Business challenge

To provide sellers with the most current information about their prospects and the sales process, the IBM Global Financing IT team needed an always-on, reliable platform to host the group's Global Sales Portal.

Transformation

The Global Financing IT team was using manual processes to collect the data it needed to populate its Global Sales Portal, a resource that sellers rely on for opportunity data. After moving the portal to Red Hat® OpenShift® on IBM Cloud® and implementing IBM Cloud Pak® for Data, the team can now automatically populate the portal with the most current information, eliminating hours of manual processes.

Results

Eliminates manual processes
by automating data gathering and saving hours of work

Refreshes data more frequently
so sellers are using the most up-to-date information possible

Improves reliability and availability
so sellers can always access the information they need from the Global Sales Portal

IBM Global Financing

An economical way to empower sellers with up-to-date information

Global Financing provides financing solutions that help companies start projects sooner, improve cash flow and enhance business results. The division finances cloud, software, services and IT infrastructure purchases.

"The data for the portal is now refreshed daily, and we don't have to worry about all of the manual data-gathering tasks we had to do in the past."

—Jorge Cruz Islas, Manager, IGF Support, IBM Global Financing

Share this

Manual processes slow access to data

Sales opportunities don't always come up during business hours. They can happen late at night, on weekends, on holidays. So when a potential client is ready to go, the seller must be ready as well.

The sellers at IBM Global Financing rely on an application called the Global Sales Portal to access key information about prospects and the sales process. However, the organization's IT team often had to perform maintenance on the cloud platform that supported the portal, which resulted in downtime for users. "We tried to do our maintenance and upgrades on the weekends," says Jorge Cruz Islas, Manager, IGF Support at Global Financing. "But if something had to be fixed during work hours, we had to disrupt the users and send them a notification that the application would not be available."

Another issue with the Global Sales Portal involved gathering data. The portal includes information collected from CRM systems at IBM, along with systems that contain information about the Global Financing team's portfolio and contracts. To gather this information, the group's IT team had to manually extract the data from each source system and then consolidate it so that it could be displayed in the dashboard. "What we had to do is manually go to each of the data sources and do the extraction, and then from there, consume the data to present it in the dashboard that we had for the sellers," says Cruz Islas. Because this process was time-consuming, the data did not refresh daily, so sellers could potentially be using out-of-date information.

A new platform and data virtualization

To minimize downtime and ensure that sellers have reliable access to timely information, the Global Financing IT team migrated the Global Sales Portal to Red Hat OpenShift on IBM Cloud and implemented IBM Cloud Pak for Data.

With Red Hat OpenShift on IBM Cloud, the portal is now running on a more resilient infrastructure that enables the IT team to quickly deploy updates. Plus, the IT team no longer needs to take the system offline to perform maintenance.

The Global Financing IT team can use the data virtualization capabilities in the IBM Cloud Pak for Data solution to simplify access to the different data sources for the portal. Instead of having to manually gather the data from different systems, place it in a staging system and then present it in the portal, the IT team simply configured IBM Cloud Pak for Data to automatically access the data from the systems and make it available in the portal virtually.

"The data for the portal is now refreshed daily, and we don't have to worry about all of the manual data-gathering tasks we had to do in the past," says Cruz Islas. "It's all done automatically."

More up-to-date information

The Red Hat OpenShift on IBM Cloud platform is designed to provide continuous availability and minimize downtime. Running on Red Hat OpenShift, the Global Sales Portal is more resilient and available, so sellers aren't derailed by unplanned downtime.

Using the IBM Cloud Pak for Data platform's data virtualization capabilities, the Global Financing IT team simply defined all of the data sources it needed to access and then defined the refresh frequency for each source. "We just needed to do that work once," says Cruz Islas. Now the data for the portal is refreshed automatically each day, eliminating hours of manual work. It used to take hours of work to gather the data manually, but now, that data is available automatically within seconds.

The Global Financing IT team has been so successful in using IBM Cloud Pak for Data that it plans to extend the use of the solution to other processes, such as accounts receivable. The team may also use the solution to virtualize other data sources, so it can provide cognitive data to the sales force.

Take the next step

To learn more about the IBM solutions featured in this story, please contact your IBM representative or IBM Business Partner.