

Case Study

Technology Finance Partners Developed a Sophisticated, Web-based ROI Tool for Their Client Using Only Excel and SpreadsheetWEB

The Challenge

[Technology Finance Partners](#) (TFP) specializes in improving the way leading enterprise companies sell their software. They are experts in designing value-based sales and marketing programs. TFP helps their clients prove to their customers and prospects that investing in their clients' software is a sound financial decision.

Their objective is to assist technology companies in improving their sales process, tools, and revenue. They build elaborate tools to help their clients prove the value of their work. Excel is their Swiss army knife.

"As a company, we tend to do most of our analysis using Excel. We think Excel is a magnificent business tool because of its flexibility, transparency, and ease-of-use. You can do some pretty powerful analytics if you have some sophistication with Excel. However, there are some advantages to building our models and delivering them online, including access from any platform, aggregate the data entered in from various engagements, controlling access, reversion it very quickly and easily. All of these are features that online models can do that's tougher for Excel. As a company, we have some experience with web development, but not enough to make us feel comfortable that we could do an outstanding job for our clients." Says Alex Corman, a Principal Analyst at TFP, explaining how Excel allows them build such complicated models. He also adds, "Excel is flexible, and calculations can be very transparent, it tends to be easy-to-use and easy for our clients to interpret, and we have some sophistication in Excel modeling, and can do everything from pretty simple models to very complicated models as needed by our clients." Indicating that their preferred method of delivery for this project also had to be based on Excel.

The Solution

One of the main goals of this ROI tool is to demonstrate a positive return to the clients of TFP's client. The solution also had to allow centralized access to the ROI model, and let the business make changes to the application as their product landscape changed over time. TFP considered other options, such as custom coding their Excel model into a web application. However, their client in this project had strict timelines, and wanted to go live as soon as possible. The tool was already built in Excel, featuring a robust user interface.

"We looked at a couple available tools to see if we could do this ourselves. We also spoke with a couple of interactive agencies that could build us a custom app, in return for a fee. In the end, we decided not to take that route. We found SpreadsheetWeb on the web, via a Google search." Says Alex about their search for a better solution than custom coding the entire application.

TFP works with many Fortune 500 companies, and some of the biggest names in the technology industry. They are a leading firm in helping their clients achieve better sales figures by building data models that can demonstrate ROI. They thrive to provide the best solution to their clients, and expect to deliver the same level of excellence in their solutions. A quick time-to-market for this project was key to their success.

"I was impressed with how quickly and easily we could bring our reasonably sophisticated Excel models to a web format. I appreciated the samples that were demonstrated to us, and thought that they looked not only accurate, but also were aesthetically pleasing. This is very important to us, especially when we are delivering something to our clients. Looking at the quality of the work that we saw, that we would be comfortable working with Pagos to deliver a

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high quality, interactive application to our clients, and that our clients would be happy with the application that we gave to them. Just as care deeply about our own work that we build, we want to make sure that anything we are bringing them meets that high standard of quality.” Says Alex about their confidence building their application using SpreadsheetWEB, and continues “Given the research that we did, we thought we could deliver a customer-ready application in less than half the time and price with SpreadsheetWeb, versus doing it ourselves or hiring and interactive agency to build us a custom application.”

Using an Excel-based platform to deliver this web application meant that TFP and their client could fully utilize their Excel expertise, while not compromising on the quality of the customer-facing product. The application could go live much faster than custom coding it, and SpreadsheetWEB proved to be the best solution for this challenge.

The Results

TFP was able to deploy and go live with their ROI tool in the span of a few weeks. The web application features a responsive design, meaning that it can be accessed from any device with a web browser. It also matches the style of the original application created in Excel very closely.

“In our case, we had the option to build the application ourselves, but instead we worked with the SpreadsheetWeb team directly to deliver this application for us. In my experience, they did so very quickly, and very accurately. They were very responsive, and they did so at a price that I thought was very reasonable.” Comments Alex on the development process.

With SpreadsheetWEB’s easy-to-use platform, the application could be developed very quickly, and costing much less than doing this as a custom application.

“I think it would have been very challenging to deliver an acceptable, interactive product not only within our budget and quality standards, but also importantly, within the timeline that we wanted to commit to. We pride ourselves in being extremely responsive to our customers, and we didn’t want this to be a six months development process. We needed to move faster. With SpreadsheetWeb, we had a usable product within a couple of weeks that our client was very happy with.” explains Alex.

In a technology environment, the software specifications, as well as client requirements are ever-changing. Being able to adapt their tool to these changes using their Excel expertise only means that TFP’s client can focus on what they do best, and continue delivering valuable products.

“I was impressed throughout, and extremely pleased with the service we have received, with the quality of the product that SpreadsheetWeb built for us. I thought it represented my company well, which I care a great deal about. We found SpreadsheetWeb to be responsive, attentive, and equally committed as we are in doing a great job for our clients.” Comments Alex regarding the outcome of this project.

TFP’s client installed the software on their own servers. Their users can now access the ROI tool from a centralized location, and modify it themselves as necessary, while ensuring that their users are always going to be using the latest version.

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