

SUCCESS STORIES - SUMMARY

Project Name	Client	Brief Description	Key Analyses
BI Infrastructure set-up	Industrial parts manufacturing company	Developed various sales dashboards on Tableau to track key business performance metrics across product and customer categories by integrating data from discrete sources and reconciling with Financial reports	Data integration, KPI definitions, BI dashboards

REPORTING INFRASTRUCTURE SET-UP

ABOUT THE CLIENT

Client is one of the **largest industrial parts manufacturing company for a niche category, in North America** and has specialized manufacturing and distribution entities spread across the continent.

SITUATION



- Due to inorganic growth, the company had **discrete and scattered data** systems for capturing pricing information for the customized product lines across entities
- Merilytics partnered with the client to **consolidate the data across systems, reconcile the differences across systems** and **create dashboards** to provide visibility into business performance by region, customer and product categories

VALUE ADDITION



- **Developed a deep understanding of the client data systems** across entities (resulting from inorganic growth) to understand the integration between orders, products and customer information
- **Reconciled the differences in sales across data systems** to establish a single source of truth for the top management
- Built **dynamic reporting dashboards on Tableau** to review business performance by region, product and customer category for various periods such as MTD, YTD Last Twelve Months (LTM) and Full year.
- Provided **flexibility to drill down** to specific regions, products and customers, for the middle management to investigate key trends

