Executive Summary

Leo A Daly is one of the leading architectural firms in the country with offices worldwide. Leo A Daly needs the ability to track and analyze potential project leads to be able to:

- Improve client relationship management and aid in go/no go project decisions.
- Synthesize the captured information into knowledge, which provides them with a distinct competitive advantage to increase lead capture rate.
- Reduce employee time on report generation and searching for information.

The business objectives of our project are:
1. To increase the rate of capture for leads from the current 25% to over 30% over the period of one year.
2. Reduce the time spent on tracking information on leads and creating reports from 446 hours/year to 120 hours/year.

Both the above objectives were accomplished through the development of the lead tracking and revenue forecasting system. Designing the system with user-friendly screens to enter data, run automatic queries and reports at any time, reduced time spent on tracking leads. The additional information provided by the system improves the client’s decision-making and increase probability of capture.

The IS development methodology used was the iterative process using April 25, 2000 as a deadline date. Further, a participative design methodology was used with input from the client and Joint Application Development sessions. The technical solution identified to attain the business objectives was to create a lead management database on a Microsoft (MS) Access platform. MS Access was used to keep the total cost of ownership low.

The implementation of the lead management database required changes in the business process, including…. The time employees spend on gathering information and creating reports would be spent analyzing data. Because of this system, all the required information on a lead is now available at one place. In addition, an important advantage of the system is that the company president does not need to create a separate spreadsheet every quarter for budgeting.

The bottom line effects of this system for Leo Daly are:
- A saving of 326 work hours a year.
- An increase of new business captured by $5 million a year conservatively.

The beta test was completed, training was done, and the system was delivered on time as per our original deadline date of April 25, 2000.