



DMSi ABANDONS SALESFORCE TO BUILD A NEW CRM APPLICATION WITH PROGRESS® ROLLBASE® IN JUST THREE MONTHS

Founded over two decades ago, DMSi is considered the leading business management solution for distributors of building material and forest products. Today, nearly 400 of North America's top lumber, millwork, roofing, siding, laminate, drywall, and other building product suppliers use DMSi software to efficiently manage daily activities in 1,500 distribution yards, shops, warehouses and offices.

A long-time Progress application partner, the company has relied on the Progress® OpenEdge® development platform to power its solutions for over 20 years. During that time, the company has continued to grow and innovate its solutions, becoming an early adopter of the Software as a Service [SaaS] model. Today, 75% of DMSi's users are running their business with the cloud-based version of the Agility SaaS ERP system.

Most recently, the company completed a CRM application development project, moving from Salesforce to Progress® Rollbase®. DMSi was heavily invested in Salesforce after five years and was using it for a number of CRM functions across the organization. For example, sales was using it to manage its prospect base, the billing department to generate customer invoices, customer service to facilitate the help desk, and development to capture the backlog of customer stories.

As with many small businesses, Salesforce fees represented a significant part of DMSi's sales and marketing budget, and DMSi expected increased costs as they faced an upgrade. In addition to the cost, DMSi found that Salesforce was limiting their ability to customize processes. For example, the options for executing marketing campaigns did not align with DMSi's business model. Finally, the complex underlying APEX code significantly limited DMSi's ability to customize Salesforce to meet their evolving requirements. Any changes were time consuming and required a highly technical resource.

Progress Rollbase on the other hand, was far less costly than Salesforce—by 35%-50%. Rollbase' point-and-click, drag-and-drop features could empower even tech savvy business users to quickly and easily create and customize applications. "The difference between Salesforce and Progress Rollbase is that Salesforce is an application that is trying to be a platform. Rollbase on the other hand is a platform that you can use to build your applications, like a CRM solution," says Brent Heavican, Director of Architecture and Innovation at DMSi. "We didn't look at alternative solutions to Progress Rollbase. DMSi is so tightly integrated with Progress that it just made perfect sense."



CHALLENGE

Salesforce was a costly solution that even after five years still lacked the flexibility, agility and ease of use the company required to support the demands of the business as well as DMSi's large customer base

SOLUTION

Move away from Salesforce and build a brand new CRM application using Progress Rollbase that would also provide seamless integration with the company's existing Progress OpenEdge-based Agility ERP application

BENEFIT

Built a functionally equivalent CRM application to Salesforce using Progress Rollbase in just three months; Rollbase costs 35%-50% less than Salesforce; empowers business users to develop and customize applications without reliance on IT

RAPID APPLICATION DEVELOPMENT WITH ROLLBASE

Using Progress Rollbase—which is deployable on any infrastructure, including public and private cloud infrastructures such as Amazon, and Rackspace, as well as on-premises or in local data centers—the DMSi team was able to create a functionally equivalent application of what DMSi had in Salesforce in less than three months. “We essentially just threw away all of that work we did over five years with Salesforce and developed not just a comparable, but a better solution in three months due to Rollbase’ rapid application development capability,” says Greg Rosener, Director of Application Development at DMSi.

In addition to freeing up significant dollars, Progress Rollbase has also liberated business users within DMSi who wanted the ability to customize applications despite lacking programming know-how. One employee was able to set up an entire workflow process for the marketing department after taking a few training modules. “You can essentially extend any existing application through Progress Rollbase. I am not a programmer, but I did most of the work on the first prototype of our CRM application. That is how easy it is to build applications with Progress Rollbase,” says Jason Niemi, Co-Founder, Vyco – a DMSi Company.

REDUCED COSTS AND FASTER TIME TO MARKET

After moving from Salesforce to their new Progress Rollbase CRM application, DMSi has realized some immediate benefits, including increased visibility with access to all customer information within a single location. With Progress Rollbase, DMSi built an application to manage the relationships it has with over 50 trade associations, enabling the company to track activities, create records, and keep the data clean. And the company has significantly reduced its costs.

“We are very excited about our migration from Salesforce to Progress Rollbase. The move has saved the company an enormous amount of money, and empowered our business users to envision the way something should work, then produce an application with little training. This benefits customers and brings solutions to market faster,” says Trent Paben, Chief Operating Officer at DMSi.

The company has extended the new CRM application to its current Agility customer base. A major U.S. retailer of lumber and building materials and existing Agility user was struggling with their own Salesforce deployment. An extremely innovative company, the retailer had many ideas it wanted to quickly put into practice, but found it difficult, cumbersome and time consuming to customize Salesforce. After considerable time, the company was 1/3 of where it wanted to be with the project.

The retailer opted to move away from Salesforce and chose DMSi’s new Rollbase CRM application. Seamlessly integrated with Agility, the retailer can now easily pull information back and forth between their ERP and CRM systems. And the underlying Progress Rollbase platform empowers the company to quickly and easily customize the system to fit the needs of the business.

DRIVING INNOVATION WITH PROGRESS® PACIFIC™

DMSi is in the process of also migrating its Agility ERP application into the Progress Rollbase platform; Rollbase will become the entire front end of the application. “Progress Rollbase allows us to truly future proof our application. We don’t have to rewrite our application every five years. We can leverage the decades of underlying rich business logic within our application while creating a user experience that meets today’s expectations for an attractive, intuitive interface,” explains Paben. “Another key driver for this move was the ability to blend our core

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DMSi

application with mobile functionality on a single development platform now that Progress has brought OpenEdge Mobile capabilities into the Rollbase platform.”

Paben believes the industry trend is growing for “disposable software”. “To meet the rapidly changing needs and expectations of customers, companies can’t continue to spend years developing applications. They need the ability to quickly develop an app to meet a specific and immediate need, and that app must be intuitive and available across devices. That is exactly what we did with Progress Rollbase when we built our CRM application.”

A PARTNERSHIP FOR THE FUTURE

In addition to adopting Progress technology, DMSi has also taken advantage of the Progress Partner+ Program which is focused on helping partners maximize growth, increase penetration and drive new sales opportunities. DMSi has worked with Progress on a number of co-marketing initiatives, including demand generation campaigns, customer success stories and industry events.

“DMSi has received tremendous benefits from the Partner+ Program. The program has been a great supplement to our small marketing department.” says Paben.

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Jason Niemi
Co-Founder
Vyco – A DMSi Company

ABOUT DMSi

DMSi provides business and accounting software exclusively to the lumber and building materials industry. They have over 12,000 users at nearly 400 dealers and distributors across North America. Founded in 1976, DMSi is privately owned and headquartered in Omaha, Nebraska.

www.dmsi.com.

If you are interested in transitioning from Salesforce® to Progress Rollbase, DMSi’s partner VyCo can help. VyCo is an expert in delivering robust applications on the Progress Rollbase platform. Its team of experienced programmers and designers have worked with the Progress Rollbase platform for many years and delivered hundreds of applications. VyCo offers many services, design and build applications from scratch, consulting services to assist with programming challenges and CRM migration. For clients interested in replacing their Salesforce or Microsoft Dynamics® CRM, VyCo offers services to convert the data, objects, field and page layouts to the Rollbase platform. Whether you need an application built or need experienced programmers to help with an issue, look to VyCo.


www.vyco.com

PROGRESS SOFTWARE

Progress Software Corporation (NASDAQ: PRGS) is a global software company that simplifies the development, deployment and management of business applications on-premise or in the cloud, on any platform or device, to any data source, with enhanced performance, minimal IT complexity and low total cost of ownership.

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