A SaaS-based multi-tenant platform on AWS to improve sales engineers' productivity

The success of a sales engineer's job depends on planning and improving client relationships. They build relationships from scratch, ask questions without being intrusive to make the customers feel comfortable to share their issues and keep the communication channel open to continue conversation till the lead is converted to sales.

While all this looks as easy as conversing with a friend, a lot of planning goes behind the scenes. Understanding the needs of the customers, researching their challenges and pain-points, and asking the right questions – open enough for the customers to share their concerns but direct enough to ensure they are not sidelined – is not an easy task.Add the woe of not having a central repository to track their research and progress to it, and your planning doubles. How do you track productivity of a sale engineer a major part of whose workday involves planning and talking to customers before the lead converts to a sale?

To address this gap, Algoscale helped the client build a centralized productivity tool that enables sales engineers track work, build client relationships, and highlight their contributions to close contracts.

Client Overview:

The client provides a web and app-based productivity tool that helps sales engineers to efficiently track their work, build their client relationships, and highlight their contributions to close contracts in one application.

Challenges:

One of the main challenges of developing the SaaS-based multi-tenant platform was the client had limited development cost. They wanted Algoscale to build a scalable customer relationship management (CRM) solution from scratch that would capture sales opportunities with the following features:

- Sales monitoring and reporting analytics
- Easy searchability
- Advance contact and relationship matrix with client images, etc.
- Easy capture of multimedia notes and URL content for future review
- Ability to upload related documents from shared drives
- Ability to add custom fields by end-users
- Continuous improvement based on incoming data

The client was also looking at Algoscale to maintain the solution.

Solution:

Building on the client's requirements, Algoscale suggested additional features and changes in the architecture to enhance the solution. Considering the budget, Algoscale built a multi-tenant SaaS solution that would ensure:

- **Amazon RDS** to set up, operate, and scale a relational database and automate time-consuming tasks like hardware provisioning, database setup, patching, and backups.
- **Amazon S3** for scalable storage
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- **Amazon EC2 instances** for secure and resizable compute capacity in the cloud
- **Amazon EKS** Kubernetes and Docker for containerization
- **Django** with front-end in Angular to create the application
- **Cloudflare** for DNS and domain management

The one-stop productivity tool brought together all the tools that sales engineers use in one place and provided an information repository and collaboration tool that can be accessed from anywhere, anytime. It helped sales engineers:

- Increase their productivity
- Improve client relationships
- Highlight performance