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VisualSmart Gets Graphic

By Heather Baldwin

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Unless you have the mind of Dustin Hoffman's famous Rainman character, all the data generated from today's CRM applications can be tough to digest – and few sales managers have the time to digest all those numbers anyway. That's what the folks at Synergex realized when they created VisualSmart, a new graphical analytic subscription service that transforms the reams of data generated by CRM systems into graphics such as pie charts, bar graphs and grid views.

"Raw data does not tell you how old your sales pipeline is or the value of deals by expected close date," says Michael Dewid, vice president of sales and marketing for Synergex. "Our visual techniques make trends, problems and patterns readily visible and actionable." Say, for example, you want to know how many deals, by sales rep, are likely to close in the current quarter. Rather than poring over an Excel spreadsheet, you could, within one or two mouse clicks using VisualSmart, be looking at that same information in a pie chart – or a bar chart or line chart. Users choose what they want to see and how they want to see it. They then can drill down into the graphic for an increasingly granular view of the data. "VisualSmart gives users the ability to ask why is that happening? And then the capability to drill into the data to learn why," says product manager Ralph Cesena.



VisualSmart is a Java-based Internet application targeted at the small- to mid-sized market. Its initial release will be geared to Salesforce.com users. Synergex is working on versions that will support data generated by other CRM and financial applications as well. Like Salesforce.com, VisualSmart can be up and running quickly. Synergex got one beta customer started in less than a day. Another beta customer is already reporting remarkable results. At a company in Dallas, one sales operations analyst said she used to cut and paste data into Excel spreadsheets to create sets of monthly management reports. "She claimed it took her about 40 hours a month to produce these reports," says Dewid. "Now she spends zero minutes. It's all there in the charts at a click."

VisualSmart is in the final stages of beta testing and will be released on Jan. 15, 2003. For more information, visit www.synergex.com

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