

What use is data if you can't analyze or share it...

ANALYTICS THROUGH SNOWFLAKE & TABLEAU



THE CLIENT

- Financial Services, Private Equity; Environmental Infrastructure
- Systems Involved: Salesforce, Snowflake, Tableau, Proprietary In-House Forecasting system
- Company size: 200-500 employees; 250+ Salesforce users

THE SOLUTION

Over the course of a collaborative partnership, the Coordona team identified key business questions. Data was extracted into a Snowflake staging database, transformed and cleansed, then exported into Tableau. Once in Tableau, Coordona developed a suite of custom Tableau dashboards for the executive team's use, updated daily, and supplementing the in-house analytics team to get to market.

Salesforce
Platform



Systems
Integrations



Tableau /
Analytics



Financial
Services



Data



THE COST

\$60,000

THE CHALLENGES

- Our client had a mountain of data - but no way to use it or share it with stakeholders
- Executive team unable to make timely decisions - *accessible* data was not clean and required manual manipulation
- Data desired for reporting stored in 4 different systems, with no relationships

THE OUTCOMES

- Key business metrics identified for reporting needs across multiple stakeholder groups
- Clean data across 4 systems
- Daily data updates
- Elimination of manual data manipulation has led to decreased lead time of 3-5 days for reporting, and related labor costs, monthly

FOR MORE INFORMATION, PLEASE REACH OUT AT HELLO@COORDONA.COM