
Case Study

Optimizing the Customer Journey to Create New Sources of Long-Term Value

How Daitan Helped a Fortune 500 ISV Build a New Customer Portal, Data Dashboards to Boost Sales, Engagement, and Retention





Introduction

Optimizing the customer journey is essential for modern enterprises. Through the customer journey, companies cultivate meaningful relationships with potential buyers, as well as gather insights that strengthen future decision-making. In today's world, designing the ultimate customer journey requires technical savvy, data analytics capabilities, and more, which is why partnering with a software development expert like Daitan can make all the difference.

Daitan helped a Fortune 500 independent software vendor (ISV) make several key improvements across the customer journey that significantly increased sales, engagement, and retention. Along the way, Daitan's client evolved into a data-driven organization that can now organize resources around high-potential growth opportunities.

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Why the Customer Journey Matters

The “customer journey” refers to the collection of interactions customers have with a business as they progress from passive onlookers to loyal patrons. Designing a seamless end-to-end customer journey is crucial, as it allows organizations to qualify potential leads, build long-term customer relationships, and learn about how their products and services are perceived in the market.

Enabling the Complete Customer Journey



OUTCOMES

- Shorten sales cycle
- Increase sale conversion
- Better customer experience
- Faster sales conversion
- Lower Time to Value
- Accelerate Time to Revenue
- Higher value upsells
- Higher License renewals
- Lower churn
- Increased Referrals

ANALYTICS

- Build **consolidated analytics and KPIs** across systems and the customer journey
- **CRM integration** ties Sales and Support activity and Portal activity into analytics

ANALYTICS OUTCOMES

- Data-driven optimization of customer experience, product performance and customer journey
- Data-driven insights that inform the business and product roadmap

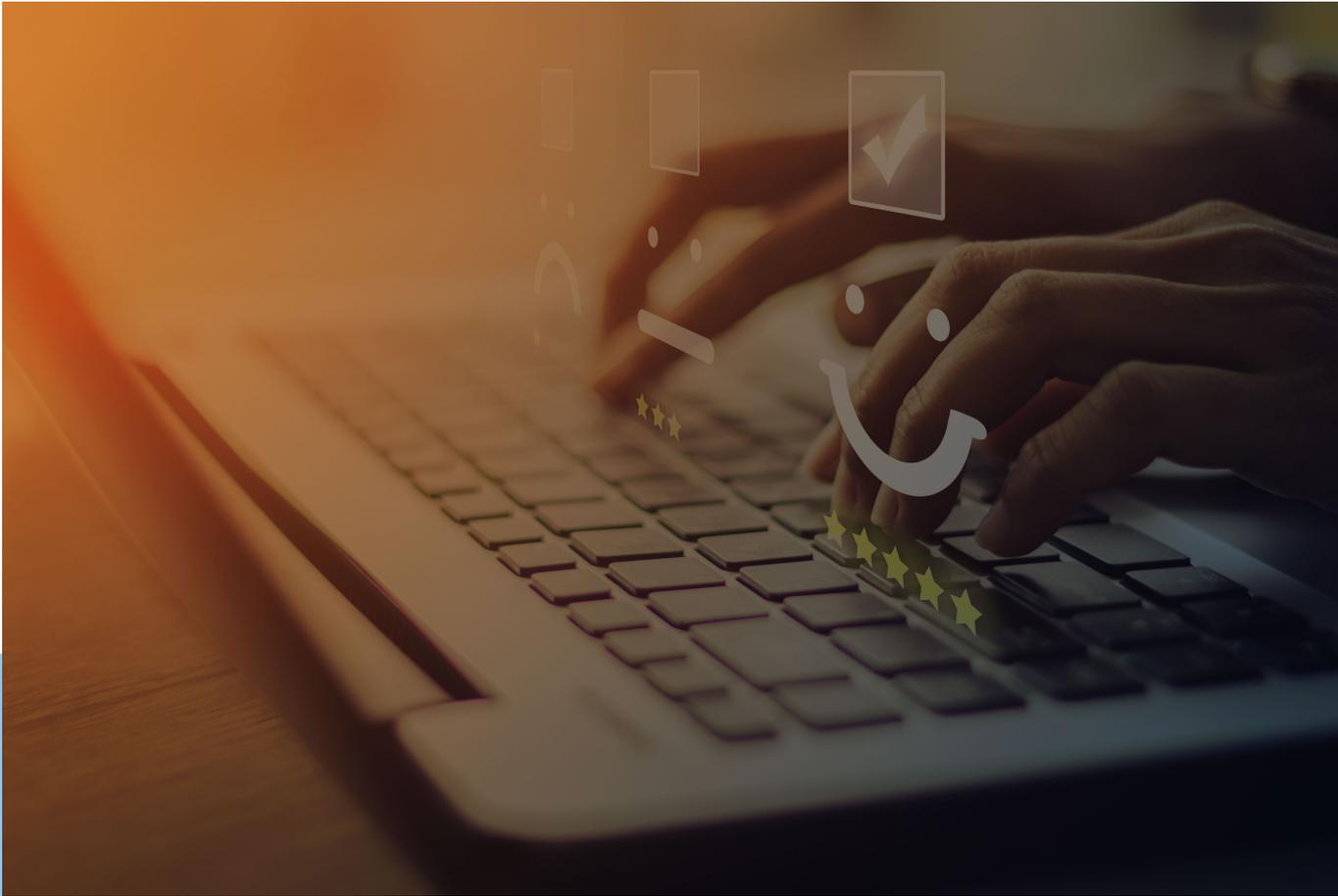
The various stages of the customer journey should complement one another and facilitate a consistent experience. In addition, it's important that any data gathered about the customer journey be accessible to other business lines. For instance, sales and marketing teams should have visibility into how potential buyers interact with different offerings. That way, they can craft tailored campaigns and outbound messaging that entices customers to take action.

