Customer intelligence platform development

Telecommunication company focused on the U.S. rural market

Developed a centralized data warehouse that integrates data from multiple sources and facilitates unified reporting across the business

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Telecommunications company needs to “tap” customer intelligence performance

Picture this…

You’re looking to develop a centralized data warehouse that integrates data from multiple sources and facilitates unified reporting across the business. Currently, there is no unified point of reference for analytics and reporting due to data being dispersed across systems in varying, non-standardized formats, existing in isolation and are not interconnected.

You turn to Accordion.

We partner with your team to develop a centralized data warehouse that integrates data from multiple sources and facilitates unified reporting across the business, including:

1) Conceptualizing and developing the enterprise data architecture by integrating multiple data sources (such as Salesforce, Zuora, SAP, etc.) and effectively modeling the data to meet the specific business requirements, thus enabling tracking of the customer journey as well as customer onboarding
2) Developing automated Tableau dashboards to monitor the expansion of the customer base over a defined timeframe, assessing through a range of business-centric factors
3) Utilizing the integrated data model to deliver comprehensive sales funnel reports, along with marketing-oriented dashboards that offer insight into the efficiency of campaigns

Your value is enhanced.

You have a unified data model with significant impact as it empowers business users in daily monitoring the customer base expansion and identifying the key drivers of customer growth across various geographies and product types. You also have optimized the operational practices of on-ground staff and achieved an efficient account and opportunity management strategy that complements the broader initiative.

CUSTOMER INTELLIGENCE PLATFORM DEVELOPMENT

KEY RESULT

- ~90% automation of process

VALUE LEVERS PULLED

- Enterprise data warehouse setup
- DBT code development
- Automated Tableau dashboards
- Sales Funnel Reports

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Data infrastructure deployment for a telecommunications company

Customer Intelligence Platform Development

Situation

- The client did not possess a unified point of reference for analytics and reporting due to their data being dispersed across systems in varying, non-standardized formats
- Most of these data source systems existed in isolation and were not interconnected, leading to the absence of comprehensive organizational reporting capabilities
- We partnered with the client to develop a centralized data warehouse that integrates data from multiple sources and facilitates unified reporting across the business

Accordion Value Add

- Conceptualized and developed the enterprise data architecture by integrating multiple data sources (such as Salesforce, Zuora, SAP, etc.) and effectively modeled the data to meet the specific business requirements, thus enabling tracking of the customer journey as well as customer onboarding
- Developed automated Tableau dashboards to monitor the expansion of the customer base over a defined timeframe, assessed through a range of business-centric factors
- Utilized the integrated data model to deliver comprehensive sales funnel reports, along with marketing-oriented dashboards that offer insight into the efficiency of campaigns

Impact

- The implementation of a unified data model has had a significant impact as it empowered business users with daily monitoring of customer base expansion and identifying the key drivers of customer growth across various geographies and product types
- The client has been able to optimize the operational practices of their on-ground staff and has been able to achieve an efficient account and opportunity management strategy that complements their broader initiative

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Methodology/ Approach

Source Evaluation

- Conducted a detailed review of the current data sources and the on-premise database
- Analyzed the compatibility of each data source for integration and assessed the data sanity to ensure consistency across systems

System Design

- Designed the Enterprise Data Architecture basis, the initial evaluation of the existing processes and the data sources
- Adopted ELT methodology considering the data volume and uncertainty around data usability
- Incorporated data sanity checks as a part of the design

EDA Development

- Implemented the designed Enterprise Data Architecture using Fivetran, dbt, and Snowflake
- Automated the DB object creation process using dbt

Tableau Reporting

- Developed various Tableau reports to report the migration of the customer base
- Enabled automated reporting to track lead and opportunity generation process
- Enabled tracking of the customer base available for upselling as well as net new customer base over a period

