



Data management platform

Industrial staffing company

Integrated data from discrete systems to create a structured Data Warehouse and leveraged it to build a reporting suite of critical Power BI reports for various departments

Industrial staffing company needs to equip itself with a robust data warehouse

Picture this...

You're looking for design and build a data warehouse by integrating data from multiple sources, to create the single source of truth along with automated performance reports on Power BI.

You turn to Accordion.

We partner with your team to integrate data from discrete systems to create a structured Data Warehouse and leverage it to build a reporting suite on Power BI for various departments, including:

- 1) Building a data warehouse to transform the data and implement the Key Performance Indicators to be tracked by various functions.
- 2) Building customized data models for tracking Salesforce performance, Operational performance and Financial Performance (Aging and DSO Reports). Leveraging data models to remodel the existing BI reports and connect to the single source of truth.
- 3) Deploying automated processes for regular updates of the back-end data models, aligning with frequency of raw data generation.

Your value is enhanced.

You have a custom-built data warehouse consolidating data from multiple sources and providing accurate and pre-calculated KPIs replacing the disjointed data sources (with inaccurate or no KPIs) and data from various discrete and disparate sources is harmonized and can be leveraged for various analyses. You also have enhanced frequency and accuracy by eliminating manual interventions needed for report generation. Also, report generation efforts were lowered by 50% which led to significant improvement in resource efficiencies.

DATA MANAGEMENT PLATFORM

KEY RESULT

- Report generation efforts were lowered by 50%

VALUE LEVERS PULLED

- Pipeline development
- KPI design
- BI suite development

BI Infrastructure design and implementation for PE-owned staffing firm

Situation

- Client has various data sources across departments to capture relevant data leading to discrete sets of data residing in individual systems. Hence, it lacked a single centralized repository, leading to highly inefficient and manually intensive reporting.
- Partnered with the client to design and build a data warehouse integrating data from multiple sources, to create the single source of truth and power the automated performance reports on Power BI

