

Developing a Suite of Marketing Technology Software Tools to Provide Actionable Intelligence

Customer: A leading global B2B research and advisory firm.

Size: 150 employees

Region: USA

Industry: Information services

Profile: The client empowers the world's leading marketing, product, and sales leaders to make better decisions, execute with precision, and accelerate growth.

Services: Custom application development

Business Need

The client specializes in B2B marketing, B2B sales, demand creation, product marketing, channel management, and strategic communications. The client works with clients in order to contextualize their business challenges and then provide in-depth analysis, consultations, and advising.

To complement their advisory role, the client sought to create and maintain interactive tools for its clients to turn their knowledge into actionable frameworks. These tools would perform a variety of functions in order to transform business processes within sales, marketing, and product organizations. While some tools had already been created prior to Synoptek's involvement, they were Excel based tools which made it difficult to verify and control who had access to them. In order to ensure they were accessible by subscription only, the client was looking to migrate them into a web based tool format. Several additional tools were also created alongside the migration.

The client was looking to deliver the best possible resources to their customers – they needed meticulously crafted tools that provide accurate data and efficient analyses. These tools would be stepping-stones for organizations, providing step-by-step and expert guidance to help them make critical business decisions.

At the same time, creating a suite of tools presents technology challenges: managing a go-to-market schedule, addressing the need for a variety of skills and team sizes, the needs for quality assurance and testing, developing a compelling user interface, and developing the applications within budget. Additionally, the client was looking to debut many of these tools at their annual summit – making on time delivery an utmost priority.

Solution and Approach

Synoptek (formerly Indusa) consulted the client to determine how to align business goals with a technical approach. A plan for the migration and creation of several tools was created in order to complement the client's advisory focus areas. With these tools, the client can transform their clients' business processes within sales, marketing, and product departments. Their primary use is to provide clients better insight into their business development goals:

- **Lead scoring tool**, providing a systematic approach to developing and validating a lead scoring model
- **Maturity tool**, allowing employees to compare different functions within the organization to highlight areas of strengths and weaknesses; this would provide comparisons for overall improvement of business processes
- **Competitive assessment tool**, to evaluate competitors and give a thorough, realistic, view of how it compares to their organization

- **Demand waterfall tool**, which would model the impact of conversion rates on demand creation efforts and goals.

Several solved technical issues were elimination of multiple logins, sharing restrictions of other tools with unauthorized users, and the creation of a single interface to access all tools and learning enrollments.

In addition to these tools, Synoptek developed a framework for Salesforce in order to address some additional issues clients were facing. This framework was primarily designed to handle and create engagement plans, assigning the engagement plans to specific accounts and summaries, plan creation workflow, and create initiatives and action items while tracking those actions. This tool was created from scratch and required more comprehensive collaboration and communication than the migration of the preexisting tools. Synoptek and the client worked closely together in order to ensure that all design and technical specifications were met.

The framework included hierarchical engagement plans to handle parent- child accounts, as well as an action/initiative library to store templates, with the ability to export plan details in Excel format. It also handled many-to-many relationships between initiatives and actions – associating an action with a case in Salesforce for better tracking, enhancing decision-making capabilities. Since some tools had already been created prior to Synoptek’s involvement, a unique combination of methodologies was needed in order to ensure uniform development across all tools. The client and Synoptek blended their strategies in order to create a cohesive project. The user interface needed to have a sophisticated design, making it compatible with all browsers and devices.

Communication between teams was a critical aspect; the client had a designated QA tester that collaborated with Synoptek in order to ensure all scenarios and bugs were properly addressed. In order for the tools to be completed before the client’s annual summit,

Synoptek utilized an offshore development team around-the-clock progress on the project.

Business Results

As a result of the collaboration between the client and Synoptek, all pre-existing Excel based tools were migrated to a web-based format. In addition to the migration, several new tools were created to complement the client’s advisory functions. The migration solved several issues that were present when using the Excel based model. By using a web-based format for the tools, the client was able to eliminate multiple logins, implement restrictions in the sharing of other tools with unauthorized users, and created a single interface to access all tools and learning enrolments. This ensured that only users who subscribed to the tools had access to them.

Additionally, Synoptek was able to create new tools for the client. These tools augmented the client’s advisory focus and diversified their business offerings. Both the migrated and newly created tools were created in time for the annual the client Summit, the premier conference for B2B sales, marketing, and product organizations. The client was able to showcase and distribute their new array of web-based tools, bolstering their reputation with potential and longstanding customers alike.

Overall, Synoptek was able to provide a highly efficient migration and development strategy. The client took full advantage of Synoptek’s flexible teams in order to ensure the project always had the right skillsets available at all time, scaling the team up or down depending on the demands of the project. Synoptek provided designers, architects, and developers that collaborated alongside the client’s teams in order to deliver the finished product. Due to the around-the-clock availability and overall efficiency of Synoptek’s offshore development center, the tools realized a quicker time to market and significant cost savings compared to if the client had been handling the project alone.

About Synoptek

Synoptek is a Global Systems Integrator and Managed IT Services Provider offering Comprehensive IT Management and Consultancy Services to organizations worldwide. Our focus is to provide maximum “business value” to our clients enabling them to grow their businesses, manage their risk/compliance, and increase their competitive position by delivering improved business results.