LeadApp
Sales Opportunity Management

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Abstract

When bringing a product to market, companies must attract customers and sell to those who are willing to buy. The model we use to describe that process is the sales funnel, and though it has been challenged it is still broadly accepted [1]. This is particularly clear in high-tech markets where high-value products often have a very long sales cycle, but bringing a product to market is often a young tech company's Achilles' heel [2]. We believe these companies would be well served by the combination of software and services we propose.

1. Introduction

1.1 Company

Founded in 2009 by Greg Wease and Chuck Cowser, LS is a Portland-based marketing company specializing in accelerating the sales process. LS's services are focused at the start of the sales funnel, where we help our clients manage leads and work early-stage contacts. Our primary business is contracting with sales groups at companies of any size and calling high volumes of prospects, passing those leads willing to engage back to our clients' sales teams.

LS's clients benefit from this service by maintaining only a small sales staff who can focus on closing highly-qualified leads rather than keeping a large pool of less-qualified salespeople who call every potential prospect. The staff that is engaging with leads knows its calling pool is already engaged and willing to talk, so the effectiveness of their sales calls is increased.

LS has not created software for public use before now, but we have done internal software development in pursuit of our primary business. Our call center employees work in a proprietary application, LeadApp, which is designed for fast throughput of calls and efficient calling list management.

1.2 Business Model

All organizations specialize in delivering a particular product or service. For most, though, that specialization excludes the ability to effectively generate and process a large volume of leads in a timely manner. Not every company needs to do this, but for those that do it is not typically their core competency. This is the space LS currently occupies.

Operating as a direct extension of our clients' marketing or sales department, we help customers identify, qualify, and convert sales opportunities by acting as the head of the funnel. We take a raw calling list containing hundreds or thousands of names and contact everyone, updating and fine-tuning the list in the process. Calls that meet their objective indicate a receptive or actively interested lead; that list of leads is returned to our clients who pick up the sales process from there.

LS acts like a flexible-capacity sales department. When high volumes of leads are available, companies bring us into play without incurring the cost associated with recruiting, hiring, training and managing a large in-house staff.

1.3 Background

For complex products or services, many firms cannot rely on impersonal, high-volume forms of communications to get the job done. Email, web advertising, social media campaigns, and direct mailing are all capable of contacting large numbers of customers but carry a low level of engagement and education. To move prospects down sales funnel requires a real conversation between the prospective customer and the solution provider.

Figure 1: The Sales Funnel [3]

Through a telephone conversation the contact's needs can be identified to discover whether the product or service is a good fit. Further, we can determine the contact's buying role within his or her company, whether there is an existing budget for the product, and what their timeframe is for making a decision. This level of engagement moves the contact down the sales funnel from Attract through Engage and into Nurture, where our client can pick up the relationship.

2 Strategy

Michael E Porter wrote in his essay titled "The Importance of Being Strategic" that a successful strategy will exploit a unique market niche [4]. It should represent something that is compatible with your own core competencies while being something your competitors cannot easily duplicate.

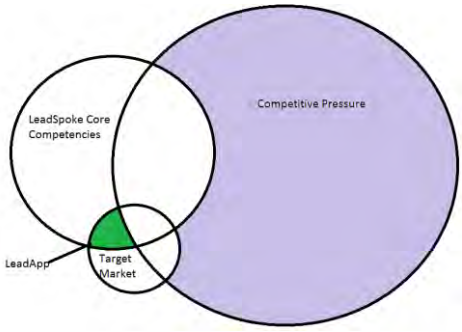

Figure 2: Strategic vision

LS's core competency is in filtering the sales funnel, and our goal is to grow that business. The company needs to find a strategy that can drive that rapid growth.

2.1 Win Condition

Strategy and tactics are about bridging the gap from means to ends. One thing LS brings to the table is an internal software product, LeadApp, which is proving itself to provide a competitive advantage. We also have a functional, effective call center operation that can grow in both size and utilization. As a young company, growth is critical to us – revenue is always challenging.

LS will leverage its internal LeadApp technology to grow our other services: not just calling services but also data management, email marketing, and more. We would consider our software strategy a success if it grows our core business of executing calling campaigns by 50% in two years. We think that by adapting LeadApp for use by external clients we can attract new users to our calling business, but this requires fast adoption of LeadApp by target customers.

2.2 Value Proposition

There are already companies producing volume calling software but none who have anything like LeadApp's unique position in the market. Volume calling software, whether standalone or added on to a CRM package, is a common thing for growing companies to seek out to get through purchased calling lists or other volume spikes. The competition is purely in the software space, however, and does not offer LeadApp's services.

In addition to what the competition offers, LeadApp users can offload large workload spikes to a trained bank of operators and receive back only highly-qualified leads, making their salespeople more effective and allowing them to focus on their core competencies. Companies looking for volume calling software have a need to contact a large list but may not wish to add headcount to do so; LeadApp gives them an alternative. Instead of adding staff, LeadApp can help them make their current sales employees more effective by offloading the top of the sales funnel.

3 Market Opportunity

The **Market Opportunity** for LS consists of four unique sections: Target Market, CRM Industry, Competitive Landscape and Product Differentiation.

Starting with Target Market, this is defined as the type of organizations that would be likely candidates to engage LS in one of three key areas:

1. Outsourced tele-prospecting / sales qualification services
2. Utilize LeadApp as an internal call-processing application that increases overall value of the client's CRM system

3. A combination of the above 2 choices: when lead volume is manageable, use in-house resources, but when client observes spikes in volume, they can tap into LS's tele-professionals to place calls on their behalf.

Based on our research, the target market consists of growing technology companies that participate in various lead-generation activities such as renting or buying lists to start the sales process, and/or take part in several field-marketing activities, such as tradeshows, conferences or seminars.

