

20/20 Companies

Customer Profile

20/20 Companies is a leader in outsourced direct sales for the telecommunications, cable, and energy industries.

Business Situation

20/20 had evolved a cumbersome and time-consuming process for dividing large numbers of sales leads into walking routes for its door-to-door sales teams. The company sought a solution that would speed up the process, simplify workflow, and support additional analytical functions.

Solution

Working with IDV Solutions, 20/20 Companies replaced its old process with a solution based on Visual Fusion. The new application streamlines the process of assigning leads, saving time and cutting costs in half. It also provides sales reps with more accurate route mapping and the company with new analytic capabilities.

OVERVIEW

20/20 Companies cuts costs by half with a solution built on Visual Fusion that provides analytics, streamlines the sales process, and manages and tracks sales leads.

Summary

20/20 Companies is a leader in outsourced direct sales that provides end-to-end selling solutions for the telecommunications, cable, and energy industries. The company had evolved a cumbersome system for dividing large numbers of sales leads into door-to-door walking routes for its sales teams. Each week, company analysts spent days loading data into multiple programs to plot leads and map routes; ultimately, they would cut and paste the results into spreadsheets for distribution.

To replace this time-consuming process, the company built a new solution using Visual Fusion, the geospatial mashup platform from IDV Solutions. Visual Fusion supplies a rich user interface, data connectors, and tools that allowed the company to build an interactive visualization of the sales lead data.

The new solution cut in half the time required to produce the company's sales lead packs, while providing managers and analysts with a dynamic, interactive user experience. Managers gained the ability to request and receive sales lead packs online, and upper management can more easily monitor performance and seek out new opportunities.

Situation

20/20 Companies typically receives from its clients large files containing sales leads; each file may contain the addresses of as many as four million potential customers. Before the advent of the new application, 20/20 analysts would load these addresses into a Microsoft Access database in order to sort them by region and zip code. The analysts then exported the sorted data into Excel spreadsheets, zip code by zip code, dividing the data into geographic areas for each sales team. Next, query results were exported to an Excel file format. Finally, analysts would cut and paste the addresses into a series of documents to send to the general manager for each area. This cumbersome process could take up to two weeks depending upon the size and scope of the lead file.

"It was an extraordinarily manual effort," said Sarah Wilson, Analyst Manager, 20/20 Companies. "The new application streamlines it to require less time and work."

Solution

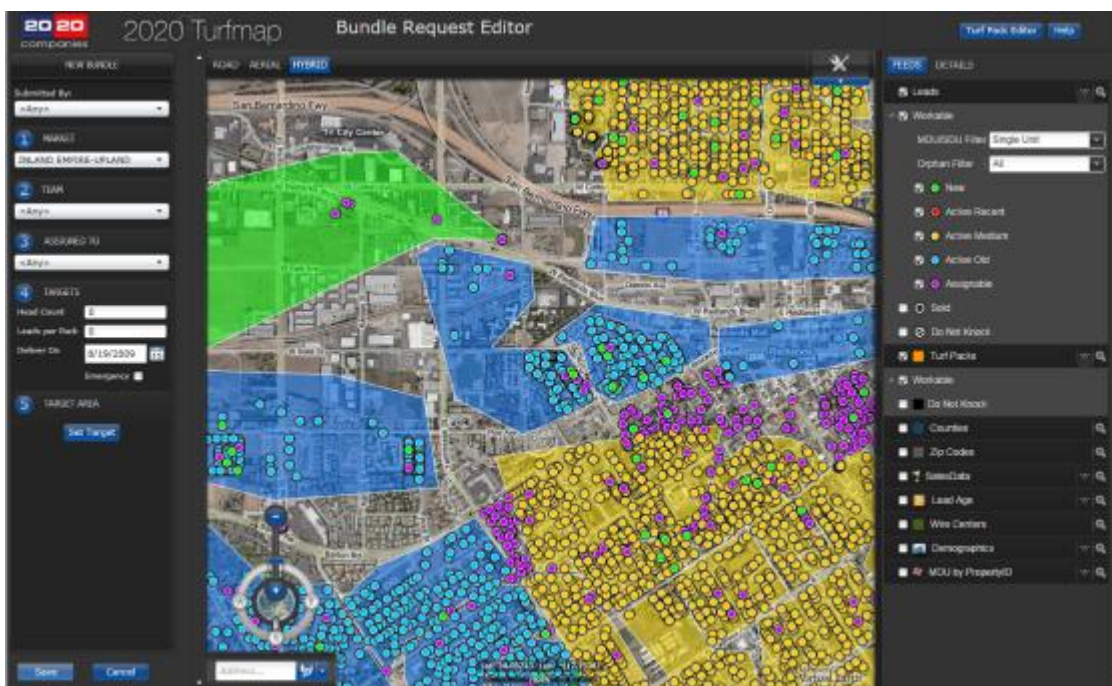
Aware that they needed to change the process, the company spent several months evaluating a range of off-the-shelf and custom solutions. 20/20 selected Visual Fusion for its rich Silverlight interface and configurability.

