

SMMARTs®

(Sales & Marketing Management, Analysis & Reporting Technology service)

For Sales & Marketing Organizations

Plan your Products, Lead Sources, Territories, Budgets & Teams

Run your Leads, Reps and Record Your Sales

Check your business performance By Period, By Product, By Resource, Monitor Operational and Financial Ratios

SMMARTs® allows Sales & Marketing Organizations to effectively and efficiently Plan, Run and Monitor your day-to-day functions, through a proven, configurable, easy-to-use, integrated service platform

Do you have **SMMARTs**® ? If not, get **SMMARTs**® today!



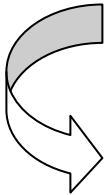
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Business Scenario

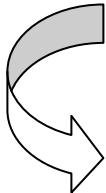
Problem

- The need for a purpose built solution for Sales & Marketing organizations targeting American households
- Lack of a simple interface and an integrated platform to conduct key tasks effectively and efficiently
 - Currently no easy way for Sales & Marketing organizations to plan, execute and review their activities in one single platform
 - Capture leads from multiple lead sources effectively
 - Define sales territories for Sales Management and Field Sales force
 - Assign leads to teams on a day-to-day basis
 - Capture the disposition on leads run (sales achieved, reason for no-sale etc)
 - Analyze market, resource and product performances for management
 - Generate and publish reports and analytics to Business/Brand Owners
- Poor conversions, high lead costs, lost productivity, revenue leakage, lost business



Solution

- The PLAN-RUN-CHECK™ construct that integrates the Planning, Execution and Analysis of the various activities related to successful sales campaigns
- Ability to configure/'purpose-build' a solution with parameters specific to a business – products, markets, resources, yet take advantage of pre-built templates and solution infrastructure
- Single, simple interface for Planners, Managers and Field resources
- Deployment in a hub-and-spoke scenario where a business/brand owner engages an in-house or outsourced Sales & Marketing function to generate and run leads
- Standard and configurable reports that summarize by market, by resource, by product - plan vs actual, performance by period, causal factor analysis, conversion, retention and other operational and financial metrics



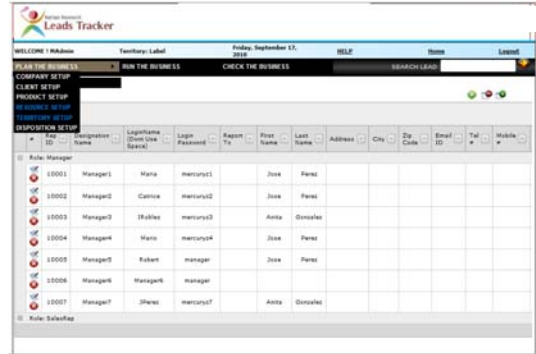
Results

- Greater sales management productivity (higher conversion)
- Greater retention of sales force
- Automation of various reporting tasks and therefore improved productivity of Administrative resources
- Additional business from business/brand owners if the Sales & Marketing function has its own P&L

Solution Features and Functions

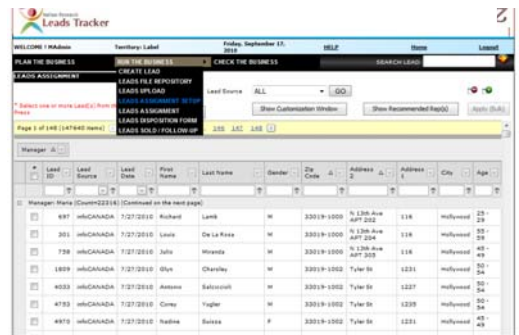
Planning

- Setup
 - Company/Division
 - Products, Prices and Promotions
 - Resources (Managers, Reps)
 - Territories, Map Mgrs to Territories
 - Lead Disposition, Sales Codes
- Define Resource and Territory hierarchies



Execution (Run Module)

- Stage purchased leads for viewing/editing
- Enter leads manually
- Upload (activate) purchased leads
- Search/sort/view leads by various parameters
- Assign leads (bulk and individual) to Representatives
- Disposition leads (Sale, Pitch-No-Sale, No-Response), along with reason codes



Monitoring

- View Business Performance
 - By Product, By Territory, By Resource
 - By Period (Day, Month, Qtr, Year)
- View Commonly required metrics and ratios
 - Conversions - Pitch/Knock, Sale/Pitch etc
 - Revenue per period, per resource..
- Causal Analysis for Sales, Pitch-No-Sales
- Filter, Sort, Drag and Drop fields to view
- Ease of management decision making and operations tracking



Solution Administration/General Features

- Role based Access Control
 - Administrator, Director, Manager, Rep
- Web Based deployment
- Upload/Download from/to Excel
- Easy setup/Solution as a Service
- Online video help



Solution Approach

Our solution approach

- Leverages pre-defined templates and models
- Is tailored to interface with various incoming feeds
- Generates plans, views and reports that are actionable

Advantages of the approach

- Provides the ability to capture and track plans, day-to-day operations and performance causal factors in an integrated fashion
- Bottoms-up plans and methods as opposed to tops-down plans that are inherently sub-optimal
- Facilitates model upgrades to adjust to changing circumstances
- Keeps the Total cost of Ownership of the solution (TCO) of the solution low

Deployment Models

The solution will be deployed as a service and configured based on the number of markets (territories) served, products managed and resources using the system. Standard help-desk support provided, along with periodic back up of data for customer needs .

Methodology

Shown here is a typical implementation cycle – short, systematic, yet comprehensive

	M1	M2	M3	M4	Months 5+
Solution Configuration					
Pilot Solution					
Process Change, System Integration					
Implementation Rollout					

Why Us

- 75+ years collective experience in
 - Planning, operational and managerial experience at Fortune 50 companies, Big 5 consulting and Supply Chain software companies
 - Process Design, Solution Development background using Advanced Modeling, Systems Engineering and Financial Analysis in all Corporate functions – Sales & Marketing, Manufacturing, Production, Customer Svc
- Design, development and deployment of leads-to-sales workflows for D2D sales & marketing companies
- Engagement with Retail and other Service Providers, including a major Home Improvement Services Provider
- Development of strategic plans, planning models (for product, price, promotions, supply chain distribution and logistics functions), operationalization of these plans
- Development of an Operational Management Discipline for Sales, Marketing, Installation and Customer Service functions
- Proven track record of successful implementations and documented benefits
- Unique approach to problem solving combining proprietary models, process discipline and technologies

Contact Information

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