

How Cisco IT Developed a Sales Web Portal

Web-based sales portal provides central point for sales information, forecasting, and management applications.

Cisco IT Case Study / Business Applications / Web Sales Portal: This case study describes the deployment of an internally developed Web portal that drives sales productivity. The portal includes personalized sales and customer information, forecasting data, and management applications, and is based in part on Cisco products for content and storage networking. The E-Sales portal, developed in partnership by the Cisco IT and Worldwide Sales Productivity teams, uses the robust routing and security capabilities of the Cisco network, a leading-edge enterprise environment that is one of the largest and most complex in the world. Cisco customers can draw from the real-world experience of Cisco's worldwide sales force in this area in order to achieve greater levels of organizational efficiency and effectiveness while building stronger customer relationships.

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– Manny Rivelo, Senior Vice President, Worldwide Field Process and Technical Operations

CHALLENGE

In order to be successful, salespeople need sufficient time to sell, as well as access to complete, current customer information. In an enterprise environment, detailed, high-confidence sales forecasts are essential for planning business strategies and responding to fast-changing market conditions.

For a large enterprise like Cisco Systems®, the challenge of capturing and delivering sales forecasts and bookings data is enormous—the company draws from approximately

12,000 sales employees in more than 300 local offices worldwide, as well as numerous regional and corporate headquarters personnel.

Like many companies, Cisco experienced a sales decline beginning in 2000 that resulted from curtailed corporate spending on technology. To counteract this revenue decline, Cisco executives launched a companywide effort to increase productivity by at least 15 percent. This included a plan to create common, standardized applications and databases within the Cisco sales organization.

At this time, Cisco sales personnel were spending, on average, about 25 percent of their time with customers. The remaining time was spent on ancillary activities such as tracking orders, resolving credit issues, searching the Internet for customer and competitor information, and generating weekly sales forecasts.

The amount of time that salespeople spend actually selling is a significant concern for any business—it has a direct impact on revenue. According to a study conducted by Proudfoot Consulting¹, most salespeople spend only 10 percent of their time on actual selling activity. Although Cisco's 25-percent average selling time was high in comparison, company executives felt that even higher levels were possible.

Slowing sales also increased the importance of having realistic, high-confidence forecasts of pending customer purchases. These forecasts are important to Cisco not only in the planning of marketing and manufacturing activity,

¹ Press release, Proudfoot Consulting, November 10, 2004 (www.proudfootconsulting.com)

but also for meeting Securities and Exchange Commission (SEC) requirements for predictions of future company revenues and earnings.

For the Cisco sales organization, these challenges meant finding new solutions that could address several broad, yet high-impact questions:

- How can we increase the productivity of our field sales force and help them better serve customers?
- How can we increase our confidence in the numbers developed for the weekly, monthly, and quarterly sales forecasts? How can we eliminate overlapping and often incongruent reports produced by multiple information systems?
- How can we create common sales information and forecasting applications that will serve the varied needs of different organizations within the company, while also maintaining a single repository for the underlying data, creating an undisputed “single source of truth”?

It was clear that addressing these questions could deliver significant, fast, and enduring benefits for the company. “We cannot afford these missed opportunities in today’s environment,” says Manny Rivelo, senior vice president, Cisco Worldwide Field Process and Technical Operations.

The planning team identified three drivers for increasing sales productivity—efficiency, effectiveness, and customer intimacy. A new sales management tool was needed to help Cisco salespeople work more efficiently, freeing their time to spend with customers. Salespeople needed to become more effective—they were expending a tremendous amount of time and effort trying to track the high volumes of product and service orders for each customer. In addition, the daily status reports that salespeople used in working with customers did not provide relevant, real-time, personalized customer information (for example, a useful view of order histories and issues) that would help them build customer intimacy.

