CASE STUDY

HTK Expands its Horizons SaaS Platform with Pentaho

Pentaho Business Analytics Software and Professional Services deliver HTK's online CRM applications in five weeks

About

Founded in 1996 and privately owned, HTK has historically developed CRM applications and web/email/SMS/voice automation services for large enterprises and public sector organisations. Past projects include building the UK's first electoral voting by interactive voice response (IVR), government 'warn and inform' systems classified as critical national infrastructure and information lines for TV's Big Brother. Today HTK serves the small and medium-sized business community with 'Lite' and 'Professional' versions of its HTK Horizon software, in addition to its enterprise customers. To support its customers' significant data storage requirements, HTK manages two UK data centres.

The HTK Horizon Software-as-a-Service (SaaS) platform changes the way that businesses sell to and serve their prospects and customers. Horizon's CRM data segmentation capabilities and one-stop integration of email, social, SMS and voice communications enable marketers to manage more effective campaigns, increase adoption of customer self-service and improve customer satisfaction. One of HTK Horizon's key differentiators is that it lets marketing professionals tailor the way they interact with customers based on things like location, preferences and behaviour; for example the amount of money they spend. This tailored approach helps marketers raise customer advocacy, loyalty and ultimately profitability.

QUICK FACTS

- Industry: Marketing SaaS
- Headquarters: Wherry Quay
- Website: htkhorizon.com
- Products/Services: Pentaho Business Analytics OEM Partnership; Pentaho Partner Xpand IT Consulting

Challenges

HTK had a strong foothold in large enterprise and the public sector, but in a UK market where 99 percent of businesses are small and medium-sized, HTK wanted to open up its CRM application and infrastructure to smaller organisations – from boutique marketing agencies to local councils. HTK knew that for small and medium sized businesses (SMBs), Cloud was the right deployment model and SaaS the right commercial model. HTK also knew that people who buy SaaS applications expect a very different experience from those using traditional, on-premise software.

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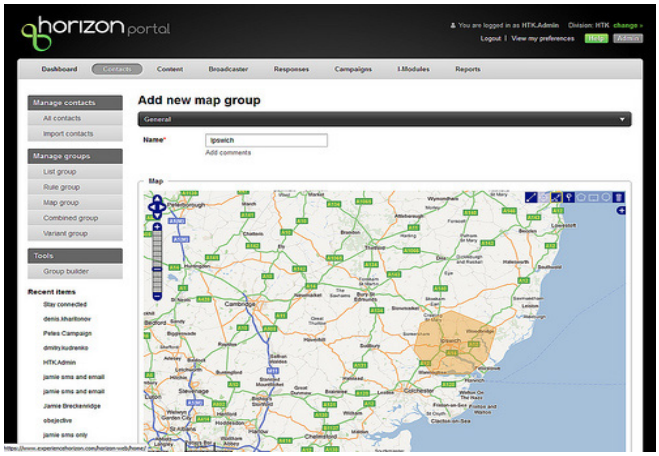
> It was important to our customers that reports looked professional and polished, they could be self-sufficient and that they could perform analysis quickly. With a SaaS product, people don't expect to wait more than a couple of seconds. Our brief was essentially to deliver great looking reports that ran fast and we're there - so it's looking good.
>
> – JUSTIN BOWSER
> *Managing Director, HTK Online*

- The interface has to be so intuitive, that new users can sign up and get started immediately without any training. HTK offers a free 30-day trial so first impressions really matter.
- Users expect data queries to perform like Google searches, with answers returned instantly, regardless of the size and complexity of their marketing database. Many HTK customers have large databases that include voice and geospatial records.
- Finally, marketing professionals need flexible, easy reporting because the information they need to present changes with every campaign and every audience.
- These customer expectations of SaaS software translated into major development implications for HTK.



