

# TIER1CRM LEVERAGES CRYSTALREPORTS.COM IN WINNING FORCE.COM SOLUTION

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Mario Lollino, Vice President of Product Strategy, Tier1CRM



**Industry**  
Software

#### Business Process

Sales, services, marketing, customer needs analysis

#### Challenge

Before integrating crystalreports.com into its Tier1ACE solution, Tier1CRM had to create custom reports from scratch for each deployment

#### Why Business Objects?

crystalreports.com from Business Objects integrates easily with existing Force.com solutions and provides the power and flexibility needed to meet stringent client reporting demands

#### Business Objects Products and Services

crystalreports.com

#### BusinessObjects™ OnDemand

#### Why Tier1 CRM?

Tier1CRM Inc. provides specialized CRM solutions for financial services and other industries, powered by on-demand industry leader salesforce.com.

## CHALLENGE

### Giving clients what they want

There is *nothing* like a happy customer. Consider this testimonial from an investment banking client using Tier1ACE products from Tier1CRM: “ACE has successfully leveraged and extended core Salesforce functionality to our sales, trading, and research areas. By combining efficient data integration strategies and careful enhancements of the presentation layer, the product has emerged as a tremendous value added to the basic Salesforce model.”

Tier1CRM's clients are about to get even happier, as the company rolls out an enhanced version of Tier1ACE – built on the flexible Force.com platform, but with the added capabilities of the crystalreports.com service from Business Objects, an SAP company.

“Our product sits on top of salesforce.com, providing capital markets clients with specialized features and workflows to enhance their competitive advantage,” explains Mario Lollino, vice president of product strategy at Tier1CRM. “Our clients, typically very large investment banks, have specific requirements for views and reports of their data. By integrating crystalreports.com into our solution, we can meet these requirements more quickly, easily, and cost-effectively.”

## APPROACH

### Leveraging crystalreports.com

Specialized printable views and reports are the rule, not the exception, for Tier1CRM clients. Lollino, says, “Building these items from scratch required a tremendous effort, and we had to do this for every different client. We wanted the ability to create these customized views and reports more efficiently and also give our clients the option of managing the process themselves going forward.”

The Client Report Card component of Tier1ACE Capital Markets Edition is a case in point. This product provides convenient centralized investor and corporate account management, along with institutionally focused call list management and contact activity tracking and history. “The Client Report Card allows our clients to track each interaction with *their* clients, in terms of meetings, commissions, expenses, and so forth,” explains Lollino. “These customized, printable report cards provide an essential tool for the broker-dealers.”

Tier1CRM clients provide investment research, ideas, and trading, and they periodically need to review their services and commissions with the global enterprises they serve. They use Salesforce.com and Tier1ACE to track services provided, manage the process, and easily access relevant data. “We leverage crystalreports.com to present the data in such a way that it’s easy for our clients to show the value they’ve delivered, leading to higher commissions,” says Lollino. “The Client Report Card basically digests all that information and presents it in a way that’s useful, rather than having to go into a massive CRM system and look at information in a random and disconnected fashion.”

Creating printable views and reports on a one-off basis is expensive and time-consuming, notes Lollino. “Without crystalreports.com, we would basically have to build an HTML page to

satisfy each separate client request,” he says. “When I visit new clients, of course, they always ask for something unique, and we have to charge for that customization. crystalreports.com from Business Objects helps meet their requirements more efficiently and effectively. If we build these customer views and reports in HTML, the clients have to pay us for any changes; doing it using BusinessObjects™ software, they can actually make the modifications themselves, with the proper training.”

The first step in integrating crystalreports.com involved porting a small part of the Tier1ACE application; Lollino and his team quickly produced a prototype to replace some existing functionality. “In terms of what we’ve done so far, it seems very easy,” he says. “My developers had no experience with BusinessObjects, but they picked it up quickly and had a prototype going in a day.” Lollino anticipates that the full-scale integration of crystalreports.com will be equally straightforward.

## RESULTS

### Customized reports made easy

The value that crystalreports.com brings to Tier1ACE benefits not only the company but also its clients. “Without the BusinessObjects OnDemand software, creating and modifying custom solutions represents a considerable added expense for our clients,” says Lollino. “The addition of crystalreports.com definitely makes a difference. That’s the value: I don’t have to create a new project for each deployment. Now I have a portfolio of reports that are built in BusinessObjects, and I can give it to the customer and say, ‘Go ahead and change them yourself.’ Having a flexible reporting engine plugged into our application lowers my selling price, because I don’t have to transfer that cost to the customer. It also gives our clients the freedom to modify their views and reports according to their unique business needs.”

Known for its deep expertise in financial services, Tier1CRM is now building on that success by creating specialized professional services practice areas in the retail, public sector, and telecommunications arenas. Lollino says that crystalreports.com has a future in these parts of the business as well. “Every product can use reporting capabilities like specialized printable views,” he says. “It’s definitely something we will consider for other products across the company.”

Lollino summarizes the business benefits of his company’s OEM partnership with Business Objects, saying, “The value to us is that we have a flexible reporting platform on-demand, making it easier to build custom reports. Now our clients don’t need to ask us to make changes for them; they have the option of doing it themselves. We save money from a deployment perspective, and we can pass these savings along to our clients. The flexibility to build these reports quickly and easily is a tremendous benefit that our clients will definitely appreciate; crystalreports.com makes everybody happier and more competitive.”

Lollino is pleased with Tier1CRM’s OEM partnership with Business Objects. “So far, the relationship has been great,” he concludes. “Business Objects has provided us with access to training and licenses to use the product. There’s tremendous value in the partnership, and it’s very important to us. For any other companies out there that need to build custom reports, I definitely recommend crystalreports.com as a powerful and cost-effective addition to your solution.”

[businessobjects.com](http://businessobjects.com)



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