

A wooden signpost stands in a vibrant, stylized landscape. The signpost is made of thick, brown logs. The sign itself is a dark brown rectangle with rounded corners, hanging from a horizontal log. The background features rolling green hills, a blue lake, and distant mountains under a bright blue sky with a large white cloud and a few birds flying. The overall style is clean and modern with a natural theme.

Salesforce Analytics Case Study

Empowering Business Excellence
through Custom Reporting Solutions

Cloud Ingenious
Your Vision, Our Execution

Client Overview

Our client is a renowned full-service design and printing company, boasting nearly two decades of expertise in delivering custom design, sales, marketing, and branding solutions to a diverse array of clientele.

Client Challenges

Despite their extensive experience and established presence, our client faced challenges in efficiently tracking and analyzing their business performance metrics. With a vast portfolio of services catering to a wide range of customers, they struggled to streamline their reporting processes and gain actionable insights to drive informed decision-making.



Solution Provided

To address these challenges, our team collaborated closely with the client to develop a suite of tailored reporting solutions, designed to provide 360 visibility into key performance indicators across various facets of their business operations.

To make the reports easy to analyze, proper dashboards were created for the department heads, ensuring a consolidated view of all the required reports at a single glance.

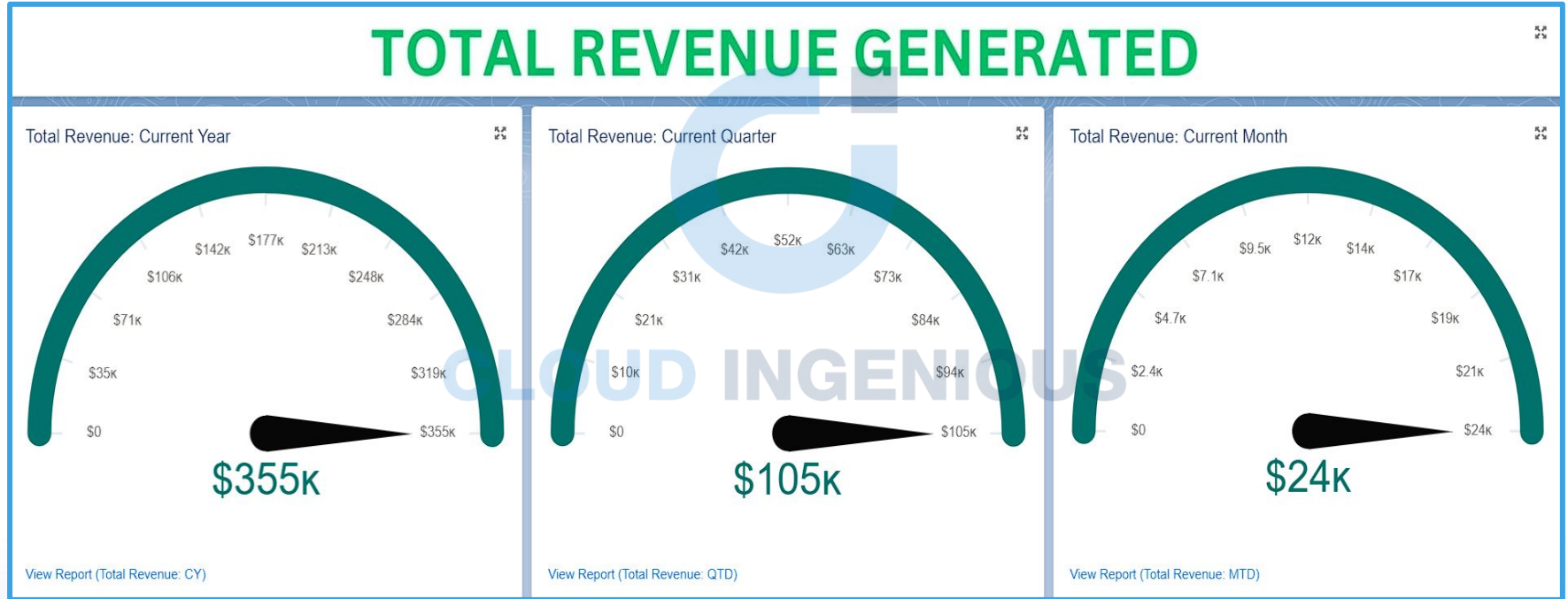
Comparison reports were created for analysis of sales and profit trends, providing insights into growth patterns and areas for improvement.

