

CUSTOMER SUCCESS STORY

SalesMasters Solutions, Inc.

“Before, it was virtually impossible to get an accurate and timely snapshot view of my business. Now I can access company data over the Web through my Crystal Xcelsius dashboard – it’s decision-making at its best.”

– Mark Loiacono, President at SalesMasters Solutions, Inc.

SalesMasters Solutions Inc.

Crystal Xcelsius Helps Sales Consulting Firm Streamline Sales Operations

Industry

Sales & Marketing consulting

Business Pain

- Inability to get an accurate, complete picture of the sales team performance on a weekly basis
- Spending too much time preparing for weekly sales meetings
- Inability to make informed business decisions based on factual information

SalesMasters Solutions, Inc. is a professional services organization dedicated to helping senior executives at technology companies realize value from the launch of their new company, products, and services. With over 50 years experience in business ownership, strategic marketing and consultative selling, SalesMasters Solutions offers a wide range of services including cold calling, lead generation, closing business, existing client campaigns, large scale call campaigns, and sales consultation.

The Challenge

The President of SalesMasters Solutions, Mark Loiacono, needed better access to sales and customer information in order to set the company’s strategies and goals on a regular basis: “To get a rolled-up, easy view of key information on a weekly basis was very difficult. I was trying to do it in Excel for a long time and it was virtually impossible – I was sorting through hundreds of spreadsheets, taking me a tremendous amount of time. And we couldn’t get it directly out of our salesforce.com CRM system because my information needs were very specific to my business and industry.”

The Approach

Mark began searching for a partner with expertise in helping companies solve their information challenge. He came across Business Objects Solution Provider partner, Appian Analytics after a Google search. “Appian Analytics was a no-brainer for me. They had a lot of experience with benchmarking and quantifying sales processes. Of the vendors that I talked to, they really understood my business and what I was trying to accomplish,” said Mark.

Anthony Milano, President at Appian Analytics recommended Crystal Xcelsius and a services solution: “At the heart of it, what SalesMasters Solutions had was a complex data visualization challenge – they needed a weekly, visual snapshot view of company data so that they could make more informed decisions easily and quickly. Crystal Xcelsius was the best technology solution for them because it provides powerful data visualization.” Anthony also noted that Crystal Xcelsius was also a good fit because SalesMasters Solutions didn’t need to track a large amount of historical data and didn’t need to have a large IT infrastructure.

Why Business Objects?

Business Objects Solution Provider Partner chose Crystal Xcelsius because of it was an excellent solution to solve SalesMasters Solutions’ data integration and visualization challenge

Business Objects™



APPIAN ANALYTICS

Business Benefits

- Ability to make informed decisions on customer campaigns
- Improved sales effectiveness tracking
- Revenue tracking and prediction
- Increased competitive advantage
- Reduced time to prepare for weekly sales meetings from 3 days to 2 hours per week

Appian Analytics' data professional retrieves SalesMasters Solutions data on a weekly basis – found in Excel spreadsheets, salesforce.com or SalesMasters Solutions customers' CRM systems – and loads them into a Crystal Xcelsius dashboard. SalesMasters Solutions can access the weekly dashboards on the Web at anytime.

Mark commented on the process: "It's a god-send for me because I don't have to deal with any of the back-end. I spend my days doing what-if scenarios, planning revenue and making business decisions based on the data."

Partnership

Appian Analytics and SalesMasters Solutions established an on-going partnership in order to solve SalesMasters Solutions' business challenge.

Mark described the relationship: "Appian Analytics has become a trusted advisor. Basically, I mapped out my problems and Appian came back to me with a strong solution. How they picked the technology solution is outside of my realm – as long as it gave me the information I needed in an accurate and timely way. Their expertise really stood out, and I'm lucky I found them."

The biggest endorsement of a strong partnership, Appian Analytics eventually became a SalesMasters Solutions customer themselves, using SalesMasters Solutions' services engagement to assist with their sales processes.

Results

Improved decision-making ability through access to company information

"Crystal Xcelsius has helped us become an information-driven company. Before, it was virtually impossible to get an accurate and timely snapshot view of my business. Now I can access company data over the Web through my Crystal Xcelsius dashboards – it's decision making at its best. I get a consolidated view of my business without having to crunch numbers at the end of the day," said Mark.

