

CRM Data Mart and Analytical Tool



Situation:

CRM systems, first Oracle and after Siebel, implemented worldwide did not present information that Latin America managers and analysts needed to perform their functions.

Business Impact:

Value aggregation of those CRM systems was questioned everywhere and adoption rate was lower than 20%. Phrases like "Over sold - under delivered" were increasingly disseminated company wide. The millionaire investment was suffering serious risks of not provide desired Return on Investment. Several disparate spreadsheets were issued in a try of getting desired info.

Root cause:

Our customer organization, a complex matrix, almost a cube, was not modeled in the analytical side of those systems. Consequently the probability of a decision maker to have success retrieving required information was very low.

Implemented solution:

A SQL Server data mart was built with source data being retrieved automatically and directly from CRM databases (first Oracle and after Siebel) by Data Transformation Services (DTS) tasks. Data cubes were built in MS Analysis server presenting aggregated data into a Web Portal to managers and analysts with several analysis features (drill down and up, sorting, pivoting, etc.). Latin America users were trained in person and via webcasts with practical business cases.

Results and benefits:

CRM adoption in Latin America reached more than 90%, one of the highest worldwide. The tool was used by 213 power users in Latin America to take strategic decisions. Latin America achieved sales quota in all regions.

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Funnel Analysis Tool



Situation:

To follow on global sector trends, our customer reduced investment and budget review cycles, based mainly in Sales Forecast numbers, from 12 to 3 months.

Business Impact:

Sales Forecast, developed to support a 12 months cycle, began to present quarterly in Brazil gaps of *up to 50%* (\cong 4 US\$ Millions). With this inaccuracy, allocation of people and resources in the country was being subjected to frequently and deeper adjustments. Consequently our customer was losing credibility quarter by quarter.

Root cause:

Siebel CRM system implemented worldwide did not have reports and analytical tools to support managers with required knowledge of sales funnel. Because of that individual spreadsheets developed in different formats, brought to sales forecast meetings by business and product managers with disparate information were used.

Implemented solution:

An intranet hosted *analytical tool* based on sales data directly retrieved from Siebel CRM and stored in a SQL Server database and Analysis Server cubes were developed, providing structure, flexibility and analytical capabilities required by the new environment. Segment, Product and Financial Managers were trained in the new tool. New tool was extended to every department involved in the Forecast process.

Results and benefits:

During five consecutive quarters our customer achieved forecast accuracy with a maximum of 5% deviation, getting an "With Honor" at corporate audit. Yearly profit exceeded target in 10 US\$ Millions. Latin America region decided to implement Funnel Analytical Tool (FAT) region wide and migrate it to new CRM system (Siebel 7.5). In the beginning of 2005 more than 200 managers and analysts in Latin America was using FAT in their decision making process.

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Financial Data Mart and Analytical Tool



Situation:

To prepare monthly financial reports in Latin America, Finance analysts took 3 days of hard work elaborating several spreadsheets to present financial data segmented by Product, Customer Segment, Region and Country as required by region decision makers.

Business Impact:

Because of delay and inaccuracy of this information, decision making process was being highly impacted. Disparate versions of financial data were not difficult to find. There was low credibility in financial reports available. Everybody felt that financial lost with this situation was high although difficult to be quantified.

Root cause:

Raw data used as source to prepare Analysts spreadsheets came from several financial systems (legacy) hosted in France, in Mexico and in United States.

Implemented solution:

A SQL Server 2000 data mart was constructed in three weeks in Miami fed by an automatic extraction, transformation and load (ETL) tool, loading legacy system into data mart and making transformations to turn data compatible. Client tools in Excel Pivot Tables linked directly to this data mart was constructed and sent to finance managers and analysts. One to one training sessions were made.

Results and benefits:

Time previously dedicated by Financial Analysts in data preparation was converted into data analysis and decision making recommendations preparation. Consolidated financial information became updated daily and automatically. Latin America Managers and directors began trusting and using new financial information. Better financial results were achieved. Latin America begun to achieve quarter over quarter expected financial results.

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Accounts Receivable Data Mart and Analytical Tool



Situation:

Over 60 days portion of company Accounts Receivable in Brazil reached 15% (15.1M\$) of the total. However corporate guidelines and Controllershship accepted a maximum of 7% for Over60 worldwide.

