

Accelerating Sales with efficient Channel Management

Overview

Location: India
Industry: Desktop and Server Software

Customer Profile

Large desktop software company with over 10 million consumers worldwide. Our CUSTOMER sells Internet protection, anti-virus, anti-spam solutions.

Business Situation

Our CUSTOMER sells their product through a distributed Channel similar to a Consumer Goods channel. Products are shipped to a Distributor and from thereon to Retailers. CUSTOMER was unable to track sales in the channel. Nor could they track salesperson activities in the field.

Solution

Impel CRM was configured to integrate and capture all partner details. CUSTOMER sales team could add new Partners and details and add their daily activity reports, expense tracking.

Benefits

- Track Channel all the way from National Distributor to retailers
- Direct visibility into sales person's daily activities
- Sales managers now plan, schedule and manage activities through Impel's Sales Activity Planner
- Sales Team's expenses tracked and managed through Expense Mgmt
- Partner Incentives and Incentive history mgmt.

Our CUSTOMER sells online defence systems for home users and Enterprises. Starting in 1991 with a DOS-based anti-virus software, in 2002 our CUSTOMER launched a sophisticated software that integrated anti-virus, anti-spam, an advanced firewall and privacy control software. Our CUSTOMER is a leading player in the Japanese software market. Our CUSTOMER's vision is to offer online defence systems in the form of sophisticated anti-virus and Internet security software, to not just large corporations, but small companies and individual users as well.

With over 20 years of dedicated experience in the Internet protection space, our CUSTOMER has threat labs that work round-the-clock to provide its customers a multi-layered defence system.

Our CUSTOMER sells its products through a widely distributed Channel of Partners, Resellers and Affiliates.

Challenge

The only automation that CUSTOMER's 130-odd salespeople had was Excel and Email. The CUSTOMER's sales and operations team faced many challenges:

- Distributors placed orders by fax/email and they were manually keyed into the in-house system for processing, delivery and collection.
- Some Distributors periodically submitted sales figures at an overall level, without Retailer-level details, in Excel form. Salespeople emailed assessments of potential sales based on what a few Retailers told them about the state of the market.
- Actual orders from Retailers were submitted in paper form to any available Distributor, with no mapping between the two.
- Retailer benefits like discounts, rebates were done based on laborious work based on numbers from paper-copies of orders.
- Consumer activations had no relationship with actual sales reported by salespeople, actual orders from Distributors or any other measurable quantity.
- Across the board, there was little or no connect with Consumers other than the one-time technical Activation process.
- Institutional sales, a growing but smaller segment than Consumer sales, was woefully under-managed.

CUSTOMER wanted to begin with a system that had the following capabilities:

- Record and track the complete distribution channel from Distributors down to retailers, SIs and OEMs. Mark specific partners who deliver better-than-average results and involve them in various marketing programs, thus segmenting the channel and tracking the effectiveness of marketing initiatives.
- Allow Distributors to place orders online, based on their own assessment of potential orders from Retailers.
- Allow Retailers to upload Consumer-side sales data, at a detailed or summary level, extracted from their POS systems in some predictable format.
- Track activation records for Consumers and map consumers to retailers.
- Allow salespeople to record daily activities, including overall sales in their region of specific categories of products.
- Track Incentives paid to specific partners from a Retailer level all the way up through the Channel based on sales.

Solution

PK4 configured its flagship product, Impel, to empower the operations of CUSTOMER. With Impel's configurable interface, the SFA module was designed to integrate and capture all the necessary partners' details to opportunity data, efficiently in one integrated system. CUSTOMER sales team could easily add increasingly richer set of details about each partner. Impel custom fields gave the team the ability to track competitive information at the Partner level, including details of competitor products that the Partner sells.

With an integrated CRM system, the CUSTOMER sales representatives have access to up-to-date, accurate sales

information. The field sales people report their daily activities, including the specific partner conversations in a simple formatted SMS, which directly lands into Impel. Using Impel's Ad-hoc Reporting Engine, PK4 designed specific report formats for CUSTOMER's management team to review the day-to-day sales information from the field.

