

Current, Standardized Information for Improved Decision-Making and Reporting

Challenges

- Automatically transform disparate data from geographically dispersed sources into Salesforce
- Multiple data silos with different versions of contact data
- Deploy in three calendar weeks to meet budget cycles

Implementation Highlights

- **Data integrity across the organisation**
- **Cost savings and rapid implementation**
- **Flexible, reusable architecture that reduces total cost of ownership**

Products

- Pervasive Data Integrator™
- Pervasive Professional Services

The UK Commission for Employment and Skills Provides Information Accuracy, Consistency and Visibility with Salesforce and Pervasive

UK national standards organisation gets data in minutes, not days

“Today we can pull reports on a real-time basis from Salesforce or from our data warehouse, allowing us to provide information to key stakeholders. Nightly data synchronisation using Pervasive Data Integrator allows us to report to stakeholders effectively as well as providing the basis for a significant number of customer facing applications.”

– Marek Kluczynski, CRM Systems Manager, The UK Commission for Employment and Skills

EXECUTIVE SUMMARY

On 1st April 2010, ownership of the Investors in People framework and brand moved from Investors in People UK to the UK Commission for Employment and Skills (UKCES). The UK Commission provides independent advice to the government to help the UK become a world-class leader in productivity, employment and skills. The UK Commission is now responsible for developing and maintaining the integrity of the Investors in People Standard and frameworks. This includes managing the licenses of the Investors in People Centres, promoting the frameworks, and quality assuring the service delivery.

The aim of the UK Commission is to improve the productivity of the UK workforce by providing a framework that any organisation can adopt, irrespective of size or type of company. This standard helps improve business performance and competitiveness through a planned approach to setting and communicating business objectives and developing people to meet these objectives.

Part of the UK Commission’s responsibility is developing and maintaining a central database of information on organisations that implement the UK Commission Standard. The thoroughness and accuracy of the data coming from partner-operated UK Delivery Centres to its headquarters is important, as the data drives decision-making for licensing and official recognition of practitioners. It allows monitoring of partners’ performance relative to target performance goals and provides this information to customers. In addition, the UK Commission needs complete, current data to provide accurate reports to sponsoring bodies and government ministers regarding its performance.

The UK Commission elected to implement Salesforce as a means to give the Delivery Centres the ability to enter a range of data themselves. It would also allow the UK Commission to efficiently share leads with the field-based centres. At the same time, they wanted to take the opportunity to improve data visibility and consistency and to create better reporting by integrating the numerous data types from the independent Delivery Centres into Salesforce. The UK Commission needed a proven, easy-to-maintain and reliable product so salesforce.com recommended that they call Pervasive Software. After evaluating a number of other options, the UK Commission selected Pervasive Data Integrator.

CHALLENGE

The various Delivery Centres used to provide monthly data in CSV formats to the organisation headquarters, and the data then had to be imported using a custom-built system. The IT team would spend several days per month preparing monthly and quarterly reports for its board of directors. Meanwhile, data related to potential and existing customers was updated inconsistently – sometimes entered by the Delivery Centre and sometimes by the UK Commission staff based on information arriving by email or telephone from the Delivery Centres.

The IT Team faced a daunting task – how to rapidly, accurately and automatically transform disparate data from the UK Commission Centres into a format consumable by Salesforce that would power the CRM application’s real-time reporting capabilities. With 30,000 UK Commission accredited organisations in the UK, around 35,000 contacts, approximately 400,000 assessment events and 16 different stages in the process of certification to track, there was a lot of data to consolidate and organise. Once complete, more than 1000 users would be using the new system, each with specific needs that originally required custom-coded reports.

In addition, they were plagued by data quality problems. Kluczynski said, “Data from partners and data from techs could be completely different. We couldn’t do mailouts. We’d get thousands and thousands of bouncebacks.” They needed a single location for accurate contact data.

Making this even more challenging, deployments had to be compressed to three calendar weeks to meet budget cycles. Manual intervention was too time-consuming, costly and inaccurate. The UK Commission needed to get an automated solution up and running fast – funding depended in part on the data being there.

SOLUTION

Pervasive understood that this project needed rapid speed to implementation, and was confident Pervasive Data Integrator could deliver results. The Pervasive Professional Services Group jumped in to help the commission’s IT group meet their deadline.