It is during these engagements that the client organization will generate a large volume of potential leads and has the need to have productive one-to-one conversations with these prospects in order to determine if they represent viable sales opportunities for their sales team.

With the above in mind, the target market also represent organizations that sell a high dollar value product or service line with a relatively long sales cycle. These are companies that are currently using phone as a means to engage with their prospects, and need an easy way to make this happen.

Because this need has existed for 20 some years, the target market has the freedom and flexibility to access high-volume call processing applications. There are numerous organizations (possibly 10+) in this space that provide a similar offering to that of LeadApp – however there are key differences between all organizations.

Because spikes in lead volume is prevalent and the potential need to outsource lead qualification calls to an outside firm exists, this is completely unique to LS's core business.

Lastly, the target market is one that is familiar with and most likely uses a CRM (customer relationship management) application. In other words, generating, processing and managing the sales funnel is not new to them.

The CRM industry strongly feels it is necessary to use phone as the primary vehicle to identify, qualify and convert sales opportunities as it relates to high dollar ticket items, $5-10K+ for a single sale. As the below figure indicates, Salesforce, the largest SaaS CRM service provider demonstrates how using phone vs. an email only campaign drives significantly higher returns.

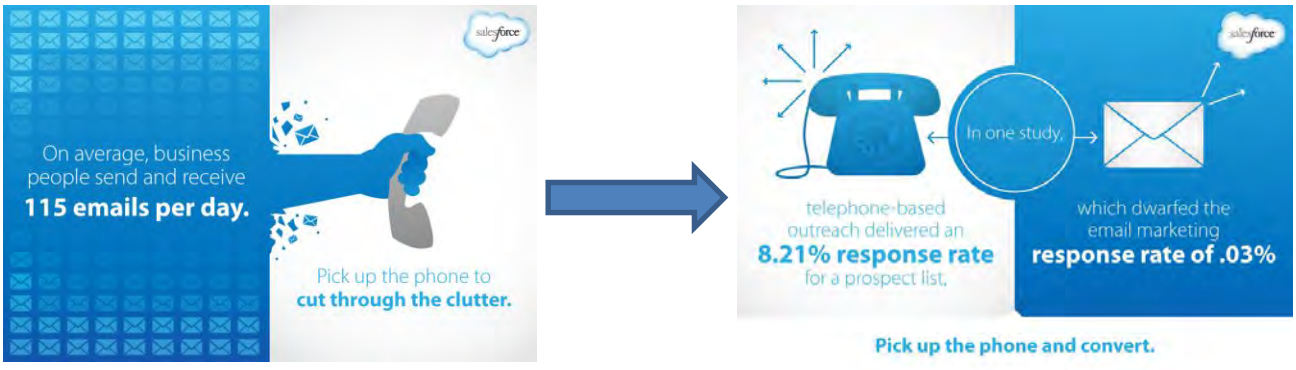

Figure 3: Salesforce email vs. phone response results. [5]

3.1 Target Market – CRM Industry Segmentation Section

Taking a closer look at the CRM industry, we see that the entire industry is really comprised of four unique service "providers". Two of which are entirely focused on large enterprise installations (Oracle and SAP). The organizations that pursue those two solutions are not our Target, as they typically represent very large organizations, and the time to penetrate them as potential LS customers would be extensive. Conversely, Salesforce occupies the largest share as a single service provider at 37%. Finally, there are a number of much smaller CRM organizations splitting the remains between them, with any single one owning a few percentage points.

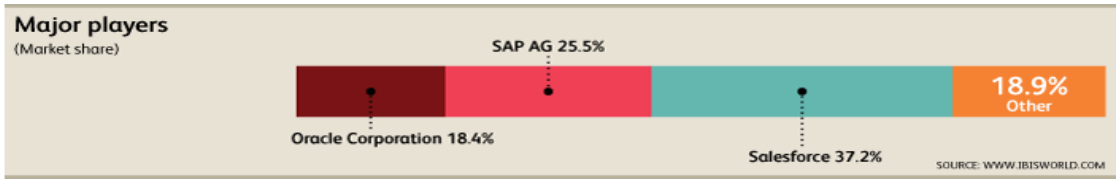

Figure 4: US Industry CRM Research Reports. [6]

With no indicator that small to medium sized high-tech companies specifically prefer another product, we can assume the majority are using Salesforce. Further, high-tech companies will have a tendency to solve problems with software, which leads us to how we will initially price and "sell" LeadApp.

3.1.1 Initial Sales Model – Freemium to first 3 users

Free products draw an audience, which in turn some will convert to be a customer and utilize LeadApp as their own call-processing solution. Building on the freemium model, LS can utilize transaction-oriented services to drive revenue. Examples: when spikes occur in lead volume, the client can off-load those spices to LS. Additionally, other support services such as data management, email marketing and engineering services (call campaign setup and management) are all key contributors to the revenue model.

3.2 Competitive Landscape

As relevant part of the Market Opportunity, we needed to do in-depth competitive research to see what service deliverables the competition would offer. To that end, the two affinity maps shows what space in which they reside.