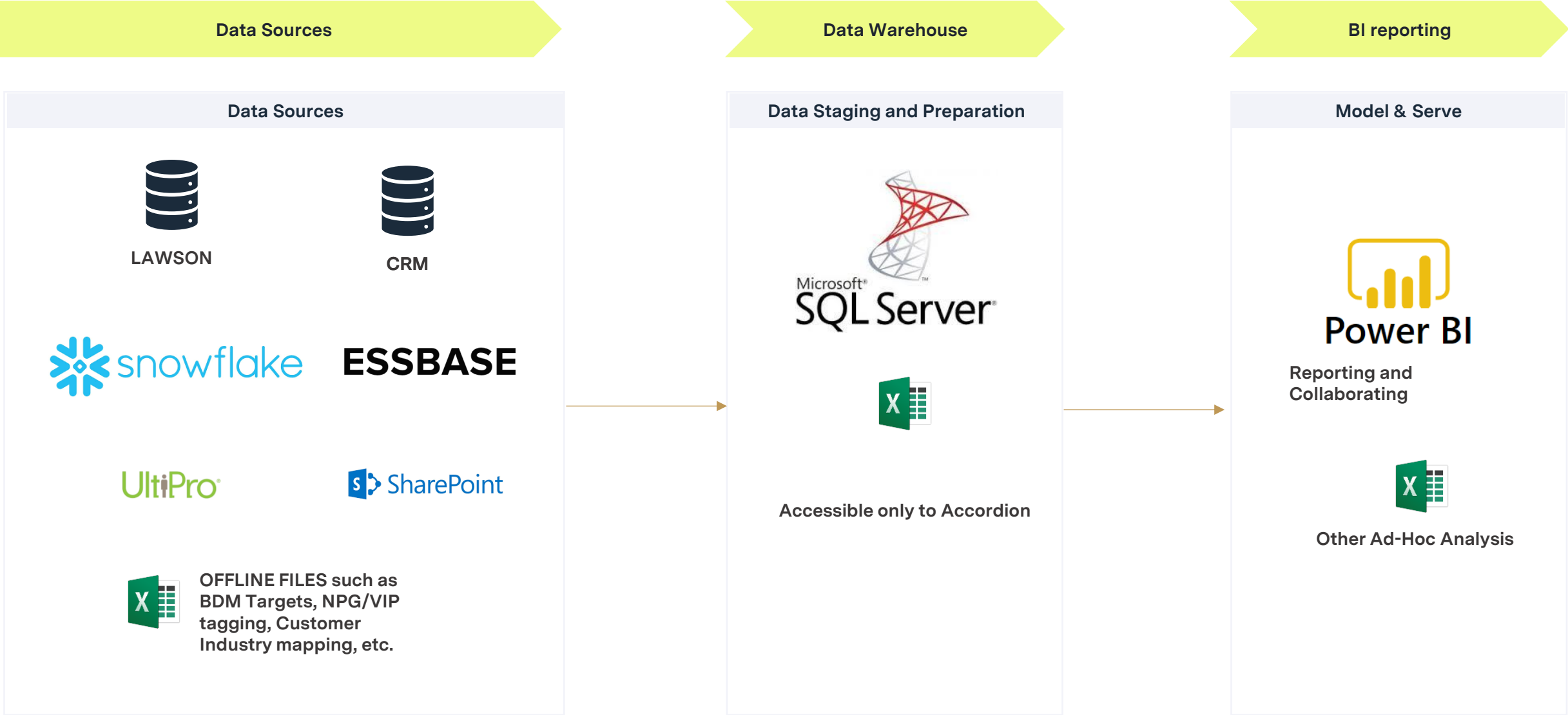
Accordion Value Add

- Designed a centralized data lake in Snowflake to capture data from multiple sources across departments such as Lawson (Financial Data), Dynamics 365 (CRM), UltiPro (HR Data), SharePoint (ad-hoc Excel files) etc.
- Built a data warehouse to transform the data and implement the Key Performance Indicators to be tracked by various functions
- Built customized data models for tracking Salesforce performance, Operational performance and Financial Performance (Aging and DSO Reports). Leveraged these data models to remodel the existing BI reports and connect to the single source of truth.
- Deployed automated processes for regular updates of the back-end data models, aligning with frequency of raw data generation

