for customer interactions and information was also a driver for change. If (for example) a Knoware executive was speaking with a client, there was simply no quick and managed process for accessing the clients most recent contract (or other relevant artifacts) without searching for these in multiple unconnected file repositories.

There was also no facility for the Knoware team to access and edit client records and information from mobile devices, creating obvious inefficiencies and rework for the whole team.

The Goal

At a minimum, the new CRM solution needed to deliver “like for like” functionality, with all the data issues fixed, along with being fully mobile capable and easily accessible from anywhere.

Strategically, Knoware knew that what they really needed was a 360 view of the customer built on a fully extensible platform that could grow with the business.

With Knoware in growth mode, absolute clarity on pipeline and opportunities for board reporting purposes was also critical.

The Challenge

Knoware knew that they didn't want to “just upgrade their CRM”, they wanted to adopt a platform for growth and implement a solution that would not only grow with them, but open the door to a whole world of possibility in terms of additional productivity tools and integrations.

The Solution

Knoware chose Salesforce as their new CRM software and selected Relationship Unlimited (RUL) as their implementation partner.

Knoware CEO, Cam Chapman, had experience of Salesforce and Relationship Unlimited (RUL) in a previous role and knew that Salesforce and the team at RUL was the right solution and the right team to deliver their CRM project.

He knew that Salesforce was more than just the world's #1 CRM, it also provided a complementary suite of enterprise applications that would enable Knoware to grow their business on a single, secure, and scalable platform.

Chapman was also a big fan of the unique business and delivery model RUL employ. As New Zealand's most experienced Salesforce consultancy, RUL have a team of Salesforce solution design and project management experts based locally in New Zealand and are backed up by more than 125 Salesforce certified developers and specialists globally.

This unique model allows RUL to deliver Salesforce solutions of the highest quality, at speed, with the most competitive pricing possible.

The Result

All of Knoware's previous CRM hassles and limitations have been removed. The Knoware CEO and board now have complete visibility on client projects, sales pipeline, resourcing and financials all in one place, as well as benefiting from the seamless integrations into existing business applications like Xero and Outlook.

More importantly, Knoware now have a single, secure, and scalable technology platform which will help them grow and scale their business. Due to the scale and depth of Salesforce expertise RUL can offer, Knoware are assured that any technical issue, question or enhancement can be quickly resolved and deployed.

Another of the key benefits for Knoware has been the incredible options for self-learning that the Salesforce Trailhead learning management system (and thriving online community) has provided. Knoware's CEO has observed that Knoware employees are thoroughly engaged, energised and motivated to learn all they can about their Salesforce solution through Trailhead, bringing their learning back to the business to expand the use of the platform and further improve productivity.

Of course, with over 20 years of Salesforce consulting experience to call on, RUL also delivered the project within timeframe, under budget and exceeded expectations in terms of value-added consultancy advice, support and training.

"We chose Salesforce and Relationship Unlimited because we really bought into the local team and their depth of Salesforce experience and expertise. We also knew that capacity would never be an issue because of their global team and service delivery model. Finally, value is always important and RUL simply provide world class service at an unbeatable price."

Cam Chapman,
Chief Executive Officer, Knoware –
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