

# **OpSource Uses DataWeb's Platform to Create Online Consolidated Data Storage Application with Seamless Integration with Microsoft Excel.**

## **Abstract**

OpSource, a California-based developer of SaaS delivery solutions, recently developed a web-based application using DataWeb's development platform. The OpSource DataWeb application serves as a consolidated database for all of OpSource's customer and sales data. Using any web browser, members of OpSource's Account Management, Operations, and Product Management teams can access the OpSource DataWeb application to update data in real-time. The data can be easily downloaded into an Excel spreadsheet using a Refreshable Web Query, and the information can then be used to measure product performance, make revenue forecasts, and track the progress of sales initiatives. The OpSource DataWeb application is relatively easy to build, and promises excellent results for business managers who currently use Excel as a data gathering and reporting tool.

## **Company Overview**

OpSource ([www.opsourcenet.com](http://www.opsourcenet.com)) is a Santa Clara, CA-based developer of Software as a Service (SaaS) enablement and delivery platforms.

## **The Challenge**

Like all companies, OpSource has an essential need for accurate, up-to-date records of customer and sales performance data (i.e. the number of customers who have signed up for the "free trial" of OpSource OnDemand 2.0 in the past week, the number of customers in "free trial" mode who will convert to being full-time paying customers within the next week, etc.). This information helps OpSource to track the performance of its products and services, identify customer needs and sales trends, and to measure the effectiveness of sales initiatives.

Three internal groups at OpSource -- Account Management, Product Management, and Operations -- were using Microsoft Excel spreadsheets to track different types of customer and sales data. Each group had their own Excel spreadsheets for storing data records, and each group updated data in their spreadsheets separately from the other groups.

With so much data being kept in multiple locations, and with OpSource's employees constantly changing and updating data within their own spreadsheets, the data itself became very hard to track. OpSource's managers found that the only way to ensure that all groups had accurate, up-to-date data records was to sit down and compare the

different spreadsheets to find the most current version of the data. Of course, this was a very time-consuming and troublesome process.

"At our weekly meeting between the three groups, we usually spent the first half-hour of every meeting comparing each others' spreadsheets, and matching one group's data with data from the other two groups," explains Jason Cumberland, Senior Manager of Client Services at OpSource. "Once we figured out which spreadsheet had the latest version of the data, we were all on the same page. But by the following week, we would all have different data again and have to start all over with the comparison."

Keeping the data in separate spreadsheets also made it very hard for OpSource's managers to track product performance and sales progress. Each member of OpSource's Account Management Group had their own spreadsheet, where they were recording customer interest levels in OpSource's products and services, and the number of sales calls made to clients to discuss those products and services. But consolidating this data from the different spreadsheets to get an overall view of product and sales performance proved to be another time-consuming process.

"As we came up with new products and services, we had a very difficult time reporting status on those initiatives to our executive team," says Cumberland. "The executives wanted to see what percentage of customers we were talking to about those products this week, next week, and so on. Every week, I had to spend hours consolidating spreadsheets to create a status update for our executive team."

Excel provides a great medium for managing data once it is delivered. But using Excel by itself makes it difficult for organizations to collect and update data in real-time. OpSource needed a consolidated, real-time data storage application where accurate, up-to-date data could be stored, accessed, and updated by all members of its internal groups. Furthermore, OpSource needed a solution that could integrate seamlessly with Excel to easily produce reports, comparison charts, and graphs with the latest customer and sales data.

## **The Solution**

Using DataWeb's Platform, Cumberland created a web-based application that consolidates all of OpSource's customer and sales data into a single online database. The OpSource DataWeb application serves as a central repository for all customer and sales information used by each of OpSource's three internal groups. When OpSource's employees wish to update data, they can access the OpSource DataWeb application from any web browser and update the information in the online spreadsheet.

Once the client, product, or service data is entered into the OpSource DataWeb application, it can then be imported into an Excel spreadsheet using the "Get External Data" option in Excel. The OpSource user can then create a Refreshable Web Query in

Excel that will automatically retrieve current data from the OpSource DataWeb application and update that data in the Excel spreadsheet on demand.