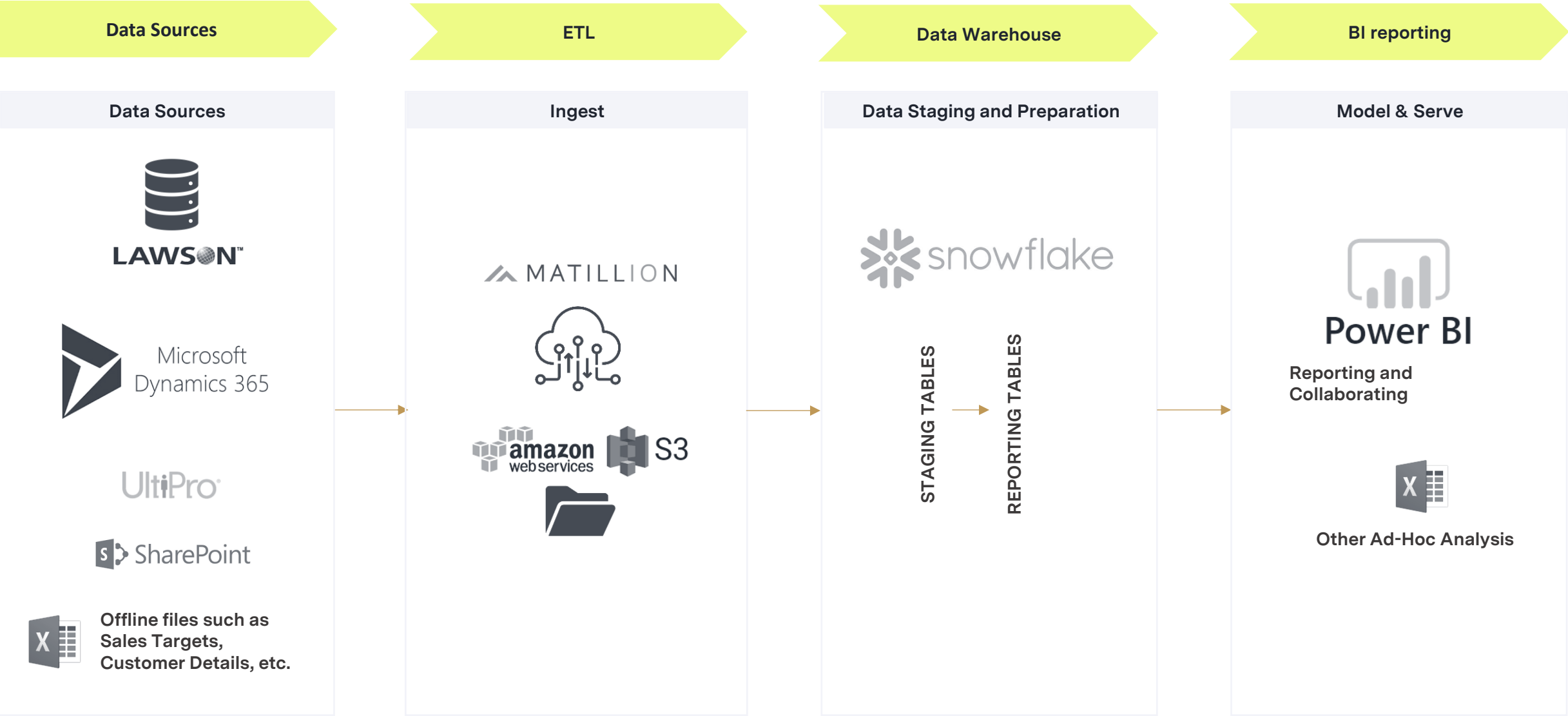
Impact

- Custom-built data warehouse consolidates data from multiple sources and provides accurate and pre-calculated KPIs replacing the disjointed data sources (with inaccurate or no KPIs)
- Data from various discrete and disparate sources is harmonized and can be leveraged for various analyses
- Enabled enhanced update frequency and accuracy by eliminated manual interventions needed for report generation. Also, report generation efforts were lower by 50% which led to significant improvement in resource efficiencies.

