



Support and Maintenance Services for an Online Sales Prospecting Tool Helps a Media Company Enhance Customer Presence

CASE STUDY

Customer: A global leader in specialized business news and information

Industry: Media and Marketing

Profile: The B2B integrated digital media company delivers premium content to professionals in the legal, real estate, consulting, insurance, and investment advisory industries.

Services: Support and Maintenance

Business Need

The client is an information and intelligence company that provides customers with critical news, data, analysis, marketing solutions, and events to manage businesses successfully.

The sales prospecting tool is the client's marquis product. Since its launch in August 2013, it has helped the client grow its retirement business substantially. However, the client was in search of new and improved features that could help provide advanced visualization and critical data-driven insights to customers.

Given that Synoptek was already providing support for Magento, the client approached Synoptek again for the enhancement project for rolling out six distinct new features, including:

1. Talking Points
2. Benchmark
3. Plan Scorecards
4. Prefabricated marketing letters
5. Map Based Results
6. Analysis

In addition, the client also wanted Synoptek to make changes to existing pages such as creating a new UI for the Dashboard and changes in Search, Export, and Report to include the above features.

Solution and approach

To meet the integration requirement, Synoptek provided a robust team from its Application group and the team to implement all the features to the existing solution. We worked on developing new features that use existing data and provides powerful, richly formatted, and dynamic display which integrates to reports as well. All feature changes were made following the Agile methodology.

1. Talking Points:

Synoptek developed the Talking Points feature to break down complicated plan issues in a way that is simple enough to be communicated to any plan sponsor. This feature helped brokers in preparing for their sales meeting with prospects and leave a good impression because of the details covered.

2. Benchmark:

The benchmark feature was developed for users to compare the performance of a single plan (the primary plan) against a peer group of other plans. It allowed client teams to compare their plan with other peer group plans and present it into the Line and Bell curve charts. This was a vital enhancement done with great finesse that added great value as it helped brokers target the right plan that had higher probability of getting success - thereby saving a lot of effort.

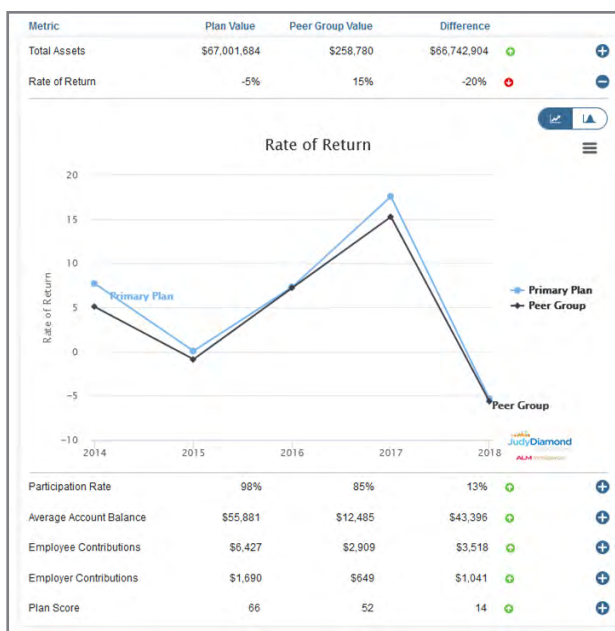
3. Plan Scorecards:

The Plan Score feature is a quick method to compare how a single plan is performing, compared to some curated group of other plans. Synoptek helped the client in calculating various plan scores:

- o **National:** To compare one plan against all other plans in the country
- o **State:** To compare this plan against all other plans in the state
- o **Industry:** To compare all plans within the same industry
- o **Asset and Participants:** To compare one plan against other plans with a similar level of assets or similar number of participants

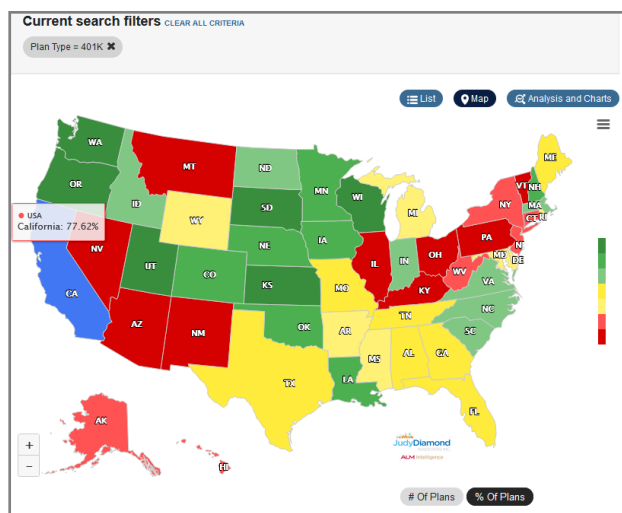
4. Prefabricated Marketing Letters:

Synoptek built professionally-written Marketing Letters that provide a detailed and personalized summary of potential problems with a plan. The Marketing Letters pull information directly from broker account profile, and pre-populate their name and phone number, along with the address info of the plan sponsor. These letters are ready to print and send or can be downloaded/copied and emailed.