This basic Excel spreadsheet, integrated with a Refreshable Web Query, can then be circulated around to all the members of all the OpSource groups. When OpSource employees need a real-time report of the latest up-to-date customer and sales data, they simply open their Excel spreadsheet and use the Refreshable Web Query to import the latest data from the OpSource DataWeb application. The Refreshable Web Query automatically populates the fields in the Excel spreadsheet with the latest customer and sales data

## **Key Benefits**

### **Consolidation of Real-time Data**

Using any web browser, OpSource employees can access the OpSource DataWeb application to update information for each client, product, or service. Each internal group -- Account Management, Operations, and Product Management -- has access to different spreadsheet views on the OpSource DataWeb application. Each spreadsheet view features key information and data points specific to the individual group.

For example, when Account Managers log into the OpSource DataWeb application, they can access the following spreadsheet views:

- QuickView -- A spreadsheet listing clients and opportunities specific to the Account Manager who has logged in to the application.
- DetailsView -- A spreadsheet listing the status of all clients in regards to OpSource products and opportunities.
- InitiativesView -- A spreadsheet tracking the progress of sales initiatives, and the status of clients concerning OpSource products and services.

Account Managers can access and update information from any of these spreadsheet views. For example, when Account Managers access the InitiativesView spreadsheet, they see a list of OpSource clients cross-referenced with the following information.

- The name of the Account Manager who is handling each client.
- The status of each client (i.e. if the client is still in "free trial" mode, or if they have signed up as a full-time customer for OpSource OnDemand), and the dates on which their client status changed or will change.
- A list of client opportunities (i.e. new products or services such as OpSource Analytics and OpSource Billing).

- If a client has received a sales call concerning a certain opportunity (i.e. OpSource Analytics), the status of their interested is listed ("Not Interested," "Interested - Not Ready," "In Initial Discussions," "Implementing Now" "Completed," etc.).
- If a client has *not* received a sales call concerning a certain opportunity, their interest status is listed as "Not Discussed."

"The big advantage of DataWeb is having one true version of our data in real-time," says Cumberland. "By putting all the information online, all the people in our internal groups can log in to the OpSource DataWeb application whenever they need to and revise the data."

### **Easy Reporting of Real-Time Information Using Excel**

For OpSource's Excel spreadsheet users, Cumberland has created a "Refresh from DataWeb" toolbar button, using Excel's built-in "Refresh All" functionality. When OpSource users hit the "Refresh from DataWeb" button, the Refreshable Web Query automatically populates the Excel fields with real-time, up-to-date data from the OpSource DataWeb application.

Everyone from executives to Account Managers to operations people can update their Excel spreadsheets with the latest up-to-date information simply by clicking the "Refresh from DataWeb" button. No one has to waste time creating reports, or comparing different Excel spreadsheets to find the latest version of the data.

### **Easy Tracking of CRM and Sales Data**

Using the Sheet tabs option in Excel (i.e. Sheet 1, Sheet 2), Jason Cumberland has created a "Dashboard" page containing numerous customized formulas. These formulas are designed to retrieve and aggregate data that has been imported into Excel from the OpSource DataWeb application. This information can then be used by OpSource executives to make revenue forecasts and track the progress of sales initiatives.

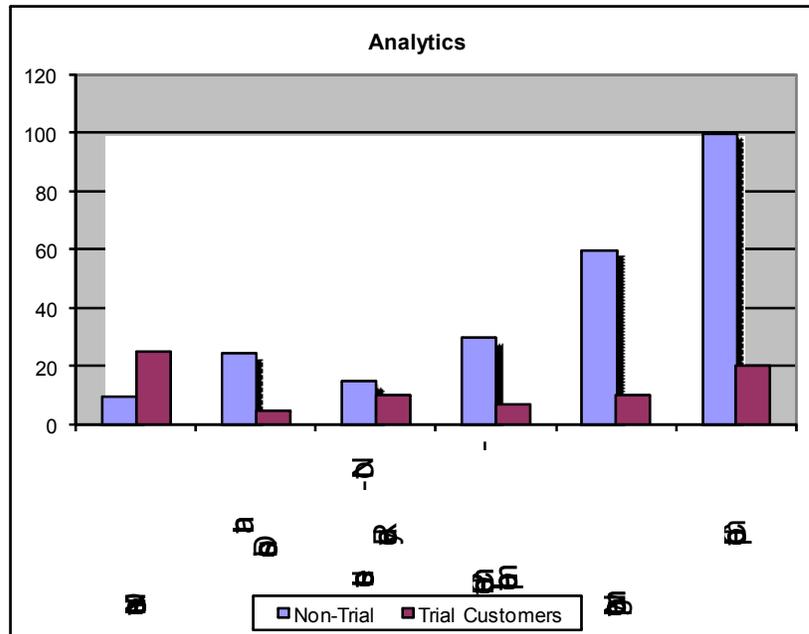
For example, when [the Account Management DetailsView spreadsheet is imported from the OpSource DataWeb application into Excel, the data is placed in Sheet 1 in the Excel document. The imported raw data in the Sheet 1 spreadsheet appears much the same as it does in the Account Management DetailsView in the OpSource DataWeb application.](#) It is simply a spreadsheet listing the status of all clients in regards to OpSource products and opportunities.

