The challenge

Today’s sales environment is the most competitive it has ever been. More than ever, companies need to leverage technology to optimize operations, maximize performance, and provide powerful sales enablement tools that help teams sell more efficiently. Despite this, a great deal of sales time is still wasted on unproductive prospecting. This is because most sales systems (SFA/CRM) fail to enable sales processes out of the office and do not provide enough insight into customers. These systems provide basic operational reports and charts but only provide sales teams with a fraction of what is needed to be successful.

The solution

MicroStrategy is an integrated platform that empowers companies with powerful analytical and mobile sales enablement solutions to be more effective and efficient when working in the field. Sales reps can have real-time access to sales data and analytics, enabling them to make more accurate pipeline forecasts and identify potential upsell opportunities in their existing accounts. In addition, with powerful MicroStrategy Mobile sales enablement solutions, sales reps can have access to multimedia content, such as presentations, product videos, and other collateral, in order to drive meaningful conversations with customers.
APPLICATIONS FOR SALES

SALES EXECUTIVE WORKBENCH

SALES COMPENSATION

TERRITORY AND QUOTA PLANNING

SALES REP ACTIVITY

CUSTOMER INSIGHTS

SALES RENEWALS

FIELD ENABLEMENT

ACCOUNT MANAGEMENT

CRM ANALYTICS

PIPELINE MANAGEMENT

PROSPECT ANALYSIS

TRAINING

TASK MANAGEMENT

SALES PRODUCTIVITY

DIGITAL ID BADGE

SALES REP

SALES MANAGER

USHER/
SECURITY
The challenge
Sales leaders often struggle to quickly identify poor sales performers and fully leverage the potential of strong sales performers.

The solution
MicroStrategy provides sales executives with the tools they need to monitor performance, whether they are in the office or on the road. Mobile sales operations apps provide real-time visibility into ongoing sales cycles and enable executives to take proactive action when necessary. By blending and analyzing data from ERP, PSA, HRIS, CRM, and other sales systems, MicroStrategy is able to deliver a 360-degree view of sales activity at the region, territory, and individual level. This type of insight is crucial to sales leadership as they seek to boost performance and reduce risk among their teams.
The challenge

Many organizations struggle to successfully implement compensation plans that effectively incentivize and reward sales employees for their performance. This is often due to problems with data availability or accuracy and the administrative challenges associated with managing multiple, complex incentive plans and tracking quotas.

Additionally, many sales managers lack the tools needed to quickly obtain a 360-degree view of their entire sales force, including information about sales cycles and sales rep performance.

The solution

MicroStrategy provides sales managers with the tools they need to monitor the performance of their sales teams, track pipeline goals, and implement effective compensation plans. Sales managers can easily access, explore, and analyze their team’s performance and quota attainment in just a few clicks and quickly determine the top performers.

Going beyond data discovery, sales managers can utilize advanced and predictive analytics, including R, to identify possible incentive improvements and ensure top performers are compensated accordingly.
The challenge
Sales managers have to go through the tedious process of planning territory assignments and setting realistic, targeted quotas for sales reps.

The solution
With MicroStrategy, sales managers can use data discovery applications to optimize quota plans and re-align territory assignments to keep sales reps motivated and ensure the company meets their revenue goals.

Leveraging data directly from Salesforce.com and other systems, managers can use sophisticated predictive analytics to analyze historical sales data, quota figures, buying history for named accounts, market trends, and more, to make more accurate sales forecasts and better position sales teams for the next quarter or year. Sales managers can then appropriately distribute quotas by determining the potential of each territory. With realistic sales quotas based on accurate territory evaluation, sales reps will be more motivated to reach their objectives.

Additionally, sales managers can use the application to perform what-if analysis to optimize territory assignments and see the potential impact of adding resources to a given territory. With visual data discovery, threshold-based markers make it easy for sales managers to identify territories that need more attention.
USHER/SECURITY APPLICATION:
SALES REP ACTIVITY

The challenge
Many sales organizations struggle with a lack of visibility into employee behavior and resource usage across the enterprise. Often, this “identity intelligence” data is stored in disparate systems, or simply not gathered at all. Without a holistic view of sales activity and performance, it’s harder for organizations to know which sales tools to deploy, which employees are performing best, and how they can better manage each employee.

