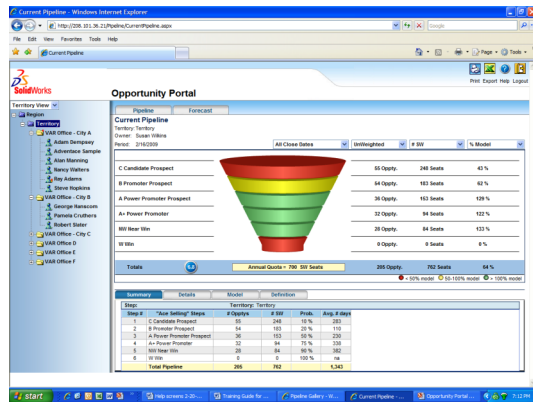# SolidWorks Corporation
A Case Study in Pipeline Management

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The Problem

SolidWorks Corporation, a wholly owned subsidiary of Dassault Systems, had a very significant problem to solve. With over 2,000 sales reps worldwide selling through 300 Value Added Resellers, they had a very strong and loyal network of channel partners. However, SolidWorks' top management had difficulty getting any consistent visibility or roll-up of the opportunity pipeline from this large network of resellers. There was no common sales process and no common metrics to which all VARs and sales reps could be measured.

This lack of pipeline visibility also created a huge uncertainty in their forecasting process at the end of each month. Most sales reps and managers worldwide were using Excel spreadsheets to keep track of their opportunities and to submit their monthly required forecasts. Unfortunately, these tracking worksheets were individually developed, with minimal common formats, and there was no easy way to "roll-up" the opportunities into the multiple levels of the organization.

Executive Feedback

Jeff Ray, CEO of SolidWorks, expressed his concern over these issues at the WorldWide SolidWorks Conference while speaking to their channel partners:

> *"At the end of each month I was continually startled by the fact that we had no easy way of rolling up a global forecast for the current month, not to mention the next 90 days. After rolling out the Opportunity Portal from Topline to over 2,000 users, the system has exceeded all my expectations. I can walk into any office in the world, for either direct reps or Resellers, and see a consistent pipeline view for any level."*

Bertrand Sicot, Vice President of WorldWide Sales, is an avid fan of a disciplined sales process and a repeatable sales methodology. Sicot remembers when everyone was trying to use a different Excel spreadsheet. He also was frustrated with the kind of information he was getting out of his Siebel CRM system to manage his pipeline and forecast. He could not obtain quick, accurate numbers for the pipeline and specifically how many new opportunities were required to meet future quotas on a global basis.

> *"With the Opportunity Portal, I can now drill down into any sales rep and any VAR organization in the world and see color coded pipelines, by products, by close dates, by weighted probabilities. I can instantly see the shortfalls in the pipeline that need to be*

filled in order to meet our sales quotas. I have a detailed view of the pipeline and forecast in seconds, not hours or days that it took before. The forecast is now 90-95% accurate.   It is amazing what we have achieved with Topline."

The Solution

Topline's "Opportunity Portal" is a hosted, web-based application that uses the increasingly popular SaaS model of "Software as a Service". The service is a highly graphical view of pipelines with numerous filtering options, by product, close dates, and key metrics. This business model has a minimal impact on the existing IT department and requires no additional investments into hardware or systems software within the client. Topline's central server has state-of-the-art security and backup procedures and minimal downtime. The Opportunity Portal allows sales reps and managers to instantly access their pipeline, personal metrics, and rolling forecasts using a simple connection through their own Internet browser.

Topline also delivered two new unique services to SolidWorks that were requested by the field sales reps. First, they offer an Excel-based, Opportunity Form that allows sales reps to do their updates in an off-line mode – in the car, on a plane, while traveling away from the office. Since most of the users are Excel advocates, this service gave them a significant comfort factor to allow off-line entry…Once the reps are satisfied with their updates, they can press a single Submit button to automatically sync with the Topline server.

The second unique service is an Upload Center created specifically for third party VAR organizations that may all have different CRM systems. This service allows the VAR organization to schedule daily, weekly or monthly uploads directly into the Topline server into one common format for all VARs, and with minimal time involvement.

Topline offers SolidWorks a variety of tools to make administrative tasks easier. Managing a constantly changing organization with a rapidly growing number of users is now being done with a series of services only available to the support organization. Territory definitions, territory realignment, new users, multiple views of opportunities, user management, and system reports are all part of the many tools available to SolidWorks support.

> *"The biggest advantage of Topline is that it gives us worldwide visibility into the opportunity pipeline for not only our own sales organization but also for our Resellers. It has greatly simplified forecasting and has significantly reduced the time to produce a worldwide forecast at all levels. It also gives big benefits to the Resellers and helps them manage their own pipeline conversations with their sales reps." ……**Brian Houle, Director of Worldwide Sales Operations.***

SolidWorks tag lines.
(To be provided by SolidWorks)

Topline tag lines:
Topline is a leading provider of advanced pipeline management and forecasting systems to large, channel-driven sales organizations. Their goal is to substantially improve sales performance by optimizing the opportunity pipeline and to substantially increase forecasting accuracy.   Topline's Opportunity Portal provides pipeline visibility at multiple levels of the organization, pipeline metrics, and automatically generates rolling forecasts off the pipeline. You can visit the company's website at www.topline-systems.com.

Topline is located at 60 State St. Suite 700 Boston, MA, 02109   Phone: 617-878-2130