

point of reference®

Case Study: Point of Reference

Point of Reference provides a full complement of customer reference program services to organizations determined to cultivate and capitalize on high value customer relationships. Primary business lines include a hosted customer reference management software solution, and recorded content development services based on a well-honed interview methodology. With Point of Reference, clients can finally orchestrate coordinated customer reference activities, inject customer references into sales and marketing opportunities with less time and hassle, and build a library of 24/7 available customer references to end burn-out. With Point of Reference focusing on key verticals including healthcare, it was important to them to ensure that all their clients could get the maximum value from their solutions and to do this they needed to be integrated with Salesforce, the question being was the solution integration with Salesforce or a fully integrated app.



The Challenges

Clients had to be able to enter the Salesforce ecosystem for deeper reach and greater access to client information and to achieve easy access the app needed to be listed on AppExchange. In addition, the app had to ensure that for Healthcare companies there was access to Shared Contact & Advanced Routing. For Point of Reference, the challenge was how to develop the app within a reasonable timescale from a position where they didn't have the necessary resource and expertise without recruiting. They also had to decide whether to have existing php system in place wrapped in APIs and then create the UI in Salesforce which connects to legacy system via these APIs. Alternatively, they could create the application completely inside the salesforce environment and do away with legacy system, a longer development process, but improved sustained returns.

The Solution

The solution was to develop an app completely inside Salesforce and bring in Metacube to work alongside the Point of Reference team to develop the app. Metacube, as a trusted PDO, had the Salesforce and industry knowledge to ensure the app not only met the immediate client requirements but gave Point of Reference a sustainable solution that would meet all the Salesforce guidelines and so could be listed on AppExchange. Metacube worked with Point of Reference to develop an app that was completely within the Salesforce environment. The app was generic and provided a configurable shared contact feature to adapt multiple implementations.

The Results

In conjunction with Metacube, Point of Reference created a 100% native Salesforce application which provided the necessary boost to the product adaptation by a larger number of organizations and users. The application was able to easily leverage new enhancements and features released by Salesforce. The solution provided necessary flexibility for these companies to incorporate ReferenceEdge into their system without compromising any of their shared contact functionality.

Metacube was one of the preferred PDOs that was provided to us by Salesforce. Following interviews with multiple PDOs and - of course! - reference checks we chose to work with Metacube because, out of all the PDOs we reviewed, we felt that Metacube had the expertise and Salesforce knowledge to be able to deliver our application to market on time and within budget.

- Darren, CTO at Point of Reference

This is a perfect example of where the Salesforce ecosystem will provide the vast majority of an organisations' data needs, however there are specific industry requirements that need to be addressed. An ISV, in this case Point of Reference, has identified the requirement and has engaged with a PDO, Metacube, to develop a solution that will further enhance the Salesforce offering and deliver increased returns in a specific vertical, healthcare.

For more information on this and other projects, call us on +44 (0) 1273 952913 or visit our website <http://europe.metacube.com/>

✉ Sales.EU@metacube.com 📍 25 Wilton Road, Victoria, London SW1V 1LW, United Kingdom