



Sales dashboard

Original equipment manufacturer (OEM) for electric vehicles

Built a reporting suite to track sales performance and help identify gaps in sales pipeline on a real-time basis

OEM enterprise needs a cutting-edge sales dashboard

Picture this...

You're looking for a comprehensive reporting suite to track sales performance and identify gaps in sales pipeline. Currently, you lack real-time visibility into sales team performance it is relied on Excel reports with long turnaround times at a monthly cadence.

You turn to Accordion.

We partner with your team to built a reporting suite to track sales performance and help identify gaps in Sales Pipeline on a real-time basis, including:

- 1) Analyzing Salesforce data and collaborating with the Data Engineering team to help set up data for the reporting suite on Snowflake data warehouse
- 2) Defining KPIs and building self-service reporting suite on Tableau with dashboards that provide real-time visibility into:
 - Actual Order Intake (OI) vs. Budget
 - Ordering Intake Forecast for next 4 months
 - Status of high value opportunities in Sales Pipeline
 - Sales Team Productivity
- 3) Identifying ~80% of the order intake is entered in Salesforce just 1 week ahead of opportunity closing and suggesting the best practices
- 4) Identifying customers that were offered higher/lower discount compared to the existing guidelines and designing a new discounting framework

Your value is enhanced.

Your real-time availability of the dashboards saved around 40 man-hours/week to develop reports, and the new discount framework helped the team reduce the overall discount offered by 2 percentage points

SALES DASHBOARD

KEY RESULT

- 40 man-hours/week saved

VALUE LEVERS PULLED

- Sales cycle time
- Customer discounting
- Sales team productivity

Forecasting AR – collections for a facility services provider

Situation

- Client lacked real-time visibility into Sales Team performance as they relied on Excel reports with long turnaround times and at a monthly cadence
- Partnered with the client to develop a comprehensive reporting suite to track Sales performance and help identify gaps in sales pipeline