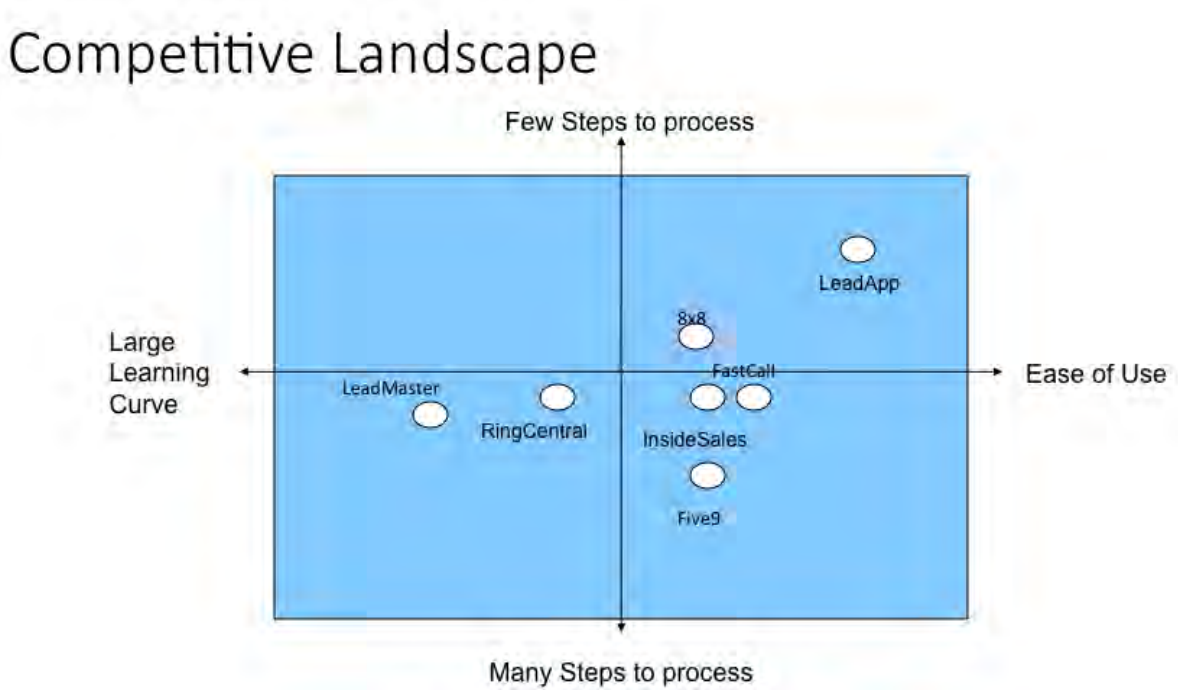

Figure 5: Competitive Landscape 1.

"Few Steps" and "Many Steps" refer to amount of fields are necessary to populate in order to log a given phone call.

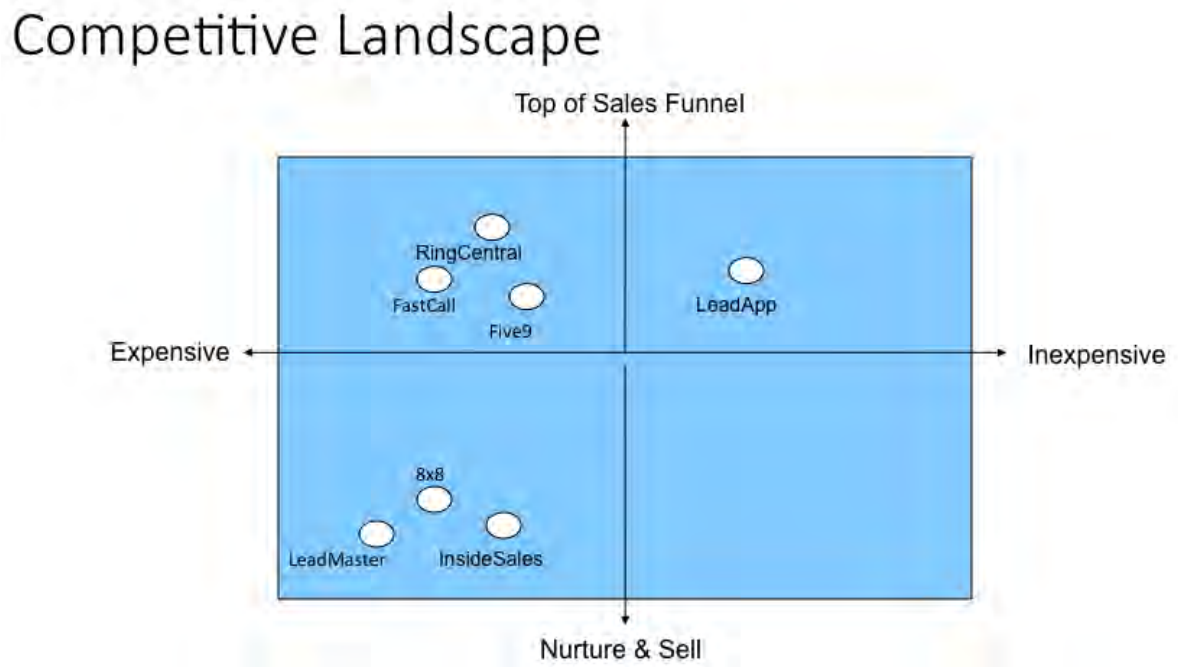

Figure 6: Competitive Landscape 2.

"Top of Sales Funnel" represents the large pool of suspect leads generated or needing to be processed. "Nurture and Sell" refers to the space where CRM tools come into play, specifically designed to manage near-term sales opportunities and returning customers.

3.3 Product Differentiation- Salesforce vs. LeadApp

Speaking of CRM, here is a side-by-side comparison on the number of steps and potential number of screens a user would encounter when documenting the outcome of a single phone call.

