



Spherion Finds Custom CRM a Good Fit for Services Tracking



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— Susan Perdeu
Senior Manager of Sales Support

Industry

Business Services—
Staffing & Recruiting

Geographies

North America

Challenges

Spherion needed to accurately track add-on services being delivered to clients.

Solution

Using **AppExchange Builder**, Spherion customized **Salesforce** to identify the services delivered to each customer.

Results

Armed with information, reps can approach customers about adding or eliminating services.

For decades Spherion has specialized in placing career-minded professionals at talent-hungry companies and lining up armies of temps. Now the staffing and recruiting company is making sure its own unique needs are met by tailoring its customer relationship management (CRM) system to the way it does business.

With the help of AppExchange Builder, Salesforce’s built-in point-and-click customization tool, Spherion is able to address challenges that range from last-minute contract concessions to costly project scope creep. The company has customized Salesforce to track all services delivered to complex long-term accounts so that reps can make sure that potential billings are not falling through the reporting cracks.

Previously, Spherion had no formal way of knowing whether services had been added on site at a client’s request after a contract had been signed. And there was no procedure for charging for those additional services. “In our industry it’s not uncommon to sign two and three-year deals with clients,” says Susan Perdeu, senior manager of sales support at Spherion. “Additional services start to creep in just because of the long-term nature of those relationships.”

Customizing Salesforce Is All in a Night’s Work

One day Perdeu and her colleagues were discussing the difficulty of tracking which services were billed and delivered when someone suggested, “Hey, maybe we could do this in Salesforce.”

That was all Perdeu needed to hear. A self-described “non-techie,” she had earlier used AppExchange Builder to tailor Salesforce to collect company-specific information about the final stages of the sales process. For the services tracking project she worked through the night to create the prototype of a module that would record exactly which services were being provided to each customer. Two days later Perdeu was ready to demo her new Salesforce tab for Spherion’s top executives.

“I can’t imagine that any other CRM solution would have made it possible for me to do this myself—and do it without the help of our IT resources,” Perdeu says.

Custom CRM Is Up to the Job, Wins Wide Acceptance

When Spherion rolled out Perdeu’s new Profitability Improvement tab, only reps managing high-profile accounts were required to use it. But managers in several regions quickly saw its value and mandated its use by their teams. As a result, more than 120 reps are using the new tab, which is indistinguishable from the other tabs they see when they log into Salesforce.

“With the tab we created in Salesforce we can take an inventory of all of the services we are actually delivering today,” Perdeu says. “This is something we use not just to gather information but to drive action and determine which services we could add or eliminate.”



Custom CRM also enables Spherion to differentiate itself from its competition. “We’re operating in a very competitive environment and it’s easy to be seen as just one more company that does staffing,” says Perdeu. “By customizing Salesforce we’ve been able to break down what we offer our clients feature by feature and evaluate exactly what our clients are looking for, the advantages we can offer them, and what they require to close a deal.”

For Spherion, the upside of tracking accounts in this new way has been making certain potential revenue is captured. The staffing company, which prides itself on taking action rather than reacting to situations, has found Salesforce, with its easy-to-use customization tool, to be just the right candidate for the job.

About Spherion

As a leader in the North American staffing industry, Spherion has annual revenues of \$2 billion and provides recruiting, workforce management, and temporary staffing services to businesses. Since its founding in 1946, the company has screened and placed millions of workers in temporary and full-time positions.

For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

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