LandenConsulting

230 Northgate Street #147
Lake Forest, IL 60045
847.604.8697
www.landenconsulting.com

Landen Consulting Case Study: Workflow Automation, Just-In-Time Application Design & Development, System Integration

The Challenge:

The client had just implemented a major new piece of functionality in their CRM system, however the implementation was experiencing significant barriers to success due to a missing feature: the new system functionality automatically downloaded sales campaigns/leads to each user's desktop, however the system did not include any features for notifying users that new leads had been received. In addition, the system did not include any kind of reporting features to allow sales management to monitor campaign/lead distribution.

The challenge: Develop an application to notify end-users when new sales leads are distributed to their desktop, and develop a reporting system to notify each sales manager of the campaign/lead distribution occurring in their area of responsibility. Since the client's technical staff was not able to support this business need, the resulting solution needed to be manageable by non-technical business personnel. In addition, the new solution had to be implemented and online within a matter of weeks.

The Solution:

To start, our consultants analyzed the lead generation & distribution process to understand what data elements were generated/utilized by the various systems involved in the workflow chain. We then analyzed how the sales force works & manages sales leads to understand what type of notification would best support their sales efforts. We also examined the sales management team's role to understand what information would help them support & manage their sales force. To add to the challenge, we had a requirement that non-technical business personnel be able to manage the new lead notification/reporting procedure.

We developed a solution which imported & analyzed several system-generated files to extract the required information. The solution then compiled the information for each sales location and sent a notification email to each user's e-mail account. The system then extracted organizational alignment/accountability information from another data source and compiled the user-level information into management-level rollup reports that were customized for each manager/reporting relationship. The system then exported fully-formatted reporting information to Excel and emailed the appropriate Excel report to each sales manager.

Due to the requirement that the notification/reporting process be manageable by non-technical business personnel, we devoted extra effort to the interface & user-experience design, and built the procedure to require zero technical support and a minimum of involvement by business personnel. The solution was built to run on a typical business desktop within an Excel interface, and required a minimum of end-user training.

The Results:

The resulting solution was so successful that even when the main CRM system was upgraded and the technical constraints removed, the client kept our reporting system in place for two years and used it as the model for designing subsequent upgrades to the system.

For More Information:

For more information on the services available from Landen Consulting, call us at 847.604.8697, or visit us at www.landenconsulting.com.