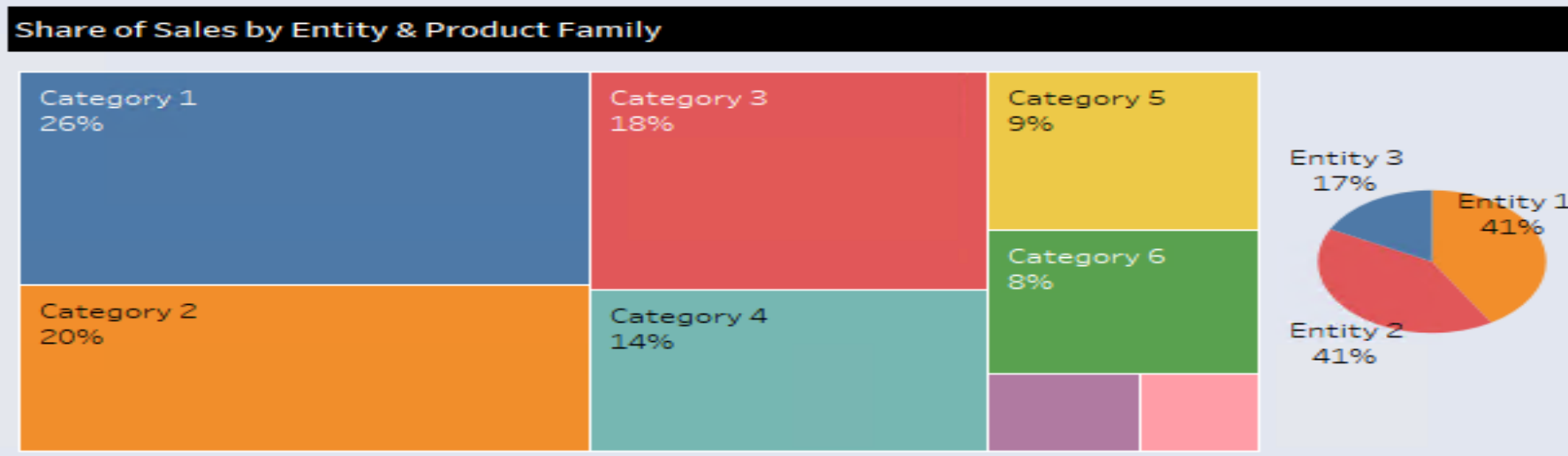
IMPACT



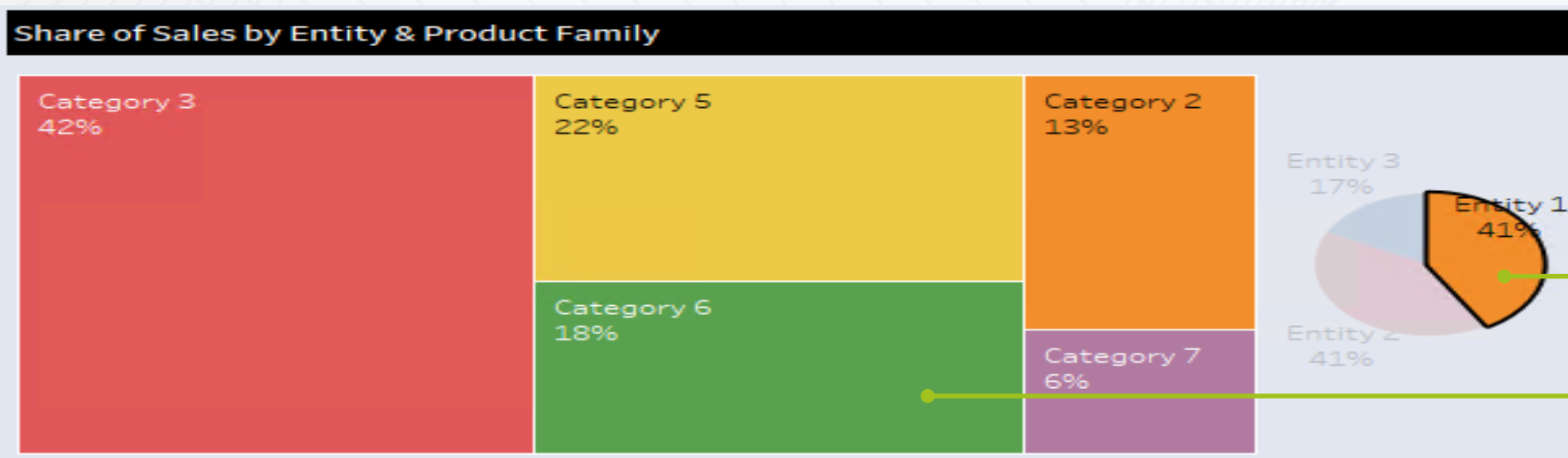
- Enabled the client to **identify gaps in data capture** and **streamline the processes** required to establish a **reliable reporting infrastructure**
- **Automated dashboards helped visualize real-time data** and provided **visibility** into business **performance** and its drivers across entities and product lines

INTERACTIVE VISUALIZATION THROUGH USER SELECTIONS ENABLES A DEEP-DIVE ON THE TRENDS

Before a selection



After a selection



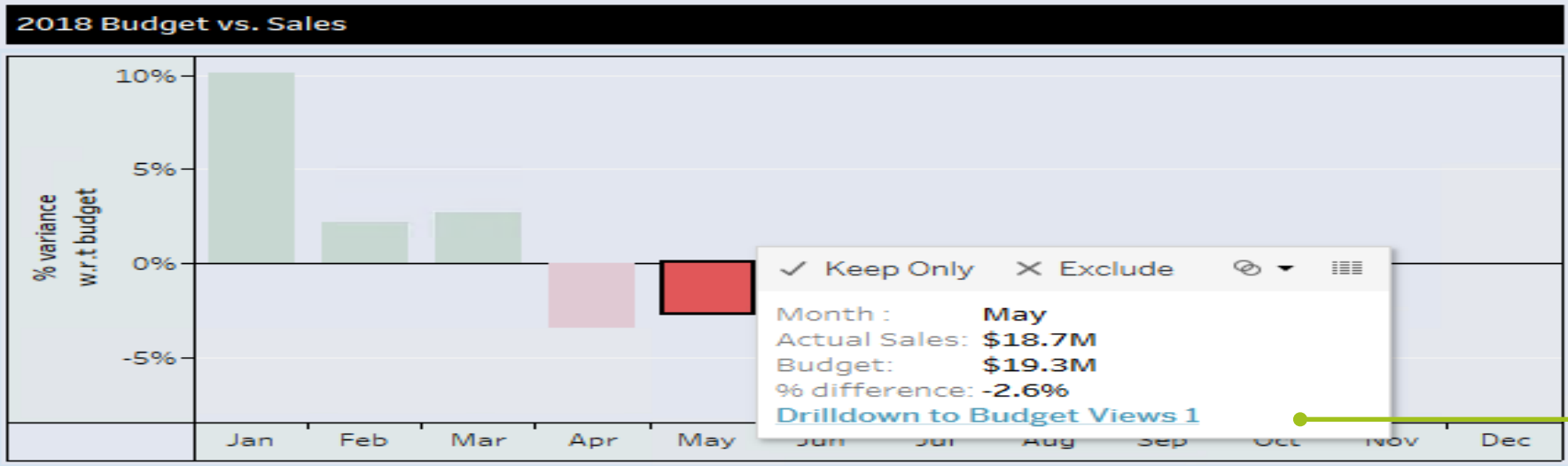
Selection on a pie chart that automatically updates the adjacent chart

