



REINVIGORATING CRM WITH ENDECA'S INFORMATION ACCESS PLATFORM

CUSTOMER

AMR Research provides subscription advisory services and facilitates executive peer forums to operations and IT executives in the consumer products, life sciences, manufacturing, and retail industries.

CHALLENGE

AMR Research's management team was not able to make informed business decisions regarding financial performance and marketing initiatives due to a lack of visibility and confidence in the data being reported out of its CRM application.

SOLUTION

AMR Research is using Endeca to power both its externally facing research site and internally as a self-service analysis environment that allows its management team to assess the state of business and to minimize IT involvement in producing monthly management reports.

KEY BENEFITS

- Provides a self-service analysis environment that allows executive team to monitor the business
- Reinvigorated CRM by allowing management to generate reports and perform ad-hoc analysis
- Re-aligned sales force with CRM, improving sales forecasting
- Enables ROI analysis of events to maximize revenue opportunities

When AMR Research deployed Endeca's solution to enhance its clients' access to proprietary research, the company saw immediate improvements in search results and in the reduction of costly calls to its help desk. Understanding the value Endeca can bring to its business, AMR Research then decided to go one step forward by deploying Endeca internally to improve management's visibility into financial performance and marketing initiatives within its Customer Relationship Management (CRM) system.

Incomplete and Inconsistent data

Due to weak reporting capabilities with only a few standard reports available, the company's CRM application was never considered an effective source for forecasting sales and managing customer interactions. AMR Research's approach to assessing the state of the business was through business analytics created in Excel, resulting in complex "databases" with often incomplete and inconsistent data. IT and Finance were acting as data services for these reports, with lengthy turnaround times for reports and limited scalability. "Management was frustrated by the lack of visibility into the pipeline and no effective way to do a ROI analysis of marketing campaigns," said Mike Melanson, VP of Information Technology.

Realizing that the lack of access to the data to help make decisions on the business was a major obstacle, Melanson decided to change the way

in which his executives accessed the data. He sought to create a self-service analysis environment that would allow management to analyze the data and answer complex questions about the business on their own. After successfully deploying Endeca on its customer-facing research site, he immediately turned to Endeca to fulfill his vision of an executive dashboard that allows users to drill down into the CRM data.

BI for the masses

AMR Research worked closely with Endeca technical resources on the

"Based on our previous experience using Endeca on our external site, we felt that Endeca would provide us with access to the data in our CRM so that our executives could easily explore and report on it in any way they saw fit," said Melanson.

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deployment. “Endeca’s professional services did an outstanding job of bringing the project team together, helping us gather and document requirements. The implementation went smoothly and, once it was launched, the feedback was astounding,” said Melanson.

The Endeca application allows management to look at sales forecasts, campaign analysis, current financial objectives and goals, and a snapshot of the business on a day-to-day basis by providing adaptive filtering for “every data slice” from an analysis perspective while also tying in unstructured content, including searchable notes that replaced email. Presented as an executive dashboard, it is now possible to search on a term and see results grouped by different dimensions, such as salesperson, region or stage in the pipeline, which dynamically adjusts by drilling into the data.

According to Melanson, creating a seamless user experience so that users could get a quick visualization of the business before drilling down into the details was a critical aspect of the deployment. “The Endeca platform provides built-in charting capabilities, just like a BI tool, but easier to use, so that an executive can search for prospects within any of our sales regions and see a pie chart showing the results grouped by dimensions, such as salesperson

or status. This lets people “slice and dice” search results and do ad hoc data analysis and discovery, rather than relying on static reports or limited searches.”

Results

Through Endeca, AMR Research greatly enhanced the value derived from its existing CRM application — thus improving sales forecasting and management of customer interactions. By using Endeca as both a sales and marketing executive dashboard, its executives are now able to have direct interactive access to sales and marketing data. Gone are the time-consuming requests for IT to pull specialized reports. Now management has the opportunity to tap into the valuable data within its CRM system on a moment’s notice.

“On a daily basis, our CEO has direct visibility into what business is going to close today, this week, this month, and the rest of the quarter,” said Melanson.

“Endeca had allowed us to re-energize our CRM. In the past, there seemed to be some hesitancy among the sales force to use the CRM to forecast effectively. Now our CEO has visibility into the pipeline on a daily basis which has caused a fundamental shift in the quality and

timeliness of data in our CRM.”

One of the greatest benefits from the Endeca application came from ROI analysis of events, which are an integral part of AMR Research’s business model. Previously, there was no visibility into the effectiveness of these events in acquiring new customers.

Today, AMR Research’s CEO can consult his dashboard at any point in time to understand status, who is working on which account, how much they are going to sign for, and when the contract will be signed. According to Melanson, this is just one of the many examples that demonstrates how the Endeca application has become the most powerful tool for AMR Research’s management team to understand the state of the business at any given moment.

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