Improving the Web Process

Previously, Cisco sales personnel were getting information from daily spreadsheets and reports drawn from enterprise-level databases and internal Websites, and distributing this data over e-mail. These spreadsheets contained large amounts of data, much of which was not relevant to individual salespeople. In addition, sending daily e-mail to thousands of Cisco sales employees worldwide consumed significant bandwidth.

Although numerous internal Webpages also presented sales information, absolute usage of Cisco’s sales-related sites was decreasing and the number of sales personnel was increasing. It had become too difficult for a salesperson to quickly find needed information. Factors contributing to this challenge included:

- Lack of standard processes, information, and interfaces—A salesperson had to first look at many Webpages to find relevant information, and then verify that sales were credited properly for commissions, especially for nonstandard deals.
- Outdated bookings reports—Each salesperson received a daily spreadsheet (called an order status report, or OSR) that listed customer orders from the previous day. There was no way to obtain information about current-day orders, or real-time alerts about order changes, equipment returns, or customer credit status.
- Volume of data points—Thousands of customers, each with many active orders and sales opportunities, made the amount of data difficult to transmit, store on a salesperson’s PC, and search for useful information.

Unmanageable Forecasting

Forecasts of future sales were required weekly of each salesperson. This was an integral part of the sales process; it was also time-consuming, nonstandardized, and difficult to manage. Each sales representative entered weekly sales forecasts into a spreadsheet, then e-mailed the spreadsheet to the regional sales manager. The sales manager spent several hours each week consolidating the forecasts from the individual representatives, producing a separate

spreadsheet with a composite forecast that would be submitted to Cisco executives. Added complications resulted from different geographic areas and parts of the sales organization using different forecasting systems and processes, as well as different vocabulary and rules for defining customer opportunities.

“It was extremely difficult to have a high confidence level in the forecast, and to subsequently plan production and marketing strategies to meet expected opportunities,” says Ravelo. “The lack of standard business processes also limited our ability to get a single, accurate source of information, which impacted our confidence in the forecast and the planning ability of the total organization.”

SOLUTION

The Cisco E-Sales initiative addressed the company’s mandate to increase productivity by creating new, Internet-based information sharing tools designed to improve a salesperson’s ability to serve customers. Launched in March 2001, the global E-Sales portal is a collection of sales information and forecasting applications that help salespeople work more efficiently and effectively—in customer interactions and in completing indirect sales tasks. The portal eliminates many of the previous manual processes while integrating—on a single, personalized Webpage—access to all relevant customer sales data and sales applications (Figure 1). The portal has also made it easier for the company to help support sales people by providing clear, relevant data—it gives data providers a single location and a single standard format to use. This information had been pushed to sales people via a variety of Webpages, e-mail, and phone messages; now, it is provided in a way that allows a salesperson to pull the relevant information on demand. Salespeople can specify the technologies, products, markets, customers, and other information that they would like to see on their personalized web portal. Based on tags in all new information posted to the internal Cisco employee web site, only the information each sales person wants to see is made available on their customized web page.

Figure 1. E-Sales Portal Home Page

The screenshot shows the E-Sales Portal Home Page with the following sections:

- Navigation:** HOME, BOOKINGS, DASHBOARD, MY DEVELOPMENT. My Applications dropdown.
- Bookings Reports Table:**

REPORT	PROD	SVC
Non Booked	0	0
kings MTD	1,536	88,086
kings WTD	536	38,086
Backlog	1,038,178	13,282
enue MTD	8,319	237,782
- Booking Options:** Current View: AUSTIN COMMERCIAL, Hierarchy: [Direct].
- My Real-Time Bookings:** NO DATA FOUND FOR DATE: 15-Apr-2003 10:16:30 AM (GMT 0.00) Casablanca, Monrovia.
- My Bookings Attainment Table:**

