RTI's CRM Applications Rivals The Major League Providers

Kevin Ramesan - August 15, 2003

Event Summary

Pursuing our focus on the mid-market CRM vendors, TEC has recently looked at RTI Software, provider of CustomerFirst, SalesFirst and WebFirst. The RTI CRM product line combines front office functionalities covering areas like services, marketing, development, and sales. Michael P. Mallen, Executive Vice President promotes the fact that a single repository makes the entire organization capable of performing collaborative work and to have a single view of customer's interactions. The Illinois based Software company is targeting the niche industry of software and software/hardware businesses. Amongst other companies like Alstom, Alcatel, Cyborg Systems, and Advanced Visual Systems Inc., RTI has recently added Harris/Baseview Publishing (technology for magazine and newspaper layouts) and Cedar (UK's largest financial management solution provider).

Founded in 1990, by E. James Emerson, RTI's focus was on sales and service to the software industry. Both Dr. James Emerson (founder and President) and Dr. William Nelson (Chairman) had prior experience in CRM and IT in general from various sources like KPMG Peat Marwick, Geac, and, Harris Data. RTI's application represents a functionally comprehensive package at a low price that could give them a head start in a highly competitive mid-market.

Product Definition

RTI's product suite comes in three distinct flavors: *CustomerFirst, SalesFirst* and *WebFirst.*

The **CustomerFirst** suite is a support management and defect tracking system that integrates technical support, development, quality assurance, and release management. It enables teamwork at the level of multiple groups. Even though RTI tends to detach its image from exclusively a software industry niche player, the tool is still highly focused on that industry and perfectly matches the process requirements in a software development environment such as hardware configurations and operating system information at the customer site or maintenance contracts for system upgrades and support.

CustomerFirst helps manage processes for tracking requests on ownership and work items list, and product issues such as priority, severity, and status. Amongst many embedded features, *CustomerFirst* provides: a contact manager; an automated rule-based escalation tool; a telephone interface using TAPI2; an e-mail manager; and a time recorder for each individual. Customer representatives can access all pending incidents, problems and their status in a single view. Alerts allow the user to set an alarm, or an alert, that is associated with a specific incident, problem, and task. Alerts can also be used as actions to be taken from escalation rules as a result of an automated rule-based escalation engine. This engine is the centerpiece of the workflow manager tool that allows process automation and notifications without the need of programming. CustomerFirst interfaces with MS Outlook to add ticklers, alerts, and tasks.

The **SalesFirst** suite tackles the marketing and sales processes and complements *CustomerFirst.* All data from both interaction tools are stored in a single data repository and shared throughout the entire organization. *SalesFirst* encompasses key feature such as, a contact management tool, a marketing campaigns and lead generation tool, a sales opportunities and forecasting tool, and a literature fulfillment. All RTI's applications are Java-enabled CRM applications and specifically match the requirements of software companies that are providing support, bug fixes, new versions, and services to their customers.

WebFirst is an option to CustomerFirst that allows both employees and customers access to information about the status of open incidents or report new incidents through a Web browser access. WebFirst uses WebEngine DBTM technology from WebXI, Inc. to provide a connection between the Web server and the DBMS.

From *WebFirst,* customers can display a list of their open incidents and those closed in the past 30 days, submit a new incident, or add additional information to an existing incident, and query the knowledgebase to search for a resolution.

RTI also offers an Inventory Management module that helps companies in tracking and analyzing information about equipments, contract management, and equipment history.

CRM implementations over the past few years have generally not had a great hit in terms of success rates. Businesses that did not spend sufficient time in planning and customizing their application to fit their special environment still struggle with return on investment. The demand for quick results does not allow adequate planning and research on the internal processes and culture to pre- match the application to the business. That is exactly where large enterprises struggled with their CRM implementations and why the mid-market customers are so reluctant to CRM adoption. Under such perspective, RTI has made a real effort providing ease of customization down to the end-user's level. Users may customize their views by selecting the fields to be displayed and to define the sort sequence for multiple items. A right mouse-click allows removing fields and changing labels down to the title.

User Recommendations

TEC's laboratory has installed an evaluation copy of CustomerFirst and SalesFirst and has navigated through both applications with ease. The software is quite user friendly and accessible to non-IT end-users. Both CustomerFirst, and SalesFirst are functionally rich and should represent a lower cost of ownership in comparison to the major league applications with similar functionalities.

The interface looks a bit crowded with a concentration of functionality in a tabular format. Users may find it challenging to drill down to other screens to complete a process. The Graphical User Interface (GUI) also appears a bit austere. Michael P. Mallen is however, confirming that the company is totally redesigning the interface and a revamped version would be available soon.

RTI's ASP hosting service would represent a real bonus to the SME as we see increasing market response to on demand services allowing businesses to rely on 3rd party providers to host and maintain their enterprise application.

With its Enterprise version 4.2 RTI Software plans to broaden its niche position and to aggressively market its technology to any industry that requires service, helpdesk, marketing campaign, and sales automation. RTI now has the ability to build upon its software industry foundations, from which to expand to other industries requiring similar service, helpdesk, marketing and sales requirements.

Rather than promoting its tool to horizontal markets, RTI intends to keep expanding in specialized niches particularly within Healthcare, Pharmaceutical and Biotechnology industries. As it stands now, the product's strengths, particularly in its pre-configured functionalities and views, matches most of the process requirements of the software industry. Tracking relationships between customers is another RTI's product feature especially useful to professional firms. This feature allows end-users tracking parent relationship between sites of the same corporate customer.

The manufacturing industry in general and the telecommunications industry in particular, could represent a natural path for RTI's vertical expansion. RTI could tap on existing functionality such as "Shipped Products", "Equipments", "Inventory Management", and "Customer Program" to develop appropriate data model and processes for other related manufacturing businesses.