

# REVENUE CYCLE VISIBILITY

How IT Brings Strategic Intelligence to Sales and Marketing



Eagle Creek Software Services  
Whitepaper



# Revenue Cycle Visibility:

## How IT Brings Strategic Intelligence to Sales and Marketing

Today's IT leaders are focused on increasing the strategic value they bring to their enterprises. One way they accomplish this objective is by providing relevant insights and actionable information to executive decision-makers. By providing a single source of truth to their colleagues, they enable executives to make more effective decisions -- decisions that drive profitable growth.

However, organizations like yours are now hampered by a proliferation of cloud-based apps and disparate data sources. The specter of Shadow IT, where departments and business lines purchase and deploy applications on their own, has made it increasingly difficult to provide true business intelligence across organizational boundaries. Ironically, Software as a Service is contributing to a new wave of organizational fragmentation. IT leaders, in turn, are ever more challenged to provide meaningful intelligence and reporting to executive decision-makers.

This is particularly true in the realm of marketing and sales where executives are now struggling to obtain critical information that spans the customer revenue cycle.

Marketing executives are under pressure to demonstrate their impact on opportunity development and sales pipelines. Lacking reports on this matter, they are unable to refine their marketing investments or prove their impact on revenue. Sales leaders, meantime, are frustrated by a lack of visibility into upstream marketing activity that undermines their ability to manage lead flow downstream. The mere existence of automation tools does not change the reality that large pools of data can create pools of confusion. More data doesn't necessarily translate into better decisions.

In the absence of visibility, both marketing and sales executives (and their respective teams) are unable to perform at their best. Worse, they are exposed and vulnerable in an era of increasing accountability.

The question is whether an IT leader can address these vital concerns. To do so, a reliable and effective solution that delivers heightened visibility into the revenue cycle will be needed.

### Backdrop: Silos of SaaS and the Unmet Promise of CRM



When Customer Relationship Management (CRM) emerged as a software category more than a decade ago, there was a great deal of attention focused on providing a "360° view" of the customer. One aspect of this vision was that sales and marketing executives should be able to actively share data and reports that enhance investment, performance and forecasting.

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“Many organizations still view CRM as a technology deployment project. CRM program and project leaders must understand the importance of viewing CRM as business strategy, rather than a technology strategy.”<sup>2</sup>

**Gartner.**

Source:  
The Eight Building Blocks of  
CRM: Overview, Ed Thompson,  
14 February 2013

This is a problem that on-premise, client-server, software firms such as Oracle Siebel were then trying to address. They rolled out expansive software suites to address a far-reaching set of front office problems (encompassing sales, marketing, service, and support). However, client-server apps were difficult to implement and integrate, making them exceedingly complex and expensive. Additionally, the organizational change and cultural commitment needed to ensure these solutions were properly deployed and implemented often never happened.

So when cloud-based apps emerged, line of business leaders were anxious to adopt them. Accessible with a browser and obtainable with a credit card, Software as a Service transformed the world of apps.

Now organizations are experiencing a new problem: Silos of SaaS. Sales and marketing professionals may now have their own, dedicated, online productivity apps. But data sources have become more disparate and fragmented, not less so. As a result, a single, unified, “customer view” is increasingly elusive. Organizations requiring that single view are faced with the choice between recreating the overall customer database and leveraging an analytical tool that provides that single view.

Without a Master Data Management plan, organizations may miss out on what Gartner calls “the basis for building and maintaining an enduring, accurate, timely and complete single view of the customer that can be shared across channels, processes, business units and partners.”<sup>1</sup>

Not surprisingly, marketing and sales executives are struggling to obtain the intelligence they need to meet their objectives. And, as demands and expectations inevitably increase, the pain these executives experience has been exacerbated by their lack of insight and visibility.

This explains the growing demand for a 360° view that surmounts conventional silos. It's a return to the unmet promise of CRM -- a promise that now demands fulfillment.

Indeed, this 360° challenge extends to business strategy -- bringing new levels of urgency to this emerging IT imperative. As Gartner indicates in The Eight Building Blocks of CRM, “Many organizations still view CRM as a technology deployment project. CRM program and project leaders must understand the importance of viewing CRM as business strategy, rather than a technology strategy.”<sup>2</sup>

Gartner reminds us that, “Customers do not think in terms of the fragmented departmental processes of an organization. Their processes often start long before engaging with the organization, finish long after and may involve other organizations. Moreover, when they interact with an organization, they may do so across multiple departments and channels.”<sup>3</sup>

The ability to orchestrate a consistently compelling buyer experience will be a critical component of your organization’s differentiation, especially in an environment where buyers increasingly view their relationships with vendors and suppliers as transactional, not strategic.