	Category	Bookings (USD) (000's)	Commit (USD) (000's)	%	Plan (USD) (000's)	%	Commit To-Go (USD) (000's)	Days Left
Week of 13: APR-2003	PROD	N/A	20	N/A	144	N/A	N/A	5
	SVC	N/A	0	N/A	18	N/A	N/A	5
APR-FY03	PROD	268	381	70%	722	37%	113	12
	SVC	1,022	1,010	101%	90	1,136%	0	12
Q3-FY03	PROD	1,045	1,157	90%	1,878	56%	112	12
	SVC	1,140	1,128	101%	235	485%	0	12
FY03	PROD	3,668	3,985	92%	7,430	49%	317	103
	SVC	1,431	1,128	127%	1,317	109%	0	103
- My Alerts:** EOL [2 of 2], Expedite Request [2 of 2], Held Order [2 of 2], Order Released [1 of 1], Ship Date Change [2 of 2].

"Dynamic, Web-based portals such as ours present real-time, business-critical information that directly affects our salesforce's ability to manage their accounts more effectively," says Rivelo.

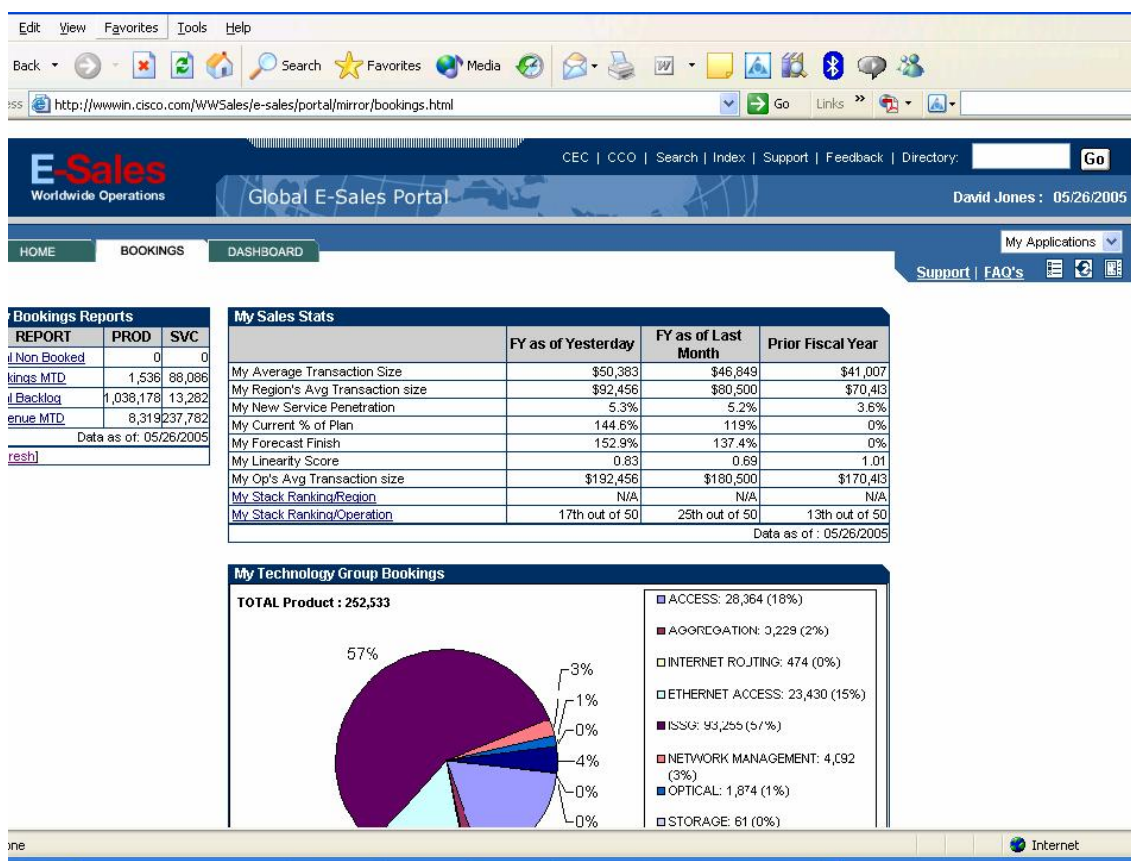
Sales Information and Reporting

The E-Sales portal encompasses a broad and growing set of applications. Individual salespeople can customize the portal to reflect their own business and customer needs, and their own styles and interests.

