

case study

K&L Field Marketing

HIGHLIGHTS

THE NEED

- Renovate labor-intensive, slow and costly reporting process
- Implement easy-to-use, cost effective data handling solution for Marketing Representatives, and 4 Office Managers nationwide
- Improve reporting accuracy and maintain integrity of existing corporate hierarchy

THE SOLUTION

- Secure web-based application
- Use of ASP with VBScript and JavaScript, SQL, and Crystal Report Writer
- Ensure compatibility with existing web connections and browsers

THE RESULT

- Report processing time reduced by 75%
- Elimination of nationwide overnight delivery and postal costs, and temporary staff expenses
- Reporting accuracy dramatically improved
- Development and migration costs recouped within 4 months of execution

the organization

K&L Field Marketing is a marketing organization committed to local and regional marketing solutions covering retail services and product demos. For more than 10 years, they have served clients in over 15 industries, bringing products face-to-face with a carefully targeted audience. As a result, they are able to keep a finger on the pulse of consumers and the challenges taking place daily in local retail environments.

K&L Field Marketing is headquartered in New York and its services are executed by a team of regionally placed management in key markets from coast to coast. This group is expert in adapting to meet the subtle differences that occur across markets and retail segments.

the need

The existing field report process was extremely labor-intensive, slow and costly, involving hand-written completion of complex forms and triple entry of statistics prior to report production. K&L Field Marketing needed an easy-to-use, cost effective data handling solution that would enable all levels of the team to send, input, receive, manipulate and run reports on critical and timely information. The method had to follow existing internal business processes.

Data needed to be sent and received by more than 250 Field Marketing Representatives (FMRs) nationwide who visit and input information on an average of 7,000 establishments per month for a major credit card company. The process required Area Managers (AMs) and Office Managers (OMs) to selectively control specific data. The integrity and validity of the information was a major concern for K&L Field Marketing, as it is a key element in evaluating the program and billing the client.

the solution

Square One developed a web-based application with tight workflow management and security elements that maintain the company's reporting hierarchy. The application ensures the reliability of the reporting by limiting the opportunity for input error, restricting visibility of data not specific to a particular user, and preventing generation and insertion of extraneous data.

The application was developed on a Netfinity 5600 server running Windows 2000 Server, IIS 5.0, SQL 2000, and Crystal Report Writer 8.0. It was written using ASP with VBScript and JavaScript, SQL, and the Crystal Report Writer web engine component. We ensured its compatibility with Internet Explorer 4.0 and above as well as Netscape 6.0 and above, allowing the field staff to utilize existing web connections and browsers.

This application is used for every step of the reporting process. It automatically assigns establishments to the corresponding FMRs by area. FMRs and Managers are only allowed to see data pertaining to their areas and levels of supervision. Managers use the application to review and print reports, via the Crystal Report Writer web engine, that reflect real-time data, that is passed over the internet securely using encrypted email and secured web transmissions via SSL.

the result

The entire process time was cut by 75%. A previously cumbersome and costly 6 week process was cut to two weeks. The whole organization is now leveraging the accessibility of the internet and reaping the benefits of accuracy through automation.

The cost savings are remarkable. Return on costs of the project development and migration were experienced within 4 months of execution.

All monthly over-night package delivery and postal costs for all 250 FMRs, all AMs and OMs, nationwide, were eliminated. Temporary staff, regularly hired for input of data from thousands of surveys, were no longer necessary. Removing the tedious manual entry process and automating form validation eliminated the large opportunity for errors.

The program was duplicated for other phases of this client's marketing program. A very satisfied major client now receives accurate, timely, data when they need it—not when the previous process allowed it.



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