Pentaho Business Analytics Embedded into HTK's Horizons

Solutions

At first HTK built its own reports using a proprietary system, but this effort proved unworkable. The reports took too long to develop and maintain, and the user interface was not intuitive enough for its marketing clientele, who wanted to be able to develop ad-hoc reports without having to rely on IT support. Ultimately HTK decided to search for a business analytics software application that it could adapt to meet its customers' requirements and white label under its own brand as an OEM. HTK shortlisted software from MicroStrategy and Pentaho, and ultimately chose Pentaho Business Analytics for the following reasons:

- Modern and embeddable software platform including end-to-end features they needed including the ability to access, visualize integrate and analyse data;
- Ability to quickly analyse large volumes of historical data. For example, one of HTK's large telecoms customers generates over 100 million new voice interactions every year. The data within each call record contains very detailed behavioural information that needs to be analysed;

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- Significant cost savings thanks to the Commercial Open Source Software (COSS) licensing model;
- Flexible, customisable reporting with highly professional, attractive interface designs out-of-the-box;
- Extract / Transfer / Load (ETL) capabilities to migrate customer data into its data warehouse.

After selecting the software, HTK enlisted Pentaho's Professional Services team to manage the development project (see sidebar) including deciding on the right architecture. The European Professional Services Manager invited Pentaho System Integrator Xpand IT into the project to build tightly embedded reports into Horizon for HTK's online customers. At this point HTK was under mounting pressure to bring its online solutions to market and needed a very fast implementation. Fortunately Xpand IT was able to collaborate with Pentaho's Professional Services on an Agile development process to deliver the first phase of the project in only five weeks (see sidebar).

Results

The development team enabled HTK to deliver integrated reports for two editions of its online SaaS software - "Lite" and "Professional" - to specification in five weeks. The new online applications are the foundation of a whole new line of business to serve the UK's high-potential SMB market, building upon the company's excellent track record in large enterprise and the public sector. Capabilities enabled by Pentaho include:

- Flexible dashboards so marketing professionals can slice, dice and present their multi-channel data depending on specific campaign requirements.
- Attractive 3-dimensional charts that render on an iPad, which is critical for marketing professionals.
- Ability for HTK to migrate customer data in near real-time into its data warehouse.

PENTAHO PROFESSIONAL SERVICES

In just five weeks, Pentaho's European Professional Services Group and Portugal-based System Integrator, Xpand IT, joined forces to fully integrate Pentaho Business Analytics into HTK's Horizon CRM application. This included:

- Building a data warehouse on the back-end
- Building OLAP cubes
- Developing integrated security capabilities
- Skinned Pentaho Business Analyzer to match HTK Horizon's look and feel
- Designated eight dashboards/reports to go with the application

Development was planned and executed using a 100 percent Agile approach.

With Pentaho's System Integrator Xpand IT being in Portugal, the geographical proximity and cultural similarities made it easy to collaborate effectively while being able to offer attractive 'nearshore' fees.

"Pentaho and Xpand IT really came through on the integration work and report styling in a very short timeframe. Those guys are very enthusiastic, passionate about the product and certainly make sure that we get a great outcome. This was a very collaborative effort, rather than straightforward supplier customer relationship."

-- Justin Bowser,
Managing Director, HTK Online

TECHNOLOGY STACK

- MS SQL Server 2005; some MySQL
- MS Windows and Linuz OS
- Intel 64-bit hardware

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Summary

HTK, a UK CRM software company that historically worked with large enterprise and public sector organisations, wanted to move into the small and medium-sized business (SMB) market by offering online versions of its HTK Horizon software. HTK knew that for SMBs, Cloud was the right deployment model and SaaS the right commercial model. It also knew that marketing professionals who buy SaaS applications have very high expectations for usability: they need to be self-sufficient from the minute they sign up to the service; their queries need to be returned lightening-fast; and they need to be able to create ad-doc reports for different campaigns and audiences. These requirements translated into major development implications for HTK who ultimately decided to embed Pentaho's Business Analytics software rather than develop in-house. HTK also engaged Pentaho's European Professional Services group who collaborated with Portuguese Systems Integrator Xpand IT to fully integrate Pentaho Business Analytics into the HTK's CRM application. The development team delivered integrated reports for two editions of HTK Horizon online SaaS software - "Lite" and "Professional" - to specification in only five weeks.

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