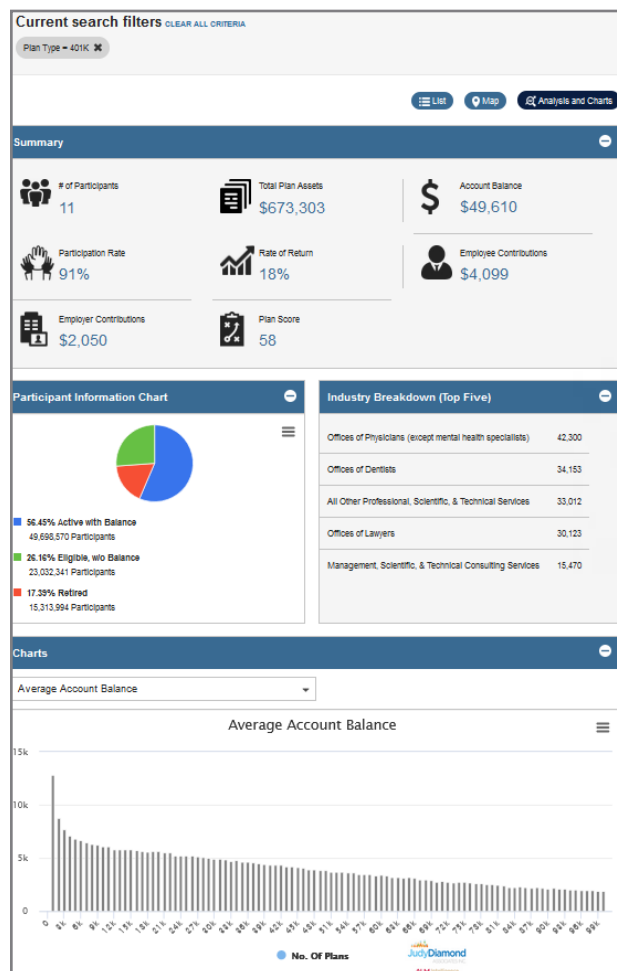
5. Map-based Results:

The map-based results feature provides the client with a new way of looking at a set of results, after a search has been run. It displays the number of Plans that belong to the State as well as the percentage of Plans which is a calculation of how many Plans in the results meet the current search criteria, divided by the total number of Plans in the state.



6. Analysis:

Based on results, the analysis feature displays some “on the fly” computations - not just for the current year but for the past 5 years as well in different sections.



“The project was ambitious from the start. We wanted Synoptek to work well outside their existing knowledge base to implement new features on our existing product. But they did it so successfully, incorporating new features and utilizing data in ways they had not done before. This was the cleanest spec-to-completion project I have ever witnessed. They did an excellent job delivering exactly what was requested, and in those rare instances where they could not, they provided good workarounds. The fact that they completed this on time and within budget is, of course, a huge point in their favor. We’ve seen so many projects slip on their timelines due to unforeseen reasons, but it was clear from the early days of development work that we would hit our target”. – Director, Product Management

Business Results

The support, maintenance, and enhancement services provided by Synoptek allows the media company to view, compare, and analyze operational data using several different options. Under Synoptek's guidance, the client can:

- Leverage the solution's rich visualization capabilities to monitor sales, logistics, and productivity of various plans
- Improve experience for customers as the details available through these features help brokers get more insight into each plan
- Readily track and analyze KPIs against key factors and gain a better understanding of how each plan is performing
- Enjoy new ways of projecting search results by Map-based results and Benchmarking and analyze data via several charts

Incorporating these features in the current solution has proved to be a game changer for the client, with scalability and greater profitability in terms of having more prime users.

About Synoptek

Synoptek is a global systems integrator and managed IT services provider, offering comprehensive IT management and consultancy services to organizations worldwide. The company works in partnership with clients of all sizes – from mid-market to Fortune 100, and for over two decades, its focus has been to provide maximum business value to its clients, by enabling them to grow their businesses, manage risk and compliance, and increase their competitive position. Synoptek is committed to delivering improved business results and unmatched service to every client, every time.

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