



“The new Tableau CRM dashboard is 100x easier than what we had before.”

Sales leader, Motorola Solutions Incorporated

Delivering predictive and actionable sales insights with the power of Tableau CRM (BI) and Einstein Discovery (AI)

Challenge

Motorola Solutions Incorporated (MSI) is a global organisation that are extensive users of Salesforce, as well as utilising a large technology stack. Their data architecture is complex and gaining actionable business insights for the sales team was challenging.

MSI relied upon demand-driven reporting, but had a vision for democratised, self-serve analytics that delivered one source of truth for decision making.

Solution

Investment in **Tableau CRM**, combined with a **strategic** and **tactical** engagement with Visioneer360, delivered dynamic, actionable data insights to global sales leaders. Investment in Einstein Discovery, engineered by Visioneer360, resulted in predictive insights around deals at risk, powered by machine learning.

“Great dashboard! It’s quick and easy. Don’t take it away!” Sales leader, Motorola



Sales Cloud



Tableau CRM



Einstein Discovery

Predictive

Analytics empowering a global sales team



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We Weaponise Data



Strategic, data-driven, end-to-end digital transformation



Digital transformation strategy and data architecture design, plus execution with Salesforce, Tableau and Tableau CRM

Challenge

The Assurance Department of Infrastructure NSW (INSW) lacked one reliable source of truth for project assurance data, even though a wealth of information about their portfolio of projects was gathered.

The data analytics and business insights at INSW were rearward-looking, not predictive and prescriptive.

Solution

INSW engaged Visioneer360 to build an **end-to-end road map** and strategic framework for digital transformation, as well as an innovative design and build with **Tableau** and **Tableau CRM**.

The end result was an outcome-based approach and the inclusion of leading indicators to the portfolio monitoring function will allow earlier identification of risks and will improve the team's ability to deliver independent advice.



Tableau



Tableau CRM



Sales Cloud

Billions of \$

of projects managed using data insights



visioneer³⁶⁰
We Weaponise Data

The Aramex logo is a red rounded square with the word "aramex" in white lowercase letters.

Moving from rearward-looking, demand-driven analytics to predictive, self-serve capacity planning – game changer

Delivered predictive and actionable insights into performance, demand and capacity – proactive capacity planning

Challenge

Aramex Australia is a user of Salesforce, as well as utilising a large and diverse technology stack. Their data architecture is complex, and the volume of data produced is staggering. Gaining predictive, actionable insights into performance, demand and capacity was always a vision, but had not been realised.

Aramex relied upon rearward-looking demand-driven reporting, but had a vision for predictive, self-serve analytics that delivered one source of truth for decision making across the organisation.

Solution

Investment in **Tableau and Tableau CRM**, combined with a **strategic and tactical engagement** with Visioneer360, delivered predictive, actionable capacity planning, powered by machine learning.

Work is now progressing at Aramex in the areas of data integration and governance to enhance these insights, as well as delivering actionable insights into sales by channel, parcel movement, pipeline management, sales activities, and franchisee performance.



Sales Cloud



Tableau CRM



Tableau

Predictive

Analytics empowering a growing business



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“We now have a development pathway to significantly advance our service provision, and, most importantly, meet our clients’ needs.”

Justin Niven, Managing Director, KJ Risk



KJ Risk Merging Decades of Industry Experience with the Power of Salesforce and Tableau CRM

Challenge

The Board of a DMF that KJ Risk runs was continuously let down by their claim managers, both operationally and also with regard to reporting and analytics.

Our clients expressed frustration that they could not access all their data in one place, with real-time access to information and insights. This relates to all the services we provide, not just claims management.

Solution

Investment in Financial Services Cloud to deliver a scalable claims management solution. Investment in Tableau CRM and Experience Cloud to deliver dynamic, actionable data insights to customers.

“They work with me and my business so there is a *genuine partnership*. They have also gone above and beyond on a number of matters, which has in turn impressed my client” Justin Niven



Financial Services Cloud



Tableau CRM



Experience Cloud

24/7

Customer access to real-time insights



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We Weaponise Data



“I am confident that the actionable insights from our new Einstein Analytics dashboards will be a game changer for our Fundraising and Executive teams.”

Mike Peppou, Head of Business Solutions, UNICEF Australia



Designing and delivering industry-leading not-for-profit insights with an innovative action framework

Challenge

UNICEF Australia had an abundance of data that was sourced from multiple, disconnected systems, and stored in a variety of siloed locations. This was extremely difficult to analyse, understand and action.

As UNICEF Australia was implementing Salesforce, they concurrently needed expert assistance to scope, design and build advanced analytics – this was crucial to provide ROI from their technology investment.

Solution

Visioneer360 worked with the UNICEF Australia team to understand their unique business model, design and implement a suite of data analytics using Tableau CRM (Einstein Analytics), and provide ongoing support, enhancements, and training.

“The Visioneer360 team has gone to great efforts to understand our business and data models and have been both flexible and innovative in making sure our requirements are met.” Mike Peppou



Tableau



Tableau CRM

Actionable

Donor segmentation and fundraising insights



visioneer³⁶⁰
We Weaponise Data



Provide one place where sales, marketing, service, ERP & PSA analytics are available to the FinancialForce and Salesforce customer

Combining Salesforce and FinancialForce data in one dashboard for a powerful “business on a page” solution

Challenge

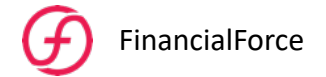
FinancialForce (FF) delivers a solution for ERP and PSA that is built on the Salesforce platform. However, the reporting and analytics capabilities of FF do not meet the requirements of many FF customers because they cannot combine, transform, and visualise information from both Salesforce (SF) and FF.

FF customers resort to the manual, inefficient, expensive and error-prone process of exporting reports from SF and FF into a spreadsheet in order to create a flawed and out-of-date “business on a page”

Solution

Visioneer360 have designed and developed an innovative “business on a page” dashboard – the FF Executive Insights dashboard – that solves the aforementioned problem and combines SF and FF data to provide a holistic analytics solution

The FF Executive Insights solution provides an out-of-the-box analytics dashboard that enables a business leader to drill into both SF and FF information and gain actionable insights.



FinancialForce



Tableau CRM



Sales Cloud

SF + FF

business 360 insights



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We Weaponise Data



“Overcame all of the restrictions we faced in Salesforce, enabling us to combine data from multiple objects to provide a ‘whole of services’ view of our data.”

Kaily Hill, Business owners, Redkite

Designing and delivering simplified wholistic view of data on a complex object model, allowing actionable insights

Challenge

Redkite had a wealth of data sitting in Salesforce. Yet they were not able to get much insights as the native reporting and dashboards limited their ability drill in on a complex object model.

In particular, reporting on the services delivered (quarterly) had been incredibly manual and time consuming, taking days to produce, and involving the manual export and combining of many reports in excel

Solution

Visioneer360 worked with the Redkite team to design and implement a suite of data analytics using Tableau CRM (Einstein Analytics) that provided a 360 degree view of their data

“The Visioneer 360 team are super smart, efficient and solutions-focused. They were quick to understand our data model and delivered a solution that met all of our requirements and more.”

Kaily Hill



Tableau CRM

Actionable

Services delivery insights



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