Updated chart based on the selection in adjacent chart

FLEXIBILITY TO DRILL DOWN AND INVESTIGATE THE DRIVERS OF PERFORMANCE

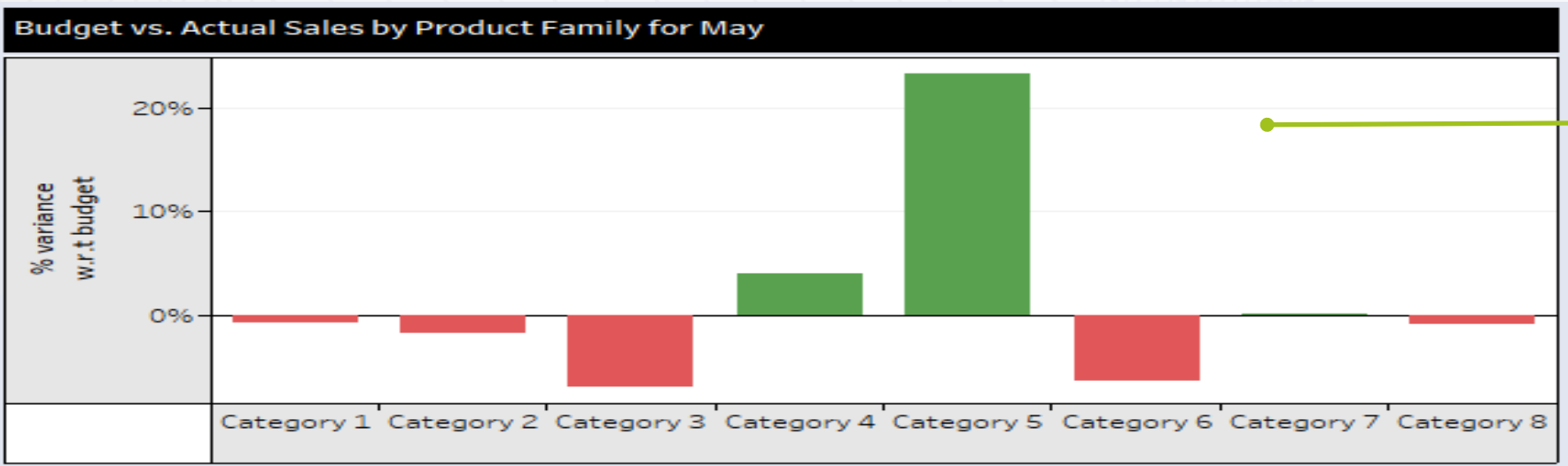
HELPS IDENTIFY AREAS THAT NEED ATTENTION

Top-down view



User can select the view to drill-down for understanding the variance for a particular month

Drill-down view



The drill-down view provides directional guidance regarding the category that led to the variance in the selected month

OPTION TO CHOOSE THE REQUIRED DIMENSION OF A METRIC ENABLES BUSINESS USERS TO EVALUATE PERFORMANCE FROM DIFFERENT PERSPECTIVES