The **My Bookings Reports** application delivers near-real-time (updated every 15 minutes) information on customer order bookings drawn from Cisco's central order database. This tool shows data according to the user's functional role and allows personalization of the display (Figure 2). Salespeople can see their current order bookings by customer, by technology, or by product, and can see the data in a variety of table or graphic formats. The application provides summary reports; users can also view transaction-level details that are presented according to a standard definition.

Current data on customer purchases is essential for salespeople when meeting with customers, and when tracking their progress against goals and quotas. In addition, regional and global account-focused sales managers can use the bookings data to track team progress and to proactively identify potential quota shortfalls.

Figure 2. Bookings Reports on the E-Sales Portal



The **My News** application provides daily information about customers, market issues, competitor activity, and the latest Cisco sales-related information. By personalizing this application, a salesperson significantly reduces time spent searching Websites and gains easy access to important and relevant information.

Personalized [Customer] Alerts proactively notify account managers of time-sensitive customer information that requires a salesperson's prompt attention, such as order status, warnings of warranty expiration dates, relevant

product issues or promotions, alerts, or end-of-sale announcements (Figure 3). Alerts appear on the salesperson's homepage in the E-Sales portal and also can be sent to a wireless device by a mobile messaging service that connects to the Cisco WAN via a Cisco gateway. With fast information and fast response, the salesperson can reduce the number of product returns and order errors, handle special customer situations effectively, and keep up-to-date with Cisco sales programs.

Figure 3. Customer Alerts on the E-Sales Portal

The screenshot displays the Cisco E-Sales portal interface. A prominent 'My Alerts' pop-up window is overlaid on the main content. The pop-up is titled 'My Alerts' and contains the following sections:

- Order Alerts (4)**
 - Shipped: 41921648 - EDS
 - CFS-Credit Check Pending: 41948876 - QUEST MEDIA SUPPLIES INC
 - ENB-Credit Check Pending: 41941162 - EDS
 - Warranty Expiration: 41779379 QUEST MEDIA SUPPLIES INC USD 3,540
- Account Alerts (1)**
 - P1: ELECTRONIC DATA SYSTEMS
- Other Alerts (3)**
 - Promotion: EUP-207_800 Series Routers Discounts
 - Promotion: EUP-206_Content Networking Partner Lab
 - Promotion: Cisco 1105 Hosting Solution Engine NFR Discount

The background dashboard includes the following sections:

- My Near Real-Time Bookings:** A table with columns for Account, Booked Date, SO#, Channel, Product, Service, and Bill. It lists bookings for NEC BUSINESS NETWORK SOLUTIONS and QUEST MEDIA SUPPLIES INC.
- My Customer News:** A list of news items from various sources like Network Appliance, Inc. and Juniper Networks, Inc.
- My Sales Stats:** A table showing performance metrics like My Average Transaction Size, My New Service Penetration, My Current % of Plan, My Forecast Finish, and My Linearity Ratio.
- My Bookings Attainment:** A table with columns for Category, Bookings, Commit, %, Plan, %, Commit To-Go, and Days Left. It shows attainment data for various periods like Week of 11-MAR-01, MAR-FY01, Q3-FY01, and FY01.

The **Sales Territory** application uses consistent account and geographic data to track the territory assigned to each salesperson. Accurate territory tracking is essential for assigning commissions on completed sales, referencing each salesperson's accounts in the Forecasting and My Alerts applications, and standardizing rules for crediting sales globally and across sales models.

Increased Visibility Through Automated and Opportunity-Based Forecasting

The E-Sales portal also provides access to the forecasting tools used by local account managers and their regional or team managers to enter and track each weekly sales forecast.

