

Diaspark White Paper
June 2010

**Organizational INSIGHTS
for Informed Decisions**

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Executive Summary

Multiple organizations have discovered that SharePoint Products and Technologies provide significant productivity enhancements, allowing teams to be more efficient in creating and organizing communication & content. In response, information technology (IT) departments are being tasked with building and managing mature SharePoint solutions.

This is a viewpoint paper based on a case study of implementing highly effective business process for Sales function. The solution provides management of digital content (structure and unstructured information), workflow and collaboration. This resulted in intuitive Business Dashboard across the organization including Top Management.

Diaspark Inc, a Microsoft Managed gold partner offered a sales solution that delivered a comprehensive, 360-degree view of prospects, customers, and opportunities. This enabled stakeholders to have the right information to identify, nurture, and retain profitable client-relationships. And they can do it all with their day-to-day software tools with which they are familiar and easy to use.

WHO SHOULD READ THIS PAPER?

This whitepaper is aimed at Business and Technology decision makers, IT experts, or anyone interested in learning MOSS 2007 features and how it can connect to their Sales process.

The information contained in this document represents the current view of Microsoft SharePoint 2007 as of the date of publication. Because Microsoft must respond to changing market conditions, it should not be interpreted to be a commitment on the part of Microsoft, and Diaspark cannot guarantee the accuracy of any information presented after the date of publication.

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The Client & The Business

A Leading Media House and Publisher with almost 60 years in the Industry that reaches to readers across the country and known beyond the international borders. Recently rated as “Fast growing newspaper” by Indian Newspaper Society.

The Pain Points

Even with the upward and growing trend towards achieving the business goals, the business development team was gradually sensing competitive waves from the market. The Business Analyst and Experts drew to the consensus that this may be due the lack of Insight for Better Sales Forecasting and Predictability. The Challenge was to have an efficient and effective selling which drives acquisition, and retention of profitable customers.

“Enhanced Productivity is the Key to Profitability- But the Reality was that the Company was spending more time in Administrative Work like Meeting/Admin Tasks, Generating Leads, and Account Management”

The obvious findings for the reasons above included; Inappropriate (With less or no Roadmap) Technology Adoption, Inconsistent Sales Process, Inability to Access Information, and Unreliable Prospect and Customer Information. This was a serious matter for Business Growth. Entire sales team of 100+ personnel spread across country was managing information in their own best way– using day-to-day software. Still it was tough to have eye on the sales process and draw business and competition intelligence at the top level.

Solution –The Approach

The CTO and the entire Technical department of the company had a challenge of quickly deploying some solution as the Sales was increasingly facing new vendors stepping into their market/ customer. Also the company was expanding their marketing and sales geography.

Diaspark Inc. took the challenge of not only understanding the current hardware and software infrastructure but the entire business process including their pain areas. Diaspark followed the simple yet robust approach and documented their existing shortcomings as well as future requirements. The resultant was entire Business Productivity Infrastructure Optimization framework around Microsoft Office SharePoint Server 2007 and related product and technologies

Transforming the Business Needs

The most critical finding was to provide a Sales tool and have Actionable Business Insight. The objective was that sales persons can conveniently use the sales tool, which is customer centric, Anytime anywhere accessible with Accurate information. An intelligent Insight that improves decisions. Diaspark assessed the current deployment and designed a SharePoint-based solution that also provisioned the integration of the existing Line-of-Business Applications and products like Dynamic CRM. This was needed because over period of time the company had adopted different products and in house designed and developed LOB Applications.

“The sales person was confused while working and closing the deal with a customer –“Should he browse multiple applications for different types of information or spend more time on high value selling activities?””

At several instances, both inside and outside Sales executives, located at different geographical places were reaching to the same customer. The Sales Coordinator was just consolidating hundreds of Excel sheets, digging information from the buried email attachments, reminding colleagues about submitting their individual and teams updates. All this to generate a Weekly/ Monthly/ Quarterly/ Yearly Sales Plan and Performance, Projection and Review Reports. The entire process of collecting information, consolidating and using the information to take some informed decision was distributed across various software products. Yet the top management was not having the flexibility of seeing the updated information anytime whenever they wanted.

Diaspark’s SharePoint Practice team worked closely with the business development and technical team in order to come up with the new – single access – dashboard type – interactive and integrated solution.

