New BI Tools Enable A Nimbler Sales Operation

OVERVIEW

Our client is a fast-growing medical products company with operations in multiple countries.

When an abrupt change in their production operations required them to adjust their sales strategy, they needed to make critical decisions very quickly. That's when they discovered they needed a user-friendly BI solution.

The Challenge

Since their initial launch, our client had reaped the benefits of hitting a sweet spot in their market. Blessed with a core set of products that were in high demand, their growth had exceeded all expectations.

But when production of a core medical product was suddenly shut down, our client—a highly successful startup—came to a startling realization: they had no easy way to determine what the impact on revenue would be as a result of those lost sales. The data they needed to map out a new sales strategy was hard to access and was not being maintained in a format that enabled useful business analysis.

Ensunet was tasked with providing regional sales managers with a tool that could enable them conduct historical analyses and calculate projections for:

- Their existing product mix
- New products currently under development
- Potential revenues by region or product type
- Staffing support needs

Strategy

Conducted an in-depth analysis of their reporting needs and technology assets.
Our client did not have a full understanding of the technology and personnel they would need to have in place in order to create the type of reporting their regional managers were requesting. What they did know is that they wanted to avoid the necessity of buying new software.

Ensunet conducted an extensive review of their technology assets and evaluated the capabilities and skill sets of their in-house technology team. We also met with their regional sales managers to establish a prioritized list of their reporting requirements.

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Developed a data warehouse to extract and connect data from multiple enterprise systems. The sales team relied on Salesforce to keep track of their sales activity. While this platform allowed sales managers to ensure that their teams were meeting their quotas, Salesforce did not store historical data. Managers could not create critical business reports, such as historical analyses or sales projections.

Due to budget constraints, our solution needed to leverage the client's existing software licenses. Since our client already possessed a license for MicroStrategy (a business intelligence tool) Ensunet made it a point to recruit a data architect who not only understood basic interface tools but also had experience designing business intelligence (BI) reports using MicroStrategy. We then focused our efforts on developing a data warehouse that could capture data from multiple applications from key departments throughout the organization.

The process of developing a data warehouse required us to:

- **Scrub the historical data that the client had previously preserved.** Although several regional managers regularly downloaded information from Salesforce, conserving them in Excel spreadsheets, this wasn't a universal practice. Ensunet carefully vetted available data for accuracy then created a normalized database with historical sales information.
- **Educate employees on data integrity principles.** To ensure that sales-related data would maintain its integrity going forward, we scheduled a series of data integrity training sessions. Our training emphasized how the data in different systems, including Salesforce, were interconnected.

Results

Enhanced decision-making capabilities throughout the organization. Ensunet designed a series of interfaces that extracts data from core applications used by the sales department, human resources, manufacturing and operations. These include Salesforce, Microsoft AX (their ERP system), and Microsoft Outlook's identity and user authentication services.

The resulting data is now stored in a data warehouse that is continuously and automatically kept up-to-date. This warehouse enables our client to:

- Create their own ad-hoc reports as needed without needing to request help from the IT department.
- Construct high-level analyses including production projections and sales forecasts of new similar products. These reports can also be broken out by region and target audience.
- Receive alerts if an interface fails, enabling our client to quickly take action to ensure that data from an underlying application continues to be uploaded to the data warehouse.
- Prevent incorrect attributions of sales activity by sending out an alert if a new sales hire is not set up in Salesforce.

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