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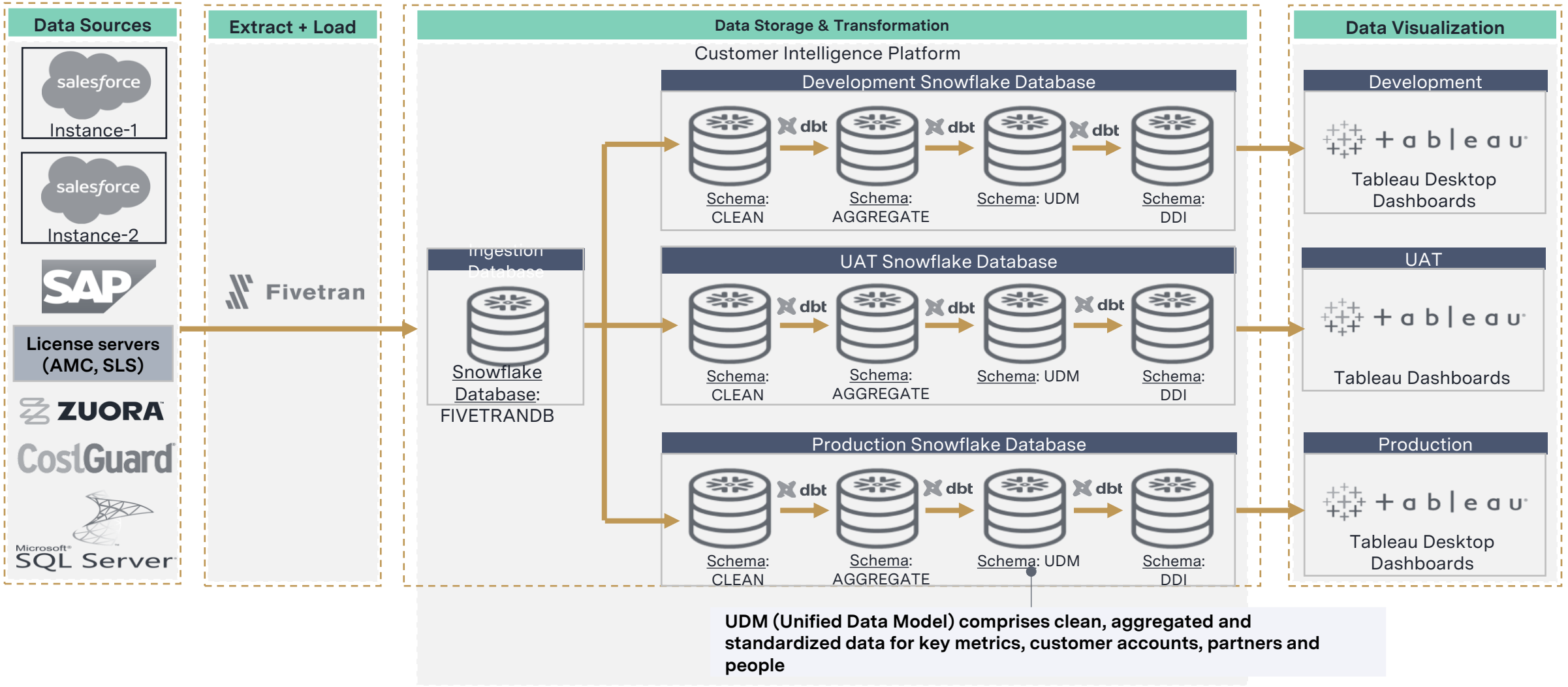
ILLUSTRATIVE

