

Case Study

End-to-end Deployment of an Enterprise BI Analytics Solution for a Fortune 500 Financial Technology Leader



Case Study:

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Industry:

Financial Technology
Services

Audience:

C-Suite
Sales Leadership
Product Teams
Finance Teams

Overview

A Fortune 500 Financial Technology Services company sought to provide analytic dashboards and business insights to core leadership teams through Salesforce Einstein Analytics. The initial build by another firm was rolled out to 20 users with little adoption and minimal user interest. The client weighed options to scrap the project, or invest in another attempt to get the platform some traction.

JPW Consulting was engaged to take over the development and design of the dashboards, as well as providing guidance and direction on awareness, communication and training.

Client Objectives



- Build a one-stop dashboard that provided Sales users insights across multiple systems from within and outside Salesforce such as HR, Finance, and other systems.
- Re-alignment of dashboard approach to provide insights to and performance tracking towards annual corporate initiatives and KPIs.
- Automate filtering of results down to running user based on the client's non-standard business hierarchy structure.
- Accurately capture and interpret business user needs into quality easy to work with insights.
- Facilitate leadership awareness and adoption of the business analytics tool to derive insights quickly and promote self exploration.

Approach

Begin with focused business user engagement and requirements gathering. Follow an agile based development cycle to insure user acceptance and quality of final product.

Build a coalition with regional coordinators and ambassadors for targeted communications and to gather feedback and future enhancement requests.

Structure dashboards using progressive disclosure design principles that guide and invite users to explore deeper insights without initially overwhelming them with a scattering of data.

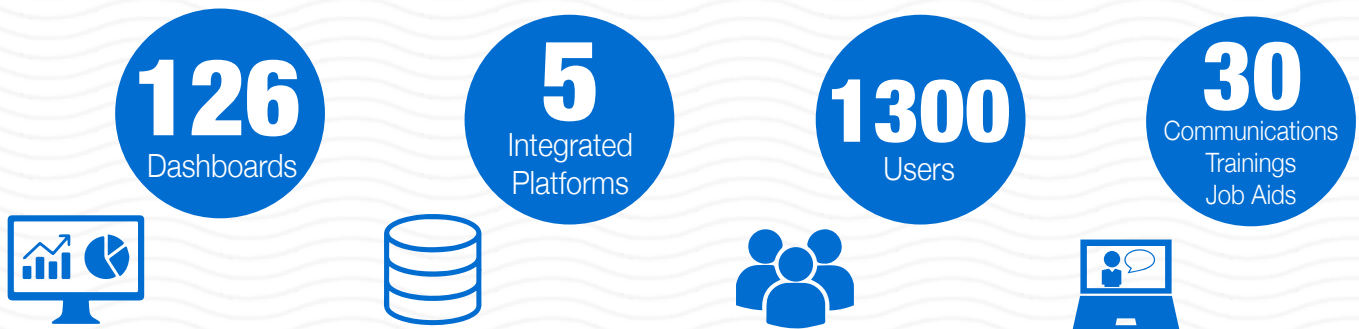
Insure that reporting dashboards provided a top down alignment and views so that all users within the organization were aligned to the same KPIs and initiatives.



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Results



Client Feedback



JPW provided guidance, support and leadership to the entire team on the path to realizing their vision. Feedback from Leadership was that JPW provided excellent service throughout the project and met or exceeded their expectations. Due to the high level of service provided by the JPW Team, and our ability to help our client overcome early challenges, JPW was awarded significantly more work.

How We Did It

Partnering, Listening, Best Practices:

- Ongoing communication with leadership
- Pressure testing against real world problems and user use cases.
- Continuous feedback from end users across multiple personas
- Suggesting useful insights options when users don't fully understand what they might need.
- Fully partnering with all levels of leadership and user roles to build a coalition that serves broader business needs.



The JPW analytics consultants worked seamlessly with client analytics directors, communications departments, and regional business ambassadors to continuously iterate and deliver quality business insights. The resulting business value was evident in better Salesforce data quality as well as key performance insights and downstream business improvement strategies