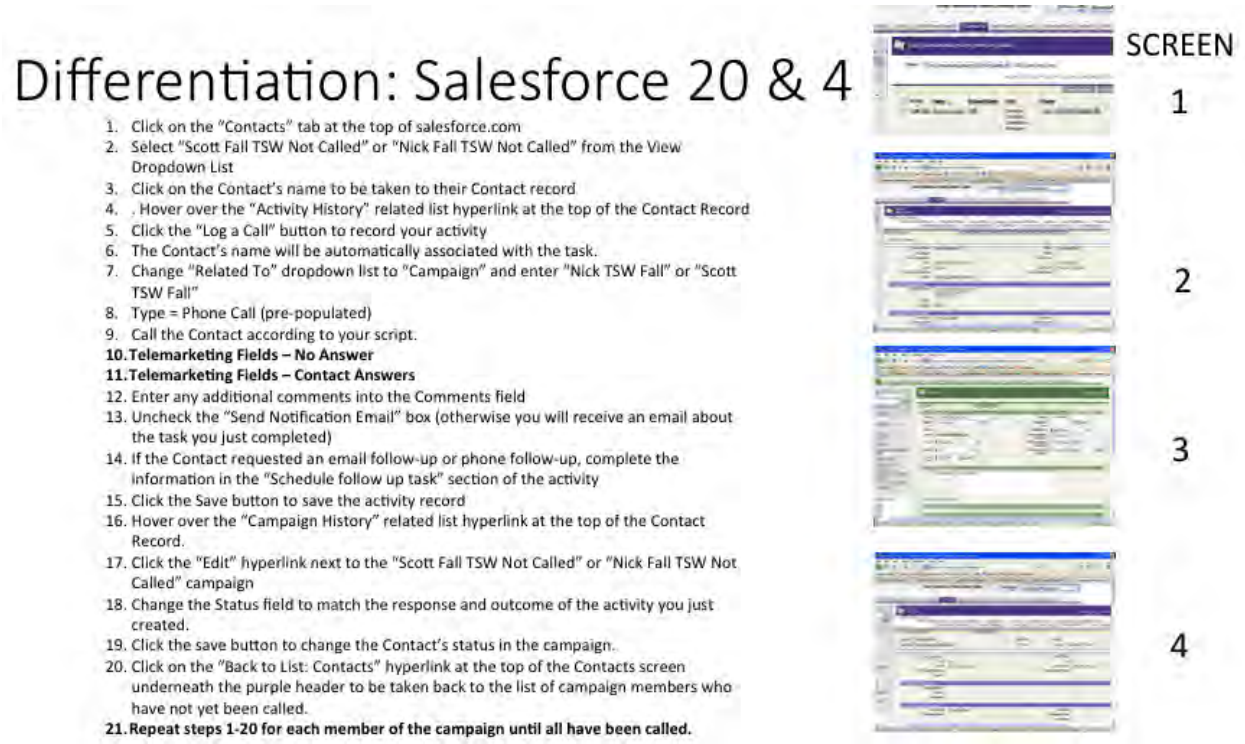

Figure 7: Differentiation: Salesforce 20 & 4

In the Salesforce example above, this application is specifically designed to manage the customer relationship, not necessarily place large volumes of calls, it could take 15-20 steps and four screens to process a single call.

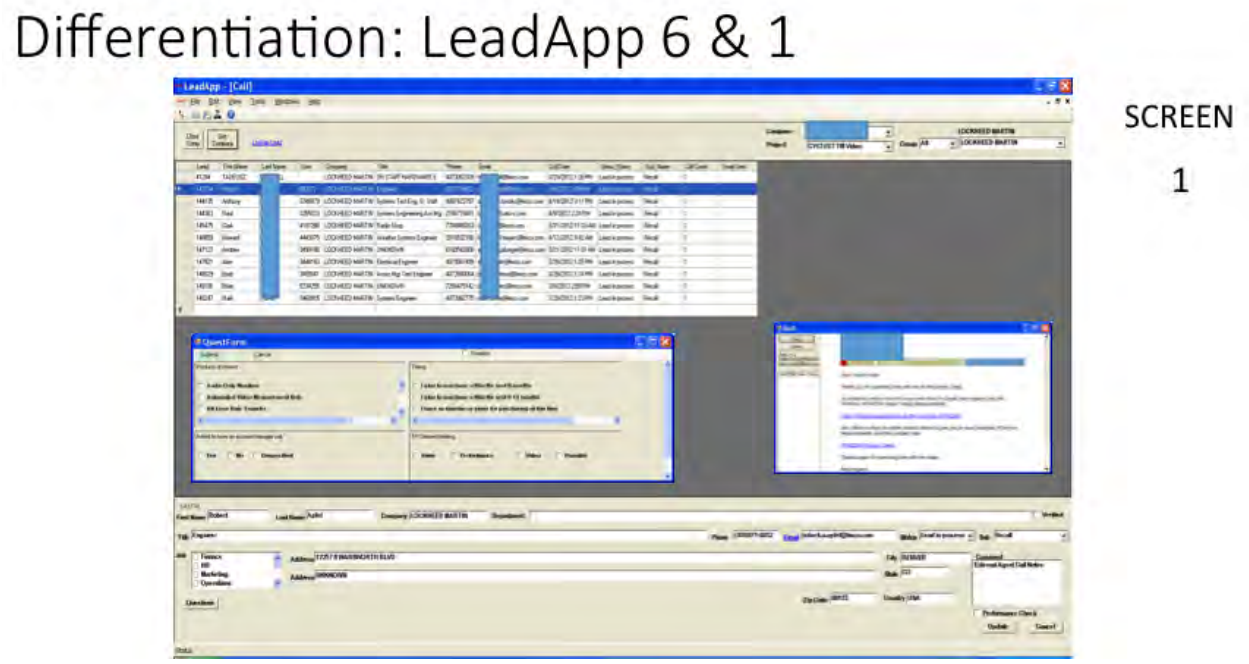

Figure 8: Differentiation: LeadApp 6 & 1

In LeadApp, shown above, that same call only takes 4-6 steps all residing on a single screen. With this tool, the user can access a given record (person they are trying to reach), ask and document customized questions, send email fulfillment and document the outcome of the call. The difference between Salesforce or other similar CRM applications and LeadApp becomes magnified when there are 1000s of records to process. Therein lies the difference: 20 steps and four screens on Salesforce vs. six steps and four screens for LeadApp. If your job was to produce 100+ calls per day, which would the user prefer??

