Solution: Consistent Strategy and User Friendly BI
Services Provided: Consulting & Business Intelligence

Bloom Consulting Group is a fast-growing business management consulting firm that delivers strategic services to security, marketing, and sales executives.

Engagement Overview

The client wanted to review partner performance at mid-year across multiple segments and needed both macro- and micro-levels of data on revenue, metrics, and pipeline. They needed deeper BI support for analysis of root causes of strong/weak areas of performance and creation of business cases to reach FY business goals by year end.

Challenges

Lack of deep business intelligence and analytics on partner performance was a blocker for corporate and field senior leadership to course correct and reach year-end targets.

Lack of analytics on Partner pipeline made it difficult to understand the contribution of top partners to overall targets.

Bloom Solution

The Bloom team aligned both to the original planning and target setting approach at the individual and partner levels for less confusion, and aligned to official reporting for confidence in the accuracy of data. For faster adoption and use, the team designed a logical flow and commonly used formats and features, then pressure tested that with several real scenarios before, during, and after publication.

Services

Consulting Support

- Created a framework to assess performance using metrics and leading indicators, gathering and framing requirements for user-friendly BI formats.
- Compared and stack ranked countries, Account Managers, and partners.
- Summarized performance issues and achievements for executive discussion, with visuals by geography and customer segment.
- Identified common trends in success and weakness.
- Validated accuracy of numbers by comparing with other related reports.
- Recommended enhancements to reporting to tie more closely to ongoing BI and performance assessments.

BI Services Support

- Built three sets of PowerPivot-based workbooks tying revenue, scorecard, and pipeline targets to actuals. Linked to live and static official data cubes and finance seasonality.
- Adapted BI for leadership summarizing area, and Cloud and AM views.
- Enabled user-friendly features to drill into details using slicers, filters, and sorts, in order to visually indicate data with conditional formatting (bars, stoplights, and graphs).
- Managers could pivot the data to review numbers achieved and gaps.
- Created new business intelligence and analytics to benchmark partners using official company reporting and data sources.

**from little ideas
big things grow**

BLOOM