Act! in the Cloud

Finding your path to success with hosted CRM

Introduction

Business owners, managers, and sales teams universally look for tools and techniques to improve the effectiveness and profitability of their sales and/or services. At Swiftpage, we believe an effective customer relationship management (CRM) solution acts as a compass to help guide businesses along the path to success.

During the selection process for any software solution, you will make a decision on whether to host the solution onsite or in a Cloud environment. The decision is not always easy. There is a virtual mountain of information available on this subject; some of it accurate and straightforward, some riddled with buzzwords, and some simply marketing hype. This can make sorting through the facts as elusive as finding a needle in a haystack.

In this whitepaper, we will help you sort through this virtual haystack of buzzwords, technical jargon, and hype to find the right compass for your organization.

Problem

In today's ever-evolving landscape of business solutions, the expanding need for access to solutions from anywhere, and the cost of professional IT resources, raises the price tag of a new CRM solution or upgrade. The price tag may simply be too high for many organizations to justify the expense.

There is also the risk of the ongoing expense to maintain and upgrade systems when software updates occur, technology changes, or the organization changes and grows, adding to the total cost of ownership (TCO).

Simply put, costs often drive organizations to continue using their inefficient spreadsheets and address books to manage opportunities, customers, or clients.

Solution

Hosted CRM

Many organizations have opted to have their CRM solution hosted for a service fee. This option is preferred over installing the CRM solution onsite for many reasons:

- Saves big on the high upfront cost of purchasing and installing the required hardware and software. The service fee is normally much easier to budget for and have approved.
- Provides ongoing access to the latest version of the CRM software without additional costs.
- Eliminates future concerns of expensive replacement or upgraded hardware when new employees are added or new offices are opened.
- Enables anywhere access to the CRM solution from any device with a web browser and internet connection.
- Maintains focus on other aspects of the business and sales without worrying about routine updates to software or hardware.
- Gives peace of mind knowing that precious data is being backed up regularly and is available when needed.

Yet this option may still be confusing for some. When you ask CRM vendors about a hosted solution, the responses range from vague to highly technical, usually riddled with a number of buzzwords and acronyms: SaaS, single tenant, multi-tenant, hosting provider, SLA, and Cloud.

The pricing is typically presented as per user per month (PUPM), meaning the cost or fee for one user to use the solution for one month. While you are digesting everything and considering the cost, you may be overwhelmed with additional available features, add-ons, extra services, and other bells and whistles that sound interesting and useful. Of course, all of these options sound affordable since it only adds a small amount to the PUPM cost, until the quote is presented and your dreams of saving money evaporate.

How do you select a reliable CRM solution that meets your business needs without paying for things you don't need?

At Swiftpage, we feel the best way for you to make the decision that suits your organization is to get familiar with hosting, the Cloud, and SaaS.

So before you decide which hosting solution is best for you, let's take a look under the hood at different hosting options and considerations:

- Traditional hosted services vs. Cloud hosted services
- Data centers and physical security
- Data security
- Monitoring your data
- Maintaining your business solutions
- Selecting a solution

Traditional hosted services vs. Cloud hosted services

The hosting service and its provider is the platform where your CRM solution will be installed. It allows access by your users and provides all the services needed to keep your data safe and secure.

Not all services are created equal as there are hosting services and there are true Cloud services. So what's the difference?

Traditional hosted services

- Offsite technology facility
- Offered to a company or companies as a service offering
- Co-located physical servers
- Usually in a data center that may serve multiple customers
- Accessible via direct connection or internet

Cloud hosted services

- Servers are virtual
- Co-managed vs. co-located
- Co-management:
  - o Resources managed across the Cloud
  - o Management is dynamic
  - o Keeps the Cloud stable, secure, and performing
- Top Cloud providers' data centers are dispersed worldwide
- Virtual servers provisioned ("built and stood up") as needed

Data centers

Let us take a look at data centers first. Your solution and data will be hosted in some sort of data center, which is a common denominator between traditional hosting and Cloud hosting.

Data centers are classified into four tiers. As an example, the lowest tier (Tier 1) could be a warehouse with power. The highest tier, (Tier 4) provides redundant power, climate control, data backup, and your data is available at least 99.995% of the time. In reality, this is not a high standard based on today's technology.

Top rated service providers such as Amazon Web Services and Google go well beyond Tier 4 standards. They offer state of the art data centers located worldwide and managed on a global scale. Their data centers and related infrastructure have been certified by numerous agencies worldwide and their physical security is on par with highly secure military or government installations.

This global management system is considered by some to be the "Secret Sauce". It has at its disposal vast human and computing resources that can be allocated as needed via dedicated ultra-high speed connections to ensure the infrastructure is secure, stable, and maintains a high level of performance.

Data security

In today's world, threats of ransomware, malware, and other vulnerabilities are ever-present risks to your data. Keeping data protected is a top priority for service providers.

