



Industry: Service Industry, Oil and Natural Gas

Technology: SharePoint Online, Power BI

Country: USA

Client Profile

The client is a leading petroleum and petrochemical service based company located in the USA. It can perform a wide range of analyses on a multitude of products including biofuel, petroleum, petrochemical, and agricultural commodities. With over 5000 staff and 250 salespeople across its 11 global offices, the company aimed to streamline the marketing and sales tasks using a digital platform and hence approached KCS for that.

Challenges

As the organization was using an excel sheet for document creation and management, the entire marketing management system was chaotic. While navigating through the business marketing and sales scenario we encountered many challenges that are:

- The current document management process was chaotic and scrappy.
- The marketing team was facing difficulty in managing and maintaining client calls and schedule due to its manual nature.
- A huge pile of marketing collaterals, deals, presentations, and other details residing in individual systems and shared drives.
- The use of a manual system encouraged data de-duplication.
- As the reports were maintained in an excel sheet, it encouraged dependency on a single person maintaining it.
- It was challenging to extract the historic data from the manual database.
- There was a dearth of a common platform where the marketing and sales team can collaborate and come on the same page.
- Searching for a document from these disparate sources was tedious, time-consuming, and at times fruitless.
- The entire system was based on email.
- The entire process of data management was time-consuming.
- It was challenging to convince the user group of the sales and marketing team on the benefits of this combined platform and get their help in migrating their digital assets onto the new platform.

Solution

To address these challenges, KCS was tasked with finding a solution that would be quickly deployed, versatile, and adaptable to consume data from multiple internal systems. Besides, the solution had to integrate with the company's current system. Other specifications included the ability to add and store documents, thus making it easy for the team to locate information in real-time. Here is a list of solutions that we provided to the company.

- We developed an end-to-end solution in SharePoint Online that helped in bringing solutions online quickly while standardizing the look and feel across the site using common site templates for information sharing and collaboration.
- We used customized SharePoint solutions through which the documents required for order entry and processing were easily customizable and adaptable for simplified order management.
- Integration of the software with the company's other support systems, while complex, reduced data entry, minimized data repetition, and improved data quality.
- With SharePoint Framework (SPFx) that provided the flexibility of customization for modern lists, libraries, and pages which enhance end-user as well as developer experience.
- For reporting, we used the Power BI solution.

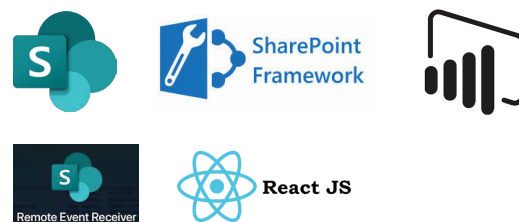
KCS Approach

The client with almost 5000 workforces wanted to implement an easy solution for the sales team of almost 250 for reporting and management purposes. Initially, it was tough for us to convince the team for the solution, but gradually they accepted it and now have fully adopted it in their daily routine. Using the latest SharePoint tools like SharePoint Online, SPFx, Customized SharePoint, and Power BI solution, we provided an intuitive client management software to the organization. It enabled the dynamic reporting system that made the entire client reporting and management process easy and cost-saving. It's been more than six months that the marketing team is using the client management software developed by KCS.

Outcome

- The solution proved to be a highly cost-effective and efficient way to manage the information.
- The excess space used by individual shared drives and servers could now be freed up for other forms of unique content.
- The data retrieval and consumption became effortless with familiar taxonomy implementation.
- Our approach helped collaborate in the search to promote an effective information transfer. It's been now almost a year that the company is using the solution and is highly satisfied with it.
- Now there is no dependency on processing or managing the marketing data.
- The sales and marketing team has now accepted the solution and identifying the challenges in the previous system.
- The marketing team can now process the data even from the client site, and there is no dependency on a single person.
- The team can get real-time information about any marketing or sales lead.

Tech Stack



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