3.3.1 Reports

With LeadApp, there are numerous management and production reports already pre-built, shown below. Everything is synced together (from the application to the reports) making it incredibly easy for the client to launch campaigns, giving tremendous visibility to campaign metrics.

Differentiation: Management Reports

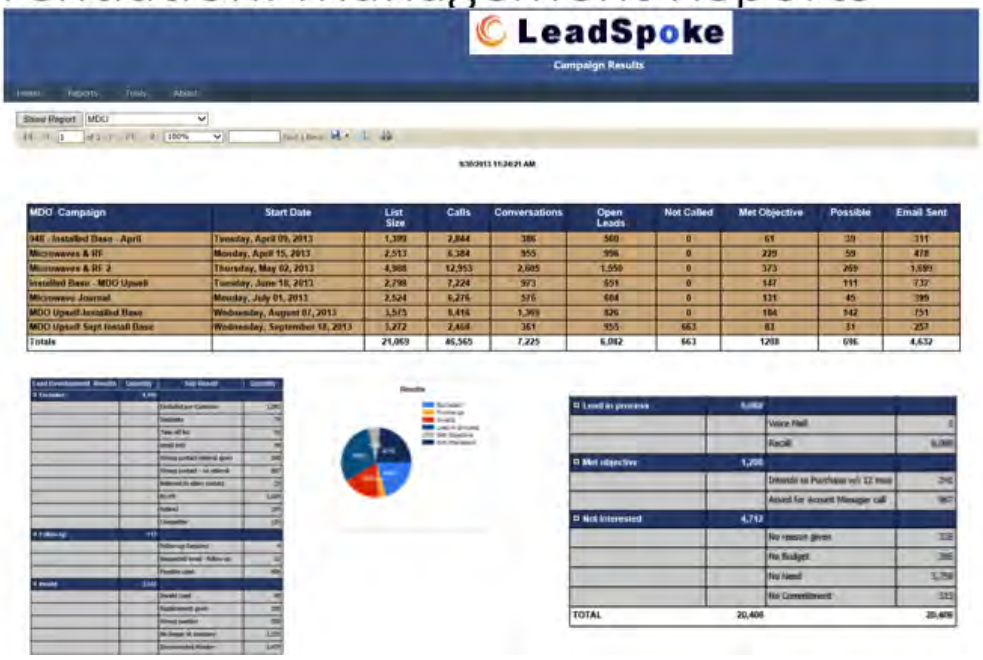

Figure 9: Differentiation: Management Reports

Differentiation: Production Reports

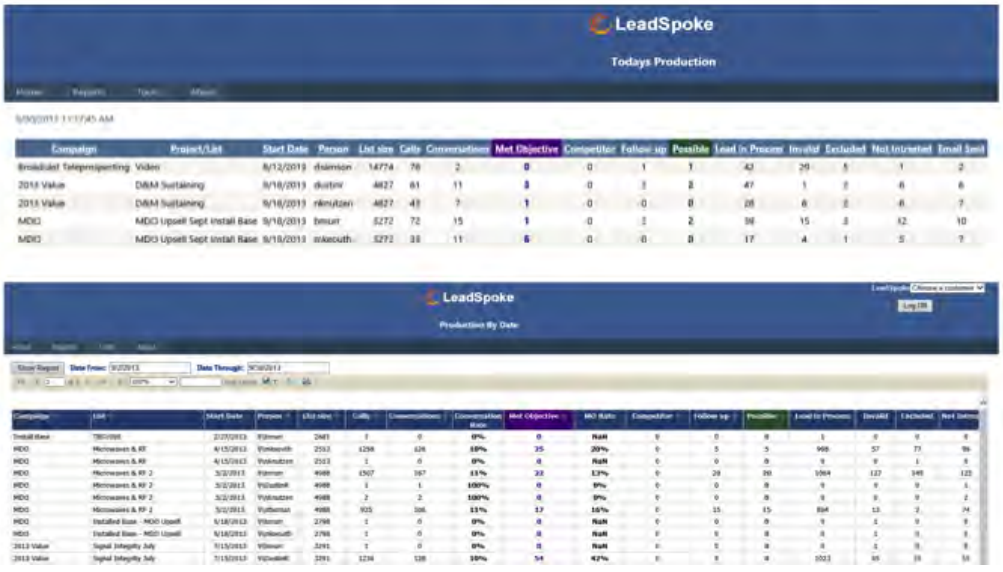

Figure 10: Differentiation: Production Reports

3.3.2 Time and Cost Slide

From a call processing time perspective and associated cost, here are the key differences:

Differentiation: Time & Cost

For a 2,000 call campaign…

	Manual/Paper	CRM	LeadApp	LeadApp w/FTE
Avg. Time spent per call	6 minutes	6 minutes	**2-3 minutes**	**2-3 minutes**
Electronic storage	No	Yes	Yes	Yes
Automated Email Fulfillment	No	Maybe	Yes	Yes
Automated Q&A	No	Maybe	Yes	Yes
Time spent	200 hours*	200 hours	**100 hours**	**24 hours**
Salary spent	$3,600 + Mgmt.	$3,600 + CRM Fee + Mgmt.	**$40 /Seat/Mo. $1,800 + Mgmt.**	**$3,200**

- Real-time Results
- Robust Reporting
- Minimal Setup

Figure 11: Differentiation: Time & Cost

With a manual process or typical CRM application, it could take upwards of 6 minutes to process a single call. Where LeadApp can do the same work in 2-3 minutes. Again this is magnified when there is a need to process 1000s of calls in a short period of time. The difference in cost is also evident. If the client chooses, they can utilize their in-house resources while using LeadApp and achieve a 50% cost savings. As an alternative, if the client does not have access to those in-house calling resources, they can offload that work to LS, still achieve a net cost savings – while not having to do the calling work themselves.

