

Salesforce CRM Provides Stream Information with a Flexible Solution in the Complex Energy Industry



“Salesforce.com was the only company we identified that could provide us with the transparent, immediate access to information we need in our business, at a cost we could afford.”

- Mitch Webster, General Manager
Stream Information.

Industry

Energy and Chemicals

Geographies

New Zealand

Challenges

- :: **Staff and time constraints:** Stream Information needed to manage its information without increasing the workload on its administration staff.
- :: **Transparency:** With a large number of stakeholders – retailers (energy supply companies), customers (medium to large enterprises) and government agencies, as well as field service sites – Stream Information needed quick, easy, and transparent access to information.
- :: **Timeliness:** The information also needed to be accurate and immediate, so Stream Information needed a simple, fool-proof, platform for field service agents to provide consistent information online.

Solution

Stream Information appointed salesforce.com, along with post-sales applications provider, ServiceMax, to provide a data management system using cloud computing, that would allow easy, accurate input and access of information for its many stakeholders.

The solution came in two parts:

- :: A **Partner portal**, including detailed reporting and analysis applications, work flow automation, and access to CASE, work orders and site compliance information, and quote approvals, for:
 - Retailers (energy providers);
 - Test houses;
 - Field Service providers; and
 - Co-owners (companies that share ownership of part of the metering assets on a site)
- :: And a **Customer portal** that will be used to engage directly with Stream's end-user Customers for issues such as arranging site work and approving quotes.

Results

- :: Although it is early days since the salesforce.com solution was implemented, Stream Information can now get a much clearer picture of their business and identify any areas of concern more quickly with the reporting and analysis salesforce.com has been able to provide.
- :: Stream Information can now provide a superior service to their stakeholders, with more accurate information.
- :: Administration costs have been significantly reduced and metrics are immediately available for easy comparisons of both old and new metering deployments.

Stream Information provides independent metering services to medium and large enterprises, to ensure they get the best deal on their energy needs. New Zealand's energy industry is deregulated, allowing enterprises to select from a variety of energy providers to best suit their financial, environmental, and volume requirements.

Stream products and services offer the ability to monitor energy consumption, identify savings and efficiencies, and to build improved energy management strategies.

Mitch Webster joined Stream as its Managing Director in July 2008. One of his first tasks was to improve the company's data quality, compliance, management reporting and analysis abilities. As an energy management company dealing with energy providers, Stream Information has a large number of key stakeholders. It is essential that each of these stakeholders has immediate access to accurate, timely information, both so that Stream can provide a useful service, and to comply with New Zealand's electricity industry requirements.

“We knew that using an ERP platform, such as is used by our parent company, was going to be too expensive, even to just complete the requirements analysis,” explained Mitch Webster, MD of Stream Information. “We knew that cloud computing, combined with a rapid prototyping approach, was going to be the only real option, and salesforce.com was providing the best service for our needs.”

Flexible Solutions

Mitch Webster had worked with salesforce.com some years ago, using a web-based management system for a remote sales team for another company in San Diego, US. When he joined Stream Information he started looking at alternative low cost solutions for field service management. Web solutions are typically less expensive – he liked the option of configuring existing applications rather than developing them from scratch.

The portal capability of Salesforce.com was attractive too, providing the easy sharing of data for customers and partners. He also wanted to be able to manage work orders and assets, as well as customer relations, in terms of the information they could provide.

From his earlier work with the company, Mitch was confident in the underlying infrastructure provided by salesforce.com, and looked for a company that could provide the appropriate post-sales application to complement it. ServiceMax's Field Service and Scheduling solution allows its customers to manage and monitor service requests to ensure that they are resolved within Service Level Agreement (SLA) commitments.

“I was impressed with just how flexible salesforce.com was in working with ServiceMax to provide us with the best solution,” said Webster. “Together, we stretched the salesforce.com platform to provide the necessary customer and partner portals, including a large customised field service management solution from ServiceMax.”

Stream had a specific need to be able to share rules to enable various players to see certain information. For example, when a customer switches from one energy supplier to another, both the outgoing and the winning supplier need to be able to see the relevant customer information until the switch is made.

“I would estimate that 75% of our cost and effort went into working with the teams at salesforce.com and ServiceMax to customise a solution to meet our specific requirements in providing a two-way flow of information with our partners,” said Webster.

One of the solutions devised by salesforce.com was to provide a shared pool of licences per annum (not named users) with general access so that we can provide or deny information to partners as required.

Benefits

“For our field services, we have moved into a model of transparent and efficient reporting and analysis,” said Webster. “We are now in a much better position to revise the reporting and status of our business every day.”

The salesforce.com and ServiceMax solution also allows Stream Information to keep a very tight hold on field service cost and management. The reporting is clear and consistent, so management can easily see where there are any problems and compare results both historically and across locations, with no ambiguity.

The partner portal allows partners to input their own data entry, which should both reduce Stream’s administration costs and improve data quality.

With workflow automation, the effort to report and manage switches will become automatic, reducing the need for manual input and ensuring quality control.

“For us, the biggest impact is in how we manage our data, and of at least being able to look at these things now,” explained Webster. “Before we implemented the salesforce.com solution, it was too tedious to gather metrics on field service providers. Now the metrics are built in so trending analysis reporting is just a matter of pressing the right buttons.”

For the future, Stream is working with salesforce.com to consider ways to change the data entry screens to a single screen format, to add more filter criteria to the reporting application for even further versatility, and to enable customers to certify orders online.

Stream is also looking to implement salesforce.com asset management, which is currently done manually.

“We see this as an evolving solution. As we identify new and modified needs we are working with salesforce.com to address these,” said Webster. “For such a crucial area of your business, it is essential to work with a flexible partner like salesforce.com; consistently working together to create the best results.”

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