Sheet 2 in the same Excel document is the "Dashboard" page. [The customized formulas on Sheet 2 retrieve imported data from Sheet 1 and use it to calculate various customer and sales-related data. For example, a formula on the "Dashboard" page adds up the](#)

number of OpSource OnDemand customers in "free trial" mode who are expected to become full-time paying customers within the next month.

Calculating this number against the subscription rate allows OpSource executives to make monthly forecasts of new revenue. If, for example, twenty OpSource OnDemand customers in "free trial" mode are scheduled to switch to full-time status in August, using the average subscription rate per month per customer, the executives can forecast the associated increase in revenue for the month.

The "Dashboard" page in Excel also allows OpSource executives to track real-time progress of their sales initiatives. When data updates are imported into Excel from the OpSource DataWeb application, a formula on the "Dashboard" page in Excel adds up the number of clients for each status level for each opportunity. This information can then be easily converted into a bar graph like the one below using the Excel Chart Wizard.



On this bar graph, we can see the number of clients in each status level for OpSource Analytics. According to the graph, approximately 25 "trial" customers and 10 "non-trial" (i.e. full-time paying) customers are classified as "Not Yet Discussed," meaning they have not yet received a sales call concerning OpSource Analytics. An executive viewing this chart would be able to notify the OpSource Account Manager to concentrate on their sales calls for the special offer.

Also, formulas on the "Dashboard" page in Excel keep track of upcoming dates when customers will convert status (i.e. from "free trial" to "full-time customer") or take on new products, and the number of customers who will convert status within a certain period of time (i.e. the next thirty days). Again, this information can be used to create a forecast chart such as the one below.

Analytics Implementation Forecast					
	Behind Schedule	<30 days	30 - 60 days	60 - 90 days	90+ days
# Customers	2	25	10	10	2

[INSERT GRAPH OF ANALYTICS IMPLEMENTATION CHART]

This information is helpful to Operations managers for resource planning purposes. For example, if the Operations managers see that 25 customers will be implementing OpSource Analytics within the next 30 days, they can schedule Operations resources to assist customers in the implementation process. If they see that two customers are behind schedule for Analytics Implementation, they can contact the Operations people to find out the reasons for the delay.

### Easy-To-Build Application

The DataWeb development platform provides a complete hosted system for developing and running any type of web application or web database. DataWeb's SaaS model provided Jason Cumberland with an easy-to-use platform to build the application that his company needed quickly and efficiently, with minimal trouble and expense. With a basic knowledge of Excel and HTML, Cumberland was able to use to create a web-based application that could be accessed by all OpSource employees who needed it. OpSource did not have to make an expensive investment in new software, or install software on any employee's computer.

"I originally created the OpSource DataWeb application for reporting for a subset of our Account Management group, but when other groups saw the effectiveness of the tool, we quickly expanded the use of the application to those groups," says Jason Cumberland. "It only took me a few days to create the initial application, after which we continued to add functionality as we identified new needs."

"DataWeb is easy to use to create your applications. It allowed me to get all our data and users onto one system without having to do a massive proposal to my management team. Because the application was free to trial, I didn't have to inform anyone in our organization that I was working on the application until after I had created it. Once it was finished, our management team agreed that the system was just what we needed to better understand and manage our customer data."

The OpSource DataWeb solution allows managers from across the enterprise to record and update real-time data easily and accurately, and the data is safe and professionally managed. The DataWeb application extends the reach of Excel from the office desktop to the Internet. DataWeb is unique in its ability to seamlessly integrate with Excel, and it

has made gathering and reporting real time information much easier for the employees at OpSource.