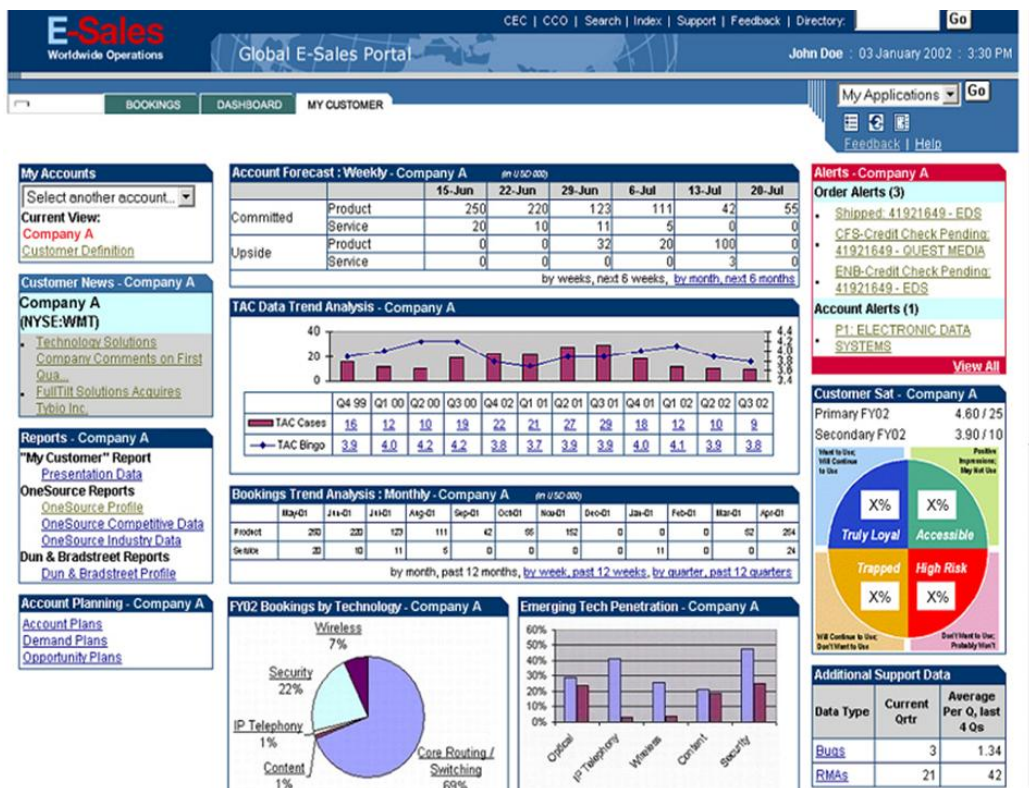
The **E-Sales Forecasting and Opportunity Management** application provides a single place for tracking customer sales opportunities and automating many of the processes for developing Cisco's weekly sales forecast (Figure 4). This application improves productivity throughout the sales organization—much of the forecast is calculated and distributed automatically, from the salesperson's initial entry of a customer opportunity, to a regional manager's review, to a summary report presented to Cisco executives.

Opportunity management features also give product groups and executives visibility into key business data throughout the entire life of a customer sales opportunity. For example, when account managers enter sales opportunities, they must also enter the products and technologies being considered by the customer. This information enables Cisco's business units, manufacturing, and marketing staff to prioritize production according to a more

substantiated forecast of customer demand.

The **Linearity** calculation tracks forecast accuracy by showing cumulative bookings divided by the weekly forecast. Sales managers use the linearity calculation to help salespeople bring in orders more consistently and to forecast more accurately. This calculation also helps the Cisco sales organization track bookings trends over the past 11 months. At the corporate level, tracking the forecast linearity against actual sales enables Cisco to proactively manage resources and inventories.