Top tier providers, such as Google, employed over 650 security engineers in 2016. These security professionals, with the help of sophisticated tooling, monitor and protect their entire Cloud infrastructure 24/7, immediately raising the alarm in the event of suspicious activity. These monitoring tools are in a state of real-time, continuous improvement to react to new, real, or potential threats.

The co-management of Cloud resources plays a major role in keeping your data secure. It maintains a vast array of resources and tools in reserve to deploy against any threat. If a threat is detected, security resources are instantly dispatched to the troubled area to neutralize the threat. These resources "swarm" the threat until it is contained.

Whether the environment is hosted or on-premises, and regardless of the level of security, all data should be backed up in case of an emergency. This guarantees that in the event that data is somehow corrupted or damaged, it can be restored. Normally, this backup strategy is the responsibility of the vendor providing the business solution on the Cloud and/or the customer organization itself. However, top tier Cloud providers should partner with your organization to determine the ideal option for backing up your data. The backup should be on another server that is virtually, or even geographically, isolated from the original data, adding another safeguard to your data.

When a top tier co-managed data center is coupled with an effective backup strategy, your peace of mind increases.

The choice is easy. Top tier Cloud service providers offer your organization the most reliable, stable, high performing, and secure infrastructure for your data, so let's take a closer look. More importantly, let's look at how a solution integrates with the Cloud and if it truly leverages all the benefits of this infrastructure.
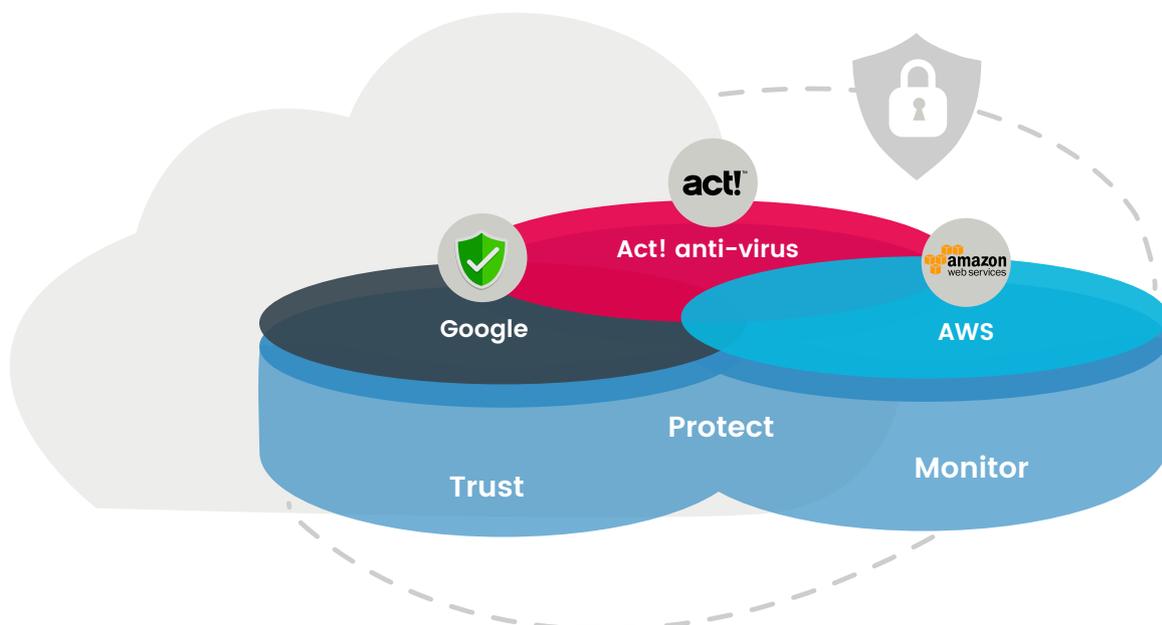
Multi-tenant vs. single-tenant

While this is a key consideration in hosted CRM solution selection, the differentiation between multi-tenant and single-tenant can be confusing, and is often misrepresented. Here's what you need to know:

Multi-tenant

Multi-tenant refers to a hosted server that has one large database shared by multiple customers. The database and server are virtually separated, allowing each individual customer to use their CRM solution as if it were on a single server.

Think of a multi-tenant solution like living in an apartment. You live in your space, but resources such as water, power, HVAC, etc. are shared between tenants.

In a multi-tenant environment, current technology and techniques allow an organization's data to be completely isolated and secure from the data of other organizations. The CRM solution is typically updated to the latest version on a pre-determined schedule. If there are server operating system, database, or business solution hotfixes or minor updates, these are usually automatically applied.