CLOUD INGENIOUS



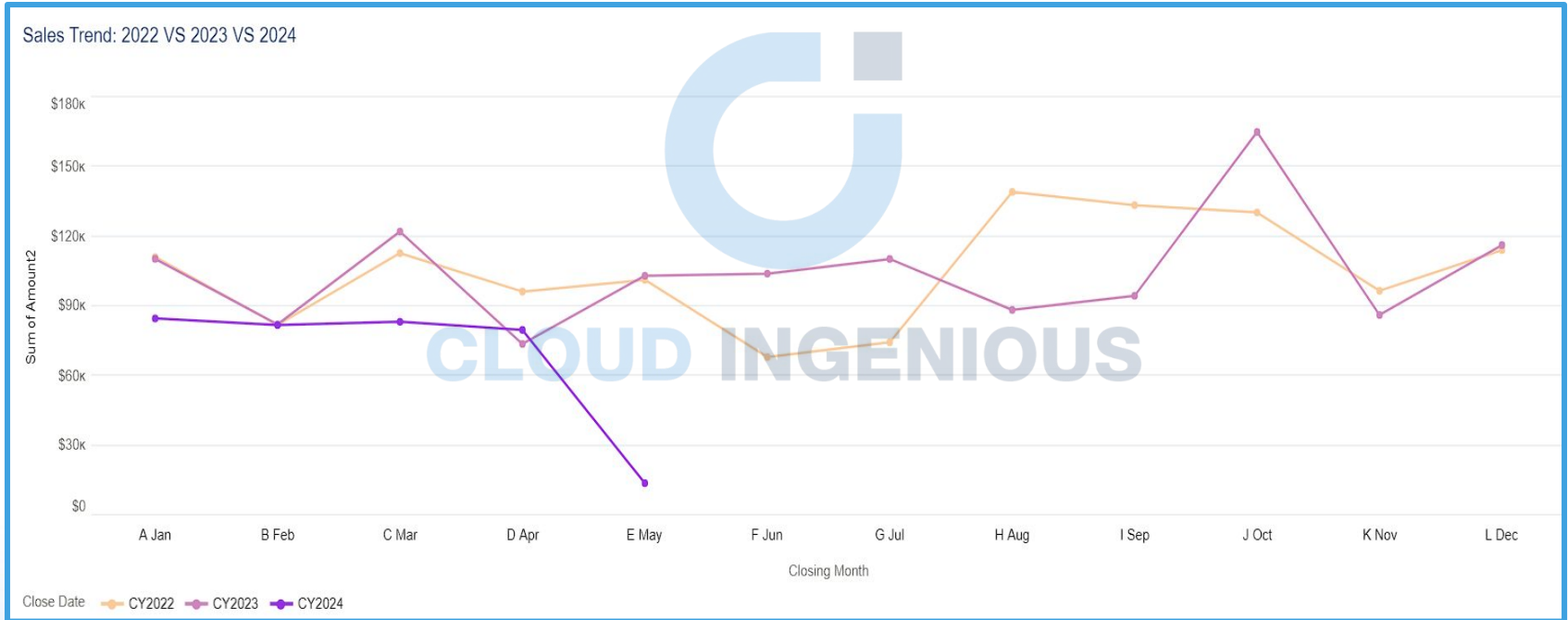
Report: Total Revenue Analysis

Monthly, quarterly, and yearly sales breakdown for a holistic view of revenue generation trends.