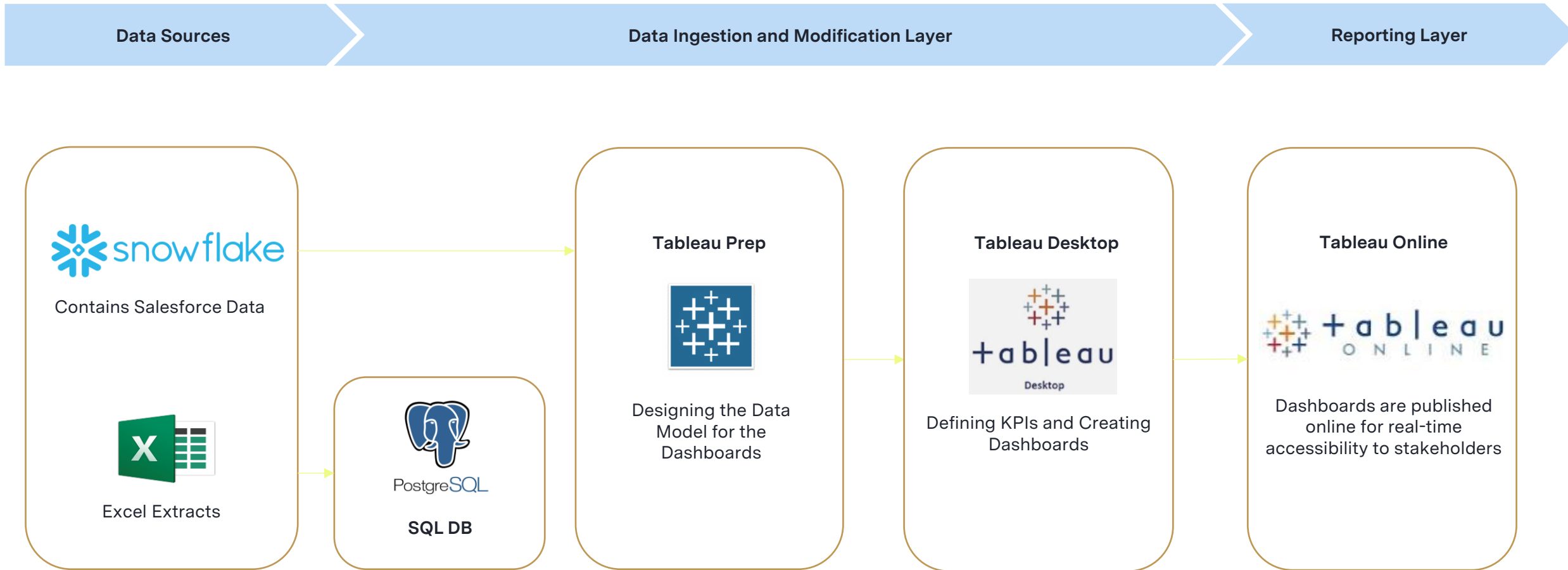
Accordion Value Add

- Analyzed Salesforce data and collaborated with client's Data Engineering team to help set up data for the reporting suite on Snowflake data warehouse
- Defined KPIs and built self-service reporting suite on Tableau with dashboards that provide real-time visibility into:
 - Actual Order Intake (OI) vs. Budget
 - Order Intake Forecast for next 4 months
 - Status of high value opportunities in Sales Pipeline
 - Sales Team Productivity
- Identified that ~80% of the order intake is entered in Salesforce just 1 week ahead of opportunity closing and suggested the best practices
- Identified customers that were offered higher/lower discount compared to the existing guidelines and helped the team design a new discounting framework

Impact

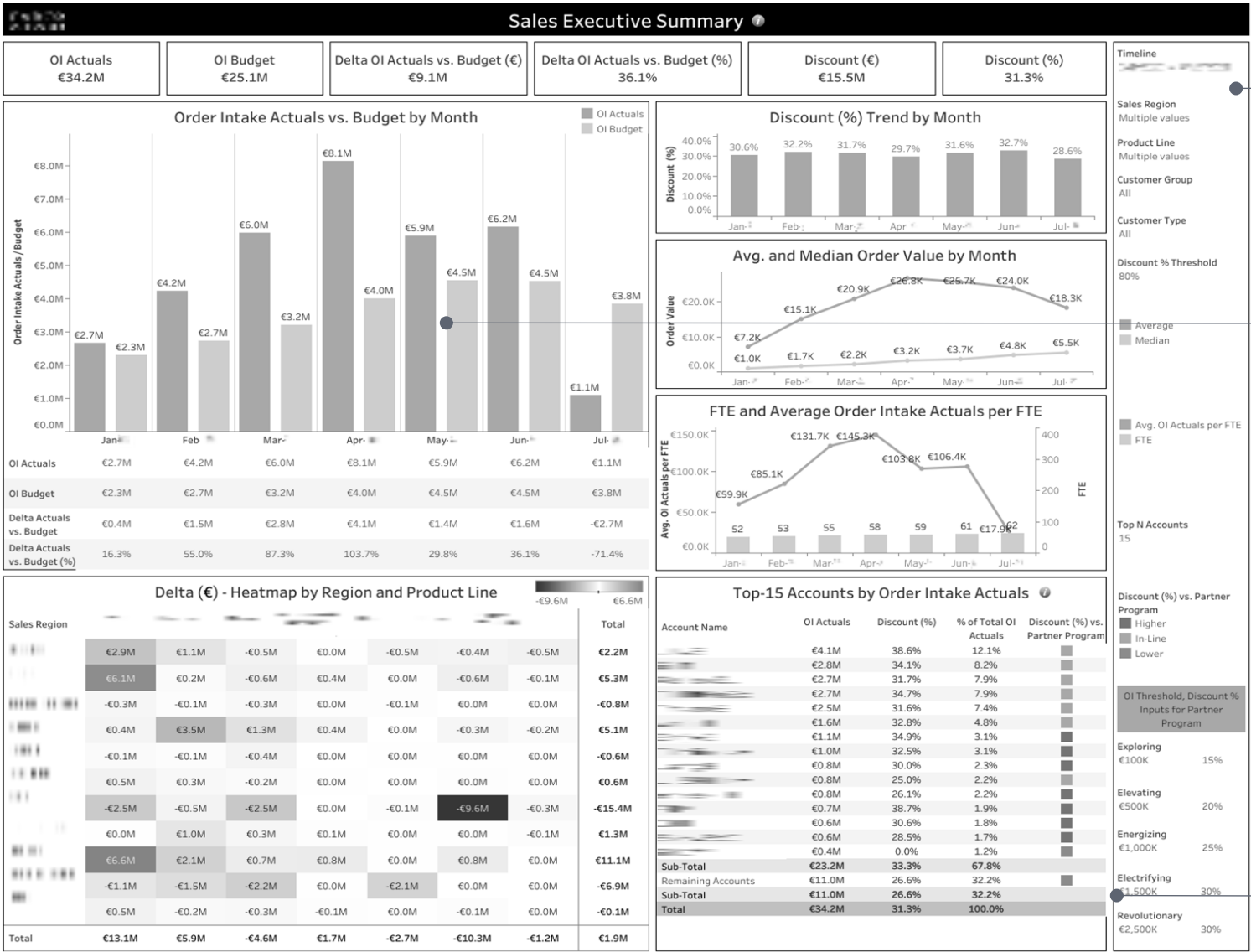
- Real-time availability of the dashboards saved around 40 man-hours/week to develop reports
- The new discount framework helped the team reduce the overall discount offered by 2 percentage points