4 Product Development Plan

4.1 IT Management

As we have identified that software development is not yet a core competency at LS, the resources needed for us to get there will be broken down into two phases. The first phase will be our development phase and the IT services needed include:

- **Development library and tools:** The development library is a suite of data and programming code used to develop software programs and applications. It is designed to assist both the programmer and the programming language complier in building and executing software.

- **Testing and integration environments:** A testing environment is a setup of software and hardware where the team will perform the testing of the newly built software product. This setup consists of the physical setup which includes hardware, logical setup (including a server operating system), a client operating system, database server, front end running environment, browser (if web application, IIS version is on the server side), or any other software components required to run this software product. This testing setup is to be built on both server and client ends.

The second phase will be post launch once the development has been completed and customers have the ability to download the application from the cloud. We will not be building the cloud infrastructure in-house and instead will be managing an external cloud infrastructure. The advantage of the cloud infrastructure is that most cloud providers operate on a pay-as-you-go model of business. This is so customers buy only the services they are truly using rather than oversubscribing to meet peak availability. Two of the largest providers of Infrastructure as a Service (IaaS) and Platform as a Service (PaaS) services are Microsoft Azure and Amazon Web Services (AWS) [7]. Both offer a rich and similar array of features and capabilities. The market analysis that we have conducted on the two of the largest providers are illustrated in figure 12-15:

Vendor	Subscriptions	Control Interface	Server Operating System	Pre-Configured Operating System
AWS	•Hourly rate •Monthly / Fixed Rate •Reserved instances •Spot instances •Free tier (no charge for 12 months)	•Web-based application/control panel •API (application programming interface) •Graphical user interface	•Linux •Windows	•Amazon Linux •Cent OS •Debian •Oracle Enterprise Linux •Red Hat Enterprise Linux •SUSE Enterprise Linux •Ubuntu •Windows Server
Azure	•Hourly rate •Free one month trial (sign up for free and get $200 to spend on all Azure Services)	•Web-based application/control panel •API (application programming interface) •Command line	•Linux •Windows	•Cent OS •FreeBSD •COREOS •OpenSUSE Linux •Oracle Enterprise Linux •SUSE Enterprise Linux •Ubuntu •Windows Server

Figure 12: IT Management: Subscription, Interface, and Configured OS [8] [9]

Vendor	Support Services Available (No Additional Charge)	Support Plans (Additional Pricing)
AWS	•Customer service 24x7x365 •Support forums •Online and self-service resources •AWS Trusted Advisor	•Developer - $49/month •Business – Starting from $100/month •Enterprise – Starting from $15,000/month
Azure	•Customer service 24x7x365 •Azure Service Dashboard •Community forums •Online and self-service resources •Billing and subscription management	•Developer - $29 flat fee per month •Standard – $300 flat fee per month •Professional Direct - $1000 flat fee per month

Figure 13: IT Management: Support Plans and Services [10] [11]

Vendor	Available Regions	High Availability	Content Delivery Network Locations
AWS	•4 regions in US and 1 region for AWS GovCloud in US •1 regions in South America •2 regions in Europe /Middle East/ Africa • 4 regions in Asia Pacific including China	Through Availability Zones	The Amazon CloudFront Global Edge Network with locations •14 in US •10 in Europe •9 in Asia •2 in Australia •2 in South America
Azure	•8 regions in US and 2 region for Azure US Gov •1 regions in South America •2 regions in Europe /Middle East/ Africa •5 regions in Asia Pacific including China (partnership between Microsoft and 21 Vianet, China)	Through Availability Zones	Microsoft Azure CDN point of presence (POP) locations •9 in US •11 in Europe •8 in Asia •2 in Australia

Figure 14: IT Management: Availability [12] [13]

Vendor	Virtual Machine	High Performance Computing	Dynamic Scaling	Hadoop/ MapReduce
AWS	Elastic Compute Cloud (EC2)	•Cluster compute instances •Cluster graphics processing unit (GPU) servers	Auto Scaling	Elastic Map Reduce (EMR)
Azure	Virtual Machine	•HPC instances/ scheduler •Batch (preview)	Auto scaling Application block	HDInsight

Figure 15: IT Management: Computing Power Services [8] [9]

The data collected during our market analysis phase gave us insight on the two leading cloud providers. With both providers being very strong in similarity, we chose to go with Microsoft Azure because the current infrastructure that LS has already setup is in a Microsoft environment. This will make our work much easier to transition in the long run. Below are reasons for us choosing Microsoft Azure over Amazon Web Services [14]:

- Write applications in the same programming languages used for Windows applications: Visual Basic, C++, C#, etc…
- Use familiar tools such as Visual Studio, along with ASP.Net and other familiar Windows technologies
- Easier for our organizations to find developers who already have the skills to create applications for the Azure platform
- Create a cloud version of an existing Windows application due to Azure's similar infrastructure with Microsoft

4.2 Project Management

The object of the LeadApp is to become the Salesforce partner within a period of six month at an estimate cost of $200K. To be part of the Salesforce partner, LeadApp will need to acquire a license, get an account on Salesforce and partner development edition organization. LeadApp will also need to contract a developer to develop the App on Salesforce.com. The estimate cost of all tasks needed is about $200K. Like other projects, LeadApp is constraint by Scope, Time and Cost.