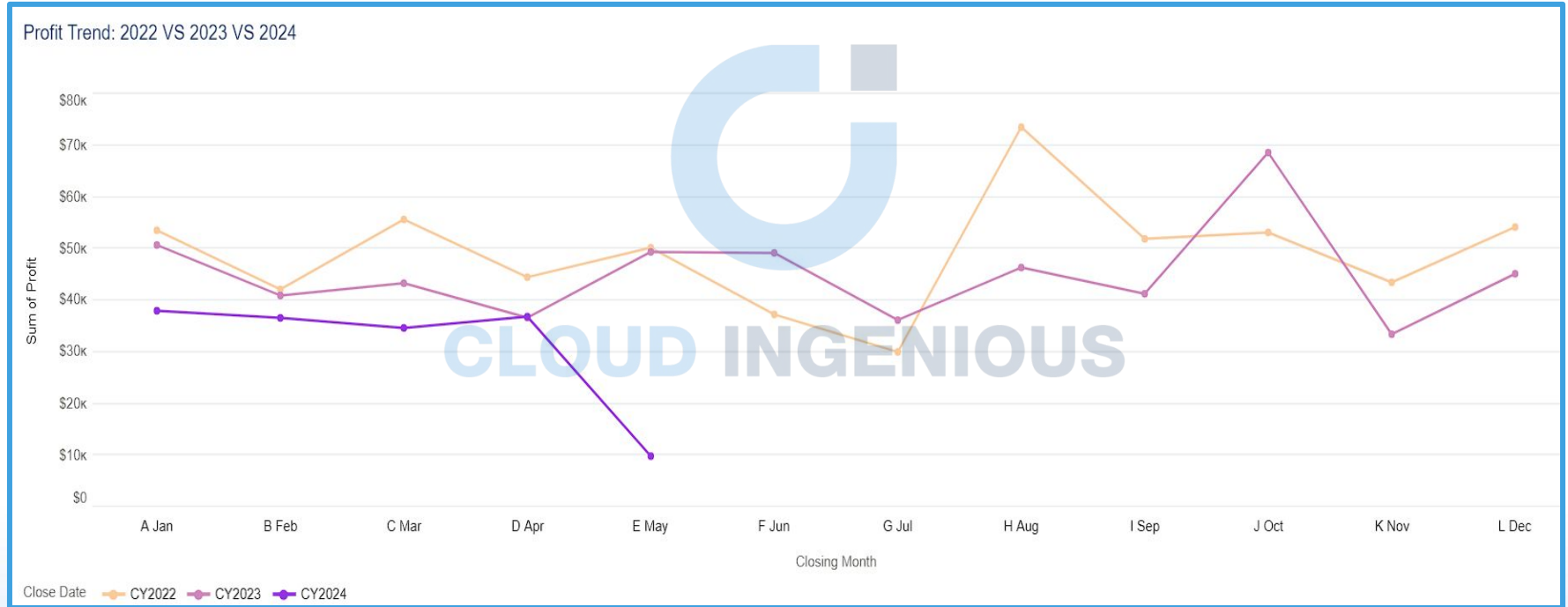
Report: Sales Trend Comparison

Comparative analysis between the current calendar year (CY) and the previous two CYs to identify growth patterns and areas for improvement.



