# CLIENT FLUX BI SOLUTION

Transforming Operational Data into Strategic Intelligence

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We could not build a BI solution on 21 rows. We needed to simulate a realistic future state.

# The "Small Data" Constraint

Fedhatrac is operationally mature but analytically young. We faced a critical limitation during the initial audit:

🗄️ **The Raw Input**

Only 21 heavily redacted client records were available.

🚫 **The Missing Links**

Zero data on *why* clients declined (DeclineReason).

| CLIENT ID | CLIENT NAME | APPROACH DATE | STATUS UPDATE DATE | LASTACTIVITYDATE | DECLINE REASON |
|---|---|---|---|---|---|
| 1 | CLIENT A | Jan 22, 2025 | Active | Oct 15, 2025 | |
| 2 | CLIENT B | Jan 23, 2025 | Active | Oct 15, 2025 | |
| 3 | CLIENT C | Jan 30, 2025 | Active | Oct 10, 2025 | |
| 4 | CLIENT D | Feb 01, 2025 | Active | Sep 30, 2025 | |
| 5 | CLIENT E | Feb 01, 2025 | Active | Oct 14, 2025 | |
| 6 | CLIENT F | Feb 09, 2025 | Active | Oct 09, 2025 | |
| 7 | CLIENT G | Feb 11, 2025 | Inactive | Jun 10, 2025 | Hasn't renewed subscription |
| 8 | CLIENT H | Feb 13, 2025 | Inactive | Feb 25, 2025 | Didn't renew after free trial |
| 9 | CLIENT I | Feb 16, 2025 | Inactive | Mar 16, 2025 | Didn't renew after the month |
| 10 | CLIENT J | Feb 17, 2025 | Active | Oct 14, 2025 | |
| 11 | CLIENT K | Feb 19, 2025 | Active | Oct 14, 2025 | |
| 12 | CLIENT L | Feb 20, 2025 | Active | Oct 15, 2025 | |
| 13 | CLIENT M | Feb 21, 2025 | Active | Sep 30, 2025 | |
| 14 | CLIENT N | Feb 25, 2025 | Inactive | Mar 04, 2025 | Didn't renew after free trial |
| 15 | CLIENT O | Feb 26, 2025 | Inactive | Mar 04, 2025 | Didn't renew after free trial |
| 16 | CLIENT P | Feb 28, 2025 | Active | Sep 28, 2025 | |
| 17 | CLIENT Q | Mar 03, 2025 | Active | Oct 5, 2025 | |
| 18 | CLIENT R | Mar 06, 2025 | Active | Oct 10, 2025 | |
| 19 | CLIENT S | Mar 09, 2025 | Active | Oct 14, 2025 | |
| 20 | CLIENT T | Mar 10, 2025 | Active | Oct 10, 2025 | |

# Our Simulation Strategy

We used Python to extrapolate the pilot data into a robust 3-year historical dataset. This allowed us to "stress test" the dashboards with realistic scenarios.

**Simulation Parameters:**

- **Volume:** Expanded to 151 Records (Jan 2023 - Nov 2025)

- **Geography:** Distributed across 10+ Kenyan counties (weighted for Nairobi).

- **Logic:** Applied weighted probability to Status changes.

**New Variables Created**

+ **DeclineReason**
  (e.g., "Budget Constraints", "Using Competitor")

+ **ClientLineOfWork**
  (e.g., "Real Estate", "Hospitality")

+ **DealValue (Simulated)**
  (To estimate pipeline revenue)