“The Glue was SharePoint – for both business and controlling the distributed and growing IT Cost””

The Process

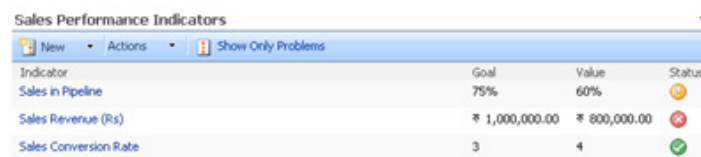
Now, every sales executive no matter he/she is at the office premise or in field, is now using Sales Process Portal (SharePoint Web Application) to create Daily, Weekly and Monthly Sales Plan. The application interface is also available on the mobile devices – a field worker’s ecstasy. The stakeholders are satisfied as the information is available in real time.

Benefits

Real-Time Customer Insight

The system started showing work ownership of every individual as soon as they log on to the portal. The dashboard displays very clearly an individual's plan for the current week and "To Do" – not only to the sales executive but also to their manager. What more – the system now sends an alert about an activity to executives and manager's email inbox. The sales person is happy not to open excel sheet or CRM or archived email.

A Single view of accounts, interactions across systems and contextual delivery based on the job role was provided because we integrated Company's Customer Relationship Management (CRM) System.



Indicator	Goal	Value	Status
Sales in Pipeline	75%	60%	⚠️
Sales Revenue (Rs)	₹ 1,000,000.00	₹ 800,000.00	❌
Sales Conversion Rate	3	4	✅

No duplication of Accounts & Contacts.

Critical and Sensitive Account related Information stays safe.

The Sales coordinators now log on the portal to glance through the entire team's weekly sales plans and updates. Moreover, the Manager gets sales intelligence as well as complete information on a particular account – contact and the lead progression.

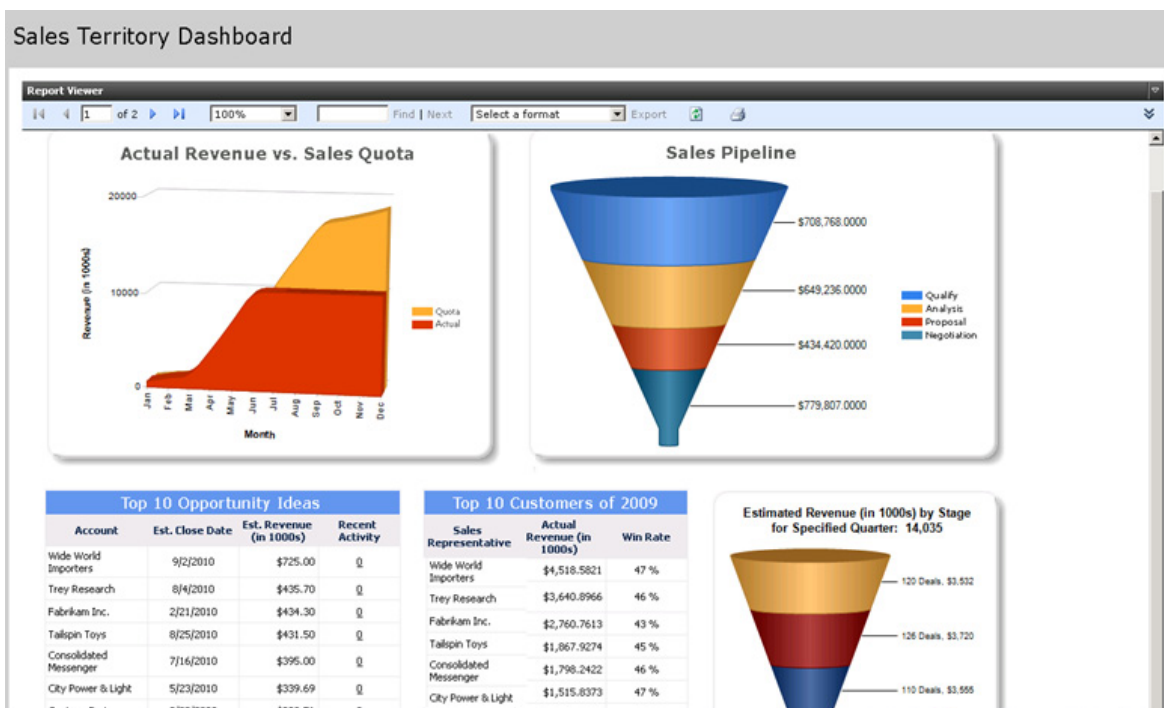
The Flexible Architecture of the entire system made a seamless flow of data between the SharePoint solution and the extended integration that Synchronized with home grown HRIS, Accounting, CRM and Exchange system. So at any given time – any personnel from Sales, Marketing, Accounts, and Top Management can have a Real –time customer Insight – from this portal.