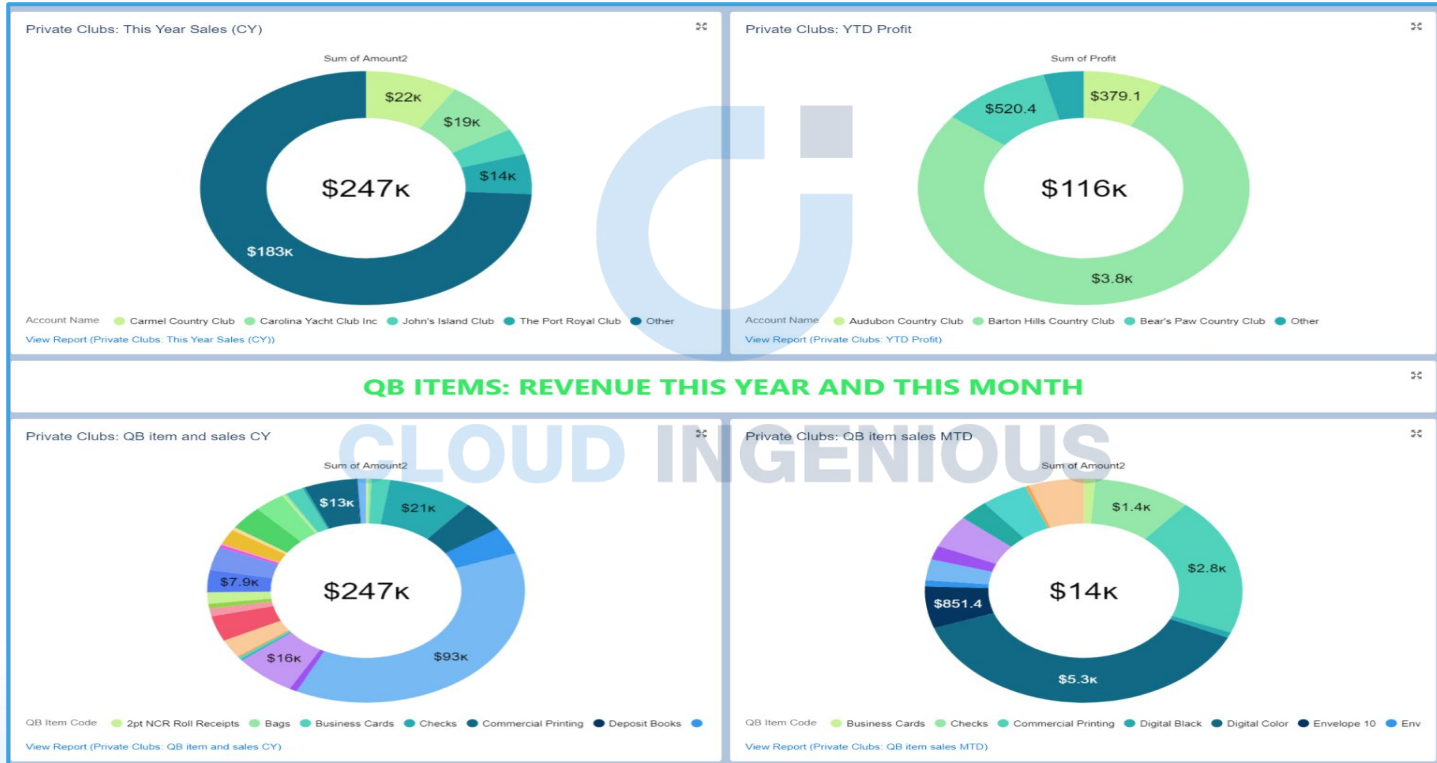
Report: Profit Trend Comparison

Comparative analysis between the profit made in the current calendar year (CY) and the previous two CYs to identify growth patterns and areas for improvement.