Methodology/Approach



Sales executive summary

ILLUSTRATIVE



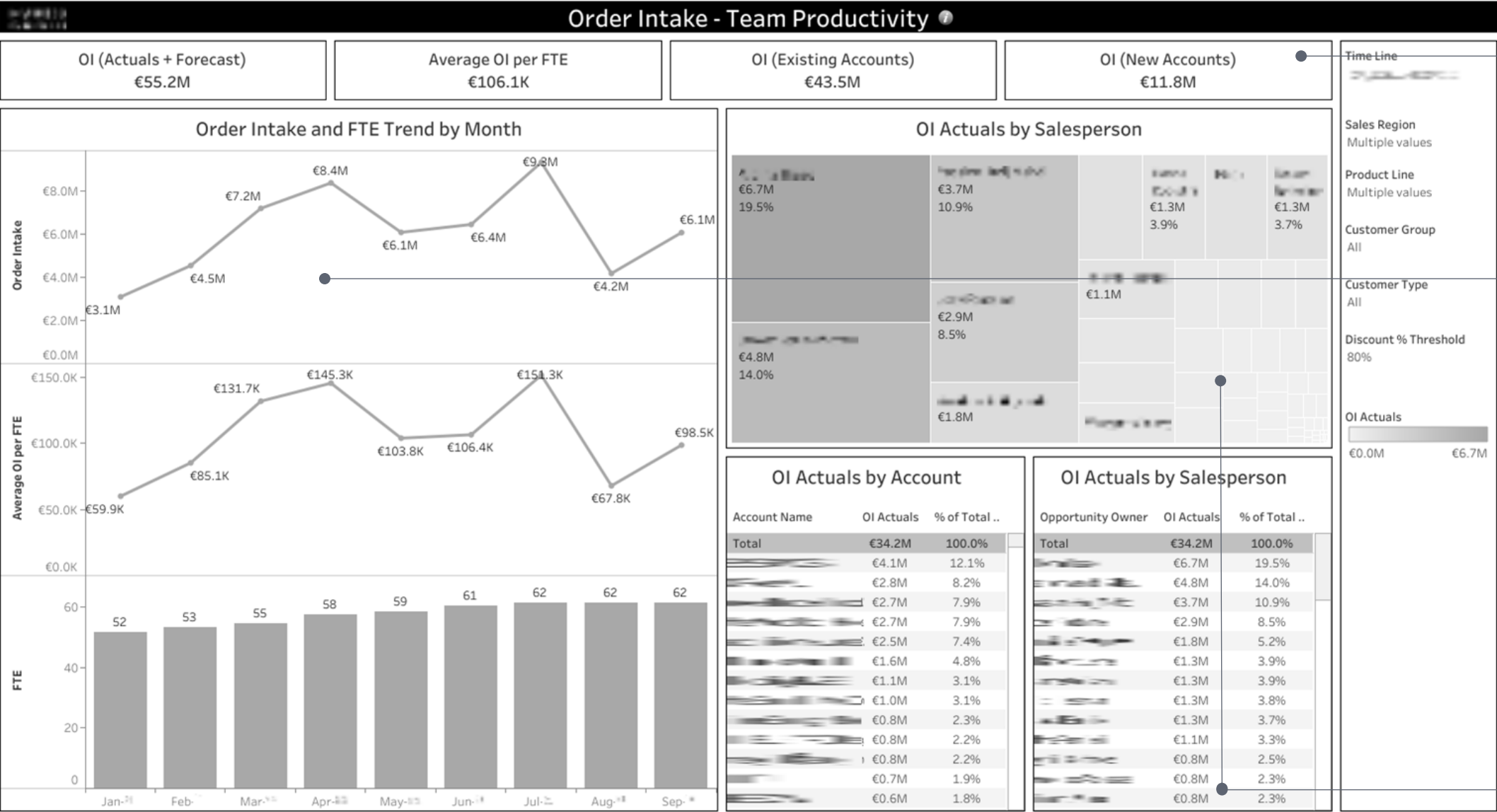
Filter pane to provide flexibility to change timeframe, sales region, product & customer categories

Clustered bar chart to showcase monthly comparison between Order Intake (OI) actuals vs. budget

Table to show Top-15 accounts by their OI actuals

Team productivity

ILLUSTRATIVE



Sales cycle time