They integrate data from 13 separate Delivery Centres, which were outside the Commission, with the Commission customer resource management system hosted by salesforce.com. Integration now takes place on a one-to-one basis between the Salesforce Objects and their corresponding tables in SQL Server. Now all Salesforce objects are synchronised with a complete copy stored at the Commission corporate site as a SQL Server database. This copy of Salesforce data is presented through a self-service portal reporting from the central SQL Server database. Selected objects in the Commission instance of Salesforce are integrated with individual Quality Centre views of the data. The UK Commission’s partners now have the opportunity to access and update their own information.

Now the UK Commission can pull reports on a real-time basis from Salesforce to provide information to management and the key stakeholders. The data is used in a large number of internal and customer-facing web and reporting applications. Nightly synchronisation ensures that data is current, complete, and uniform across all Delivery Centres. Before, extraction alone was a 3-4 week process.

Pervasive Integration Solution



BENEFITS

Up-to-the-minute data

Stakeholders seeking meaningful data get information in 2-5 minutes, rather than 2-5 days.

Fast implementation

The reusability of maps and the move from expensive-to-maintain custom code enabled delivery in a tight 3 week window.

Accurate unified global data view

Pervasive Data Integrator provides automated synchronisation between Salesforce and a SQL database, so all field-entered information is fully available to headquarters each day and Delivery Centres have a unified view of lead and account information.

Reusability

Thanks to the flexibility of Pervasive software, the IT department can continue to deliver additional value to the UK Commission. Pervasive is used to integrate and combine data from multiple sources and format it into a single unified schema. This enables UKCES' client companies to directly access a customer-facing data warehouse and benchmark their organisation's progress against the UK Commission Standard as well as for standard internal KPI Reports. The Commission also plans to use Pervasive for several projects across the whole of the Commission.

Data quality

Data that was once tracked differently at each Delivery Centre is now standardised in one object. Kluczynski said, "We've got one single source of data that Pervasive replicates to the SQL Server, so there's just one single source and view of the data shared by all of our applications. We can worry about the trending of the data now. We can actually make decisions, rather than worrying about the quality of the data."

CONCLUSION

The UK Commission improved its data quality, reporting effectiveness and team efficiency under a tight timeline by using Pervasive. Ease of use and powerful functionality fed speed to completion.

Pervasive has allowed the UK Commission to create reusable maps to significantly reduce deployment time. The UK Commission was able to design one process for one Delivery Centre that could be readily reused across all 13 Delivery Centres. The entire integration process can now be managed by one employee.

The results of this Salesforce integration are a progression to automation, better quality assurance, improved management and monitoring of its partners, stronger lead generation, and rock-solid reporting that meets the exacting standards of stakeholders.

Marek Kluczynski sums up the experience: "*Utilising Pervasive Data Integrator allows us to quickly integrate partners' databases with Salesforce without the need for complex custom processes, reducing long-term costs and giving us control over data. The UK Commission has also been able to build on the robust Pervasive technology and use the platform for other projects without the need to purchase additional software.*"

He adds, "*We've been able to build web applications. We've been able to do a lot of things that we wouldn't have been able to do without Pervasive.*"

About Pervasive Software

Pervasive Software provides agile data integration software that speeds the flow of data between applications and between organizations. Our robust technology addresses SaaS, SOA and traditional integration modes and allows customers to re-use the same software for integration scenarios that span data warehouses, real-time application integration and data exchange with trading partners.

Company Profile

The UK Commission for Employment and Skills is the organisation that develops and maintains the integrity of the Investors in People Standard and frameworks.

www.ukces.org.uk
www.investorsinpeople.co.uk

For More Information

1-888-296-5969 (North America)
1-512-231-6000 (Main Office)
+44-207-965-4706 (Europe)
www.pervasiveintegration.com
info@pervasivedataintegration.com

For other international contacts, please visit
http://www.pervasiveintegration.com/company/Pages/contact_pervasive_software.aspx

1.888.296.5969 www.pervasiveintegration.com

The most comprehensive initiative for universal connectivity to all data sources and applications – from legacy to on-premises to SaaS applications, files to databases, Web to mainframe.



Whatever it is, Pervasive connects to it and integrates it.

Over 500 reusable connectivity components

Connectivity out-of-the-box to thousands of applications and data sources

Rapid extensible connectivity to everything else