



## **IntelEfficient**

*The intelligent use of information & energy to promote efficiency and sustainability*

*Information is a key resource that, used intelligently, can be of tremendous value to your organization. Leverage our experience in three key areas: business intelligence, marketing communications, and relationship management.*

### **Business Intelligence**

Turn your operational data into strategic information by analyzing business patterns in your financial and customer data

- The IT department within an HR outsourcing firm had struggled to satisfy increasing requests for a variety of standard and ad hoc reports, so we worked together to design and implement a data warehouse to capture key metrics for the flagship division of the company. This enabled them to analyze revenue and transaction trends, and more effectively report growth to industry analysts. This data warehouse became a platform for additional data from other business units, and a number of enhancements were incorporated into the system to provide better decision support and increased customer satisfaction.
- A software manufacturer deployed a new order processing and invoicing system, which was intended to replace an existing proprietary system. The two systems were used concurrently in different parts of the world as different countries were slowly migrated to the new system. To maintain global reporting, we developed a data warehouse to combine data extracts from both systems into single database. After merging with another company, the data warehouse was modified to capture consistent data from a third source. This global database provided a number of complex ad hoc reports to management, resulting in more timely and intelligent decisions.

Other contributions to this company include the following:

- Developed a web-based reporting system to facilitate role-based access to leading business indicators that included sensitive data.
- Managed development of detail revenue reporting system to allocate charges to appropriate product business units, and eliminate manual adjustments to the corporation's general ledger,
- Documented complex relational database and restructured database categories used in ad hoc reporting, fostering user access and accuracy of query results; also served on several task forces to improve corporate data integrity, and developed audit programs and corresponding metrics to measure improvement

### **Marketing Communications**

Create partnerships with employees, customers, prospects, and suppliers by enabling access to online information.

- A government agency needed to create a web-based extranet portal to share intradepartmental data both internally and with outside agencies. Together we designed a solution using Microsoft SharePoint to create a distinct branded web image, and leveraged the core functionality of this web platform.
- A software manufacturer with hundreds of sales representatives and resellers needed a single portal to maintain marketing collateral. We developed and implemented a database-driven website that enabled sales and marketing staff to easily store and retrieve marketing materials. The site also included an FAQ database, event calendar, image library, shopping cart application for printed materials, and internal news, and was a launch pad for web-based sales applications.
- A convention and visitors bureau wanted to recreate their website, which was used to attract visitors and highlight attractions within the city. We developed a database-driven website that provided information on local events, attractions and other features of the area. Visitors were able to create a customizable itinerary, book lodging on-line, and search for items of interest. In addition, event planners were given access to other tools and resources to better plan upcoming events.



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### **Relationship Management**

Develop and strengthen your relationships with customers, prospects and partners in both sales and customer service efforts using automated, personalized communications.

#### Sample success stories:

- A renewable energy solutions provider was stretching the limits of their web-based ACT! system to coordinate sales activities and opportunities between sales reps and managers. We customized a web-based CRM solution to meet their needs, and migrated customer, prospect, opportunity and activity history data from ACT! to Salesforce.com.
- An architectural firm had been using a variety of spreadsheets to track projects and business opportunities, and used Microsoft Outlook to maintain contact information. We created a Microsoft Dynamics CRM solution to track accounts, contacts, and potential sales opportunities, and customized the system to capture information about historical projects to facilitate their marketing efforts.
- The business development organization within a hospital network was interested in tracking and coordinating calls, meetings and visits with the physicians on their staff. Microsoft Dynamics was used as a platform to enable them to better manage interdepartmental relationships with these physicians. The system was also customized to track the success of marketing outreach campaigns, develop and manage physician recruit campaigns, and track service recovery cases.
- A direct mail business was interested in tracking relationships between sales of various products to their customers so that they could more effectively cross-sell products across their customer base. Together we implemented a new order processing system designed for mail order businesses, which enabled the company to more effectively process orders, track sales and create more effective marketing programs.
- A business credit insurance company used a variety of marketing programs to generate sales leads, and was interested in tracking which programs ultimately generated the most revenue. We redesigned their lead tracking system, resulting in more effective lead distribution and reporting of marketing program effectiveness.
- A fitness center that had been marketing annual memberships found that light or non-users were much less likely to renew their memberships, so we created a system for members to log in whenever they used the gym. This enabled the organization to target marketing communications to this customer segment, resulting in a 20 percent increase in the overall retention rate. The system was also used to manage all billing and marketing activities, resulting in increased customer satisfaction.
- A non-profit agency providing care to children of families in distress was challenged with managing a paper-based tracking system for the families they served. A series of electronic forms were developed to capture data from a web-based platform, which was used to track visits across multiple locations and aggregate the data for reporting purposes.

### **Contact**

*I've spent my 25-year career bridging the traditional gap between marketing and information technology. Together we can create or improve the marketing information systems that will help you achieve your goals.*

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