The solution
Usher Professional helps organizations harness the power of identity intelligence by providing a powerful analytics platform, an out-of-the-box mobile productivity application, and tools to easily monitor activity and instantly communicate with users globally. Tapping into access and user activity data, it empowers sales executives with granular information about resource utilization and sales rep engagement. At a glance, sales executives can quickly locate all sales reps in a specific region on a map and can re-allocate resources based on workload, geography, and any other challenges that arise. With such a simple way to manage sales teams, managers can more effectively support the performance of every employee and build a more productive organization.

Gain visibility into sales rep locations and productivity across the organization.

Interactive maps displaying identity and access data
Instantly identify sales reps in a particular region and communicate with them
Instant communication with users via push notification, text, phone, or email

Help boost sales productivity by using Usher data to optimize resource usage and improve sales processes

Monitor the sales reps in each region and the different applications they use to close a deal
Custom report of user and resource activity

Gain visibility into sales rep locations and productivity across the organization.

Interactive maps displaying identity and access data
Instantly identify sales reps in a particular region and communicate with them
Instant communication with users via push notification, text, phone, or email

Help boost sales productivity by using Usher data to optimize resource usage and improve sales processes

Monitor the sales reps in each region and the different applications they use to close a deal
Custom report of user and resource activity
Leverage big data analytics to help anticipate and identify potential opportunities

Harness historical data to make better, more informed pipeline forecasts

Connect to large volumes of data—both structured and unstructured—to gain better insights into the sales pipeline

With big data, manage and analyze data to produce meaningful and actionable insights to enhance sales effectiveness

The challenge

Many sales reps feel their company has missed opportunities due to ineffective utilization of internal, external, and social data about prospects.

The solution

MicroStrategy’s big data capabilities enable organizations to tap into vast stores of information across all their business channels so they can enhance customer segmentation and hone prospecting efforts. Using powerful analytics, sales professionals can analyze new streams of information—including data from blogs, Facebook, Twitter, and LinkedIn, etc.—in conjunction with corporate CRM systems and customer directories. With the ability to visualize unstructured social media data alongside corporate data, business development teams can more effectively identify leads and build a stronger sales pipeline.

Sales teams can easily connect to terabytes, even petabytes, of data stored in big data sources like Hadoop, seamlessly blend with other data sources, and perform predictive analytics in order to make more accurate pipeline forecasts.
ANALYTICS APPLICATION:
PROSPECT ANALYSIS

The challenge
Prospecting is often considered the most difficult stage of a sales cycle, as it’s difficult to target and engage with the right prospects. Valuable sales time is often wasted on unproductive prospecting.

The solution
With MicroStrategy, sales professionals can drill down into their win-loss data to learn more about the buying trends of target personas to see where their message is resonating. With greater visibility into historic purchasing behavior, sales reps can better identify which prospects are likely to convert and shift their focus to the most promising opportunities.

MicroStrategy applications empower sales managers and reps to visualize ever-changing pipelines, quotas, and won/lost deals, so they can make better decisions to ensure revenue growth. Using these tools, sales professionals can be more proactive — and successful — when acquiring and retaining business.

Analyze win-loss data to better understand buying trends and give sales teams the information they need to identify and focus on the most promising opportunities.

Drill into win-loss data to arm sales teams with relevant information on which leads to go after
Determine a systematic, analytical approach to understanding why deals were lost
Get more visibility into historic purchasing behavior for the customer
Focus attention to the most promising opportunities
MOBILE APPLICATION: CUSTOMER INSIGHTS

Identify underperforming accounts and drill down to investigate the contributing issues

Analyze data such as market share to ensure sales reps are maximizing opportunities in accounts with the highest potential

Gain a holistic view of customers, from communication records, to open or resolved issues, to account-specific needs.

The challenge

Traditional sales and CRM systems only provide a fraction of the capabilities demanded by modern sales organizations. They are not equipped to handle the demands of a mobile sales team, and struggle to provide the type of in-depth insight into individual customers or prospects that salespeople need to be effective.

The solution

MicroStrategy helps sales organizations effectively utilize customer insights to acquire new customers, retain existing ones, and maximize customer lifetime value.