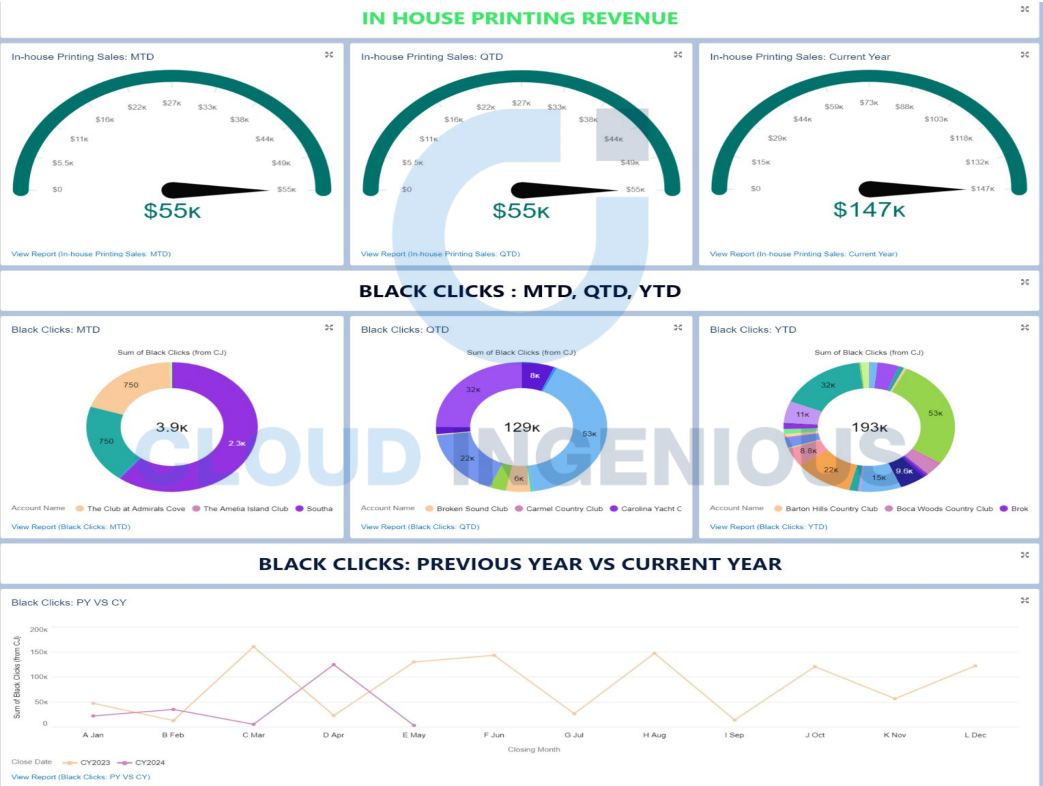
Private Clubs Account: Dashboard

Dedicated dashboard for major clients, offering insights into sales, profitability, and product performance on a monthly, quarterly, and yearly basis.



