



## Intralinks

### A Business Intelligence Case Study September, 2009

#### Summary

Intralinks is a leader in On-Demand Workspaces. As the company grew, management recognized a need to better understand the sales pipeline and sales performance. They had outgrown an existing management reporting solution that became brittle and unreliable. They needed a Business Intelligence solution to help them better manage their business. They asked Corporate Technologies to design and develop a Business Objects sales dashboard and reporting solution. Corporate Technologies developed a solution to handle the complex reporting and analysis needs of the sales and marketing department with the flexibility to grow with the demands of the business. »

#### Customer Results

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<b>Industry</b>	Web Commerce
<b>Customer</b>	Intralinks
<b>Problem</b>	Lack of infrastructure to implement a major Business Intelligence solution and their reporting solution had become brittle and unreliable and lacked the flexibility to support an expanding number of metrics the company wanted to track.
<b>Solution</b>	A sales and marketing dashboard with tracking, reporting and interactive analysis of sales pipeline and commissions which includes over 30 key business metrics
<b>Benefits</b>	Greater insight and control over the sales process Improved information flow Increased understanding of customer relationship management issues A rich infrastructure to support complex analysis
<b>Products</b>	Business Objects Edge Professional Edition, Rapid Mart, Web Intelligence, Data Integrator and Universe Designer



## The Challenge

Since inception, Intralinks has seen exponential growth in sales. They have hosted more than 750,000 users representing over 90,000 organizations worldwide through their On-Demand Workspaces™. Customers leverage Intralinks' On-Demand Workspaces to safeguard documents, streamline communication and collaborate on thousands of projects.

As the company grew, their reporting solution became increasingly brittle and inflexible, rendering the solution unreliable and ultimately obsolete. Intralinks required a solution that was simple to use yet could handle complex reporting and analysis needs of sales, marketing and finance. The solution needed to provide the flexibility to grow with the ever increasing demands of the organization. Yet, like many mid-sized companies, Intralinks did not have the technology infrastructure in place to support a major BI initiative. This lack did not prevent the metrics-driven company from making a strategic decision to bring Business Intelligence in-house. Recognizing that BI is at the heart of a success driven organization, the company hired Richard Grant, as Senior Vice President of Business Performance, to spearhead the development of their next generation Business Intelligence solution.

Intralinks has a complex commission and sales reporting model which has to account for a sales force of over 100 representatives. Many of them often split commissions with each other. This was one of many complex dynamics that the BI solution had to easily accommodate. Further complexities included the ever expanding number of sales and marketing metrics that needed to be incorporated into management reports.

Grant recognized that he needed help with this initiative. He contacted Business Objects consulting companies in the greater Boston area. After evaluating several firms, Intralinks selected Corporate Technologies to define the project scope, and to provide the technical and business expertise to implement a solution. This included a scope of work that would support the company's well-defined short, medium and long-term goals for Business Intelligence.

"Corporate Technologies was the best choice because of their breadth of knowledge in understanding both the business problem and the IT environment. I was impressed with their team. Their business knowledge and product expertise facilitated a design that met the immediate needs for sales performance management reports and allowed for future analytic and reports needs in every department of the company," Grant said.

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## The Solution

Corporate Technologies assigned two BI consultants to the Intralinks project. Richard Rodriguez was selected as project manager and Ron Keler was the principle architect who provided most of the on-site work around analysis and design.

Additionally, a small implementation team worked remotely at Corporate Technologies offices to maximize productivity while Intralinks acquired and implemented their BI infrastructure. This combination of on-site/off-site effort was paramount in meeting Intralinks' deliverable dates.

The initial phase of the project included database design, integration with data sources such as Salesforce.com, sales metrics reporting and analysis, and the installation of the following Business Objects software:

- › Business Objects Edge Professional Edition
- › Rapid Mart – a pre-built data mart for sales and pipeline data
- › Web intelligence – to provide Web-based reporting and analysis
- › Data Integrator – provides the plumbing to populate the data mart; ETL
- › Universe Designer – the metadata layer management tool

Corporate Technologies rapid prototype methodology and best practices ensured that the delivery of solution include a reliable database design. This design was the foundation that has lead to the expanding success of the BI initiative. The Corporate Technologies architecture addressed the 3 core requirements of a well design BI solution:

- 1) Simplicity for adding departments and metrics
- 2) Robust reporting and ad hoc analysis capabilities
- 3) Easy to support and maintain.