Armed with mobile sales enablement apps, sales reps can vastly improve interactions with customers and prospects by accessing and sharing personalized information on demand. Information-rich apps provide sales representatives with the ability to quickly view their entire book of business and analyze real-time account information related to quotes, buying patterns, demographics, products, regions, and more. Our software enables sales reps to gain a holistic view of customers, from communication records, to open and resolved issues, to account-specific needs. Armed with customer insight, sales reps are empowered to present more compelling offers, easily identify upsell or cross-sell opportunities, and have spontaneous conversations with their accounts that help to drive profitability.
The challenge

To establish recurring revenue streams from existing customers, sales managers need tools to increase the availability of customer data. With better insight, they can improve the customer experience, manage customer expectations, identify competitors on each account, and discover new opportunities.

The solution

For many companies, a large portion of their revenue and profits come from existing customers. That’s why investing time and effort in existing accounts to ensure recurring revenue is a critical part of the sales process.

MicroStrategy gives sales teams the ability to dig deeper into customer data to determine opportunities for future expansion in accounts and forecast the probability of recurring revenue. Sales teams can drill into the data to identify and address renewal revenue challenges and employ best practices to achieve revenue growth and customer retention.

Give sales reps and managers the ability to visualize customer health analytics, so they can identity at-risk accounts and increase efforts to protect and maintain them.
Present relevant and up-to-date materials to improve interactions with customers and prospects.

Access a full library of rich multimedia on mobile – sales presentations, brochures, competitive information, and training videos.

The challenge
Many B2B prospects and customers say that sales teams are not prepared for their first meeting. Limited mobile access to up-to-date content such as training videos, sales presentations, and marketing collateral are major challenges for many sales professionals.

The solution
MicroStrategy empowers companies with mobile sales enablement solutions that give sales professionals everything they need to drive meaningful conversations with their customers. These mobile apps integrate data from a wide range of sources and give sales reps seamless, on-the-go access to everything they need to make the most of their meetings.

Armed with mobile sales enablement apps on tablets or smartphones, sales reps can vastly improve interactions with customers and prospects. These apps give reps the ability to access and share the latest multimedia content such as sales presentations and marketing collateral. By leveraging training videos, industry research, and competitive intelligence, reps can better prepare for meetings, present more compelling offers, and more appropriately respond to client questions.

Integrate data from a wide range of sources and enable sales reps to instantly access training videos, sales presentations, marketing collateral, and more.
Help sales people streamline processes and perform quick administrative tasks on the go with write-back to critical sales systems.

**The challenge**
Sales people spend too much of their time completing administrative tasks. The hours devoted to these tasks is time away from actually selling.

**The solution**
MicroStrategy Mobile apps support offline data access and transaction services, so sales people never have to wait until the end of the day to catch up on their administrative tasks. On-the-go processing of mobile transactions lets sales reps update account information and forecasts, create sales quotes, and log meeting activities, regardless of internet connectivity. That means that sales reps can focus their energy on closing business instead of completing administrative work.

Sales teams can work smarter and more efficiently with the ability to access and update critical opportunity information and create quotes on the road. That leads to empowered sales people, more sales, and happy customers.
MOBILE APPLICATION: 
SALES PRODUCTIVITY

The challenge
Sales reps spend much of their time in the field meeting with customers and prospects. Often, their accounts’ schedules change and meetings get cancelled at the last minute. These scheduling changes can significantly impact the productivity of sales reps.

The solution
MicroStrategy sales productivity apps can completely change the way sales people work. These apps give sales teams the ability to visualize ongoing field activity, so they can more effectively manage workflows and improve forecasting accuracy and performance. With these tools, sales professionals can have instant access, while online or offline, to the information they need to prepare for meetings and close deals. That means if a customer has a question during a meeting, the answer is just a tap away.

With data at their fingertips, sales reps can be more responsive to changing schedules. When a meeting gets cancelled at the last minute, a salesperson can quickly identify another prospect or customer to call during that time. And with the ability to access and write back to critical information systems, sales people can update opportunity information or forecasts, create sales quotes, log meeting activities, and more — all from the field. They never have to wait until the end of the day to catch up on administrative tasks.

