Blueprint Intelligence

A Case Study

"CAMPAIGN TO CASH" ANALYTIC

A SALES & MARKETING READY-GO ANALYTIC

At a Glance

INDUSTRY:
Logistics, Sales & Marketing

PROBLEM:
No single 'customer view': data on the journey from marketing campaigns to cash in the bank (and everything in between).

SOLUTION:
Blueprint Intelligence Custom Dashboard, ETL, Datawarehouse

SYSTEMS:
Salesforce CRM, Salesforce Marketing Cloud and SAP ERP, SAP Data Services, Microsoft Azure SQL Server & Microsoft Power BI

RESULTS:
Near real-time metrics on marketing campaign and sales performance to inform future strategies and weak business processes.

The Background

A logistics company with over $6million in annual revenue was investing considerable dollars on sales and marketing each year. With clear objective to generate revenue for the business, it was important to understand how well the marketing function was performing and opportunities for improvement that could boost bottom line results.

The majority of marketing activity was email based. Sales and Marketing Teams were using Salesforce Marketing Cloud, Salesforce CRM and SAP ERP for orders and billing.

The Problem

There was no 'single customer view'. That is, there was no easy way to attribute leads to a Marketing campaign to assess ROI or what works for further investment.

This extended to gaining a visual on the sales pipeline and process to identify problem areas, where leads commonly slipped or lost to competition.

As a result, it was impossible to to determine the true impact to bottom line of marketing and sales efforts, where marketing spend was more likely to convert to cash in the bank, and what processes needed attention to Improve close rates.

In an effort to build this picture, executives were spending a lot of time manually pulling numbers from three different databases across sales, marketing and accounts to build a picture; this process was error-prone, and outdated by the time reporting was completed.

The Solution

The task at hand went beyond a simple measure of lead value or revenue generated by a particular campaign. We needed to provide means to identify and track the source of leads that were ordered, delivered, billed and paid. This required the integration of data from three operational systems:
1. Salesforce Marketing Cloud which was used for digital marketing activities,
2. Salesforce CRM which managed prospect data, and
3. SAP Enterprise Resources Planning (ERP) used for customer details and billing.

For our analysts, this meant that we were dealing with varying data structures from the different systems that linked the sales and marketing process.

The business also desired an automated solution – one that could provide a real-time visualization of data extracted directly from live systems in one click.

For these reasons -despite the fact these are enterprise-scale solutions in their own right – we couldn't implement the reporting solution natively in any of the operational systems. Instead, we had to deliver a solution that could integrate the different data formats, query that data and present it in a beautifully easy to understand visual; for the Data People out there, this was a dream project.
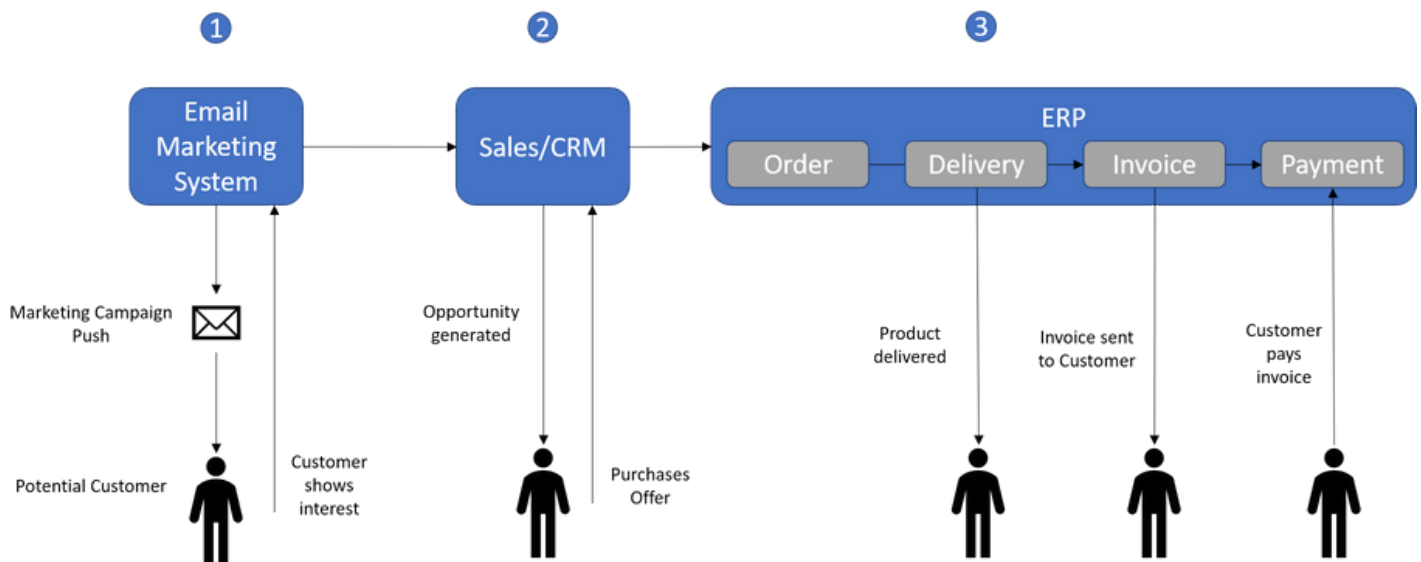
Building the Business Intelligence Solution

The technologies used to achieve a solution were:
- BI tool (front-end): Microsoft Power BI
- ETL tool (middle-ware): SAP Data Services
- Data Warehouse (back-end): Microsoft Azure SQL Server

The lay of the land for the systems is illustrated below and most importantly, how the high-level business transaction works:

When architecting our solution, the Blueprint team had to keep a couple of things in mind: at any point in this 'campaign to cash' process, something can interrupt or end the transaction before it is transformed to revenue. An accurate analysis of data across the sales and marketing workflow required tight integration between three operational systems. We achieved integration by using SAP Data Services, which extracts and loads data, and Microsoft Azure SQL Server, which is used to store data from the three systems.

