Case Study

Compete Pipeline Visibility

Team-Based Selling Leverages Business Intelligence to Improve Sales Process Efficiency

BI Pillar Partner

4965 Preston Park Blvd.
Suite 700
Plano, TX 75093
972-608-1803
888-548-1973
eVergeGroup.com

Compete Pipeline Visibility

Business Challenge

A leading global provider of business information solutions to professionals in legal and academic organizations uses a team-based selling model. An out-of-the-box business intelligence application was not delivering the complete coverage view of the sales pipeline they needed to manage the sales process. Secondary selling team members were not visible in the pipeline and didn't have visibility to the reports and dashboards relevant for their team. As a result, the the sales organization was not leveraging its previously made technology investment. Spreadsheets continued to be the foundation for reporting.

Solution

The solution eVerge Group designed was conceptually simple and technically complex: simultaneously support the capability to include an opportunity team view in any arbitrary report or dashboard, while not overcounting metrics and KPIs. The design resulted in the creation of an opportunity team dimension. This dimension - working in concert with custom physical aggregate tables and the application's dynamic aggregate navigation capabilities - provided the complete view that the company needed to build coverage reporting, while still accurately calculating metrics and KPIs. Even with all opportunity team members listed on a report or dashboard, each opportunity is counted once and only once, at each level of the organizational hierarchy.

Results

The opportunity team implementation enabled the company to change the way sales teams are managed and also contributed to data reporting efficiencies. Key successes include:

- Users are now able to see the revenue for all of their opportunities, even if they are not the primary user
- Roll-up to managers and VPs does not over count the revenue
- Users no longer have to extract data and manipulate it in Excel.
- User adoption has increased due to ease of use and time saving benefits

Industry

Business Services

Client Feedback

"Before this functionality was introduced, we had to do all of our pipeline tracking manually. We had no clean image of which opportunities the consultants were working on and how they were spending their time supporting accounts. Once this was released, the way we managed our teams changed for the better. We gained efficiencies in reporting the data… and could focus on next steps."