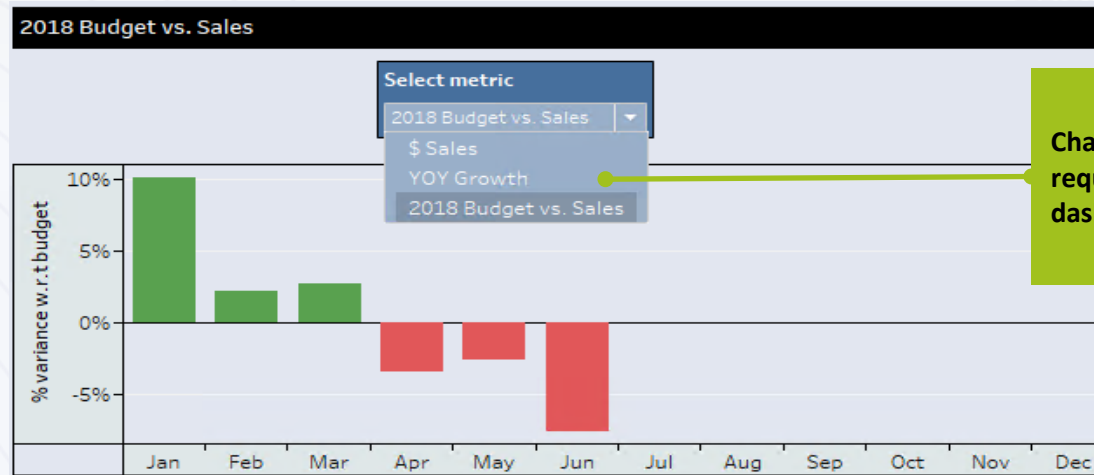
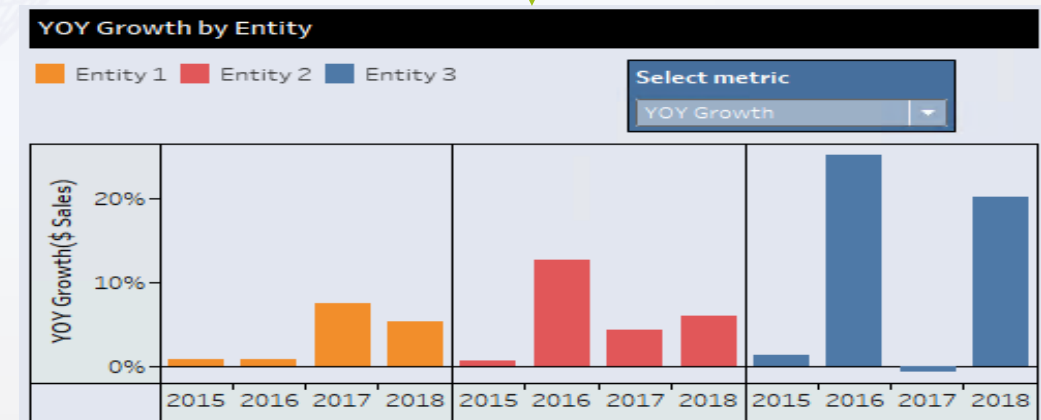
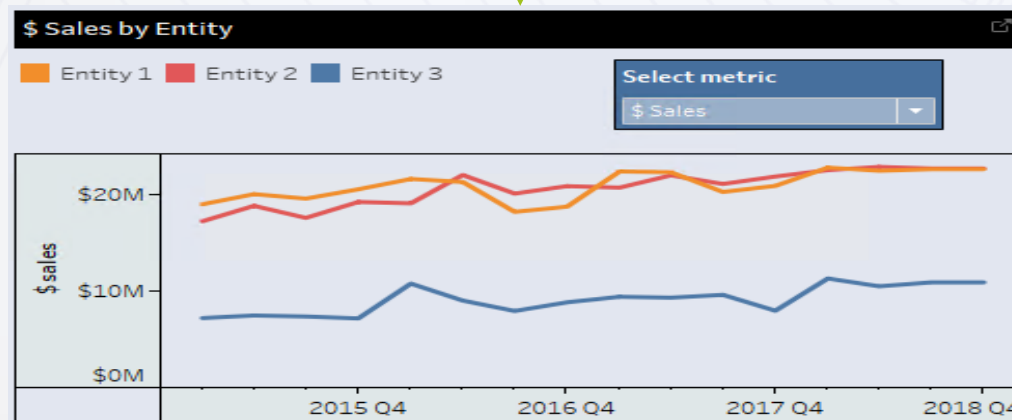


