

**Landen Consulting Case Study:  
Turnkey Business Solution for Workflow Automation –  
Requirements Discovery & Development; Interface Design;  
Application Design, Development, Implementation & Support**

*The Challenge:*

The client needed to develop & implement a new reporting solution for its country-wide field sales management force: The territory & market managers did not have a consistent way to manage & monitor relationships with their frontline sales staff - conversations (if they were managed at all) were tracked & communicated via emails, faxes, and unwieldy Excel spreadsheets, with frequent missed communication points and unreliable upward reporting - As a result, senior management did not have a clear picture of the on-the-ground conversations happening with their sales force...

To rectify the situation, executive leadership tasked our client (a sales support division for a leading insurance & financial services company) with developing a new technology system to allow field market-level managers to provide regular activity reports to their senior managers about progress in key business areas, along with specific reports surrounding recruiting activity and processes. The market-level managers typically work remotely, dialing in to the corporate network using a low-bandwidth laptop connection.

Prior to Landen Consulting's involvement, the client was preparing to develop an "automated-yet-manual" solution involving the weekly emailing of thousands of Excel spreadsheets into an elaborate public folder tree, with the folder structure being arranged according to the field reporting structure. This solution would have required additional full-time administrative staff just to manage the continual changes in reporting relationships. In addition, manual manipulation of the report data (in Excel) would have been required for the reports to be usable by senior managers.

The challenge: devise a solution where market-level managers can quickly and efficiently submit their weekly activity reports, and allow senior-level managers to quickly access both high-level summary data and detailed activity reports for their market managers.

*The Solution:*

Our client turned to Landen Consulting, we designed & built a relationship management system that helped enrich the business conversations happening within the sales force, giving leadership the tools needed to improve relationships and business results.

To start, our consultants analyzed how market-level managers typically collect the data needed for the reports. Since these managers were working remotely, we looked at their overall work-day and work-week to determine the most efficient solution (from a technical perspective and a workflow perspective) for submitting the weekly report data.

We then devised a combination offline/online solution which allowed market-level managers to record their data while offline, and then at the end of the week (or whenever desired), they could upload the report data to a central repository. The technical format of the report data was designed for quick upload over a dialup connection, offering a significant improvement over the earlier proposed Excel solution. An auto-update feature was implemented to allow easy upgrades when the business team needed a change to the data capture/reporting requirements.

To enable the senior-level management reports, we performed a thorough analysis of the management hierarchy and field alignments/relationships, in order to determine the optimal reporting views for senior managers. Managers were provided with a robust set of reports that allowed them to quickly slice & dice to get to the desired information, and all reports were exportable to Excel for offline viewing.

As part of the design/build process, we performed several rounds of iterative prototyping & usability testing which examined all of the variations in workflow that could be initiated by end-users, and designed a flexible interface design which enabled business performance without getting in the way of performance. The up-front focus on design allowed for an intuitive interface that allowed users to quickly accomplish the required tasks, with minimal training.

We utilized our strengths in change management and training design to create a training strategy for the new application, and developed the materials to support the implementation (including an animated online training course and a robust job aid/documentation package) and conducted train-the-trainer sessions.

During the project, Landen Consulting's unique strengths in both business and technical areas were called upon: after our business-facing team led the client through the design process, our technology consultants developed and tested the code for the new application, and then implemented and supported the application for an extended period – over time, we partnered with the client's internal technical resources to enable a smooth transition to their internal technology support team.

### ***Our Results:***

The application was delivered successfully and on-time – over 11,000 activity reports were uploaded the first month the system was live, and for the first time, senior leadership had dynamic real-time reporting capability which gave them a picture of the management conversations occurring within their districts. The close partnership between the client's team and Landen Consulting resulted in an application that was so well-targeted to the needs of the end-user groups, that this non-mandated “use it if you like it” application was voluntarily adopted by a majority of the sales management force. In addition, our comprehensive user-experience design effort included a self-administration feature which minimized support costs, and the client estimated that our emphasis on solid user interface design resulted in an extremely intuitive & easy-to-use application which reduced training costs by up to 50%.

### ***For More Information:***

For more information on the services available from Landen Consulting, call us at 847.604.8697, or visit us at [www.landenconsulting.com](http://www.landenconsulting.com).