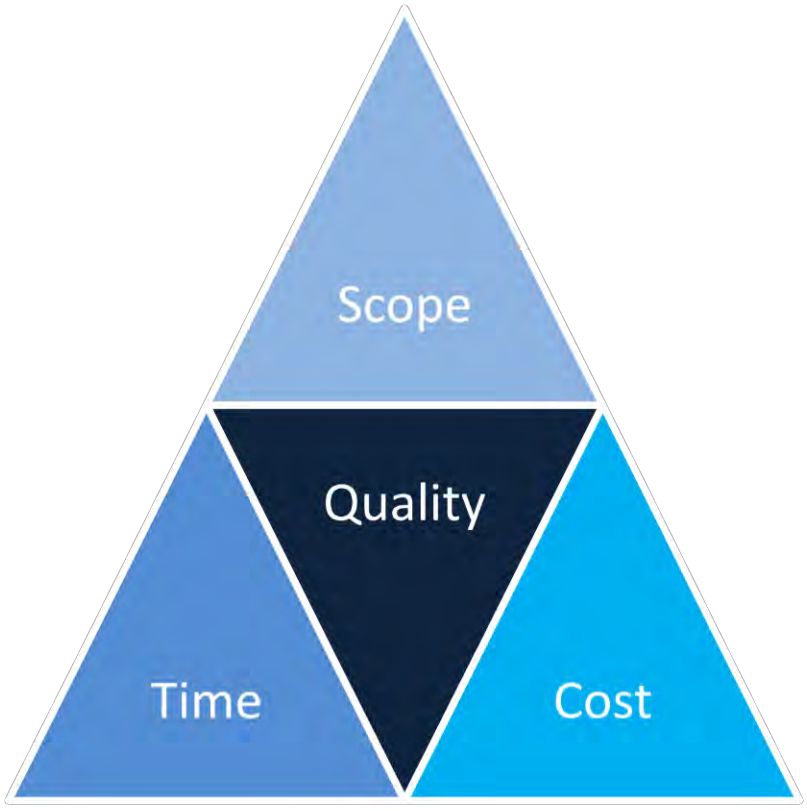

Figure 16: Trifecta

Scope goals: Take existing App and integrate into Salesforce. Time goals: Targeting 6 months to align with fall tradeshow season. Cost goals: $200K for engineering, support and IT infrastructure.

The team compared two project methodologies, the Water fall and agile. The waterfall model is a sequential design process, used in software development processes, in which progress is seen as flowing steadily downwards (like a waterfall) through the phases of Conception, Initiation, Analysis, Design, Construction, Testing, Production/Implementation and Maintenance while Agile methodology breaks the project into small increments delivered in boxed iterations. Agile methodology accommodates changing requirements. It includes SCRUM and extreme Programming (XP) Progress is measured in terms of working functions or products [15] [16]. After comparing the two methods, the team decided to choose Agile because of it can accommodate changing customer requirements and also the time the product is supposed to be delivered.

The team will determine the changes necessary to implement a backlog item. The development team will then write the code, teste it, and document the changes. During wrap up, the team will create the documentation necessary to demonstrate the changes. In review, the team will demonstrate the new features, add new backlog items, and assess the risks. Finally, the team will consolidate the data from the review to update the changes as necessary.

4.3 Team Leadership

As mentioned in the project management section, our timeline for the software development project from now until the tradeshow is six months. We are willing to allocate to this project one manager and two software developers. Our primary focus during recruiting is to utilize local talent. If an issue arises, where workload becomes a burden for the current team or we aren't able to find someone locally that has the skillset that we need, we are willing to consider the option of having the employee work remotely (from another city, state, or country). We compiled a list of what local and remote teams means and what is to be expected (figure 17).

Local		Remote	
Advantages	**Disadvantages**	**Advantages**	**Disadvantages**
Interpret thoughts and feelings	Travel	Reduces travel time and cost	Different leadership skills needed
Enhance credibility	Time	Recruit talented employees	Language barriers
Gather Feedback	Increased likelihood of distracting conversation	Create equal opportunities in the workplace (i.e disability)	
Build a relationship		Reliability (i.e Trust)	
Privacy and security of information		Time Zones	

Figure 17: Local vs. Remote Teams [17]

If we were to branch out to add remote employees to our team, the advantages of operating as virtual team include [17]:

- **Reduction of travel time and cost:** If someone doesn't have to commute to work, they save on gas as well as on upkeep of their vehicle. If they commute using public transit, they will save on

the cost of the bus or subway to get to and from the office. This can significantly harvest savings over time for the employee. On a related note, the environment benefits when there are fewer cars on the road generating carbon dioxide.

    - **From a business perspective:** A full-time remote worker doesn't require network resources or office space. They don't require lights or power and while this may be negligible savings, if the business is already supporting physical infrastructure, migrating enough workers to a remote model can offer cost saving to a business.

- **Recruiting talented employees:** Virtual teams allow all organizations to recruit the most talented employees in the field since the hiring pool becomes more diverse geographically. In some ways, this is beneficial because it can lead to economic benefits to smaller communities, but in other ways it means that the best talent may not be near your business location.

- **Creating equal opportunities in the workplace:** Physically disadvantaged employees gain easier access to the virtual workplace than to a physical office. This ease of access helps organizations reasonably accommodate the particular needs of a range of disadvantaged employees.

Along with the aforementioned advantages, the following are a few disadvantages of using a remote team [17] [18]:

- **Different leadership skills needed:** Team leaders are challenged to adjust their leadership styles to meet the needs of remote teams. This may be especially challenging for traditional leaders who are more comfortable and familiar with face-to-face meetings. Virtual team leaders need to schedule sufficient time in their day to make the calls, emails and online visits necessary to achieve an encompassing virtual walk around of the entire team.

- **Language barriers:** Communication problem arises especially when a common language is required to conduct team business. For example, even if the official language for the remote team is English, not every non-native English-speaking member finds it easy to communicate during a team meeting.

- **Reliability:** Trust is at the foundation of all successful relationships and in order for virtual teams to succeed, they need to build and foster their relationship carefully and intentionally. If that trust is broken among the virtual team members, project progress will hinder and reduce the ability to meet company goals. Trust is often the result of team members knowing that all people in a team can be counted on to complete their assigned tasks. The trust factor is especially vital for remote teams because of the lack of personal face-to-face interactions.