Revenue tracking and prediction

Through its Crystal Xcelsius dashboards, SalesMasters Solutions can now see critical revenue information such as how many leads went to customers, how many prospects are near closure, what the probability of close is, and how many deals were done versus what was planned. This delivers an overall pipeline view, helping SalesMasters Solutions predict future revenue. The dashboards also enable SalesMasters Solutions to track revenue received from both customer services fees and commissions on closed deals.

These dashboards also help SalesMasters make informed decisions on other areas of the business. "For example, I needed to know if I had the revenue to support a major upgrade to our phone systems. Because I had the data available to me, I was able to make that decision with confidence. It helps me navigate my business in addition to helping me with specific sales operations," said Mark.

Improved sales effectiveness tracking

Through Crystal Xcelsius, SalesMasters Solutions collects information on its sales representatives, including overall sales performance, performance by region, how many calls individual sales reps make, who they call, and what follow-up occurred for example. "This helps me choose and keep the best sales people in the industry," said Mark.

Improve competitive advantage

“When I go head to head with my competitors I seldom lose. This is attributed to the people I have, and also, our ability to quickly present our customers with up to date information on what’s occurring with our sales engagement. We can show them rolled up views of all activities, all leads, all closed business, or any different areas we’re working on with them – and they realize they can make decisions from this information too,” said Mark.

Employee recruitment and retention

When Mark is recruiting a new team member, he shows them the Crystal Xcelsius dashboard. Prospective employees immediately see the value this delivers to the company and to their role: they can spend more time on the phone closing deals instead of reporting.

Increased value-add services for customers

Through its Crystal Xcelsius dashboards, SalesMasters Solutions can easily see key customer campaign data such as information on sales reps performance, quota achievement, or number of deals closed. As a result, SalesMasters Solutions can make informed decisions on campaigns, giving customers more value-add.



Appian Analytics Crystal Xcelsius Dashboard

For example: “We were feeding one of our customers’ sales reps somewhere between 36 and 42 leads a week. At six weeks, they had closed no business. The numbers were bad. Because of access to that information delivered via Crystal Xcelsius, I was able to make key recommendations to our customer in order to fix the problem. The day that I got back from their office, they had closed their first deal,” said Mark.

Reduced time to prepare for sales meetings

Before Crystal Xcelsius, the organization spent approximately 40-60 hours a week getting ready for weekly Monday morning sales meetings. Mark spent three days over the weekend, plus each sales rep would spend two hours a week preparing information. Explained Mark: “Sunday nights

were always a grind because Monday was right around the corner and I still didn’t have a good picture of what was happening in the business. Now with Crystal Xcelsius, I spend about 2 hours a week getting ready for my sales meetings, and I can focus on making strategic decisions based on the data.”

For More Information

About Business Objects

Business Objects is the world’s leading business intelligence (BI) software company. With more than 30,000 customers worldwide, Business Objects has also built the industry’s strongest and most diverse partner community, with over 3,500 partners worldwide. Business Objects helps organizations gain better insight into their

business, improve decision making, and optimize enterprise performance. For more information on Business Objects Business Intelligence suite of products please visit www.businessobjects.com or call 1 866 681 3435.

About Appian Analytics, Inc.

Appian Analytics is a business analytics firm that provides analytic services, research, and software solutions to solve challenging business decision making problems. We assist clients in selecting and applying the best analytical, technology, and research solutions. Our approach draws on core competencies in computer technology, traditional decision theory, management science. Our projects require expert application of business analysis software tools; survey data collection; knowledge of statistics, operations research and other decision theories; and experience with the industry in question and the unique challenges, data models, and issues faced. For more information on how Appian Analytics can help you please visit www.appiananalytics.com or call 1.877.757.7646.

If you would like to find out how your business can become a Business Objects partner and benefit from a Solution Provider partnership, please call 1 888 866 2366 or visit www.businessobjects.com/partners.

www.businessobjects.com

Copyright © 2006 Business Objects. All rights reserved.