The client also wanted to monitor different stages in the process to understand where attention was required to improve the rate of sales closed. We presented data from key stages of sales-marketing workflow in a waterfall analysis to demonstrate where the most revenue opportunity was lost so they could dig further into why, and how it could be addressed.
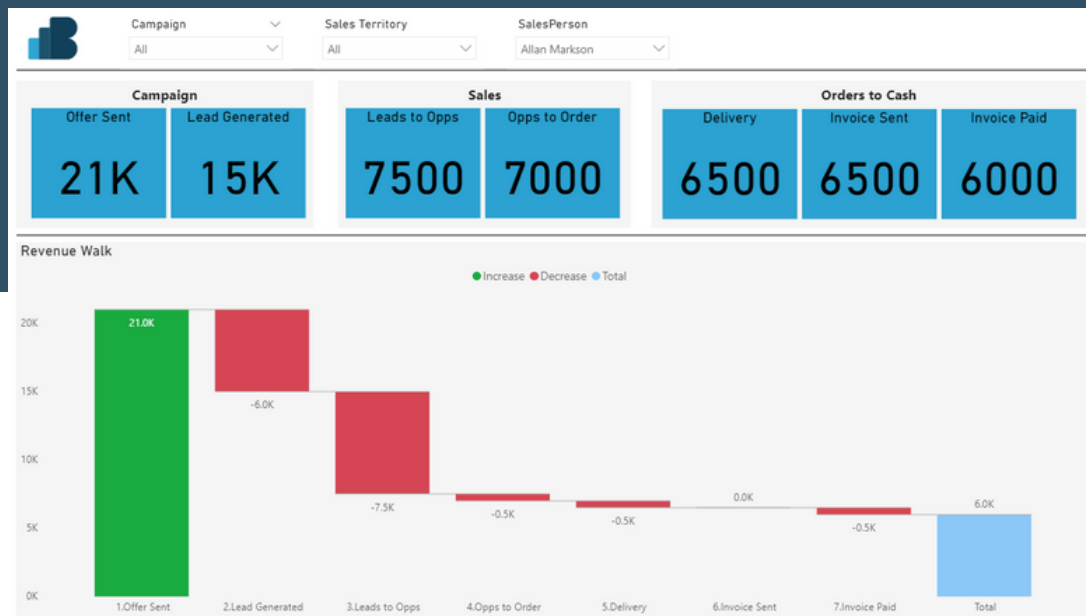
The dashboard, built in Microsoft Power BI provided the following features:

- Filter by Campaign, Campaign Month, Sales Territory, Area Manager and Salesperson
- Number, value, and conversion rate of all stages: Lead Generated, Leads to Opportunities, Opportunities to Order, Delivery, Invoice Sent, Invoice Paid. The only variation to this is the Offers Sent is the email open rate.

Users could drill into any stage of the sales-marketing process to get the details of the individual transaction.

The Drill-Down

The Results

Our Campaign to Cash solution immediately provided the client with three major insights that demonstrated issues and opportunities for improvement from across the business:

- Campaigns were generally effective for lead generation however, those that followed simpler messaging and more consistent timing performed the best.
- Due to problems with master data in SAP, potential sales were slipping through the cracks due to confusion amongst staff around genuine leads, orders and opportunities and duplicates, incomplete or error entries.
- A high number of cancelled invoices were due to confusion around the right type of invoice to apply within the accounts department.

The project also provided two additional value-adds:

1. There was an unreported integration issue between the Salesforce CRM and SAP ERP that had contributed to issues in the campaign to cash process.
2. Customer master data was out of sync across all 3 systems. So our team completed a master data clean-up service and generated a report that would provide continuous monitoring of master data health.

In response to the findings, the client optimized marketing so that campaigns were simpler and consistent in execution, and prospects would respond most positively.

Duplicate client records were removed, and previous issues with master data and synchronization has been addressed to save the business massive time and money on lost sales opportunities and unnecessary administration.

Accounts processes and training have been implemented to address ongoing inefficiencies and issues with duplicate invoices.

The results of this analysis have optimized workflow between three departments and improved the business' capability to generate leads and convert them to cash in the bank.

Although the client had tried multiple times internally to achieve the analysis, a couple of issues held them back:

1. Data issues hampered previous efforts.
2. The team had attempted to build reports natively in Salesforce and/or SAP, however due to the nature of the data and the complexity of the business logic, they constantly came up short. This problem required a true. business intelligence solution to solve it, where data can be extracted, integrated, cleaned and presented, all in the click of a button!

ABOUT US

The Blueprint Intelligence team is team experienced in all major analytics applications and business process improvement.

Our services include end-to-end implementations, specialized projects and managed services.

We're different to alternative contractors because we build a solution that solves your immediate issues, and meanwhile improves systems so you gain a sustained continuous improvement.

This strategic approach delivers a solid return on your investment in analytics. Meanwhile, you enjoy the flexibility of our service, and accessibility of our fees.

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