Customer Intelligence Platform (CIP): High level design



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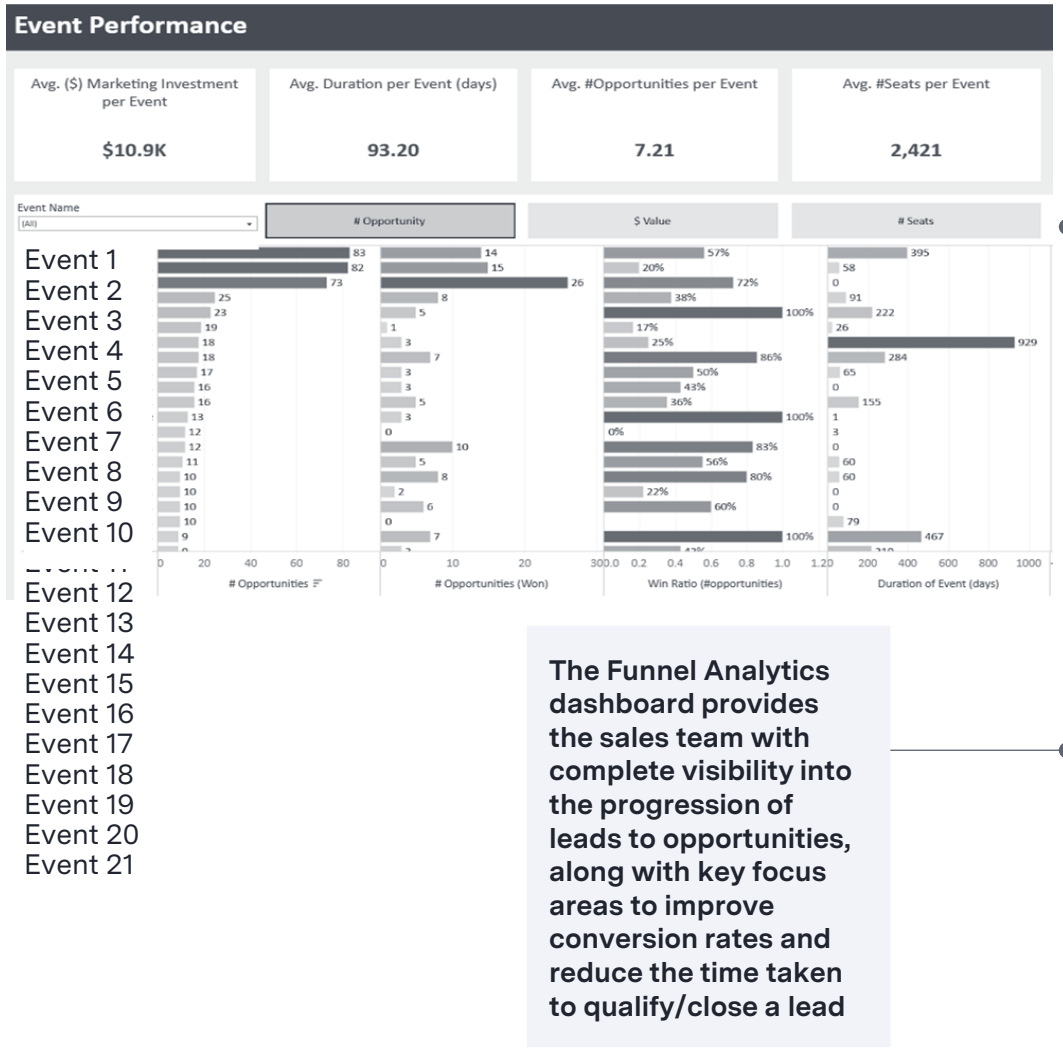
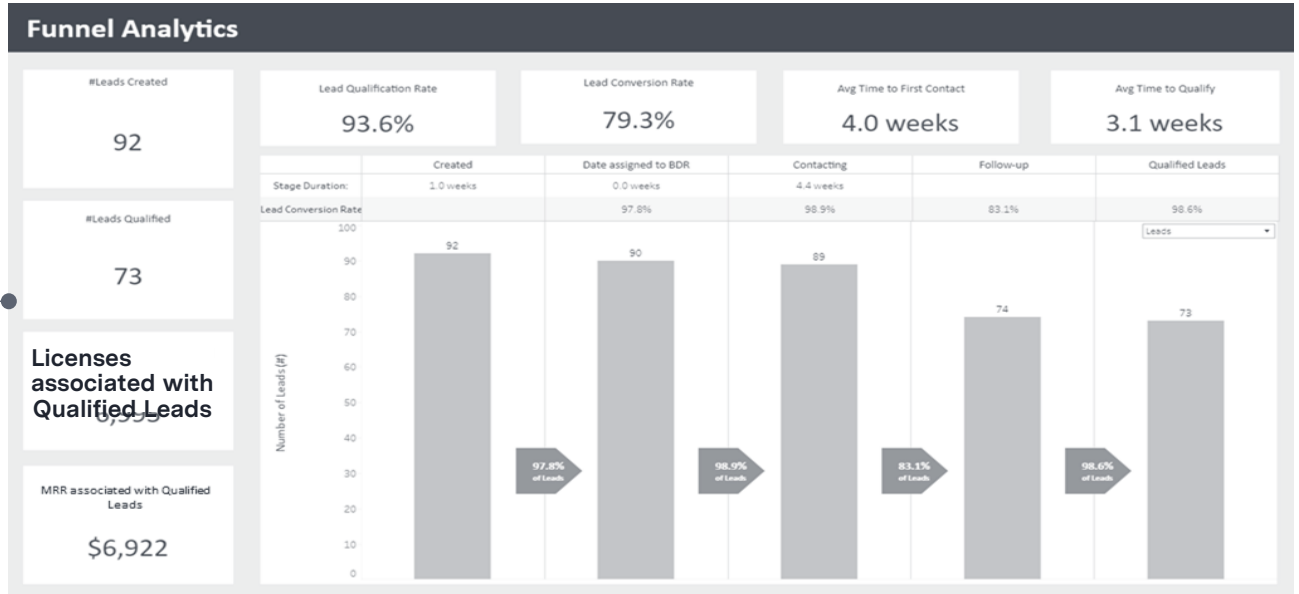
Sales and marketing reporting