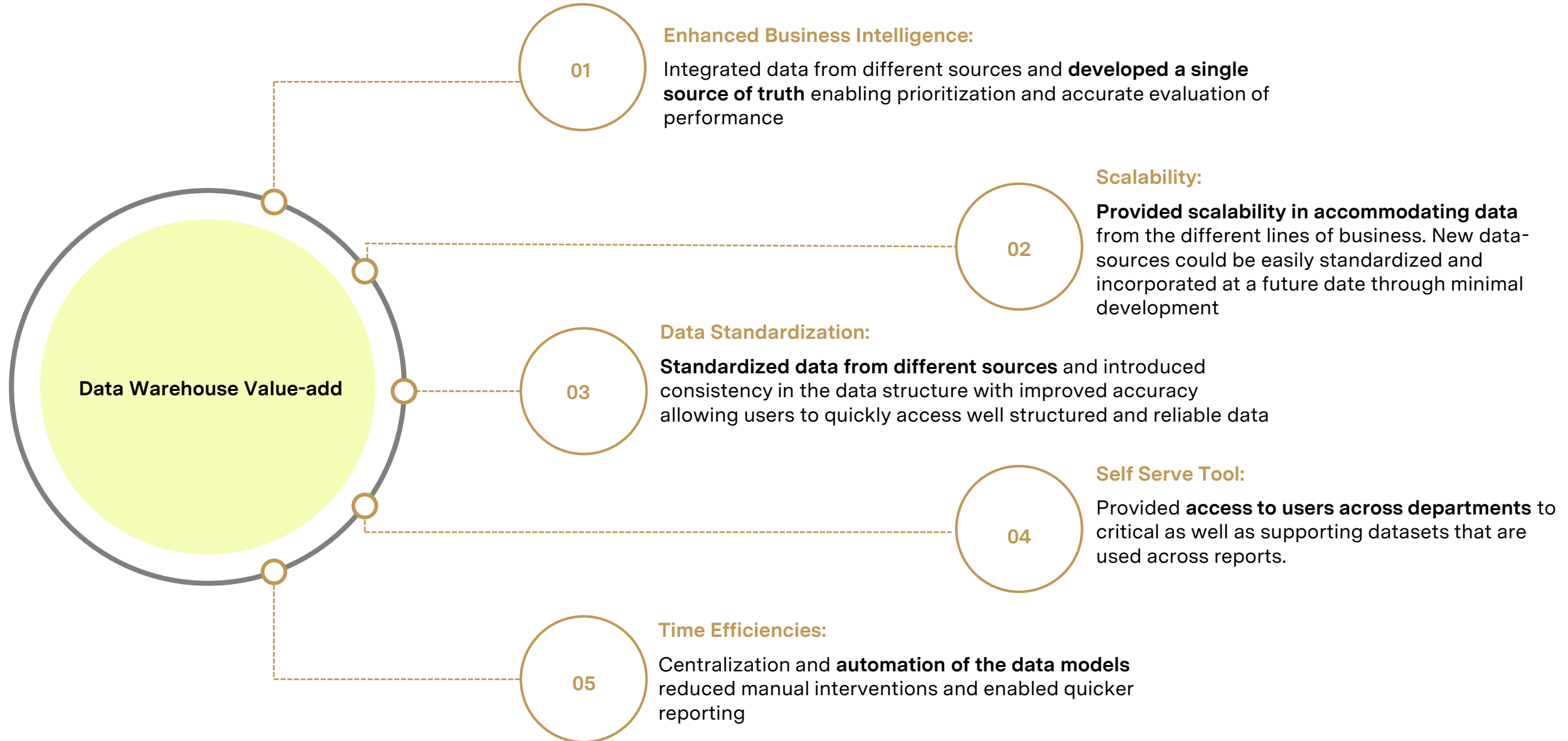
Business Intelligence infrastructure – Before



Business Intelligence infrastructure – Implemented



Key focus areas and benefits of new Business Intelligence infrastructure



Enhanced KPIs and reporting suite

01

Enhanced Business Intelligence

- Allows users to develop incremental reports and analytical models that provide a more holistic view of the business
- Data reconciliation and integration from different sources such as Lawson, CRM, SharePoint, UltiPro, etc. enable robust analytics that link key metrics such as Revenues, GP, AR across Branches, Customers and Sales Representatives

Finance KPIs by Branch Hierarchy & Customer segments

- Revenue, Gross Profit, Hours billed etc.
- Distribution of Customer by Industry
- AR aging – Current Due vs. Past Due
- Eligible vs. Ineligible invoices
- Current DSO vs. Entitlement DSO
- Customer Tier migration