Business Impact:

Credit for Customers begun to be analyzed one by one by headquarter controllers. Credit concession then formed a strong bottleneck in sales process reducing sales volume in approximately 10% (\cong 12M\$) in the quarter.

Root Cause:

There wasn't a systematic way of retrieving Accounts receivable data and their respective aging. Process was manual, slow and presented low accuracy because it was based on several spreadsheets that presented disparate versions of true.

Implemented solution:

An Accounts Receivable portal working with information stored in a datamart was developed, using SQL Server2000, Analysis Server and active server pages. Information retrieved daily and automatically from *corporate AR system* begun to be presented to managers and analysts with drill down by Segment, Customer, Aging, Sales Manager, etc. Business rules used by analysts to prepare AR data were identified and loaded into transformation phase of ETL (extraction, transformation and loading). Managers and analysts were trained in the new system and processes, converting previous data preparation time into planning and execution.

Results and benefits:

3 months after this implementation Over60 was reduced in US\$ 9 Million, representing only 6% of total AR and has been under control since there. Sales quota was achieved in the quarter and Accounts receivable area received an "With Honor" approval in the corporate audit.

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Channel Coverage Database and Analytical Tool



Situation:

Our customer was finding each time more difficult to plan and manage Channel department activities because information about indirect channel market coverage was very poor.

Business Impact:

Indirect sales were almost 20% under target because of increasingly conflicts between Channel Partners.

Root cause:

A Channel system that took two years to be developed by the Information Technology department did not provide information required by Channel Sales and Marketing managers to behave their functions.

Implemented solution:

A system was developed in MS Access where market and channel coverage information was loaded. Sales regions of equivalent size were created and parameters of certified professionals, demo equipment and training were defined and graphically showed by region in MS Access system. Channel Sales and Marketing managers, that had participated actively defining business requirements of new system, were trained and their feedbacks used to improve the second release of system.

Results and benefits:

Due to achievement of a better balance between Channel needs and offering and the great reduction of Channel conflicts, indirect sales productivity increased 30% and quota was exceed for several consecutive quarters. Brazil received a reward as the Best Channel Operation in Latin America.

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Channel Funnel Database and Analytical Tool



Situation:

Indirect sales funnel management was manual. Indirect sales opportunities information inaccuracy and delaying was visible to the entire organization and exposing Channel team to frequent questioning.

Business Impact:

Sales opportunities were frequently lost due to lack of a timely planning with channels to win big deals. Conflicts between direct and indirect sales were increasing due to lack of a clear role definition deal by deal and an engagement process. Indirect sales value aggregation was being questioned inside the organization.

Root cause:

Although channel partners used to send weekly their list of sales opportunities, this list did not receive a systematic treatment by vendor.

Implemented solution:

A Channel Funnel system was developed in MS Access with active participation of Channel managers in business requirements. Two years of manual forms sent previously by Channel partners were registered into the system forming a Channel Funnel database. A user friendly data entry screen was created for Channel managers to input their funnel data. Sales quotas and results were loaded into new system and updated regularly allowing a quickly, graphical and historical evaluation of funnel health in detail. A planning process for big deals was implemented allowing timely definition of roles between Indirect and Direct sales, Channel Partners and consultants deal by deal. A one-to-one training was delivered to everyone involved in the process.

Results and benefits:

Cooperation between Direct and Indirect sales forces got a real and unprecedented breakthrough. All Channel salesmen went to 125% Sales Club during 3 consecutive years. Indirect sales volume triplicates in three years.

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Sales History Data Mart and Analytical Tool



Situation:

Planning process in Latin America that year would be based on Customer sales history evaluation. However this information was not available in the region.

Business Impact:

Regional Marketing and Sales executives would find a high degree of difficulty to justify investments in the region without this information, showing besides a lack of basic knowledge of customer base.

Root cause:

Sales information was spread in several enterprise systems without a unique Customer identification number.

Implemented solution:

A Sales history database was developed, first in MS Access and after in a SQL Server data mart, retrieving and integrating sales data from several legacy systems. A unique Customer identification number and parent account attribute was implemented. A five years Sales history with detail by region, country, state, city, customer segment, product, sales districts etc. was implemented. A client tool in MS Excel Pivot Tables linked directly to this data mart was developed. Latin America Sales and Marketing managers and analysts were trained one-to-one on how to use this new tool to get required Customer knowledge.