Rodriguez and Keler worked with Intralinks over a 30-day period to fine tune the database design with Richard Grant providing subject matter expertise. Grant was invaluable to the success of the initiative, bringing his unique perspective to the BI needs of the organization. Prior to joining Intralinks as the VP of Business Performance, Grant was an outside consultant to Intralinks. As a consultant, he produced monthly sales performance reports from a system he had developed using Microsoft Access and Excel.

“We were very fortunate to work with Richard who knows their business very, very well,” said Corporate Technologies Ron Keler. “He helped us bridge gap to understand what they wanted to do.”

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## The Result

One of the biggest challenges in designing the database was to accommodate complex reporting and analysis.

“We do a fair amount of transformation out of Salesforce.com to get bookings,” Grant said. “There’s a lot of conversion that occurs to reflect the way the company tracks sales.”

For example, a sales representative may get 50 percent credit on 20 deals, splitting that with any number of sales representatives. This is where the reporting can get complex because Intralinks has more than 100 sales reps that are assigned different vertical markets, sell a broad mix of products and report to several sales managers.

“The database had to be organized in a special way,” Keler said. “That was the hard part. A key part of our unique value was that we were able to understand exactly what they want to do, and then had the expertise and know-how to apply the Business Objects tools. This empowered Intralinks to do the analysis they wanted to do.” Now, Intralinks’ sales team has instant access to 30 sales metrics, with the ability to slice, dice and drill into any of them in any number of ways.

“Knowledge transfer was another important goal of the project,” Grant said. He used an educational analogy to describe how Corporate Technologies has helped Intralinks prepare to develop its own in-house BI expertise.

“When we started the project, I felt like we were in prep school; getting ready for college,” Grant said. “Corporate Technologies was college. Now we’ve graduated and hired our own BI expert. We wouldn’t be where we are today without Corporate Technologies, and they are still our ‘go-to’ partner when we need outside help.”

“The key is that this solution gives us more control,” Grant said. “More people have access to the data, and they have daily access to new data. We now have a very rich infrastructure to do analysis going forward.”

“It’s a really strong architecture that Corporate Technologies put in place,” Grant said. “It will accommodate the growth and change we expect in the future.”

Richard Rodriguez, Corporate Technologies project leader, said that “Intralinks went from an organization that was using static and brittle reports from Salesforce.com and had limited analysis capabilities, to having a completely automated reporting and analysis solution that allows for expansion to the future analysis demands of their various departments. We have eliminated their pain points.”

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Grant believes that Intralinks has taken the first important step in the company's journey to run its business based on Business Intelligence. He credits Corporate Technologies with helping establish a “rock-solid” foundation that accommodates growth and change.

### **Business Intelligence Expertise**

Corporate Technologies Business Intelligence Group architects, implements, and manages production-quality BI solutions encompassing dashboards, reporting/analytics, BI Web portals, data warehouses, data quality enhancements, and custom integration.

We've done this for clients in many industries—including finance/insurance, manufacturing, retail, and hospitality—across many functions, including financial, sales, marketing, HR, and operations.

We're experts at understanding the data in your systems, its quality and security issues, and how to integrate it with BI platform and database technologies from market-leading providers including SAP/BOBJ, Oracle, and many others.

### **About Corporate Technologies, Inc.**

Founded in 1994, Corporate Technologies, Inc. is one of the largest providers of complete IT solutions and services to enterprises in the Northeast. We provide clients with professional services expertise in the areas of IT Strategy, Business Intelligence, and Data Centers, supported by a selective product line, support contracts and services, IT staffing solutions, and financing options.

The company is a top partner with many technology leaders including Sun Microsystems, NetApp, SAP/Business Objects, Oracle, Symantec, VMware, Juniper, and F5 Networks. Its annual investment in R&D and the company's market-leading Technology Lab allow Corporate Technologies to continually evaluate and recommend the best current and emerging technologies.

### **Customer Results**

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