Logicle Analytics, LLC

Case Study: Inbound Lead Aggregation

By reducing the dependencies on third-party apps and providing an in-house solution, Logicle delivers an automated and scalable inbound lead management workflow.

Dean Elmer Co.

Industry: Financial Services
Location: Greenville, SC

Company Bio
With over 20 years of experience in helping improve small business performance, Dean Elmer Co. has offered clients the tools, resources, and guidance necessary for all their accounting needs.

"Without the help of Logicle I would describe lead management as chaotic. Now the data I need is at my fingertips when I need it and in the right place. Jonathan has given me complete peace of mind with how I handle inbound lead management and contact solutions."

- Dean Elmer
President
Dean Elmer Co.

Overview

As a full-service tax, bookkeeping, and business solutions firm, Dean Elmer Co. has inbound leads coming from multiple sources. These leads were processed with a hodgepodge of third-party tools, sending partial data to some of the company's core data management tools. Logicle Analytics assessed the situation and built a custom solution that placed all inbound leads according to their source, saved a backup of each lead in the company's data store, and initiated a defined sales workflow tailored to each lead.

Average Leads Processed	Manual Hours Saved	Recurring Costs Reduced	Response Time Improved
40/mo	**10**/mo	**$600**/yr	**50%**

The Challenge

As a comprehensive financial services firm, Dean Elmer Co. has several inbound lead sources that feed directly to email. The information in these emails must be manually entered into the the Company's CRM resources and address books. The Company bought into a few third-party services to automate this process, which connected the most critical of components, but did not allow for scaling up. In addition, these services created dependencies that introduced multiple failure points. The end goal of the project was to bring in the lead information from the body of each email, route it to the appropriate destination systems owned by the Company, and create a backup of each lead in a simple database. This increases efficiency, eliminates broken dependencies and reliance on third-party services, and reduces out-of-pocket cost.

The Approach

There are plenty of third-party tools available to parse email and make systems talk to each other. They are useful, they can get out of hand (both in terms of effort and cost) if scaled up. Logicle wanted to give the Company the same functionality they had with their existing third-party tools while reducing the cost to maintain that functionality and giving them more control over their data. The solution had to reside on the Company's own infrastructure, reconcile contact records across multiple sources, and accommodate future expansion in both lead volume and destination accounts.

"We wanted to consolidate -- not only the information coming in, but the tools being used as well. There were too many moving parts, potential failure points, and associated costs."

- Jonathan Fowler
Founder and CEO, Logicle Analytics LLC

The Solution

Logicle first sketched out all the incoming lead sources and all the desired outbound locations, with the built solution represented as a black box in between. Then, Logicle defined the rules that routed each incoming lead to an outbound source. This conceptual map ensured both Logicle and the Company understood exactly what was coming in and their destinations. The solution was named *Celeste* and given a dedicated Company email address.

The build itself involved Python scripting with several base libraries, pyodbc, Exchange Web Services, and specific cloud CRM API endpoints. The initial challenge involved matching the template text for each lead source in order to parse out the necessary fields, but was overcome after some iteration over a sample of lead emails.

Deployed to the Company's environment, Celeste checks for lead emails on a regular basis. It then pushes those leads to the Company's CRM systems, makes an entry for each lead in the Company's data warehouse, adds the lead to the Company's Exchange contact folder, and sends a batch report via email. The modular code is written to be expandable for new inputs and outputs.

The Results

Dean Elmer Co. now has Celeste, the automated solution, handling inbound leads in a completely managed workflow. They have eliminated the third-party services and associated costs. The architecture of Celeste allows scaling up in both inbound sources and outbound destinations. The time spent on manual entry and data validation has been reduced, as has individual response time. Now, Dean Elmer Co. and Logicle Analytics are looking at further development phases to add to Celeste's functionality and play a key role in the Company's growth.

Reduce Cost   Increase Efficiency   Own the Data   Strengthen Workflow