CASE STUDY

Opportunity Portal

By Clarion Technologies

Clarion Technologies

Pune | Ahmedabad | Bangalore | Rhode Island(US)

About the Client:

The client is an on-demand, hosted application service provider focusing on revenue enhancement. The client is also a leading provider of advanced pipeline management and forecasting systems to large, channel driven sales organizations.

Client Situation & Challenges:

The client has over 2,000 sales reps worldwide selling through 300+ value added resellers enhanced with a very strong and loyal network of channel partners. However, the top management had difficulty getting any consistent visibility or roll-up of the opportunity pipeline from this large network of resellers. There was no common sales process and no common metrics to which all VARs and sales reps could be measured – 'Optimizing Opportunity Pipeline'.

This lack of pipeline visibility also created a huge uncertainty in their forecasting process at the end of each month. Most sales reps and managers worldwide were using Excel spreadsheets to keep track of their opportunities and to submit their monthly required forecasts. Unfortunately, these tracking worksheets were individually developed, with minimal common formats, and there was no easy way to “roll-up” the opportunities into the multiple levels of the organization – 'Improve Forecasting Accuracy'.

Solution Offered:

“Sales Planning Tool" (SPT) was a web based application (Web 2.0) that was The required solution was a measure to optimize the sales cycle and improve forecasting accuracy. The client wanted an increase in the performance of the sales rep and requested a monitoring function to notify the low performing sales rep as well.

Solution Offered:

"Opportunity Portal" is a hosted, web-based application that uses the increasingly popular SaaS model of "Software as a Service". It is a highly graphical, intuitive tool to provide sales and marketing departments with a powerful, analytical way of maximizing revenue. It provides pipeline visibility at multiple levels of the organization, pipeline metrics, and automatically generates rolling forecasts off the pipeline.

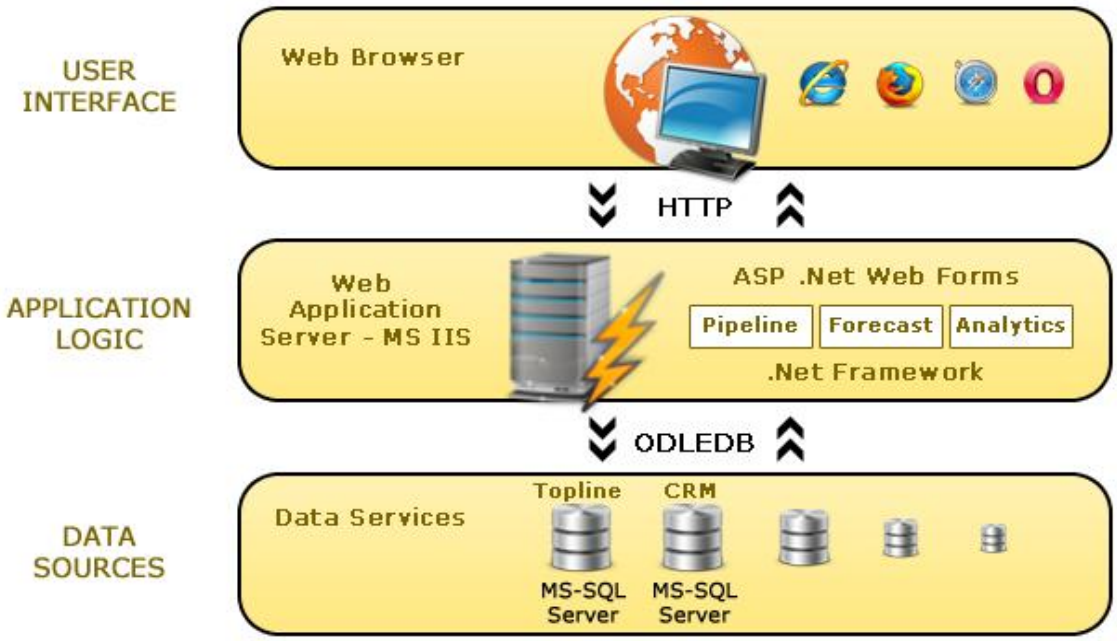
The second unique service is an Upload Center created specifically for third party VAR organizations that may all have different CRM systems. This service allows the VAR organization to schedule daily, weekly or monthly uploads directly into one common CSV format for all VARs with minimal time involvement on client's server.

Security being very important in sales business like any other application, user logins are based on the 16-byte GUIDs (Security Tokens) used throughout the user session. In the database, there are set of secured "views" over the base data, which are parameterized and require use of a security token. Every database access is processed through secured views which take care of data security.

Some of the other features of the system are:

- Highly graphical Sales Funnels for sales reps and managers
- Quickly configurable sales process and Model Funnels
- Sales cycle time spent in each step
- Tabular views of accounts, opportunities, rankings and forecast
- Pipeline comparisons to Model Funnels required to meet quota
- Pipeline "Grading" of opportunities
- Pipeline trend analysis
- Rank ordering of sales rep performance by key indicators
- Multi-level roll-up of sales forecasts
- Historical record of forecasting accuracy

Technology Flow Chart:



Technology Used:

ASP.NET 2.0, SQL Server 2005, Infragistics, Dundas Charts, Microsoft Excel VBA, Red Gate SQL Compare.

Benefits:

- Significant increase in revenue performance
- Shortens sales cycles
- Substantial improvement in forecasting accuracy
- Increase in the percentage of high performing sales reps.
- Auto-generation of early warnings into the metrics of low performing
- Reduction of ramp-up time to full effectiveness for new hires
- Consistent framework for better coaching of sales reps
- Rapid implementation of new and improved sales process
- Rapid payback and a very compelling value proposition

About Clarion Technologies:

Clarion Technologies is a leading technology solutions provider based out of India. Clarion partners with its clients with a single-point agenda - to transform their business challenges into growth opportunities! Time and again Clarion has mobilized the right people, skills, technology, and processes to help clients strengthen their competitive advantage.

With services spanning the technology value chain, Clarion is a one stop shop for enterprise wide IT needs. Our singular focus on 'client satisfaction' cements our relationship with our clients. As a matter of fact more than 90% of our customer base has repeatedly partnered with Clarion to continuously build technical solutions for almost a decade.

For more information on partnering with Clarion Technologies, contact us at info@clariontechnologies.co.in