Support agile processes and accommodate rapidly changing schedules by giving sales people the ability to visualize ongoing field activity and write back to critical systems.
The challenge

Historically, global organizations have used access cards, passwords, and hardware tokens to store employee identities and grant access to secure systems. However, these are difficult to use, issue, manage, and revoke—and often create barriers for salespeople that inhibit productivity. To be successful, sales reps need to be able to seamlessly access critical systems, wherever they are, so they can focus their efforts on engaging customers and closing deals.

The solution

MicroStrategy Usher delivers powerful analytical and mobile sales enablement solutions that help sales reps work effectively and efficiently in the field. Any employee can use a digital badge on their smartphone to access corporate VPNs, web and mobile applications, facilities, and more. Usher integrates data from a wide range of sources and gives sales professionals seamless, on-the-go access to information and analytics about customers, accounts, competitors, and products. With secure, easy access to any resource, sales reps can focus on driving relevant discussions with their customers to close business.

Provide sales reps with faster access to all applications by replacing traditional passwords with an employee badge delivered via a location-aware smartphone app.

Unlock workstations /enterprise applications

Timekeeping

Frictionless remote access to VPN and MicroStrategy applications

Access to sales/warehouse inventory

Entrance to facilities/garage

Additional services:

Access to sensitive digital and physical assets

Personalized messages to colleagues

Seamless access into sales applications to obtain key customer/prospect data
Customer case studies

Learn how our customers are using MicroStrategy to digitally transform their business.
Autotrader has a sales force of approximately 1,000 Advertising Consultants (AC) that interact on a daily basis with auto dealers throughout the United States. Many hours used to be spent each day by the ACs gathering information to prepare for meetings and presentations. Armed with spreadsheet printouts and their laptop, the AC would meet with dealers. Even with extensive preparation, the AC could not be prepared for every possible request posed by a dealer and often they would be asked questions that required additional research. In order to answer the dealers' questions, the meeting would have to stop so that the AC could start up their laptop and research the answer. This time delay to gather the necessary information could cost the AC an opportunity.

Now, with their MicroStrategy iPad application called Strategic Account Management Process (AMP), the information ACs need is at their fingertips and they can instantly respond to questions posed, making effective use of time spent with the customer. AMP not only provides detailed information in an intuitive manner, it also frees up ACs from the time they previously spent preparing for meetings and gives them more time to work on additional opportunities.

The iPad has become an indispensable tool for the ACs. They can see their book of business, instantly see how they are trending for the month and view how they are performing. Also, they can view their information whether they are connected to the Internet or not.

“One of the things we measure as the value of the platform that we enable with MicroStrategy is the usage from our customers (dealers and sales force) and the usage of the platform has grown 40 times from 4,500 requests weekly to 175,000 requests weekly. This is big success for us and MicroStrategy is a big part of this success,” said Scott Salter. Autotrader has received very positive feedback from their sales force. The most frequent comment is that this app (AMP) saves them time and gives them a more professional and polished look. They are also able to quickly respond to questions posed.
Ceva Santé Animale built a sales enablement app using MicroStrategy, which aggregates CRM, ERP and sales data, and makes that information available to sales reps both online and offline. Ceva's Chief Information Officer, Francois Tricot said, “Our sales reps only have a short 15 minutes with their clients and they need to use all this time for their visit; they can’t waste time waiting for technology or information. The MicroStrategy sales app is very easy to use and provides quick access to all the data they need to customize a conversation with a client, even if they don’t have network connectivity. Sales reps don’t like having to go back at the end of the day and update the CRM tool; they want a tool that helps them perform their job throughout the day. Using the app, I expect that the sales reps will be able to sell more.”

Tricot adds, “The MicroStrategy app also helps sales reps to focus on the right client and to optimize their time. Further, they can re-schedule their days very quickly. They use an integrated Google map view to select a different nearby client to visit in the case that one client cancels a meeting at the last minute.”

It was a real diamond for Ceva to discover that not only was MicroStrategy their BI solution but that MicroStrategy also provides the platform for building Mobile applications. Tricot states, “We can build it once and then run it on several platforms. It makes a big difference.” Ceva was amazed that it only took 3 months from concept to production of their mobile application. This time period included data modeling, creating I-cubes, datasets, reports and the first iteration of the application. Once the app was in production, the initial number of users ramped up to 70 people. In the near term, the number of expected users will rise to 700 people in multiple countries around the world. Ceva’s iPad application uses the MicroStrategy map widget so that sales representatives can schedule their day, see nearby customers, and can quickly make changes when cancellations occur.