Figure 4. Customer Information and Forecasting



Enabled by the Cisco Network and Cisco Solutions

The E-Sales portal is hosted at Cisco's data center in San Jose, California, and is accessed by employees worldwide through the Cisco IT wide area network (WAN). Within the data center, Cisco Catalyst® 6500 Series switches use the Content Switching Module to load-balance the E-Sales application servers. The associated database servers are connected in a storage area network (SAN) using the Cisco MDS 9509 Multilayer Director.

Cisco salespeople access the E-Sales portal through the Cisco intranet when working in a Cisco office. When traveling, at a customer site, or at home, salespeople use a secure—and often wireless—virtual private network (VPN) connection. The flexibility of VPN connectivity and wireless access is key for giving the salesperson easy access to current information before entering a customer meeting or allowing the salesperson to respond quickly to a customer's question or request.

The global deployment of Cisco Application and Content Networking System (ACNS) Software and Cisco content engines at the edges of the Cisco network improves response times for the E-Sales applications and reduces the load on central application servers. For example, when a salesperson first accesses a page on the E-Sales portal, the content is drawn from the appropriate server in San Jose, then stored on the nearest Cisco content engine. Upon

subsequent access to that page, static content is obtained from the local Cisco content engine, while a request for dynamic content elements is sent to the originating servers in San Jose. This deployment significantly reduces network traffic and server load, and enables faster page loads and application response for users. This improved performance is significant in sales offices a great distance from the San Jose-based servers. The Cisco sales office in Dubai, United Arab Emirates, was reporting that it took over 20 seconds to load each of their E-Sales portal pages; after the ACNS content engine was deployed locally in Dubai, page load times dropped to an average of 2 seconds. (For more information on ACNS at Cisco, refer to the Cisco IT case study “Enterprise Software Delivery” at http://www.cisco.com/web/about/ciscoatatwork/data_center/enterprise_software_delivery.html).

RESULTS

Both quantitative and qualitative results continue to prove the tremendous value of enabling Cisco salespeople to easily obtain vital, up-to-date customer information and applications. Data about user activity on the E-Sales portal, tracked monthly, indicates that the portal's content and applications are used at least weekly by all Cisco salespeople.

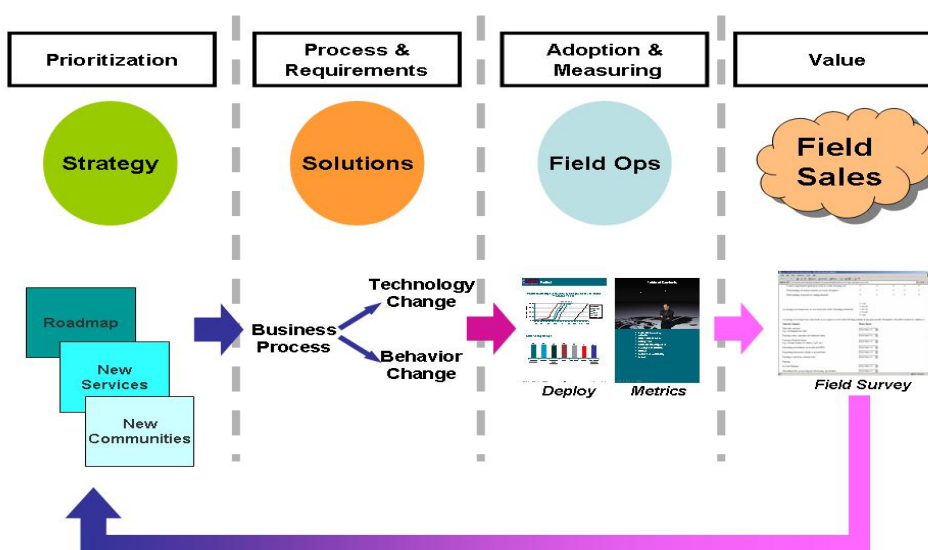
Account managers and regional managers have reported that the forecasting application has saved each salesperson approximately one hour per week for forecast data collection, rollup, and submission. Online training is available as an ongoing tool to help sales personnel use the E-Sales portal for maximum benefit.

