



CMMS Data Group Validates RingCentral Integration with Salesforce® Lightning

Company profile

CMMS Data Group is the creator of MVP Plant, software that lets maintenance, facilities, reliability, and inventory professionals work smarter and more efficiently.

Website

cmmsdatagroup.com

Office

Chicago

Size

30 employees

Year founded

2000

“The Lightning UI provides new layout options, allowing salespeople ‘to have more data in front of them, in an optimized fashion.’ With RingCentral Office integration, they can be even more productive.”

— Jonathan Clark, Director of Professional Services

When Salesforce introduced the Lightning user interface overhaul to its suite of cloud software, it promised easier customization of workspaces for everyone and a simpler approach to software development for add-on modules. However, it also created a dilemma for customers who had added customizations to what is now known as “Salesforce Classic”—the change was dramatic enough that it broke compatibility with many apps and integrations.

When RingCentral announced a beta version of its Lightning integration, CMMS Data Group was quick to sign up. The company, developer of the MVP Plant maintenance management software, has been trying to work through a checklist of important integrations as quickly as possible, says Jonathan Clark, Director of Professional Services. Although Salesforce is allowing customers to decide whether to move to Lightning at their own pace, the newest features are only available to users of the Lightning version. “I would constantly see things I wanted, only to find out they were only in Lightning,” he says.

Both Salesforce CRM and RingCentral Office® are essential tools for the CMMS sales and service teams, but to be most useful they had to work together.

Essential business software

“For us, the driving factor is sales, as it is in most places,” Clark says. Click-to-call dialing saves time spent manually dialing the phone. Automatic matching of phone numbers to customer records allows those records to be displayed the moment a sales or service representative picks up the phone.

Combined, these RingCentral integrations “can add 20% or more calling time to their day,” he states.

Meanwhile, the Salesforce suite plays a role in “pretty much every single thing we do as a company,” Clark says, including sales, customer service and support, and marketing automation with Salesforce’s Pardot.

Validating the integration

Clark initially tested the RingCentral integration on his own account before giving it to one of his lead salesmen to try for a week. “He was able to do his normal workflow,” Clark says. The Lightning integration provides the same basic functionality as the “classic” version, just appearing in a different position on the screen.

“We’ve checked RingCentral off the list” of integrations needing to be ported to Lightning, Clark shares. Unfortunately, as of April 2017, CMMS hadn’t completed its testing of all the Salesforce add-ons it wants to continue using. In one case, where a software vendor proved unresponsive, CMMS had to drop that vendor.

CMMS originally planned to make the switch to Lightning in early 2017, but because the CMMS technical staff is tied up with other projects, Clark can only say it will happen by the end of the year.

He is looking forward to it. The Lightning UI provides new layout options, allowing salespeople “to have more data in front of them, in an optimized fashion,” Clark says. With RingCentral Office integration, they can be even more productive.

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