

E.J.'s Journal

Adventures in Technology

This is part 12 of an ongoing series.

BY E. J. SIWEK, C M P

This month's entry is dedicated to my dad, who passed away in January at the age of 73. His research contributions in the field of rechargeable batteries and subsequent contributions to technology have been lauded by the Smithsonian Institute. His pioneering work has had an affect on all of us who are today's mobile warriors.

The past 12 months have certainly come and gone quickly. In late December 1999, Excel Partnership Inc. decided to embark on an aggressive effort to integrate OverQuota® with Lotus Notes. The benefit of the system would provide functions for automated sales management and provide a solid platform for account management. In February, we made steady strides to achieve our system integration goals. This all-encompassing effort, along with several other projects requiring my time, has taught me some valuable lessons in striving to achieve a balance between work and family life.

Have we achieved all that we set out to do 12 months ago? Has the organization benefited by the work that has been done? Did we change Microsoft followers into Lotus Notes followers? Will our ability to capitalize on lead management generate new sales?

More than a year ago, our goal was to have completed the system integration effort throughout our Connecticut headquarters by the year's end. Approximately 45 staff would have the system up and

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running on their desktops. We have not met this goal quite yet. Why? Despite spending numerous hours in defining the system, which is based on users' needs, many users did not really grasp the new system's functionality and how it would affect their daily jobs. The reason for this was because those of us charged with leading and developing the system were not thoroughly briefed on the advanced functions of the system early on so we could effectively lead other team members. The other delay was the complexity of customizing the system. No one could have imagined how extensive this would be.

While this has delayed the project timeline, the company has already benefited from some short-term process gains. The area gaining the most has been the certificate process automation. Before introducing a new process through OverQuota and Lotus Notes customization, a certificate could take as long as six weeks to generate. Now the time has been cut to one week. We are in an area requiring "certified training" and our process must deal with much more than the mere

generation of a piece of paper. Instead, course attendee test rates (pass/fail) need to be logged, payments collected, proper names need to be assured and much more. In addition, we produce more than 18 different types of certificates. Together, we produce an estimated 30,000 certificates annually, so this one gain is profound and highly significant.

Has the organization benefited from our work so far? The answer is yes, thanks to account management features, mass marketing functions, refined work processes and in-depth reporting options. Now we can quickly assess work across the various divisions of a major corporation in little time. We also can automate the fulfillment literature requests and view marketing campaign history at the individual contact level. A direct result of viewing

marketing history at the individual record level is better data collection of marketing source codes. Armed with the available data and advanced reporting functionality, we can quickly analyze the results of marketing campaigns almost in real time. The cumulative gain of this improvement will save not only marketing dollars but will help reduce overall paper consumption.

Those of us who grew up on Microsoft Suite products are still not convinced that OverQuota was the best route to take. Our largest obstacle has been not having the ability to easily link tables and records as is done in a pure relational database. This has made data migration cumbersome. At the highest management level, our decision to stay a Notes-based organization made sense if for no other reason than to leverage our previous Notes investment.

Those of us who need to work with the data beyond the provided functionality of OverQuota will clearly need to learn alternative reporting options using programs such as Crystal Reports.

At the customer relations level, I believe the hardest transition has been in understanding the sales account management function. Up until now, we did not think of the selling side of the operation; instead, we booked orders. We really didn't see ourselves as an organization with a sales force or the real need for a selling arm. However, now we are able to instantly link a lead to a marketing source and assign the lead for follow-up to one of our field-based consultants or to members of our business development team. Now we can build a solid sales organization by taking advantage of the new system.

Unfortunately, as of February, we have not been able to introduce the system into the field. My guess is that we are six months from being able to do so. We can't harness the full power of the account management functionality or sales management modules built into the system. However, in time, the organization can make considerable inroads to better sales management by using OverQuota.

Next month will be my final entry into this journal. It will share a combination of lessons learned, suggestions for those of you who are charged with this type of responsibility and bring you up-to-date on my new adventures. ▲



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