+ **County**
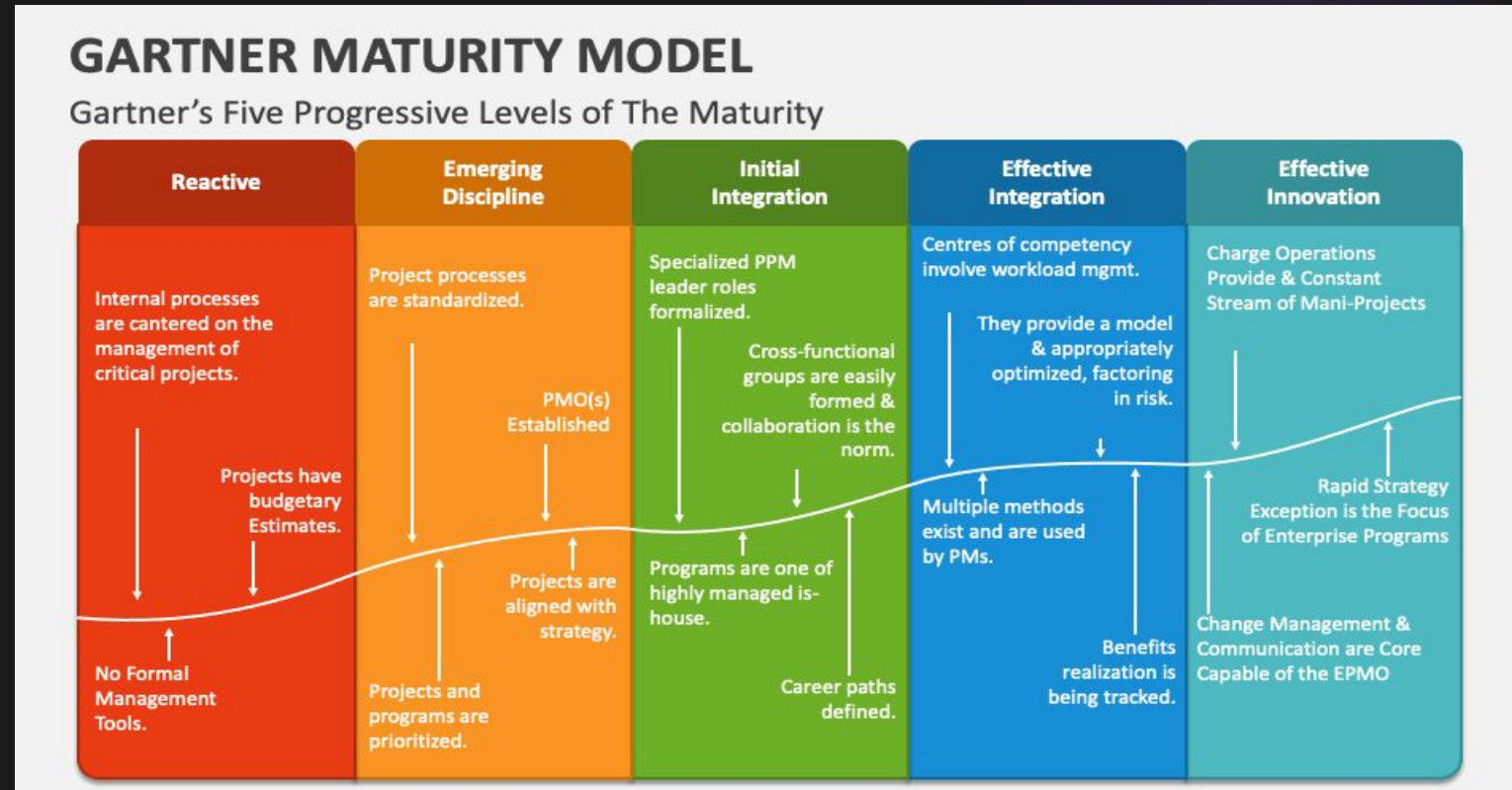  (To capture where the a particular client is based)

# Current BI Maturity

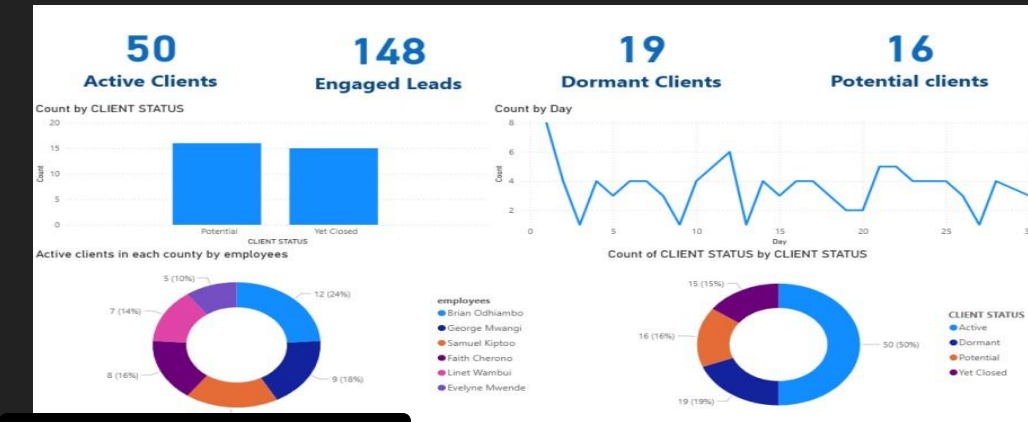Based on the Gartner Model, Fedhatrac is at the **Early Descriptive Stage**.

**Data:** Siloed in operational apps.

**Reporting:** Ad-hoc & manual.
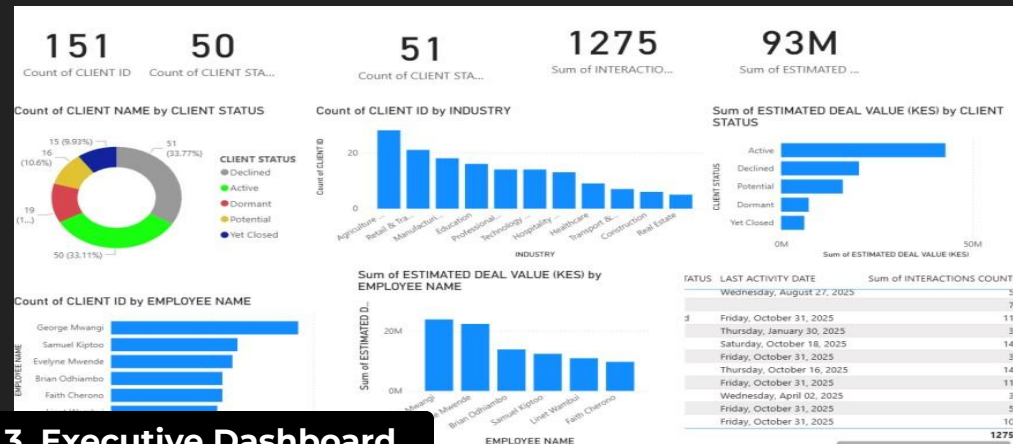
**Goal:** Move to *Diagnostic* (Understanding "Why").