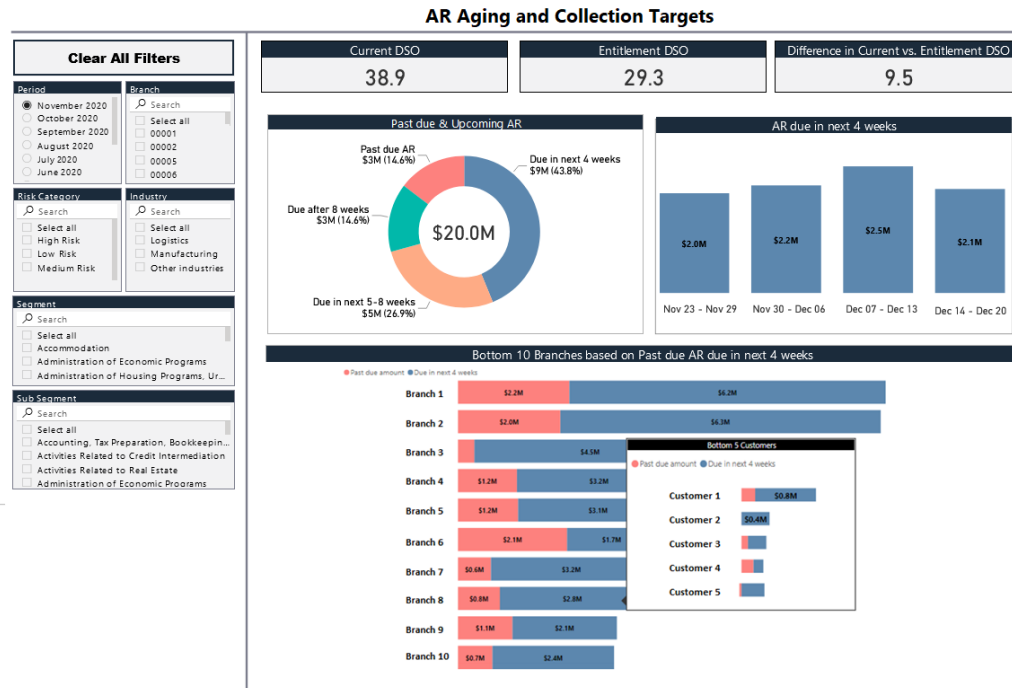


Sales Pipeline KPIs by Branch Hierarchy & Sales Rep

- Lead to Sales Conversion Ratio
- Sales Cycle Length
- Distribution of Leads by Industry
- Conversion rates by industry
- Sales Rep covered Revenue and Gross Profit
- Avg. client size per Sales Rep