Operations teams should be able to use data from the customer journey as well. Data points collected along the customer journey can reveal if friction exists in the onboarding process or highlight how order fulfillment processes could be improved going forward. The customer journey can even inform what professional services, deployment tools, and packaging options companies should provide to enhance buyer experiences and reduce operating costs.

Analytical insights are also useful for validating the effectiveness of the overall customer journey. Businesses should set target outcomes, metrics, KPIs, etc., by which they can measure progress against predefined benchmarks. When leaders set these feedback loops up, they can identify growth opportunities and winning investments more easily. It's in this work that we see data-driven organizations differentiate themselves from the competition.

Next, we share how one Fortune 500 ISV optimized its customer journey as a result of Daitan's guidance and technical expertise—leaving the company well-positioned to create incremental value over the long term.

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Software Company Launches New Front-end Portal & Revamped Customer Experience

A leading enterprise in the software virtualization space approached Daitan about supporting a specific business unit that was responsible for generating new revenue streams. This particular unit had aggressive growth targets, most of which centered around boosting customer engagement through a front-end demo portal.

Daitan first upgraded the portal's back-end infrastructure so that the software vendor could deploy new features and integrations much more quickly. The updates also increased the portal's scalability and reliability, which were critical for ensuring the client could handle increased utilization at sales events and global product demonstrations.

In the next phase, Daitan revamped the front-end user interface (UI) to improve the overall user experience. Daitan's engineers added several features, including single sign-on (SSO) access and an automated chatbot. The team also redesigned the interface to focus on what solutions the company provided in order to better align with customer needs.

Additionally, Daitan added business intelligence (BI) tools and intuitive dashboards so that the client could extract insights about how customers engaged with different products and services. These insights were shared directly with the client's CRM and sales team for further analysis, as well as the C-suite to bring visibility around engagement and sales objectives.



The Outcomes

Shortly after going live with its new portal and data tools, Daitan's client experienced radical success in multiple areas.

Increased Demo Site Access

On the early side of the customer journey, the new demo portal attracted a tremendous amount of incremental volume - the client saw more than a **400% increase in demo site access**, which meant many more potential customers were testing the client's platform in the evaluation phase—enabling qualification before sales involvement.

Prospective customers were able to test specific features and products while feeding valuable data to the marketing team. The marketing team can now use this data to create custom outbound campaigns to help move prospects along the customer journey.

In addition, the demo environment shortened the client's sales cycle and reduced how much time the sales team spent upfront with unqualified leads, thereby **lowering the company's cost of acquisition**.

Enhanced Customer Experience

On the UI/UX front, the features and functionality that Daitan added increased overall user activity **by 250%**. In implementing SSO access, Daitan lowered the friction associated with using the client's products and services. Both prospective and current customers could easily enter and navigate through the company's portal to find what they needed. SSO access also helped the client identify upsell opportunities for existing customers while accelerating the purchase process for prospective buyers.

Furthermore, by redesigning the portal to highlight solutions instead of products, the client now speaks directly to the problems customers are trying to solve. As a result, the vendor experienced **10x growth in user enrollment in the portal**. In other words, the company is converting customers at a much higher rate than before.

Moreover, Daitan's client can now launch new integrations in one week, down from 3-4 weeks previously. With this increased agility, the company is able to deploy features and functionality quickly to users, increasing the overall value of the platform.

Intuitive BI Tools & Comprehensive Data Dashboards

Daitan also built a suite of BI reporting tools that provides helpful context and insights around portal activity and product utilization across the organization. Internal stakeholders can use these dashboards to draw conclusions about the effectiveness of their organization's customer journey.

Platform integrations move data to those that need insights. For instance, Daitan integrated the client's portal with the company's CRM, so that analysts can study how different touchpoints map to sales data. Consequently, the company can now qualify leads better before deploying sales resources. Additionally, the client's new BI insights also inform the development roadmap, as product managers can identify what products drive customer engagement the most.

Data center insights reveal incremental upgrades.

In addition to the BI tools, Daitan implemented data center assessment tools that generate reports about high-potential leads. The sales team can now focus its energy on these qualified prospects and proactively reach out with upgrade offers, new products, and more.

Without these BI and data center tools, the client would not have known that a recent feature launch increased **platform usage by 20%** and **sales by 10%**. By layering analytics capabilities on top of the customer journey, Daitan was able to clearly demonstrate the value of the client's portal makeover, both in terms of engagement and economic productivity.

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Create a Complete Customer Journey with Daitan

Daitan exists to help enterprise leaders generate meaningful long-term value through technical innovation. As shown in this case study, we use our software development and data analytics expertise to optimize the customer journey for our clients so that they can hit ambitious growth targets and serve end users well.

In our *How a Data-Driven Approach Transforms Small and Medium-Sized Enterprises* eBook, we share the many advantages of becoming an organization that can leverage data to engage customers, enhance digital operations, and streamline digital product development. Those who become truly data-driven organizations have the potential to augment team capacity, improve strategic decision-making, apply advanced analytics, and much more.

Download the eBook to discover how you can become a mature data-driven organization today.

> About Daitan

Since 2004, clients have trusted Daitan to build core technology, data science solutions and software products that scale with real-time performance. They rely on Daitan because we deliver quality results, while de-risking projects and accelerating time-to-market. From well-funded start-ups to global Fortune 500 enterprises, Daitans clients span a wide variety of industries.



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