

Building a Lead Management System to Improve Workflow and Efficiency

CASE STUDY

Customer: A leading provider of lead generation and database services

Size: 30 employees

Region: USA

Industry: Marketing Technology

Profile: A marketing technology firm that focuses on lead generation, demand generation, content syndication, big data, online marketing, and entrepreneurship.

Services: Custom application development

Business Need

One of the primary functions of the client is demand generation, so they have amassed a database of several million contacts. They use this database for their marketing services, which includes promoting a client's content as needed until the campaign's lead requirement is fulfilled. The client has dozens of active paid campaigns running simultaneously for different clients – making the organization and efficiency of their contact databases a top priority.

In order to manage their lead contacts they used a hosted solution from another provider. In this solution they could import contacts with each contact characterized by either a standard or custom field. The data was searched via queries and users could export records as needed. The solution primarily served as a data dictionary for importing, query building, exporting, and reporting functions.

The solution however, had some shortcomings that the client was looking to circumvent with a new data management system. The primary issues with their previous provider was the dependence on a subscription-based solution, inadequate control over the database of contacts, a primitive user-interface, a lack of customizability, and slow query execution.

In order to provide the best possible services to their clientele, the client needed a reliable and innovative data solution that allowed them full access to all of their contacts. The reliance on a subscription-based solution was cumbersome, creating the need for a better data management solution to provide them with more independence. Therefore, the client needed a more advanced solution to help them maintain their reputation and standing in the marketing technology industry.

Solution and Approach

Using SQL Server 2014, Synoptek built an innovative lead management system for the client. This system has the capability to handle millions of contacts with ease, providing increased support and functionality over the client's previous contact database, as well as the ability to migrate contacts from their previous solution to the new system.

The leads management system allows users to import millions of contacts' data and details while data validation and business rules are performed. An interface was created for the ability to build extensive and complex queries using various fields and filter criteria, generate reports on queried data, and provide up-to date information via an innovative dashboard. In addition, the system has an upgraded UI with enhanced navigational features like drag and drop capabilities and collapsible sections.

They also has two smaller companies running under them: One connects marketers with buyers to accelerate the business solutions and technology sales process, focusing on lead generation and providing data to clients, the other provides demand generation, content marketing, and data products for providers of healthcare technology, medical devices, pharmaceuticals, medical education, and other healthcare industries.

While these are two unique businesses, they both operate under the client and their data needs frequently overlap. Taking the needs of the two smaller companies of the client into consideration, Synoptek built a combined solution for both, allowing for users to easily navigate between databases as necessary while still keeping information separate. This functionality was a key requirement for the new leads management system.

Overall, the primary functions of the new leads management system were:

- Importing contacts from various sources while maintaining business and validation rules
- A data dictionary showing all available fields of information for selected contacts
- A query builder and execution function
- Ability to export lists of contacts in various formats
- Updating contact data with information provided from ESP providers
- User management, audit trail, field management, migration, and dashboard functions

When importing contacts several business and validation checks are automatically performed including: checking email addresses for duplicates, updating old information with new contact details, address validations (country, state, and zip code), phone and fax number validation, and email syntax validations.

All of these capabilities were essential to the client's primary business functions and worked to streamline numerous processes that were previously operating under an obsolete system. The lead management system provided a comprehensive solution to numerous troubles that the client was having under their current database system, enabling them to cut costs and increase efficiency.

Business Results

With the sheer number of contacts, clients, and campaigns that the client manages every day, they needed a robust data solution that could live up to their reputation. As a result, Synoptek provided a state-of-the-art leads management system to streamline all of their data needs.

The client no longer needs to work with a troublesome user interface or rely on a subscription based tool – they can manage their entire contact database by using the new leads management system.

This solution empowers the client and gives them increased capabilities that were not possible when using their old data management system.



Overall, this comprehensive solution included numerous functions that **improved workflows** within the organization and simultaneously **improved their efficiency** while **reducing overhead costs**. The client can now manage their data in a way that enhances and aligns with their business strategies and goals.

About Synoptek

Synoptek is a global systems integrator and managed IT services provider, offering comprehensive IT management and consultancy services to organizations worldwide. The company works in partnership with clients of all sizes – from mid-market to Fortune 100, and for over two decades, its focus has been to provide maximum business value to its clients, by enabling them to grow their businesses, manage risk and compliance, and increase their competitive position. Synoptek is committed to delivering improved business results and unmatched service to every client, every time.



19520 Jamboree Road #110 Irvine, CA 92612

888.796.6783

www.synoptek.com

salesinquiries@synoptek.com