Results and benefits:

A US\$ 50 Million investment aiming to improve share of wallet in key Latin America customers was approved. Several “up and cross selling” initiatives begun to be planned and implemented based on this five years sales history. By his contribution on this result, Market and Account intelligence manager received the Latin America Key contributor reward.

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Marketing Database and Analytical Tool



Situation:

Latin America region was growing fast and a corporate analysis was in place to decide heavy investments in the region. To go ahead, corporate requested a detailed picture of our customer market positioning in Latin America to decide three year investment. However, due to information limitations, this study was hard to be done.

Business Impact:

It would be impossible for our customer to win this growing opportunity without providing the study requested by Corporate.

Root cause:

Company's products and geographies were organized in a different way in relation to available Market researches and this was the first time that a complete like this was being done.

Implemented solution:

A database in MS Access where market researches were loaded was built. Conversion tables between customer product lines and geographies and market research company ones were created. Market research database was linked through the conversion tables to Sales History data mart (SQL Server). A client tool in MS Excel Pivot Tables linked to SQL Server was created and provided to business analysts and managers. A one to one training was delivered on how to navigate and analyzing (drill down, up, pivoting) available data.

Results and benefits:

Beyond to get a detailed comparison between company and market with detail by Products, Regions, Countries, Ranges of Annual Revenue, Segments etc. it was possible to see the evolution of this market share in 5 years and build several BCG (Boston Consulting Group) matrixes showing graphically where the best investment opportunities were (company growth x market growth). Investment plan was approved, implemented and well succeed. The Latin America executive was promoted to a worldwide position.

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Services Productivity



Situation:

A great supplier of hardware and software in Brazil, counted on its Customer Services area with 240 professionals whose efficiency (productive hours/paid hours) was less than 70%.

Business Impact:

Due to high cost of this operation, maintenance contracts prices weren't competitive and Customers renewals were being reduced year after year. Increasingly Customer dissatisfaction with services made each time more difficult to reach established goals for Sales.

Root cause:

Rework level to attend near 7,000 service calls monthly in Brazil was very high (30%) with no apparent reason.

Adopted solution:

A new model of Services report was implemented, allowing laboratory and field technician and engineers to define and report with exactness cause of rework in each call. A system was developed to register these Service reports data and an analytical tool created allowing rework to be analyzed by Customer, Site, Geography, Technician, Product, Date and Cause. A metric for Lab and field rework was implemented being monthly benchmarked against international standards. Through rework data analysis it was possible to identify its root cause: low quality of diagnosis made by field and laboratories technicians and engineers. Based on information provided by this new system several initiatives to improve quality of diagnosis were adopted such as buying of more efficient diagnostic software, implementation of regional test centers, acquisition of new testers and diagnostic tools, modification of training programs to prioritize teaching of preventive actions, modification of performance evaluation system to reward technicians and engineers with low rework, etc.

Results and benefits:

Through rework reduction an increase of 10% in Services efficiency was gotten. This allowed supporting an increase of 20% in the following year sales without any contracting in Services department with customer satisfaction increasing. Due to the reduction in costs, services contracts prices could be reduced becoming more competitive in the market. The investment of US\$1M made in the project reached its return before one year. Sales growth goals were successively reached. High quality in Customer Services allowed the company to conquer a participation of 60% in Brazilian servers market.

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Turnaround Time



Situation:

Our customer, a multinational company in the Technology sector, was just starting its operations in Brazil and quality in Customer support was elemental to enable their expected growth. However their spare parts importation time from Houston to São Paulo was 60 days.

Business Impact:

Several resellers were complained about this time because it was forcing them to increase investment in inventory levels to keep the required service level to the installed base.

Root cause:

The information necessary to manage the spare parts importation as a whole was dispersed into several systems and spreadsheets inside and outside organization.

Implemented solution:

A system was developed where the information captured from the several systems and spreadsheets, internal and external, involved in the importation process was integrated. An end-to-end tracking system was made available and process performance measures were implemented. An analytical tool to support manager's decision was created. Individual training sessions were delivered to internal and external team members and stakeholders.

Results and benefits:

Several bottlenecks in the importation process were quickly identified and fixed. Spare parts turnaround time from Texas to Sao Paulo was reduced from 60 to 15 days. Our customer growth objective was 100% achieved.

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