



# FootPrints

## Case Study

### Increasing Company Profits with a 100% Web-based Sales Collaboration Solution

PC Mall, Inc. is a \$1.4 billion technology reseller. It operates as a direct marketer of computer hardware, software, peripheral, electronics, and other consumer products and services in the United States. The company represents more than 100,000 different products from companies such as Microsoft, Apple, IBM, Hewlett-Packard, Toshiba and Cisco. PC Mall markets to business customers using relationship-based outbound telemarketing, catalogs, and the Internet ([www.pcmall.com](http://www.pcmall.com)).

#### Overview

##### Industry

- Technology

##### Challenge

- Manage complex pre-sales operations for various market sectors, improve bid desk operation and coordinate sales support centers across multiple geographies

##### Solution

- Numara® FootPrints®
- Numara FootPrints Dynamic SQL Database Link
- Numara FootPrints Change Management

##### Business Application

- Multiple Business Process Management
- Centralized IT Service Desk
- IT Service Management

##### Key Features

- Improved workflow for unearthing sales opportunities
- Duplicating information feature for speeding up the bid creation process
- Database link creating instant, accurate bidding information
- Detailed reports for managing the sales pipeline and improving sales knowledge
- Personnel scheduling features that improve resource allocation
- Multi-project functionality that improves ROI
- Automated change management that speeds up the process

##### Benefits

- Higher profits
- Lower manufacturer pricing
- Improved open-bid win rates
- 94% support approval rating
- Implemented in just days

## **The Challenge: Create a system for real time collaboration across multiple locations for 1200 sales executives and their support groups**

During the past several years, Torrance, CA-based PC Mall has doubled in size, created multiple divisions and subsidiaries, and opened offices in numerous locations, including Orange County, CA; Denver, CO; New Jersey, Milwaukee, Virginia, Montreal, Canada and Manila, Philippines.

Such growth presented significant challenges to the company's sales support operations for small and medium sized businesses (SMBs), enterprise and government organizations, and consumer markets. In a short span, PC Mall increased their sales account executives from 600 to more than 1200, all located across various locations and time zones. During the pre-sales process, these account executives must collaborate with engineers, product specialists, manufacturers, and other support groups.

The challenge for PC Mall was to figure out how to effectively manage support (up to 2,500 unique requests per month) and collaboration in such an increasingly complex sales environment in order to maintain its aggressive pricing model and profit margins.

PC Mall decided that the answer was to establish a virtual sales support center for its sales organization, powered by a centralized, online software solution that would manage and automate all sales support requests, and help all participants involved in the process collaborate via standard web browsers.

The company called this the Sales Resource Center (SRC). The SRC united global sales support resources, including primary call centers in California, Montreal and Manila, as well as support groups in Milwaukee, Wisconsin and the company's headquarters in Torrance, CA. With the SRC foundation in place, PC Mall next needed to find the technology to power the center.

## **The Solution: Implement a 100% web-based solution for a Sales Resource Center and other initiatives with Numara FootPrints**

According to Chris Swadish, Director of Support and Services at PC Mall, after evaluating several software options without success, PC Mall eventually selected Numara FootPrints in April 2005. This web-based service desk solution would serve as the underlying technology platform behind the SRC and several IT-led initiatives, including a centralized IT service desk and a formal change management program.

Swadish said the open architecture, web-based design, customization attributes, and SQL database integration capabilities in Numara FootPrints were the key criteria for his team's choice. After formalizing sales workflow and process requirements, his team fully deployed Numara FootPrints in just a few days. Shortly after, the SRC was launched.

## **Key Features: Better access to data through 100% web based collaboration Improved workflow for unearthing sales opportunities**

Numara FootPrints has improved collaboration among various work groups and geographic locations. This enhanced collaboration helps sales operations unearth many sales opportunities that may have been overlooked in the past.

"A sales representative may go to an HP product specialist for help with the HP portion of a bid, which may have been for servers, for example," said Swadish. "The server expert would then put together a package for the sales representative. Before Numara FootPrints, our storage, licensing, and pricing specialists were not looking at the same deals, so we were not maximizing opportunities."

"Today, with Numara FootPrints, we are automating workflow, and using auto-routing capabilities to automatically contact individuals that should be looking at a specific opportunity to maximize it, and add customer value."

## **Duplicating information feature for speeding up the bid creation process**

Swadish notes that PC Mall's Bid Desk is a steadily improving area thanks to Numara FootPrints. "On the pre-sales side, Numara FootPrints copies a version of a request for pricing (RFP) over to the bid desk immediately upon a sales representative submitting the bid for configuration. If it meets certain criteria, Numara FootPrints sends an instant notification, telling us that this bid should qualify or not qualify for special pricing.

"With Numara FootPrints reports, we can see how well account executives are performing, and track their actions and functions within SRC. More specifically, we can discover instantly if we are meeting expectations and if we are honoring our service-level agreements."

– Chris Swadish,  
Director of Support  
and Services

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The end result is that bid staff are working on a deal well before it's even finalized on the configuration side. This enables them to turn around accurate pricing and configuration details to the sales representative in charge of the deal. Bids are coming back faster, more accurate, and loaded with intelligence that we just didn't have before."

## **Database link creating instant, accurate bidding information**

Using the Dynamic SQL Database Link in Numara FootPrints, PC Mall has been able to notably increase the speed and accuracy of its manufacturer bids within the SRC. All information that account executives need to process a bid with a manufacturer is pre-populated within a Numara FootPrints ticket, including manufacturers' contact information, pricing history, discount level, and more.