As a result, IT leaders are under increased pressure to transcend silos of automation and provide visibility into the revenue cycle -- enabling sales and marketing executives to drive growth, obtain a superior return on their investments, and provide an exceptional experience to customers.



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## Breakdown: Confronting the Fog of CRM

Due to the limitations of today's fragmented marketing and sales automation systems, there are a series of key business challenges that are going unaddressed. Call it the Fog of CRM. The absence of visibility into customer-focused data is undermining performance and putting careers at risk. While united in their dissatisfaction with the CRM status quo, different executives are experiencing different concerns. All of these leaders are challenged in some important way:

**IT leaders are challenged to provide strategic value by providing actionable intelligence that supports revenue growth initiatives.**



In an increasingly decentralized and cloud-based environment, the potential responsibility and relevancy of an IT department is greater than ever.

Business decision makers are hungrier than ever for insights. They are competing on analytics and increasingly data-driven. Under the circumstances, IT is uniquely positioned to deliver strategic business value. By providing an expansive and actionable view of key business processes, IT enables leaders throughout the enterprise to perform at superior levels.

And yet, IT is presently struggling to provide a unified view of data. IT leaders are challenged to provide a single source of truth – a problem that has become ever more difficult as data sources become ever more disparate. One area that is particularly difficult to support in terms of actionable, business intelligence is the revenue generation process. This is the flow of actions, activities, and initiatives that is critical to executives in both marketing and sales.

**Marketing leaders are challenged to demonstrate the impact of their activities and achieve a strong return on marketing investments.**



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With a large number of leads generated through activities such as paid search and content syndication, marketing organizations struggle to track, clarify and demonstrate the impact of their investments on sales pipelines.

They are unable to drop thousands (or tens of thousands) of early-stage leads generated through Google AdWords into a sales force automation systems. And so they are unable to document the full impact of their efforts. As a result, they are vulnerable in an era of increasing accountability. They are prone to unjustified blame-shifting when sales targets aren't met. And even when sales targets are met, they are unable to claim credit for their contributions to sales performance.

More significantly, they are unable to refine and optimize their marketing investments because they can't close the loop between upstream marketing activity and downstream opportunity and pipeline development. They cannot perform appropriate attribution analyses that would clarify which campaigns or messages produce which results. Without feedback and visibility, they simply lack clarity.

**Sales leaders are challenged to maintain a predictable lead flow and deploy their people optimally.**



Lacking visibility into lead generation activities of the marketing organization upstream, sales leaders are prone to over-staff or under-staff their sales efforts. They are vulnerable to the phenomenon of feast or famine. Unable to gauge lead flow, they are unprepared to effectively manage it.

Instead, they are dependent on marketing organizations to pass leads to the sales organization at their own pace and discretion. Rather than taking actions that might accelerate a sales cycle and escalate the qualification of a lead, sales organizations must passively wait for leads to be handed off – even when they have sales team members that are eager to obtain more leads (or more qualified leads).

It's a suboptimal state. Sales needs to be able to reassign leads and opportunities to the right sales people for rapid and appropriate response. If the prospect is not in the sales force automation system, sales has no way to act on a time-sensitive lead or trigger the auto-assignment as to who should own that prospect. It has no way to escalate the qualification of a lead -- or prioritize prospects that might deserve more immediate attention than they are currently receiving.

Given the demands you face, you understand the need to provide strategic value within your organization. And it's clear that critical business value could be delivered to both marketing and sales executives by giving them more a transparent and real-time view of



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the revenue generation process. It's a pressing issue these executives face -- even if they struggle to articulate it.

By enabling these executives to meet their respective objectives in a more effective way, you help them collaboratively drive profitable growth -- something the entire enterprise seeks.

## Breakthrough: Rolling Out Revenue Cycle Visibility

To drive revenue growth and meet the objectives of today's sales and marketing executives, IT leaders now must roll out solutions that provide Revenue Cycle Visibility.

Such solutions give marketing leaders full visibility into their impact on sales pipeline downstream, while giving sales leaders full visibility into lead generation patterns and activities upstream.

What's the impact?

**Impact on Marketing:** Revenue Cycle Visibility enables marketing to clearly demonstrate the results of marketing investments. Early stage leads that are stored outside a sales automation database can be paired with records in that database to document the influence of a marketing action on sales pipeline development.

Marketing, as a result, gets full credit for the influence of its initiatives. But the marketing organization also learns -- with much greater precision -- how various campaigns perform and which ones deserve still greater investment. Insights of this kind enhance return on marketing investment (ROMI).