With Impel SFA, CUSTOMER was able to import Activation records of their consumers, received from their Activation servers, to create Consumer records in Impel.

This also empowers them to map consumers to OEM. i.e. trace specific sales all the way from their National Distributor through the specific sales partner that sold that licence. Using Impel Adhoc reports, this data was used to locate the most active Retailers, multi-license-holding consumers and so on. Also, specific Custom Objects were configured for tracking Incentives paid to

Add Pre-Activity sheet

Users* 

Funding Description

Total Budgeted Value Rs Type of Activity

▼ Break up for estimated Value

Stall charges

Transportaion Charges Collateral Printing charges

Misc Expenses Promoter Stipend

▼ By doing this activity

Earlier business in the region Rs Expected Business growth

Add Multiple Expenses

#	Name	Amount	Date Spent	Expense Type
1	Hotel bill at Golden Tulip	3675.00	10/06/2013 	Accommodation <input type="text"/>
2	Taxi hire for the day	1800.00	10/06/2013 	4-wheeler <input type="text"/>
3	Flight tix BLR-DEL-BLR	8398.00	03/06/2013 	Flight <input type="text"/>
4	Lunch with Paramjit Singh	1230.00	10/06/2013 	Meals <input type="text"/>
5	Phone calls	187.00	10/06/2013 	Communication <input type="text"/>

specific partners and to record the delivery of gifts to partners.

Add D A R

#	Start At	Account	Contact	Notes	Nature Of Visit	TS 1U
1	4/06/2013 09:00 AM	2 chars or **	2 chars or **		<None>	
2		2 chars or **	2 chars or **		<None> CIL-Office Channel Activity Cold Call Demo Joint Call Lead given by HO Meeting New Business Others Primary Secondary Training	
3		2 chars or **	2 chars or **			
4		2 chars or **	2 chars or **			
5		2 chars or **	2 chars or **		<None>	

Business Impact

- Impel has provided CUSTOMER the ability to upload and maintain its complete Partner database, all the way from its National Distributor down to the Retailers, SIs and OEMs that they work; within one centralized system
- Sales management now has a direct visibility into the working of each sales-person. Activity Tracking has become simpler and easier than ever before with Impel's SMS enabled SFA

Solution Details

- Track salesperson activities via DARs
- Distributor, retailer sales tracked via weekly uploads
- Sales Activity planning between Sales Manager and team
- Expense tracking for sales team.

The future

Improve the Consumer engagement process with email / SMS reminders for renewals, special offers.

Improve field sales with distributor orders placed on Android tablets.

Weekly invoice, stock updation from distributors, retailers integrated via Impel's APIs.

- managers can plan, schedule and manage activities, sales meetings and track activity status
- Impel's interactive analytical tool, delivers actionable insights to the Management team to gain deep insight into business
- CUSTOMER uses Impel's enhanced SFA to track of activated consumers and to map consumers down to OEM's hassle free
- Impel expense management enables CUSTOMER sales team to easily report, track and manage their expenses. This also helps CUSTOMER track and manage partner incentives and incentive history.

About PK4

PK4 Software is the market leader in on-demand CRM solutions for India. Our flagship CRM product - Impel CRM - helps companies put their customers at the center of their business. Impel CRM enables sales executives to spend more time with customers and less on administrative work. Impel CRM helps companies increase revenues and maximize profits by increasing sales productivity, marketing efficiency and service operations. The web based CRM is used by sales, marketing and customer service teams across a variety of industries ranging from SMBs to large enterprises.

Available on the Web, on mobile devices, via SMS and on Android tablets, Impel CRM provides field forces with the largest possible accessibility options.

For more information, please visit our website at www.impelcrm.in. You can also call us at +91-96118-10000 or e-mail us at sales@impelcrm.in.