

# Case Study - Executive Dashboards & Reporting for Sales Performance Management



## Client Overview

This client is one of leading equipment manufacturing business who manufactures equipment for industries such as agriculture, construction, mining, and utility. They offer customized solutions to their customers ranging from Multinationals and Government institutions to small businesses worldwide.

This client already had Information systems inbuilt to handle Sales and Opportunity management (Sales workbench- custom built) application and Order management System (Oracle Order Management) implemented in their IT landscape.

In order for top management to have clear understanding on how the Sales team is performing for converting leads into opportunity into actual sales transaction, business users has to do lot of manual excel analysis and reporting which included extractions of data from two different source systems and then spending almost a week to prepare monthly Sales Dashboards.

### Business Challenge:

The integrated Sales & Marketing Data Mart was developed by leveraging following technology stack

**Data Warehouse:** Oracle 10g

**ETL:** DataStage 8.5

**Reporting:** MicroStrategy 9.3

### Technology Solution

## Business Values:

The following are some of the benefits that the client was able to realize as a result of the implementation:

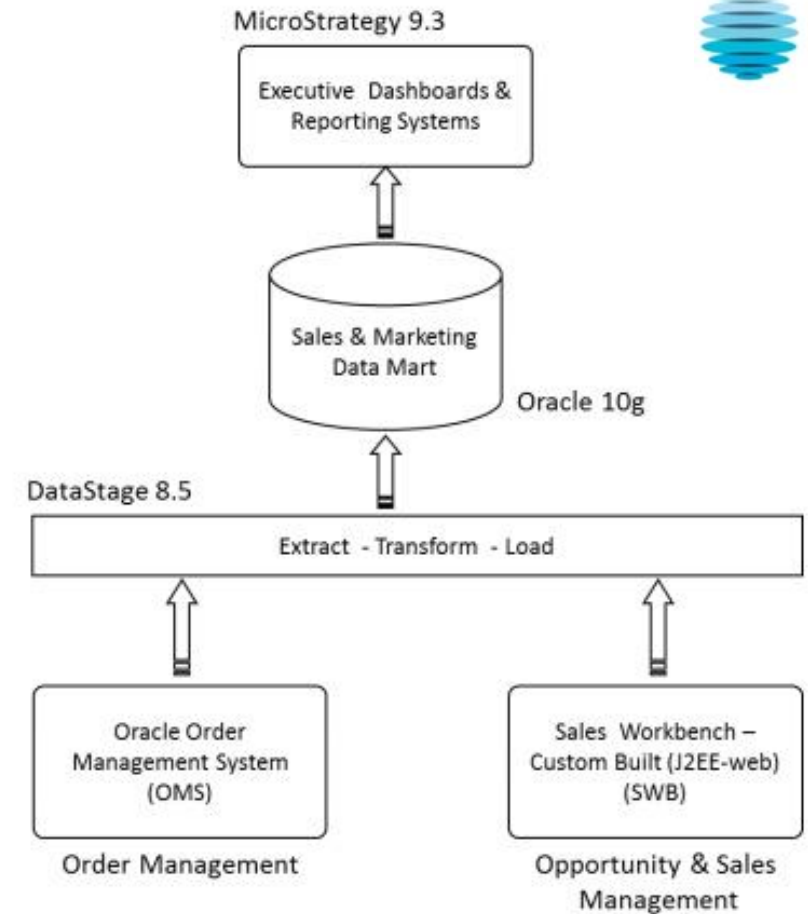
- Unified view of Sales and Marketing information integrated on a robust architecture which can sustain continuous reporting needs such as, Dashboard & Reports, ad-hoc business queries and other data mining/analytical queries & tools
- Availability of Executive Dashboards and Reports within 4 hours after data extraction
- window is kicked off Capability for the top level management to monitor the KPIs
- Self-Service BI capability for Sales teams resulting in better Goal vs. Performance management

## EGS Solution:

After assessing and analyzing the business requirements, EGS worked very closely with client business and IT users to build the Sales & Marketing data mart. One of the key challenges was with respect to definition of Key Performance Indicators. Another challenge was data extraction from multiple systems within the stipulated time frame to avoid impact on Sales workbench and Oracle order management systems.

## Services footprint:

- Data and KPI discovery consulting
- Data Warehouse Architecture
- Data integration
- Reports and Dashboards
- Performance Engineering
- Global Delivery model
- Production Application Support



## High Level Technology Architecture