

An **ITUtility.NET** White Paper



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Putting SharePoint to Work in Small Business

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Introduction

Microsoft SharePoint® offers small and medium businesses the technology to manage their operations at a level once available only to large enterprises.

Unfortunately, because of the perceived implementation costs, most small and medium business owners do not even consider SharePoint as an option.

Problem Statement

Anybody having extensive contact with small and medium business owners can attest that these owners are willing to tolerate significant challenges before deciding to implement technology to alleviate the situation. They typically cope with very tight budgets and cash flow is always a limiting factor in any decision. Given this, one would assume that they are perfect candidates for hosted SharePoint and Exchange solutions. Unfortunately the group that could benefit most from the power of hosted SharePoint and Exchange often never considers them.

When a small or medium business owner does consider a hosted SharePoint solution, the initial customization costs usually deter them, and they consider other options perceived to be more cost effective.

Previous Options

Based on our canvassing of local small and medium businesses, 60% continue to use an amalgam of Excel, Word-forms and Access-based solutions that have resulted from organic growth. They use this approach in conjunction with point of presence (POP) e-mail. Although this approach presents

significant problems and inefficiencies, other solutions are not considered until they are forced to meet standards such as International Standards Organization (ISO), or they begin conducting business with larger organizations whose vendor agreements require organized internal systems.

Situations with small and medium businesses being forced to implement provable processes for running their businesses represent approximately 20% of the small and medium business market. Companies with 30 or more users sharing 2 or 3 Salesforce.com accounts are not uncommon – this configuration would, for example, allow them to have a traceable helpdesk system for report generating. However, the true benefits of that solution can only be realized when every user in the workflow has access to the system.

Sometimes businesses have implemented open-sourced Linux, Apache, MySQL, and PHP (LAMP)-based software bundles such as Sugar's Customer Relationship Manager (CRM) – only to find that any software savings are quickly offset by extremely high customization costs. This often forces these organizations to return to their initial, problematic systems to try to figure out an inexpensive means of just “getting by”. We also frequently encounter customers who installed a dedicated server only to discover that getting it to work on their own had

too steep a learning curve, and it was never used. They also returned to their original systems, investing in “getting by”.

To meet mandated customer requirements, approximately 12% of businesses have either signed up for a fully hosted solution, such as Salesforce.com, or have invested in a proper CRM installation. With extensive reporting requirements, typically these customers can not settle with “getting by” technology.

Less than 8% of businesses we encounter have used a Microsoft partner to implement a customized SharePoint solution.

ITUtility Solution

The very affordable ITUtility solution provides the functionality small and medium businesses need to get going. With a low monthly price per user, companies are more likely to include user access for all employees during sign-up. Channel partners will benefit from leveraging deep penetration into a market that they would not ordinarily have access to – the 60% of small businesses still using their problematic solutions. Up-sell opportunities include customization, or an entire upgrade to solutions such as MS CRM.

Lead Management

Almost every revenue-generating opportunity for a company stems from a lead. A lead can be an idea provided by a motivated employee, a list of potential customers, an up-sell idea from an existing contract, a customer referral, the outcome of a successful cold call, an information request via company web site, or a contact made at a marketing event such as a

tradeshow. Knowing leads' origins and histories is extremely valuable information for a company's management. Knowing that leads are being followed up and well-managed is a fiduciary duty!

The PortalDesk Lead Manager is a simple repository of all leads. It provides managers with tremendous insight into the entire lifecycle of a lead, from its creation to either its closure or its conversion into an opportunity.

Opportunity Management

Opportunities are leads reaching a level where there is a reasonable expectation of revenue for the company. For many companies, successfully closing an opportunity can be a team effort requiring the involvement of multiple individuals; managing the process throughout the opportunity lifecycle is essential.

The PortalDesk Opportunity Manager is a simple repository of all opportunities. Managers in real-time can see the status of any opportunity being pursued by the company.

Delivery Management

Many companies consider success to be the conversion of an opportunity into a signed contract. In actual fact, that is the point when the work should really start. Companies are usually judged more on how they fulfill a contract than on how they won the contract.

Whether fulfilling a contract involves the simple shipping of a box or a massive project involving professional services coupled with the delivery of complex technology-based products, the PortalDesk Delivery Manager provides a simple repository of all activities required to fulfill contracts, including their associated status.

Issue Management

Issues are situations where individuals or organizations wish to engage the company in a registered matter. Company service representatives review issues and direct them to the appropriate individual within the company for a response or action. Issues can include customer complaints, employees inquiring about health benefits, or even employees on a customer site alerting the company of a potentially undesirable situation they see developing.

The PortalDesk Issue Manager is a simple repository of ongoing issues where managers and issue owners can view and track the status of each issue.

Document Center

Electronic documents are an integral part of running a business. They can consist of the latest version of a proposal, a marketing brochure, or a benefits claim form.

The PortalDesk Document Manager is a highly-organized repository that manages all documents involved in the daily running of the business.

Implementation

There are two ways to provision customers on this new system – either through the self-provisioning engine, or directly through the reseller.

Self Provisioning

By providing a credit-card number, customers can sign-up and provision users on their own. As a part of the sign-up process, they must select an authorized ITUtility channel partner from a drop-down menu. The partner is contacted and chooses whether to receive commissions directly or be invoiced for the customer's use. Either way ITUtility will not accept orders directly from end-users.

Reseller Provisioning

Just like any other ITUtility small business service, resellers can provision users for these services on the PortalDesk Administrative Console.

Summary

ITUtility offers a variety of small business services, opening up a market to ITUtility partners unavailable to them in the past. It provides resellers with a tremendous service upside and opens the door for migration to a hosted Microsoft Dynamics™ CRM solution.

For more information, visit www.PortalDesk.NET.