For particular product lines, account executives only need to enter a manufacturer part number in a Numara FootPrints ticket. The Dynamic SQL Database Link software then automatically queries the product's database, including all vendor information contained within the company's order management system. With this functionality, sales agents instantly have the information they need to accurately price a bid.

In the past, this was a manual, cut and paste, email-driven process, and one that was extremely slow. "This was something that we were not able to do with our existing tracking solutions or any open source solution alternatives on the market," Swadish said.

## **Detailed reports for managing the sales pipeline and improving sales knowledge**

PC Mall uses Numara FootPrints reporting features extensively to measure performance and track its sales pipeline. "With Numara FootPrints reports, we can see how well account executives are performing, and track their actions and functions within SRC," said Swadish. "More specifically, we can discover instantly if we are meeting expectations and if we are honoring our service-level agreements."

PC Mall also uses automated Numara FootPrints request surveys to conduct follow-up assessments to customers and partners to discover how they are doing in pre-sales engagements.

Beyond performance, PC Mall runs reports within Numara FootPrints to gain sales knowledge. "We run reports to see how well we are trading in the pipeline, where the large opportunities are, how well are they being managed, what is the close rate, how many opportunities we are approving special pricing for or declining, and much more."

## **Personnel scheduling features that improve resource allocation**

With the scheduling capabilities in Numara FootPrints, account executives can see who is available to help them complete a project. This ensures that sales projects are completed more quickly and available resources are used more intelligently.

Numara FootPrints' group assignment features help PC Mall assign sales resources, including account executives, engineers, product champions, and sales managers to specific projects based on skill set, product and vendor knowledge, or other desired attributes. This allows all information to be shared with each member of the group when notable events occur during the lifecycle of the common project.

## **Multi-project functionality that improves ROI**

While its initial use of Numara FootPrints centered around sales support automation, the company found that the central issue-tracking capabilities in Numara FootPrints could deliver concrete benefits to its internal IT support group as well. Additionally, the built-in multi-project functionality allowed PC Mall to create several projects to manage a range of business applications, and increase their total ROI from the solution.

Thus, while they were configuring Numara FootPrints for the SRC, PC Mall also deployed Numara FootPrints to centralize the company's IT service desk. With this in place, PC Mall provides web-based and multi-channel IT service and support to its 2,400 employees located in various locations.

## **Automated change management that speeds up the process**

In addition to using Numara FootPrints to power its SRC and IT service desk, PC Mall also created a project to automate IT Change Management processes. Prior to Numara FootPrints, formal IT change requests at PC Mall were manually processed, thus it would take days or weeks to reach approval.

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Using a dedicated change management project in Numara FootPrints, PC Mall is now able to automatically manage formal change requests from initial submission to final sign off from change sponsor and IT steering committee. The entire change process and executive approval cycle can be completed in a very short period of time, with all parties participating from their desktops.

## **The Results: Improved sales process management, higher profits, and increased sales executive satisfaction**

### **Reduced prices, higher profit margins**

"Numara FootPrints absolutely helps us manage day-to-day sales activity," said Swadish. "Since implementing Numara FootPrints, we have been able to work with vendors and manufacturers to bring down costs and gain an upper hand on special pricing contracts. With Numara FootPrints, we have witnessed very strong growth in profitability, and in particular, per-deal margins within the bid desk has increased."

"Before Numara FootPrints, we had no official bid desk, and our sales staff worked on deals via email, with no way to track performance, growth, problems, etc. Success was essentially a guessing game, but now we are able to tell company executives what product lines are growing, and demonstrate how the margin dollars we are achieving by special pricing and contracts are positively impacting profitability."

### **Sky-high approval ratings**

Numara FootPrints enjoys an approval rating among sales account executives and other Numara FootPrints users at PC Mall exceeding 94%. According to Swadish, typically anything above an 85% is considered good, so this number is extremely encouraging to his executive team.

### **The Future for PC Mall**

Numara FootPrints was so successful powering the SRC and IT Change Management program, PC Mall has plans to use the solution for many additional programs within the company:

- **Sarbanes-Oxley (SOX) Compliance Tracking**

Like all public companies, Sarbanes-Oxley has impacted PC Mall's operating environment. According to Swadish, "Numara FootPrints is perfect for SOX. It can do everything in this area, including managing and creating un-editable audit trails for SOX-affected business processes, including IT change tracking and HR hire-in programs."

- **HR Process Automation**

Through this special project, PC Mall's HR department will utilize Numara FootPrints to automate hire-in procedures, including auto-routing IT requests, security checks, and other workflow parameters.

- **Exciting new uses planned**

Other Numara FootPrints projects under development at PC Mall include a professional services project, an eService portal for customers, purchasing support automation, integration with Microsoft® Outlook, and deeper Numara FootPrints integration with legacy CRM systems. The expanded use of Numara FootPrints to power other projects allows PC Mall to optimize its investment in the software, and achieve additional efficiencies in the future.

## **About Numara Software, Inc.**

Founded in 1991, Numara Software, Inc. (formerly Blue Ocean Software) is a global provider of service desk management solutions for IT help desk and customer support professionals who need to simplify and gain control over their increasingly complex environments. The Numara Software trusted solutions address critical IT and support functions, such as customer service desk, IT help desk, asset management, software patch and deployment, and network monitoring.

With its two flagship products, Numara Track-It! and Numara FootPrints, and more than 50,000 customer sites worldwide, Numara Software is the service desk management leader for small to mid-sized enterprises. To register for a one-on-one guided walkthrough, attend a webinar or download a trial, please call (800) 557-6970 or visit: [www.numarasoftware.com](http://www.numarasoftware.com).