Example of Power BI report

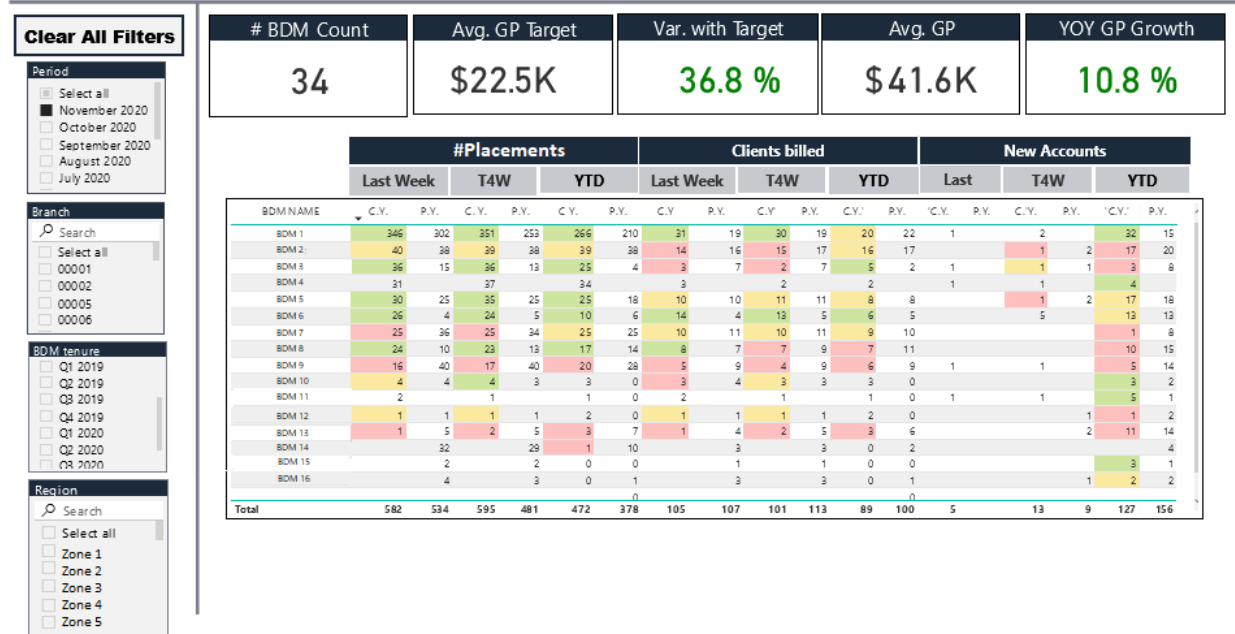
AR Aging and DSO Performance



Provides visibility into **outstanding AR and DSO** along with flexibility to drill-down and identify biggest offenders. Additionally, it also provides the **week-level forecast of upcoming dues**, to set the collections target.

Salesforce Performance

Salesforce Performance Tracker



Enables to **track current performance of each Sales Representative** via key metrics such as New accounts generated, GP generated, target achievement, etc. to **identify strong and weak performers**

Data Management project impact – Data standardization

03

Data Standardization

- Earlier, different reports had data present in different formats and sources which did not talk to each other., which led to manual data manipulations to resolve inconsistencies
- Data reconciliation and cleansing efforts have led to consistency in data, thereby improving data quality

Consistent data format has been incorporated for commonly used dimensions

BEFORE

- **Branch ID:** Nomenclature varies across data sources such as Essbase, Snowflake and CRM (099B vs. 99 vs. 699)
- **Branch Hierarchy:** Inconsistent hierarchy mapping across data sources
- **Management Hierarchy:** Mismatches existed in the reporting hierarchy across data sources
- **Customer ID and Name:** Customer ID formatting and Customer nomenclature varies across sources such as Essbase, Snowflake, etc. which makes it difficult to integrate and use data from two sources
- **Customer Attributes:** Account type was inconsistently mapped across Reports and Snowflake
- **Sales Rep Names:** Sales Rep nomenclature varies across Essbase and Snowflake making it hard to tie back data for the two sources (Sales Rep named as Buck, John L. in the UltiPro database, John Buck in Snowflake and 774 – John L Buck in Essbase)

AFTER

- **Branch ID:** Consistent tagging added across all tables
- **Branch Hierarchy:** Single source identified and deployed for all Branch related Hierarchy mappings
- **Management Hierarchy:** Single source identified for deriving the reporting hierarchies at Branch as well as Sales Representative level
- **Customer ID and Name:** Consistent formatting and nomenclature introduced
- **Customer Attributes:** Single source identified for Account Type, Category/Tier classifications across all reports/data models
- **Sales Rep Names:** Consistent nomenclature for Sales Reps introduced across various metrics by incorporation of an intermediary mapping table which maps the different name variants by Sales Rep across sources

Data Management project impact – Automation driven efficiencies

05

Automation

- >50% reduction in effort for recurring Power BI report refreshes. Most reports would refresh in ~2 hours time span with additional ability to increase refresh cadence from monthly to weekly/daily (as applicable).
- Less resource utilization in terms of processing and manpower, thereby being cost-efficient in longer-term

	BEFORE		AFTER		
Report	Time needed per refresh	Cadence	Time needed per refresh	Cadence	Work Hours saved per month
REPORT 1					
Weekly refresh (Sub-Report 1)	1 day	Once per week	2 hours	Once per week	24 hours per month
Monthly refresh (Sub-Report 2)	3 days	Once per month	2 hours	Once per month	22 hours per month
REPORT 2					
Weekly refresh (Sub-Report 1)	1 day	Once per week	2 hours	Once per week	24 hours per month
Monthly Refresh (Sub-Report 2)	3 days	Once per month	4 hours	Once per month	20 hours per month
REPORT 3					
Monthly Refresh	4 days	Once per month	4 hours	Once per month	28 hours per month
Total					~120 hours per month