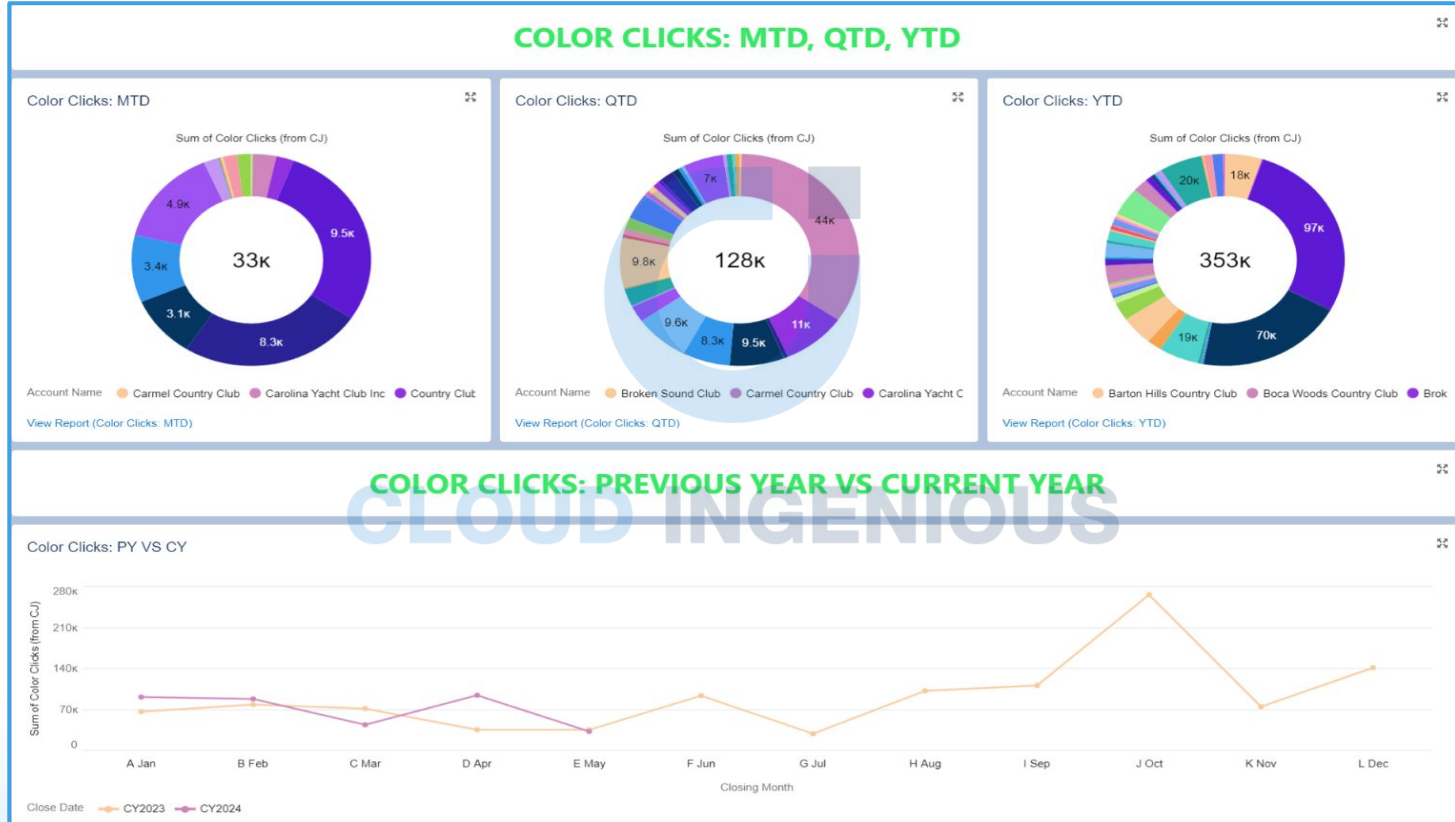
In House Printing Tracking: Dashboard

Tracking of revenue generated from in-house printing services, including breakdowns by color and black clicks to monitor production costs and resource utilization.



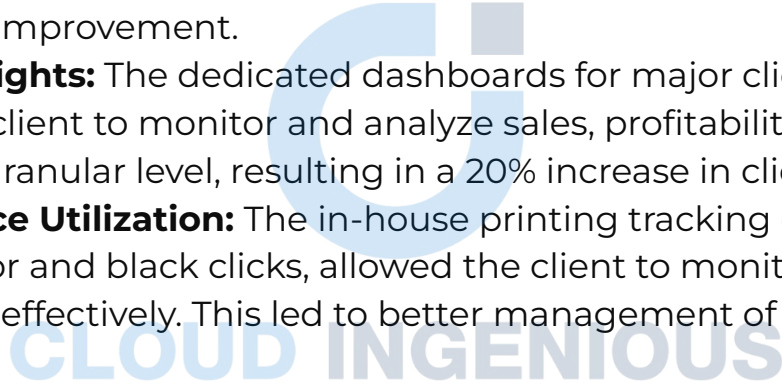
In House Printing Tracking: Dashboard

Color Click Tracking



Impact

- **Enhanced Visibility and Accessibility:** Custom dashboards enabled quick access to key metrics, reducing decision-making time by 40%.
- **Improved Sales and Profit Analysis:** The comparative sales and profit trend reports provided insights into growth patterns, allowing the client to identify successful strategies and areas needing improvement.
- **Focused Client Insights:** The dedicated dashboards for major clients, such as private clubs, enabled the client to monitor and analyze sales, profitability, and product performance on a granular level, resulting in a 20% increase in client retention.
- **Optimized Resource Utilization:** The in-house printing tracking dashboard, with detailed breakdowns by color and black clicks, allowed the client to monitor production costs and resource utilization effectively. This led to better management of printing operations and cost savings.
- **Data-Driven Decision Making:** The holistic view provided by monthly, quarterly, and yearly sales breakdowns facilitated a comprehensive understanding of revenue generation trends. This empowered the client to make data-driven decisions, boosting operational efficiency by 30%.



Thank you

