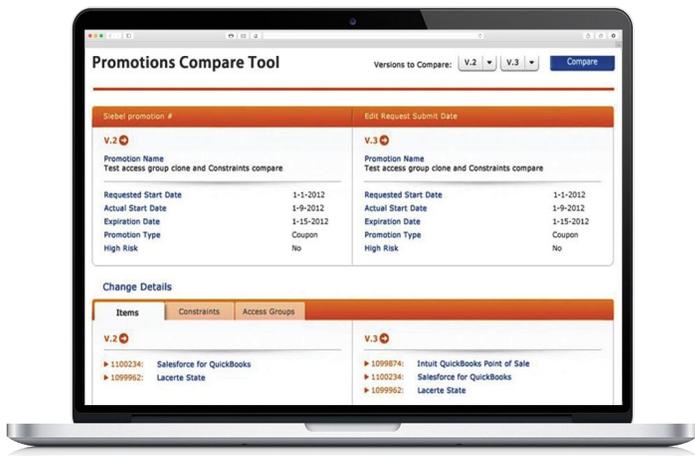## CLIENT CHALLENGE

Intuit needed a way to track and evaluate it's sales campaigns that promote various product lines. Purchase incentives were created for each product promotion with specific starting and ending dates. Each promotion was time sensitive and included associated costs and revenue goals.

In addition, there were multiple versions for each promotion, making the approval, setup, and evaluation process even more complex. Intuit found that getting the approval and setup process completed in a timely manner was challenging. Otherwise, the window of opportunity for the promotion would pass, or result in a financial impact of revenue not being recognized in the proper quarter.

Reducing the time for promotion approval and setup was the goal, and the most effective way to accomplish that was by finding a more efficient method of comparing changes in the versions. The primary challenge was there was that there were large sets of data in multiple tables relating to each version and there was not an easy graphical way to compare the various versions of a single promotion.

Ultimately, Intuit needed a way to gather and interpret data automatically to help leaders make smart business decisions.

ABOUT INTUIT®

Intuit is a publicly traded U.S. computer software company based in Mountain View, California. The company was founded in 1983 by Scott Cook and Tom Proulx. Intuit currently employs approximately 8,000 people and reported earnings in fiscal 2014 of $4.5 billion.

The company makes software applications for individuals and small businesses, primarily related to accounting (QuickBooks), personal finance (Quicken) and tax reporting (TurboTax). In 1999, the company created QuickBase, a database program that allows users to create their custom applications without having to understand programming languages. Other product lines include the popular Lacerte and ProSeries applications for professional tax preparers.

For more information visit their website at: www.intuit.com.

MCFTECH SOLUTION

MCFTech solved the problem by creating a Compare Tool using Intuit's QuickBase software, enabling the user to compare any version of a promotion with another version, side by side, to easily identify what changed. Changes were categorized in three ways: Additions (identified in green), changes (identified in yellow), and deletions (identified in red).

To further simplify the comparison, the tool was separated into sections for a quick visual reference.

- Header Section: lists data that is common to the entire promotion
- Change Details: consists of tabs of the various child tables to promotion
  - Items are child records and contain the product that is being promoted.
  - There can be multiple items on a promotion.
  - Constraints are child records to items and contain how that item/product is restricted depending on the promotion
  - Access Group is a child table to header
- Change Summary: a quick summary in text as to what has changed
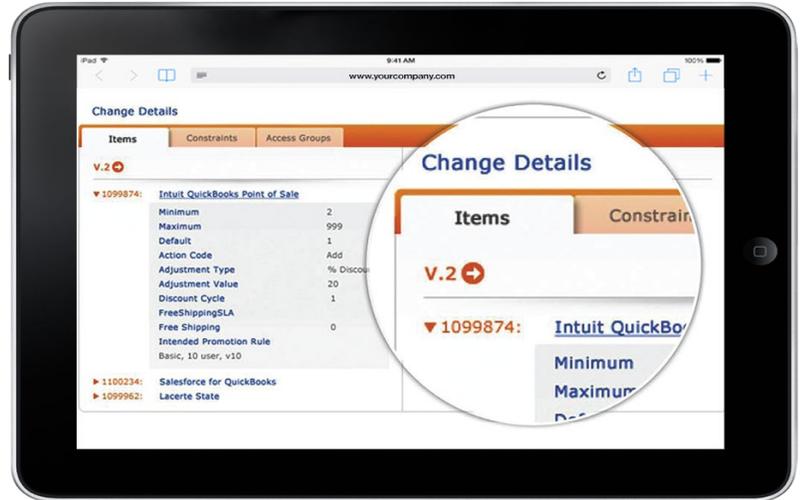
DEVELOPMENT & TRAINING

The Compare Tool was built using a QuickBase database platform and JavaScript pages. MCFTech application developers met with stakeholders from Intuit to identify their needs. MCFTech then developed mock-ups of the proposed visual interface to help the team refine their vision. As the Compare Tool is very intuitive for users and the Intuit staff is already familiar with QuickBase, minimal training was needed. MCFTech simply demonstrated to it's stakeholders during weekly meetings.

ABOUT MCFTECH

MCF Technology Solutions delivers Services, Strategy, and Products to business customers worldwide. We focus on the successful development, deployment, and support of Business Applications for diverse teams. We believe the best solutions come from a sound business understanding and the thoughtful application of technology. Our Business-First approach ensures a high-level of collaboration with our clients and results that satisfy the organizational needs. As a modern, virtual company, MCFTech provides resources and services in the Americas, Europe, Africa, Asia, Australia, and the Middle East. Our global footprint includes deployments in more than twenty countries as well as systems that touch nearly every corner of the business world.

We utilize a proven methodology, dubbed the "The MCF Way," which has led to hundreds of successful engagements. It is an iterative, customer-centered methodology based on extensive experience with leading software development, business process, and project management practices such as Lean, Six-Sigma, Agile, and PRINCE2®. This methodology allows our expert teams to deliver technical solutions to the world's top companies. We bring the best value to help our clients achieve flexibility, collaboration, and intelligence in adapting to a changing global marketplace.

We believe that the best solutions are born out of sound business understanding combined with the skilled application of technology. Why accept anything but exactly what you need from a software application? You shouldn't! Contact MCFTech today to find out more.

THE BENEFITS

The Compare tool allows Intuit to easily compare the current version of a product campaign to previous versions of the campaign. This comparison allows Intuit to easily see what has been added or removed between versions, as well as any differentiated data between versions. The tool allows for a quick comparison of the versions side by side and is color coded to make the comparison as easy to read as possible. Implementation of the Compare Tool has reduced the cycle time for approval and setup of promotions. This new efficiency ensures that Intuit can meet designated deadlines required by Service Level Agreements and not miss out on potential revenue.

The application has worked so well that a Compare Tool for Campaigns has also been developed using the QuickBase platform and the same basic requirements.