InfoCepts

Consolidating Multiple Sales Systems to Provide a Single Report View of Ad Sales

Summary

We used MicroStrategy to create a portfolio management application with ad-hoc reporting capabilities for our client, a global media and entertainment company. The solution gave our client a single report view across multiple sales systems, resulting in increased prospect and pipeline throughput.

Industry

Media and Entertainment

Users

Account Executives, Vice Presidents, Senior Sales VPs, Ad Sales Directors

Technologies

MicroStrategy 9.x, Oracle 11g, Ruby on Rails (client's portal)

Team Size

4 InfoCeptians, 6 customer associates

The Challenge

Our client, a leading media and entertainment company, needed a better, more comprehensive view of its ad sales across a variety of TV channels and other properties. For years, it relied on an outdated reporting system that accessed canned reporting services offered by different sales systems, such as Salesforce and Dealmaker. When the president of ad sales wanted to consolidate the reporting services of different properties and sell their services as one portfolio, the company encountered these challenges:

- Disparate reporting capabilities limited to the respective sales systems.
- A lack of integration among the individual reporting systems, tie outs, and deal tracking, creating a lack of visibility across platforms.
- Media properties that resided on different sales system, leading to an inability to sell these properties.
- Little to no visibility of the sales pipeline across media properties, leading to the inability to properly forecast company revenue.

The Solution

To help, the InfoCepts team developed a portfolio management application that supports multiple business processes for creating, managing, and reporting on diverse sales transactions. The processes focus on budgeting and sales, with integrations across multiple backend systems, including Salesforce, Dealmaker, Sintec, and others. The application features:

- 15 reports for comparing and measuring current and past performance, such as current-year sales vs. prior-year dollars and projections, along with extensive ad-hoc reporting capabilities.
- Self-Service Business Intelligence that enables business users to create their own reports and documents via MicroStrategy Web
- Seamless MicroStrategy integration, with the capability for users to self-publish reports and documents on a web-based portal; user security parameters can be set at both a portal level and the MicroStrategy level.
- Reporting and Ad-hoc capabilities for different business areas including budgeting, pacing, analyzing financial performance, and more
- A secure, rights-based user login (account executive vs. VP, etc.).

The Results

The application we developed provided our client with its first-ever cross-reporting system, creating a seamless user experience and eliminating inconsistencies and inaccuracies of information. In addition, it streamlined the sales process, leading to increased prospect and pipeline visibility and throughput. The new set up allows users to:

- Create hundreds of reports to be used by more than 500 users, ranging from business managers to account executives.
- View different types of analysis based on a user's specific access to properties and agencies.
- Consolidate reports across the properties and sell to agencies via one portfolio-level view, with the ability to expand properties in the same application in the future.
- Create an exec-level view of the sales pipeline for accurate forecasting of company revenue.
- Publish a wide range of reports via a portal to an external user audience, with the intent of integrating various business intelligence tools