PROFILE

Industry Specifics: Pharmaceutical preparation manufacturing
Location: France
Products: Architect, Desktop, Mobile, Server, Web
Core Capabilities: Enterprise Analytics, Mobile Analytics, Mobile Productivity Apps
Weiler Corporation is an industry-leading global manufacturer of surface conditioning solutions. The company works to enhance the longevity of equipment, providing significant value to its customers. As a manufacturer, Weiler offers an array of different industrial cleaning brush types, from power brushes to non-woven abrasives that finish, grind, clean, and surface.

Weiler went from paper-based, old reporting methods to MicroStrategy’s dynamic mobile application platform, where the sales team receives the most up-to-date information in real time. MicroStrategy Mobile improves the productivity of sales meetings because each session is tailored and personalized to the customer’s needs. With greater insight, Weiler sales reps are able to engage channel partners and share meaningful, interactive data about trends in the business.

“Our salespeople use MicroStrategy daily to see their personal dashboards within the opportunity pipeline. They can drill into any dips or spikes across their accounts, products, markets or territories, and react quickly to close gaps,” said Bill Dwyre, the Vice President of Strategic Marketing at Weiler Corporation.

Users can see and analyze pipeline data that’s embedded in Salesforce.com, in the warehouse, or in another system, without having to exit that application and run another separate report. According to Dwyre, “The ability to combine all of our data in our dashboards and reports embedded within Salesforce.com and not have to move data and combine it into one report provides a lot of value for our users.”
Sonic wants to ensure that their executives and management have 24-7 access to daily business tracking metrics via a mobile platform. To achieve mobility, the company is investing heavily in Apple mobile technology, deploying iPads and iPhones to the executive team, regional management, and dealership management.

Sonic Automotive enlisted MicroStrategy to develop and deploy its mobile application, FIRE (Financial and Insurance Reporting Engine), resulting in an increase in car product sales by 38%. Since rolling out FIRE, Sonic Automotive has gone from selling between $800 and $900 in products per car, to nearly $1,100.

The iPad app built for Sonic is focused on an overarching view of business performance that touches on internal sales, service, finance, and insurance as well as external market data. This app is already used every day by top executives and others to keep tabs on the performance of Sonic-owned auto dealerships.

Sonic corporate executives and Regional Vice Presidents rely on the new iPad app daily to evaluate sales performance at its 100+ dealerships in 26 major U.S. metropolitan markets. Executives, including the VP of Operations, CFO, President, CIO, SVP/Controller, and VP of Corporate Accounting, leverage the app to analyze daily operating costs and month-to-date results compared to forecasts and previous months.

The app provides a scorecard for each dealership with insight into sales effectiveness across automotive brands, product categories, and geographic regions. It also provides information on each dealership's compliance with corporate Playbooks.

The Sonic Executive Team and Regional Leadership use the iPad app to conduct monthly financial reviews and compare performance against that of other dealerships across regions. With this app, Sonic replaces large binders of spreadsheets and saves significant time by eliminating the need to perform manual analysis of the data.
Founded in 1832, the Trade Publishing division of global learning company Houghton Mifflin Harcourt (HMH Trade), is one of the oldest trade publishers in the United States.

To effectively manage such an extensive list of titles, HMH Trade needs full visibility into all aspects of the publishing lifecycle. From monitoring publicity, to tracking sales and stock levels of key customers, to overseeing warehouse inventory, decision-makers require access to critical information in order to meet the demand for popular titles. Also, the time and costs associated with reprinting and shipping are high, so staying aware of demand while monitoring supply levels is key to achieving the full sales potential of a given title.

HMH Trade uses its MicroStrategy app to equip each employee with easily accessible dashboards and reports. With these tools, HMH Trade executives monitor product line performance against prior year actuals and current year budgets. They also review daily updates of top selling titles and customers, as well as incoming business for the current month and year.

