



PROBLEM STATEMENT

A high tech company uses multiple third party data housing systems with main source of CRM data in Salesforce. Some analytics teams are enabled for a self-service process through a review program we configured. Several teams require IT to lead the strategy, architecture, and development process for Einstein Analytics.

The company faced challenges with Renewals VP + persona, Sales persona, Sales AM/ Specialist Persona, and self service.

SOLUTION

Search Discovery delivered dashboards for:

- Renewals to provide executives a view of Total Annual ATR (Available to Renew), Products Annual ATR and Services Annual
- 20+ KPIs such as Funnel Growth, Funnel Creation, Stage Regression, Missed Funnel etc
- Highlighting Difference of opinion AMs and Specialists may have on EBD, Amount, Products
- Showcasing acquisitions Opportunities

We created unified dataflows that not only power a host of dashboards across the organization but also enable self service

BUSINESS IMPACT

Renewals VP+ Persona: C Level Executives leverage Renewals Dashboard for weekly planning on renewals opportunities.

Sales Persona: Entire Sales Organization leverages dashboards weekly to monitor/plan their funnel activities.

Sales AM/Specialist Persona: Account Managers and Tech. Specialists are able to view difference of opinion on opportunities.

Acquisitions VP+ Persona: Acquisitions Leaders leverage dashboard to explore cross-sell opportunities.

Self-Service: We've ensured data democratization and performance across each business unit.