For the company as a whole, the Cisco E-Sales portal has delivered benefits in two primary areas: order bookings and sales forecasts.

Bookings Applications and Data	Forecasting Applications
Displays near-real-time customer order information to Cisco's sales hierarchy	Establishes a single, global, and high-confidence forecasting process that is based on defined customer opportunities
Automates analysis of sales data for quick reference	Gives product and functional groups more relevant data about future product sales
Provides a scalable delivery vehicle for sales reports across the company	Incorporates standard sales terms and definitions across the company
Displays data according to the user's functional role and enables additional personalization	Improves productivity for salespeople and sales managers by automating the weekly and monthly forecasts
Provides the ability to manage a salesperson's progress toward goals on a daily basis	Helps salespeople manage their entire customer opportunity pipeline
Delivers real-time alerts that enable better control and responsiveness for the customer relationship	Provides better business visibility, enabling sales managers, marketing and operational managers, and company executives to make better decisions about resources and strategies

LESSONS LEARNED

From the beginning, Cisco's E-Sales portal was built to be far more than combining Webpages and a set of software tools. It was created with the intent to work in conjunction with processes and standards in support of driving the sales productivity agenda—a new way of working (Figure 5). “Treating the E-Sales initiative like a technology project would have led to certain failure. We also needed to look at our optimizing our legacy processes,” says Rivelo. “Our approach was to re-engineer previously siloed processes across Cisco in order to recognize a single, end-to-end sales process. That strategy, used in combination with a defined systems architecture that includes the E-Sales portal, creates business value for the Cisco sales organization and enables greater productivity gains.”

Figure 5. E-Sales Portal Improvement Process

Several factors were essential to the development and rollout of the E-Sales portal, its associated applications, and the necessary changes in business processes and ways of working for sales employees. These factors included:

- Demonstrated leadership support from sales and corporate executives at all levels
- Strong partnerships between the sales and IT organizations to determine application and data requirements, as well as effective use of technology for information delivery
- A focus on measurement and accountability throughout the development projects
- Implementation of one system worldwide, with standard processes and definitions for everyone
- Use of prototypes to validate the approach and obtain early feedback from users
- Verifying that the source data was “clean,” following standard definitions for content, format, naming, etc.
- Hands-on training for all sales employees, with online training courses for future reference
- A focus on small incremental steps and quick wins, with an early understanding that end-user feedback was critical to repeating this “small incremental steps” process for continual improvement

NEXT STEPS

Cisco continues to enhance the E-Sales portal, adding new capabilities, new types of information, and new types of users. Selected applications will also be adapted for different access devices. For example, key sales and forecast numbers could be displayed on a Cisco IP phone or a wireless personal digital assistant (PDA) to enable anytime, anywhere access.

The E-Sales portal reporting capability is being expanded to provide more reports to more users, all from a single data source. Called **My Business Reports**, this capability will eventually serve all levels in the Cisco sales organization, as well as Cisco executives, global account groups, Cisco product marketing units, and channel partners. Each of these user communities will receive reports that are summarized and tailored to their interests and authorized views.

The My Business Reports application will replace multiple internal reporting systems that had been created to address different user needs. This consolidation will significantly reduce the demands of maintaining and upgrading the associated infrastructure. It also will enable Cisco IT to make service-level commitments for the E-Sales reports, covering both average response time and application availability.

Most importantly, the new E-Sales reports will enable Cisco to be more proactive in the face of changing sales activity. Everyone involved in selling Cisco products and services will be able to make decisions and take action with the confidence of useful, meaningful, and up-to-date sales information.

FOR MORE INFORMATION

To read the entire case study or for additional Cisco IT case studies on a variety of business solutions, visit Cisco on Cisco: Inside Cisco IT www.cisco.com/go/ciscoit

NOTE

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