The HMH Trade management team uses its MicroStrategy application ‘INsight’ to navigate unstructured data and gain a comprehensive view of HMH Trade customers, products, sales territories, and more. Account reps monitor progress against their sales goals and drill down into Customer Dashboards, where they can track customers’ orders and identify what top-selling titles their customers have yet to purchase.

Since implementing MicroStrategy, HMH Trade has been able to optimize overall performance by improving the flow of information throughout the organization. Today, HMH Trade has a user community of over 400 employees, 90 of whom access their mobile BI application every day. In 2015, HMH won the prestigious Ventana Research Technology Innovation Leadership Award. HMH earned this recognition for the success of INsight, the MicroStrategy Mobile application that the company uses to help drive efficiency and productivity throughout their enterprise.
Application

With an extensive product portfolio to manage, DeRoyal was challenged to track orders, sales, and production data effectively. Most tracking was done using spreadsheets of one kind or another, supplemented by the occasional homemade system or static, hardcopy report. Those needing information had to ask the data owner to conduct the analysis and create the report. As a result, requests often took days to turn around, if they were answered at all. This left DeRoyal managers to make business decisions that were too often based on old or anecdotal information.

MicroStrategy has helped DeRoyal Industries be more agile and cost effective by offering the following benefits:

- **Superior data analysis.** DeRoyal employees now have immediate access to accurate, timely data. Drawing from a central database, staff can break down sales, orders and production information by product line, individual products, parent customer, and specific customers.

- **Empowered decision-makers.** Access to DeRoyal’s business information is no longer exclusive to the individual who manages the data, and staff no longer has to request data analysis from the data experts. MicroStrategy Cloud empowers employees – from senior management to sales and product marketing – by making the same information directly accessible to everyone.

- **Enhanced mobility.** A mobile app enables employees to access DeRoyal’s cloud application everywhere they go. Senior executives sitting at the management table conduct data analysis on their tablets, and sales and products representatives access data on their mobile devices while traveling to client sites.

By adopting MicroStrategy in a cloud environment, there was no need to invest in any hardware or infrastructure and the time to value was very fast. DeRoyal also avoided the need to invest in future software upgrades.

PROFILE

**Industry Specifics:** Surgical and medical instrument manufacturing

**Location:** United States

**Products:** Cloud

**Core Capabilities:** Enterprise Analytics, Mobile Analytics, Mobile Productivity Apps, MicroStrategy Cloud
Application

In TrueCar programs, customers submit information such as personal data and vehicle interest and receive dealership pricing and commitments in return. To improve the TrueCar experience for parties in a transaction, the company sought ways to convert as many of these “leads” as possible into buyers for their member dealers. If the close rate went up—that is, if a greater proportion of customers purchased a vehicle from dealers referred by TrueCar—TrueCar would know that their efforts were working.

TrueCar did not want to rely on trial and error methods to improve close rates because prospects were costly to acquire. Instead, the company opted to identify leads that were more likely to result in a purchase based on past and current behavior. However, projecting the close rate based on incoming leads was a time-consuming effort. Timelines and purchasing trends added complexity, which the company dealt with by manually generating applicable data from a statistical model. This level of effort forced TrueCar to generalize its close rate calculations across its 100+ car buying programs, rather than calculate them accurately for each program. Additionally, because of uncertainty in recent sales activity data, several weeks of purchase history had to accumulate before TrueCar could make a reliable projection. As a result, projections were less accurate and less reliable than the company would have liked, forcing them to settle with a lower ROI.

Supported by MicroStrategy, TrueCar created a business analytics application with a “plug-in” function based on R, an open source programming language widely used for statistical computing. With the plug-in, users could create custom functions that executed automatically when running a MicroStrategy report. Now TrueCar can project close rates against a variety of factors, such as car brands, day of week or month, geographical location, or specific buying programs. Refreshed information is available via same-day reports and customized dashboards for multiple stakeholders at the company. The improved accuracy and availability of information enables TrueCar to make more effective business decisions that have resulted in better targeted promotions, faster reaction to successful testing variants, and more staff time for strategic initiatives.

PROFILE

Industry Specifics: Automotive pricing and information website

Location: United States

Products: -

Core Capabilities: Enterprise Analytics Platform, Mobile Analytics