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A PROCESS 10 COMPANY

Leveraging Data to Provide Business Insight

Client: A large CPA firm based in downtown Minneapolis.

Industry: Financial Services

Issue: Lack of insight on marketing $ spend and ROI on those investments. This CPA firm has 10+ business development and sales staff. Their primary role is to generate new business and service existing clients. These employees were spending lot of marketing $ on activities like lunch, networking, meetings and promotions for prospecting and servicing clients. Each employing was maintaining their own excel spreadsheet for monthly marketing expenses. At the end of the month these excel spreadsheet were consolidation by an admin for analysis and creating marketing reports. The issue with this process was:

- It was too time consuming
- The individual reports were not consistent
- The reports had lot of inconsistency in data and formulas that resulted in errors
- The reports were getting too big and difficult to manage.
- Due to the size of the spreadsheet it was difficult to manage data and do any type of trend analysis, cost projections and budgeting
- The report had to be email to the management; this resulted in multiple copies of same report being saved on shared drives.

Technology: SQL 2008 & Access 2010

Solution: We created an online forms based solution that allowed users to enter their marketing data. Built macros that auto generated reports based on business requirements of the management, with a click of button. Following were the benefits of the application:

- Web based solution so no duplication, easy access 24 x 7
- Forms based data entry, all user had to enter the same information, resulting in consistency in data capture and reporting
- Predefined reports that generated auto reports that compared $ spends by employee by activity type by business generated on both new and existing businesses. This provided great insight into the ROI on marketing efforts and $ spends.
- Created projection reports for forecasting based on current data that allowed the firm to budget for future marketing efforts
- Create comparison reports for monthly, quarterly and yearly performance that gave the management insights into their employees marketing efforts and allowed them to make better decisions.
- Overall substantial cost saving and efficiency, the admin did not have to spent the entire 1st week of the month reconciling, creating and emailing reports.

For more information on our services or ways we can help your organization contact us at info@intellixion.com