GARTNER MATURITY MODEL

Gartner's Five Progressive Levels of The Maturity

**Reactive**

Internal processes are cantered on the management of critical projects.

Projects have budgetary Estimates.

No Formal Management Tools.

**Emerging Discipline**

Project processes are standardized.

PMO(s) Established

Projects are aligned with strategy.

Projects and programs are prioritized.

**Initial Integration**

Specialized PPM leader roles formalized.

Cross-functional groups are easily formed & collaboration is the norm.

Programs are one of highly managed is-house.

Career paths defined.

**Effective Integration**

Centres of competency involve workload mgmt.

They provide a model & appropriately optimized, factoring in risk.

Multiple methods exist and are used by PMs.

Benefits realization is being tracked.

**Effective Innovation**

Charge Operations Provide & Constant Stream of Mani-Projects

Rapid Strategy Exception is the Focus of Enterprise Programs

Change Management & Communication are Core Capable of the EPMO

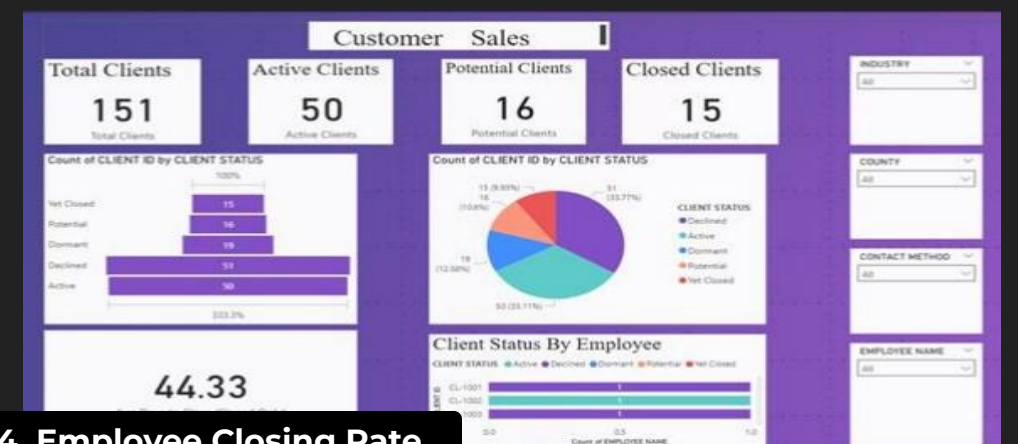# Report Snapshots: The 4 Dashboards



**1. Executive Overview**



**2. Pipeline & Flow Analysis**



**3. Executive Dashboard**



**4. Employee Closing Rate**

# What the Simulation Revealed

By analyzing the 151 simulated records, we identified clear strategic pivots:

**Geographic Opportunities**

Strong traction in **Nakuru** & **Mombasa** suggests these are key growth markets outside Nairobi.

**Ideal Client Profile**

**Real Estate** and **Hospitality** firms showed higher deal values and faster conversion than other sectors.

**The "Why" Behind Decline**

Attrition is driven by **Budget Constraints**, not product features.

# Future Data Architecture

To move from *Simulated* to *Real* intelligence, Fedhatrac **must** start capturing these 3 missing variables:

## 1. Contract Value

**The Gap:** We only track client *counts*.
**The Need:** Capture DealValue (KES) to calculate Customer Lifetime Value (CLV) and unit economics.

## 2. Client Segmentation

**The Gap:** All clients treated equally.
**The Need:** Capture ClientType (SME vs. Individual vs. Corp) to segment sales cycles properly.

## 3. Referral Source

**The Gap:** Unknown marketing ROI.
**The Need:** Capture LeadSource (Socials vs. Direct) to know where to spend marketing budget.

# Implementation Roadmap

**Week 1-2: Data Standardization**

Update CRM forms to make Decline Reason` and `Industry` mandatory fields.

**Week 3: Integration**

Connect Power BI to live SQL/SharePoint data sources.

**Week 4: Training**

Upskill Sales team on accurate data entry for the new variables.

# CONCLUSION

"Data without context is noise. With these new variables,

Fedhatrac turns noise into strategy."

Questions ?

# Thank You & Goodbye

Thank you & Goodbye

Asante na Kwaheri

Grazie e Arrivederci

Gracias y Adiós

Danke und Auf Wiedersehen

Tack och Adjö

Спасибо и До свидания

Merci et au revoir