Chart can be changed to view the required metrics on the dashboards

Metric selection from the dropdown

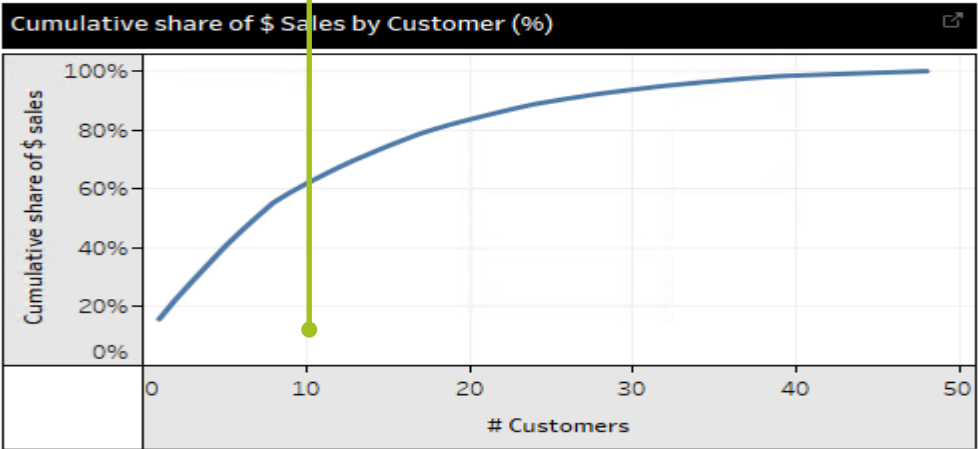


PARETO CHARTS, SCATTER PLOTS, TABULATIONS AND MAPS HELP VISUALLY REPRESENT VARIOUS ASPECTS OF BUSINESS PERFORMANCE

ILLUSTRATIVE

A pareto chart to determine the distribution of customers contributing to the top percentile of the sales

Pareto chart



A scatter plot to segment customers into quadrants based on YoY growth and \$ sales

Scatter plot

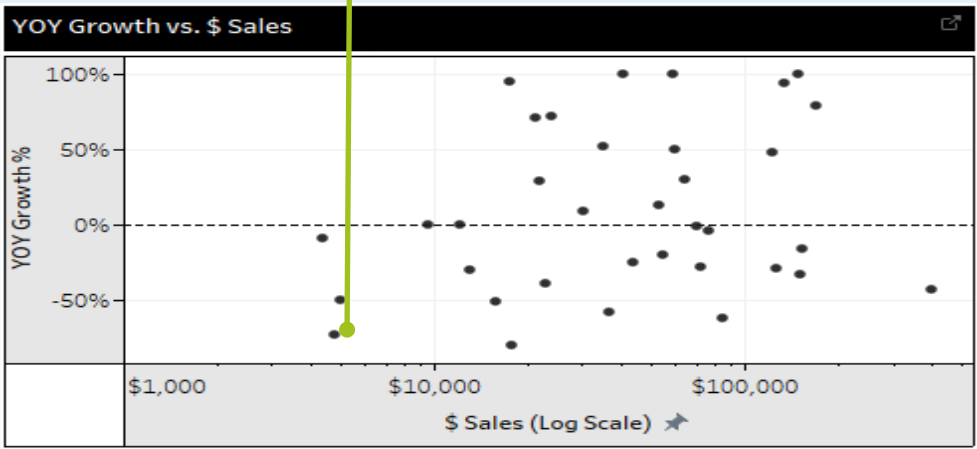


Table chart with search Option

Name Search
(All)

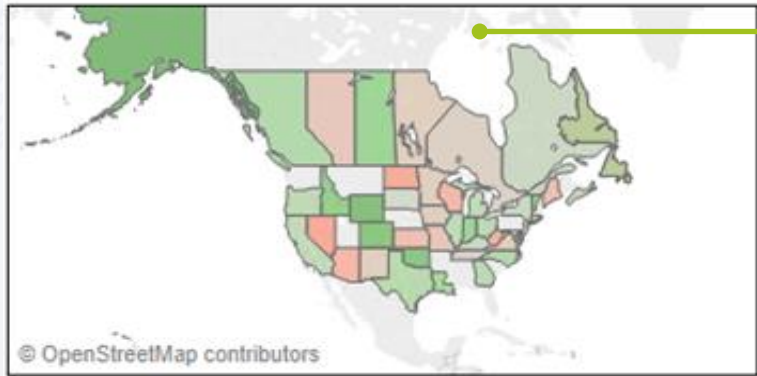
A tabular view to search and evaluate a specific customer's sales trends

Top Customer \$ Sales & YOY Growth

Rank	Name	\$ sales	YOY
1	Customer 1	\$6,403,552	2.13%
2	Customer 2	\$6,293,316	-0.32%
3	Customer 3	\$5,624,381	25.29%
4	Customer 4	\$3,765,071	21.46%
5	Customer 5	\$3,466,445	-23.35%

Map chart

YOY Growth by State



A map depicting sales growth across regions