- **Time zones:** Having various time zones reduces the window of opportunity for personal contact. It can result in delays that can be frustrating for team members when the team cannot proceed without a colleague's response. Work-time shrinks as more time zones are crossed, becoming almost non-existent when team members are on different sides of the world.

4.4 System Integration

LeadApp will need to have the ability to integrate with other business software such as Salesforce and possibly other CRM packages. It will also have some ability to import and export data to common formats so it can integrate generically with other business software.

To that end a middle tier will need to be developed that can act as an interface. This middle tier will initially integrate tightly with the Salesforce SaaS offering as well as import and export CSV files, but other capabilities may be added later. This represents a horizontal integration pattern [19], but one lightweight enough to release in a relatively short time.

Some additional work will be needed to enable the freemium sales model; we'll need technology to detect usage levels at a company and force a purchase to unlock additional functionality. Delivery of LeadApp in a SaaS model suggests that our licensing work as a subscription. Clients who take advantage of calling services will need to be able to easily do so and have calling fees assessed; those fees are based on current business partnerships.

Delivering software as a service is simple, but in this case we must be available to integrate with Salesforce from the start. We'll need our own servers for this at first, but once proven in the market Salesforce will host on its own AppExchange.

Given the SaaS model, we expect to release updates online to all users simultaneously. Ongoing support is expected to be a cost against the increased business generated, but we will need to monitor support costs to ensure the balance of the software's impact on our business is positive.

4.5 Strategic Innovation

The tools used during project implementation (waterfall/Agile) includes [20]

A contact list will provide a place to store information about project team members, customers, stakeholders, etc. It is especially helpful when a large number of people are working on a project. Most projects have a number of stakeholders who each have requirements for the project. For example, what should the layout be for the new plant? What functionality is needed with a system upgrade? Using a document like this helps the project team document and consolidate all of these needs. The purpose of a project plan is to identify tasks, owners, and timelines to keep the project on schedule. These can also be completed in another tool, such as SharePoint or Microsoft Project. RACI chart can to lay out roles and responsibilities for a group. This is especially helpful in complex initiatives, where the group has interdependencies. Whereas the project plan focuses more on timeline and dependencies, a RACI chart focuses more on the people and how they work together. It answers questions like, "Who needs to approve this?" "Who else is working on this?" "Who do I need to communicate with?" Before implementing a change, it's helpful to understand how it affects various stakeholders. By identifying current and future states, as well as resistance and benefits, the project manager can tailor the communication and training more effectively. Every initiative has stakeholders-- people who can influence the project's outcomes or who are affected by the project. It's helpful to identify these people

or groups early and understand their perspective (are they in favor of the project or are they likely to resist it?). Once project manager knows the level of support or resistance he has, he can change a plan to build or leverage support. A small amount of consideration can make a significant difference to his project. As the leader championing the project, sponsors play a critical role in its success. This template helps the project manager and project sponsor decide how the sponsor's time will be most effectively spent during the project. Finally the purpose of a status update is to briefly describe the project's progress and strategize for any upcoming milestones. The project management and project sponsor should determine how frequent these updates should happen. The most common intervals are weekly, bi-weekly, or monthly.

4.5.1 Best Practices in Software Innovation

First, LeadApp decided what they want to achieve, and where to focus. To help identify where to start, we thought about LeadApp business in terms of: Which processes involve most Information Management waste and risk? Which types of document are involved in those processes and which of them are most important? Which people are using which tools and who is involved in managing those documents today? Where does information enter and exit LeadApp business? Choosing a tool that is integrated with systems that people already use. It may be best to start with a pilot. Information Management (IM) pilots can deliver fast results with low risk, helping you to learn and to demonstrate success. A pilot should have narrow scope – e.g. a small team that needs to collaborate frequently on a limited quantity of documents

Set goals

After deciding on the project scope the next step was to confirm the business goals for our project. They depended on the pains that our customer were experiencing. Setting business goals and measuring progress on them are vital to ensure that our effort is focused on the right things, and delivers real results. Measuring progress towards these goals is vitally important.

4.6 IP Protection

Intellectual Property Rights (IPR) come in many forms, e.g. patenting technical invention, protecting a design, trade marking a logo, product or service and/or copyrighting of a piece of creative work. Based on our research, coupled with the type of software deliverable and the current stage of the company, we believe the Trademark and Copyright is the best fit at this time. We are not pursuing a patent because not a completely unique idea, cost, time, and according to our guest speaker, Charles Moore mention that patenting software has become much harder to patent today because it raises the question can you patent software code? Lastly, we aren't considering trade secret because at this time we don't have any confidential business information which provides an enterprise a competitive edge in the industry.

5 Conclusion & Future Work

As presented throughout the paper, we set out to identify if it would be feasible for LS to develop and launch a web-based "public version" of their LeadApp call-processing application. To that end, we first set out to identify the Win condition & Unique Value Proposition which would help us define LeadApp's unique position in the marketplace.

We relied on various research sources such as literature review, competitive analysis to identify product features/benefits of LS's competitors in the same or similar space; combined with many hours of interviewing the CEO of LS in order to provide a more detailed, "insider's view" of the LeadApp application and the competition.

To better identify the transformational steps that the LS organization may take, we suggest the following future work research activities:

- Continue to purse existing Full Time Equivalent (FTE) services to fund application development. In conjunction with this primary activity, seek outside investment to accelerate the development timeframe.
- Deploy first-generation web-based version (Freemium Model). Justify its need and potential revenue.
- Finally, if deemed "acceptance" by all parties involved, move to the Salesforce AppExchange for widespread adoption.

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