Optimized Sales Cycle

Now the Sales executives have ready information with respect to their plan, activities due and outcome of the sales calls. To reduce the Sales cycle and give more and more time for opening new leads, the solution featured the following:

- **Easy-to-use interface that increased adoption** – not going to multiple interfaces, just one web application
- **Minimal need for training and downtime** – web 2.0 enabled site – we are all used to it.
- **Accessible via Mobile phone** – anytime, anywhere. Sales executive updates information from a virtual expo directly into the CRM using the portal and the entire sales cycle gets pushed to the next level.
- **Create consistent, repeatable selling experience based on best practices** - Deployed a centralized repository of customer information to improve referral process and improve pipeline insight. • **Auto-populate quotes and proposals with price and product information from back end systems** – Content Types helped in handling heterogeneous information.
- **Automate handoffs between groups** – Standard and Customized Workflows using SharePoint Designer and Windows Workflow Foundation.

“Accelerate sales cycles with streamlined lead qualification, management and deal tracking”



The Lucrative Part

With the Sales MIS and Operations optimizing with this portal solution, the accounts and finance modules were integrated too. The custom .NET components integrated with the portal played a major role in finishing the revenue and cost cycle. The accounts department is intimated from the system about the due payments from a customer with detailed information including the Order date, Execution, Amount etc. The system also sends the Order and Invoices copy attached to the respective emails apart from storing them in the SharePoint Storage library. The Accounting software is integrated to get an update from the SharePoint Portal.

Customer Portals

The system was extended to high value customers where the teams from both client and vendor started executing business collaboration over the web. The turnaround time for closing the existing deal and looking at new business horizons is very clear now.

Conclusion

Within span of 4-5 weeks of SharePoint based Sales Portal implementation, the astonishing results from sales team was aggregated and seen in the top management's dashboard. It showed up the impact on the sales team results. This was aggregated to:

- Business deals booked and closed by week.
- Hurdles for the unclosed business leads
- Sales Performance by territory, person, plan v/s actual
- Dynamic KPI's for sales forecast and informed decisions.

Sales - Key Performance Indicators

New Actions Show Only Problems

Indicator	Met								
	All			Yes			No		
	Goal	Value	Status	Goal	Value	Status	Goal	Value	Status
Sales in Pipeline	75%	60%		75%	100%		75%	0%	
Sales Revenue (Rs)	₹ 1,000,000.00	₹ 800,000.00		₹ 1,000,000.00	₹ 800,000.00		₹ 1,000,000.00	₹ 0.00	
Sales Conversion Rate	3	4		3	4		3	0	

KPI Details - Sales in Pipeline		KPI Details - Sales Conversion		KPI Details - Sales Revenue	
	<p>Title Sales in Pipeline</p> <p>Description This shows the weekly sales analysis plan.</p> <p>Comments The information shows the number of clients contacted and pushed for closing the final sale.</p> <p>Value 60%</p> <p>Goal 75%</p> <p>Warning 60%</p> <p>List SalesInfo</p>		<p>Title Sales Conversion Rate</p> <p>Description Sales Finalised</p> <p>Comments All the cold sales calls which got converted to final sales.</p> <p>Value 4</p> <p>Goal 3</p> <p>Warning 2</p> <p>List SalesInfo</p>		<p>Title Sales Revenue (Rs)</p> <p>Description This information shows the number of Sales calls which are converted as Final Sale</p> <p>Comments This will purely show the number Sales Contract</p> <p>Value ₹ 800,000.00</p> <p>Goal ₹ 1,000,000.00</p> <p>Warning ₹ 850,000.00</p> <p>List SalesInfo</p>

Software & Services

Microsoft office

Microsoft office SharePoint Server 2007
Microsoft Office 2007

Server

Windows Server 2003
SQL Server 2005

Development

Microsoft Visual Studio 2008
Microsoft SharePoint Designer

Technologies

Microsoft .NET Framework 3.0
InfoPath and Excel Services



Technology Services....Ahead of Times

USA - Edison - Corporate Office
200 Metroplex Drive, Edison, NJ, 08817
Tele: +1 732 248 8333 Ext. 6740
Fax: +1 732 248 8334

USA - New York Office
333, 7th Avenue, New York, NY, 10001
Tele: +1 212 972 2740

India - Indore - Global Delivery Centre
"Labh-Ganga" Building, Indore, 452003
Tele: +91 731 4273300
Fax: +91 731 2436613