"As an extremely dynamic company, 20/20 was looking for a solution that would allow data with any geometry associated with it to be visualized on a map within minutes," said Scott Gross, 20/20's Information Systems manager. "We saw this as a key technology that could let us easily deploy a rich client interface and handle the amount of data points required by the application."

Working together, 20/20 Companies and IDV Solutions built an industry-first sales mapping technology named Ngen Leads, using Visual Fusion. This application automates information, assignments and logistics while also providing critical analysis for 20/20 Companies' sales teams.

The Visual Fusion application connects to an SQL Server 2008 database where the addresses are now stored, then automatically maps them via Bing maps. Analysts review the leads on the application map. Icons are clustered when the user zooms out; clusters break apart as the user zooms in. Using Visual Fusion's polygon drawing tools, the analyst groups leads to delineate a sales area for each sales rep based on their geography or territory.

"Then it's just a matter of clicking the Save button," said Gross.



Visual Fusion uses the polygons to run a series of spatial queries against the SQL Server 2008 data, and uses SQL Reporting Services to return the query results as a report in PDF format. The report, called a "turf pack bundle," contains sets of addresses (leads) and a map image for each sales rep.

"The ROI was clear. Visual Fusion was the only solution that provided the tools we needed to manage our sales leads effectively and efficiently. "

-- Scott Gross,
Information Systems
Manager,
20/20 Companies.

Bundle reports are saved in a SharePoint library. Each manager logs in and downloads the turf pack bundle for his or her sales team. The application tracks who downloaded each bundle and when—this eliminates duplication errors where the same sales area might be assigned to more than one team.

New functionality

In addition to enabling analysts to create turf packs more efficiently, the application provides 20/20 with some new capabilities:

- **Aging leads.** Icons and turf pack areas are automatically color coded by age. Each phase of the selling process is color coded making it easy for sales to monitor activity.
- **"Do not knock" labels.** Analysts can now issue a "Do Not Knock" label to an individual lead or an entire area automatically excluding these from the turf packs. This allows 20/20 to quickly deactivate an area based on client direction.
- **Filtering addresses by type.** Using a drop-down control, users can filter the icons to display either multiple dwelling units (apartment houses or complexes) or single units. This allows analysts to be more specific in assigning a number of leads to sales teams.
- **Online turf bundle requests.** Regional directors can request new bundles of turf packs through the application's "Bundle Request Editor," specifying a sales area, a sales team, the desired number of packs (number of reps), leads per pack and a delivery date. Bundle requests can be designated "emergency" for priority status and quick turnaround.
- **Additional feeds available.** In addition to the lead addresses, the application can display demographic data from the U.S. Census, county and zip code boundaries, ShapeFiles for client sales territories, and sales data. These feeds are used for sales performance reporting, trend analysis and new territory research.

Benefits

The introduction of the application has cut 20/20's costs for assembling the turf pack bundles in half, and saves significant time each week cutting lead processing from two weeks to two days. Moreover, the geocoding process through Visual Fusion provides a more accurate map for the sales rep.

The company plans to expand its use of NGen Leads to include additional sales analytics. This new application will pinpoint sales target areas based on multiple data sources.

"The ROI was clear," said Gross. "Visual Fusion was the only solution that provided the tools we needed to manage our sales leads effectively and efficiently.

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About Us

IDV Solutions[®], a Microsoft Gold Certified Partner, is a software company specializing in enterprise mashups.

IDV's Visual Fusion[®] software helps organizations consolidate existing data, unlock data silos, and leverage outside data feeds, all in a single platform.

IDV assists Global 2000 and government organizations in making their information more accessible, understandable, and contextual.