

Katpro Tech

Partner Lead Management Tool on .Net and Azure

Client

Business

MNC that develops, manufactures, licenses, supports and sells computer software, consumer electronics and personal computers and services

Business

Needs

- Automation of Partner Lead Management Process
 - A robust web based tool with easy to use interface
 - It should increase Marketing ROI
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Technology

- C#.NET, ASP.NET 4.5, AJAX, JQuery
 - SQL AZURE
 - VMs, Cloud Services, SQL Databases, Storage, Cache, Active Directory
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Case Study: Partner Lead Management Tool

Summary – Katpro has been instrumental in conceptualizing, developing and managing a Partner Lead Management System for the Client’s (SMB Marketing Team) which automates the entire Partner Lead Management process across India for all partners.

Background – Our Client spend millions of dollars in generating leads, end user awareness and marketing activities. But there was no proper system in place for managing those leads effectively to/from partners and to derive business decisions on the performance of partners or Clients’ Partner Account Managers. In addition to pipeline management, incentive programs and software assurance programs were not tied to lead management which increased management overheads to track and monitor performance of leads. Due to lack of proper structured system in place where leads are distributed, nurtured, qualified, tracked and closed, marketing expenses increases considerably.

Our Client engage with Partners for selling their licenses. There are several leads that are generated by Client as well as Partners. A good Lead Automation platform can significantly increase sales closures through a proper lead management system.

So the customer was looking for automation tool of their Partner Lead Management System for entire India region.

Earlier Process/Problem - Earlier the entire Partner Leads are managed manually through Email & excel sheet updates & multiple touch points. There was a huge Risk of data loss and mismanagement & difficulty in tracking/re-assignment & reporting

- SMB Marketing Team are relying on unstructured lead generation processes, lead qualification and lead tracking
- As a result, channel partners do not have a very fruitful experience with leads that are “pushed/pulled” down/up their pipe.
- Over time, the marketing ROI starts to drop.
- So even if one were to assume that 30% to 40% of leads directed towards channel partners are high quality, you can be sure that a majority of those leads will never be followed up or missed and will die a natural death.

Outcomes

- A Structured Lead Management System
 - Increase in Marketing ROI
 - Increased revenue generation by 20%
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Developed Solution - What started as a simple deal registration management tool today is built into a system that provides livelihood for more than 2000 partners and their many sellers in the SMB space. This tool is the only tool that is available for the partners to register their leads for Deal Reg programs, Cash Back Programs, SAM Programs, etc. To enable a solution that is readily available, mobile application is also provided in all three platforms such as Windows, iOS and Android. A simple easy to use, centralized web portal hosted in Azure for Leads management across different stakeholders (Microsoft Inside Sales, Partners, Field Sales) is also provided for scalability and performance.

The new web portal will simplify Lead tracking, Assignment/Re-assignments to different stakeholders basis performance/progress & management reporting. It will also provide a holistic view of the leads status at any point. It will enable them to move away from the cumbersome & error prone email & manual reporting process.

Benefits

- A Structured Lead Management System
- Proper Lead Assignment or Lead Distribution
- Tracking of Lead at any stage of sales cycle
- Increase in Marketing ROI
- Increased revenue generation by 20%
- Incorporates completely dynamic and configurable workflow system for managing new demands on business
- A BI dashboard for business stake holders is also provided that drives this business
- 12*7 Support through Phone and Support desk
- It handles Lakhs of leads in a Year
- Very critical tool which is handling transaction worth more than \$million in a day. So even a single min of down time is not affordable. A robust portal is in place which will not allow the system to stand still at any point of time during Business hrs.