

**ABSTRACT**

Microsoft Corp.  
 Cleanses Sales and  
 Revenue Data with the  
 Trillium Software System and  
 Expects 10X ROI in  
 Year One.

**PROJECT**

Data Consolidation  
 Sales Force Automation  
 International Data Cleansing

**INDUSTRY**

Technology



# TRILLIUM SOFTWARE

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## Microsoft® Background

Since its inception in 1975, Microsoft has been the leader in creating software for personal computing. The company offers a wide range of products and services for business and personal use, including operating systems for PC's, server applications for client/server environments, business and consumer productivity applications, and interactive media programs, and Internet platform and development tools. Microsoft products are available in more than 30 languages and sold in more than 50 countries.

**Problem Solved**

Microsoft's sales database contains all sales and revenue data for every product the company sells worldwide. The information is used for everything from general ledger revenue postings to sales forecasts, customer rebates, sales force compensation, and purchase orders for inventory restocking. We need detailed, accurate information on what Microsoft is selling and what Microsoft partners are selling through the channel, down to the individual customer level.

Each week, there were 40,000 to 50,000 unrecognized organizations – distributors, resellers, customers. For example, information about a reseller might be entered by more than one distributor with slight variances in the data.

Entries could contain erroneous or incomplete data. Revenue totals were not matching up properly for resellers. Report generation was slow and cumbersome, as unmatched records had to be manually reviewed and matched. The rapid growth of the database—14 million new transaction entries each quarter—was outstripping the ability to correct errors.

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### Trillium Software System Operating Environment

- Windows 2000/NT
- AS/400
- Mainframe
- UNIX
  - Solaris      - AIX            - NUMA-Q (Sequent)
  - HP            - NCR            - Compaq Himalaya
  - Linux        - Tru64

“ Because of the overwhelming success we’ve experienced with the Trillium Software System we plan to incorporate the software into online applications within our organization. ”

Jon Elliott, Microsoft Sr. Manager

While records for larger resellers and customers could be manually matched, the proliferation of smaller organizations meant many records were being left unresolved. A third-party data cleansing and reengineering technology was needed. The solution needed to be multi-platform, multitasking and provide international coverage in multiple languages.

### Product Functionality

Trillium Software System is fully integrated into our sales database to clean all new customer data as it enters. We rely and trust Trillium to identify and match to our existing customer list as well as identifying new customers.

The software uses modifiable match routines to reconcile transaction records with the appropriate organization. This is done through an industrial strength parsing engine that uses intelligent pattern recognition to identify words and phrases as well as names and addresses. We are then able to review the suggested matches and reconcile accordingly.

New customer records are then generated for all transactions that do not meet our business rules for the definition of an existing customer. That’s how much trust we have in the Trillium Software System. If it can’t find or suggest a match, one probably doesn’t exist.

### Solution Strengths

The software is very tunable, allowing us to easily configure the business rules. It is a worldwide software solution that can process data in several languages. Its scalability is important as we expand it to cover other enterprise applications and also move it to smaller systems to handle specific tasks, such as managing customer profiles.

### Solution Weaknesses

The current user interface is workable but needs significant improvement. In batch mode, the application is currently based on flat files and is unable to dynamically call a database. This limits the flexibility of integration with disparate products. Lastly, the current application doesn’t support double byte character languages.

### Solution Selection Criteria

The software was chosen because of its ability to handle data in eight languages, its multitasking capabilities and the vendor’s ability to provide test files to evaluate capabilities prior to implementation.

### Deliverables

Within the first year of implementation we’ve experienced a tenfold ROI from our initial investment with Trillium Software.

Revenue and sales reports can be generated in less than two days, instead of five. The number of personnel dedicated to reviewing and auditing data has been reduced from 18 to 8.

The IS department now provides a value-added corporate-wide service by ensuring quality data for channel analysis, revenue forecasts, inventory restocking, general ledger postings and other functions.

Because of the overwhelming success we’ve experienced with the Trillium Software System we plan to incorporate the software into on-line applications within our organization.

### Vendor Support

Trillium provided test files for use in evaluating their system. The test files were detailed and gave us assurance that the Trillium system could be adapted to our needs.

### Documentation

Trillium’s documentation is excellent. We needed a solution that could be implemented quickly and easily learned by a staff of 20. Product documentation, including technical bulletins, are also available online.

### Reviewer

Jon Elliott, Microsoft, Sr. Manager

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With more than 450 customers worldwide, Trillium Software provides the industry’s leading software solution for cleansing and standardizing global customer information in e-business, CRM and Internet applications.

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