**Impact on Sales:** Revenue Cycle Visibility, meantime, enables sales to more decisively staff up in relation to upstream lead activity -- early indicators of marketing's coming effect on sales opportunities and pipeline. With upstream visibility, sales leaders can enhance the precision of their forecasts, take action to optimize the flow of leads into sales, and more productively deploy limited staff and resources.

Sales, as a result, can dramatically improve its productivity and performance. Upstream visibility also enables the sales organization to work more effectively with marketing to prioritize high value leads, increase the throughput of leads, and accelerate sales cycles.

**Impact on IT:** Such payoffs in marketing and sales results all require a new and expansive window into the revenue cycle. IT leaders must play a pivotal role in providing this visibility.

By introducing Revenue Cycle Visibility solutions that draw data from marketing and sales automation databases, they enable revenue-focused professionals to produce the real-time reports that answer key questions that now go unanswered and unaddressed. You can provide:

- Rich and relevant marketing reports that show direct correspondence between upstream campaigns and downstream pipeline development.
- Geographically-oriented maps that enable sales organizations to appropriately staff up their teams in relation to upstream lead flow.
- Drill-down reports enabling sales to pull leads from a lead queue in a marketing automation system to an opportunity queue in a sales automation system as appropriate.

Such solutions pull data from marketing automation and sales automation systems to provide relevant insights, dynamic reporting and actionable information needed to support superior decisions. By employing Revenue Cycle Visibility, IT leaders infuse their organizations with new levels of strategic value. They enable key decision-makers within



marketing and sales to meet their top objectives. And they enable revenue-focused teams to make smarter decisions and investments.

So this approach may seem inherently attractive. It addresses key objectives faced by leaders in IT, sales, and marketing. But how will you embark on this endeavor? This is a question that may give you pause.

These are advanced solutions that have been implemented through immensely expensive, custom projects in the past -- though these implementations are rare. Given this fact, you may not be in a position to implement such a solution and introduce these powerful new capabilities on your own.

Indeed, IT organizations tend to have limited (or zero) experience implementing solutions that provide full visibility into the revenue cycle. Even IT professionals that have experience with custom implementations are unlikely to have implemented advanced, yet scalable and cost-effective solutions in association with their marketing and sales automation platforms.

Under the circumstances, you are likely to benefit from the expertise and experience of a trusted partner to support your rollout. So what should you look for in a solution implementer?

## Decision Criteria: Choosing a Solution Partner

Here are some proven criteria you should consider as you seek out a solution partner to support you in the design, implementation, and ongoing support of your Revenue Cycle Visibility solution:

- **Depth of expertise.** Look for a partner with deep expertise implementing the "trifecta" of sales automation, marketing automation and business intelligence tools.
- **Length of experience.** Expect your partner to have more than a decade of experience in CRM implementation and be comfortable with the complexities inherent in a global enterprise.
- **Agile development.** Your partner should provide real-time, on-sight, process insights as opposed to bogging you down with inflexible waterfall approaches.
- **Responsiveness and engagement.** Your partner should act as an accessible and engaged extension of your IT organization.
- **Cultural alignment.** Look for a partner that understands and can interpret your business (not just technical) objectives.

Together, such capabilities define a compelling and effective partner. By making the right choice in terms of your service provider/systems integrator, you set the stage to deliver powerful results that elevate your role as a provider of strategic value.



## About Eagle Creek Software Services

Eagle Creek Software Services provides consulting and technical expertise to the Enterprise. The firm focuses on CRM, Information Management (BI) and Applications Development, helping clients increase quality and efficiencies while managing price and risk in software development, deployment, & support.

With over 350 consultants, Eagle Creek Software Services is the largest U.S. based onshore software services company. Eagle Creek is uniquely positioned by combining on site expertise with U.S.-based Technology Centers. The onshore delivery model allows Eagle Creek to achieve consistency, scalability and sustainability in the provisioning of technical and consulting capabilities.

Eagle Creek has expertise in a multitude of industries, and has the experience and know-how to implement, upgrade and maintain enterprise-grade front office technologies, applications and platforms.



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<sup>1</sup>: Gartner, *The Eight Building Blocks of CRM: Data and Information*, Jim Davies, 14 February 2013

<sup>2</sup>: Gartner, *The Eight Building Blocks of CRM: Overview*, Ed Thompson, 14 February 2013

<sup>3</sup>: Gartner, *The Eight Building Blocks of CRM: Processes*, Praveen Sengar, 14 February 2013