One consideration with a multi-tenant configuration is that you may be limited in making modifications to the CRM solution as changes or customizations could affect other users. It is really much like an apartment dweller; they can make some interior changes but normally cannot do a major remodel of the unit.
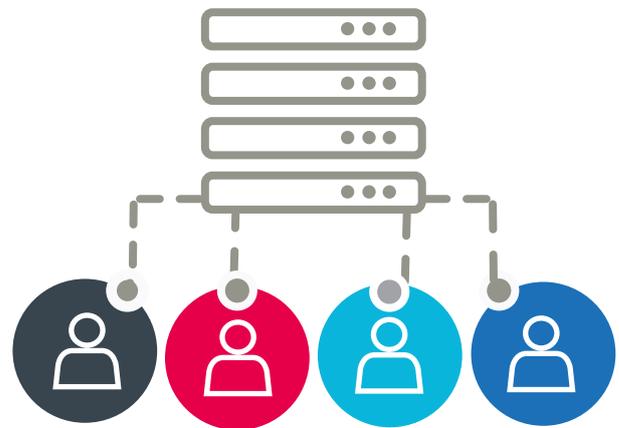
Modern multi-tenant solutions are stable, secure, and reliable. They meet the needs of many organizations and normally have a lower PUPM cost.

Single-tenant

Single-tenant refers to a Cloud server that is dedicated to an organization's CRM solution and hosts all related databases. In comparison to multi-tenant, think of single tenant like living in a house where you can make changes and customizations as needed. With single-tenant, you can customize your CRM solution as needed to fit your unique business needs. This may be a key consideration if your organization is part of a specific industry that requires a highly customized CRM solution.

Other advantages of single-tenant include the ability to have server operating system and database updates applied based on a pre-defined schedule. However, you have control if you want to upgrade to latest version of the CRM solution.

Many organizations have regulatory concerns about having their customers' data in a "shared" database as is the case with the multi-tenant configuration. If you fall in this category, a single-tenant solution may be your best Cloud option. Single-tenant costs are typically higher than a multi-tenant solution.

Choosing your CRM solution

Now that you understand the Cloud/hosted solutions concept and some of the various considerations, this should give you the tools you need to find your compass needle. The last piece to consider is which CRM solution to choose.

Act! Premium solutions

At Swiftpage, we have taken a measured approach to our Cloud offerings, focusing on reliability, security, accessibility, and performance. The result of this work provides the freedom of choice between multi-tenant and single-tenant solutions, available to both new and existing customers.

When a customer subscribes to either Act! Premium or Act! Premium Plus, their instance is provisioned on the Google Cloud Platform™ using a fully automated process, making sure all customers receive a fully configured and secure version of Act! ready to use.

This provisioning process integrates the Act! Premium security features with those of Google Cloud Platform, providing the customer with secure CRM coupled tightly with state of the art Cloud infrastructure. There will be an anti-virus solution installed and configured to update behind the scenes keeping the solution virus free. Also integrated into this provisioning process are the monitoring tools that allow the Swiftpage team to monitor the solution for any changes in behavior.

This monitoring is 24/7 and if any issues or concerns are detected, the operations team is notified and takes action. One of the key differentiators with Act! Premium solutions is that the resources on the virtual server can be adjusted (completely behind the scenes) providing the customer with a consistently stable, secure, and high performing version of Act! Premium.

An example of this capability that most organizations can relate to is the hiring of additional employees. An Act! Premium solutions customer simply contacts their Act! Certified Consultant[1] or the Act! Customer Service team and has the additional user or users added. As the new employees log in and begin to use Act!, this additional workload may impact the performance of the system, so additional resources are dynamically added to the virtual server. This is accomplished behind the scenes and typically the customer is not even aware the change was made as the system continues to perform.

Another consideration is the storage space required for data as an organization grows. With Act! Premium solutions, you will be alerted that the maximum storage capacity limit is being approached and you should consider adding more storage. With some hosted solutions this would mean you need a larger server or additional physical storage space added to your existing server. The cost of this can vary and it may mean your CRM system is taken down to make the change. With Act! Premium solutions, you simply pay a small annual fee for additional storage and it is added with no interruption to your organization's access to the system.

There is final consideration to keep in mind regarding your organization's data and the protection of that data. Earlier, we mentioned how backups are stored remotely from your dedicated virtual server. With Act! Premium solutions, your data will be backed up twice daily, in addition to a weekly backup every weekend. These weekly backups are maintained and available for 4 weeks. There are additional backup tools available with Act! Premium solutions that can be leveraged by your organization if needed.

All CRM solutions, operating systems, and databases require updates and patches. Act! Premium solutions are upgraded, updated, and patched behind the scenes by our team, normally on weekends. If there is an emergency update, we will apply it as soon as we can notify you with the details about the update and when the update will be applied.

Further, an active subscription to Act! Premium solutions equip your business with innovative features that keep you competitive, including Ask Act!™ voice integration with Amazon Alexa, interactive Act! Insight dashboards that serve up real-time metrics, the Act! Companion mobile app, and so much more.

Conclusion

Using a Cloud/hosted solution has many advantages that are well documented and marketed. However, you should be aware of some of the differences and features offered by various vendors. At Swiftpage, we hope when you search for your compass needle, you will consider and select an Act! Premium solution to guide your organizational to success.

act!

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About Act!

Act! makes it easy to build relationships that last with quick, organized access to highly personalized customer details. Because every business runs differently, you have the freedom to tailor an Act! experience to your business and industry needs—your adaptable, everywhere, connected workspace. Finally, a CRM solution that's uniquely yours.

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