The Event Performance dashboard provides the marketing team visibility into effectiveness and ROI of various marketing campaigns being rolled out



The Funnel Analytics dashboard provides the sales team with complete visibility into the progression of leads to opportunities, along with key focus areas to improve conversion rates and reduce the time taken to qualify/close a lead

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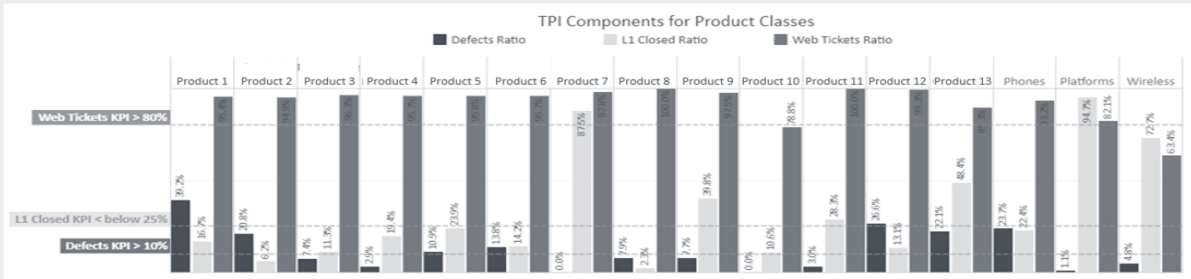
Customer base growth summary

Customer Retention Waterfall

Provides visibility into the net movement of accounts month-on-month, quarterly and yearly basis

Technical Performance Index Overview



Partner Engineer Performance

Partner Engineer	TPI	# SR Created	# SR Closed	# Requests To D..	Defects Ratio	# L1 Tickets Clos..	L1 Closed Ratio	# Web Tickets R..	Web Tickets Rat..
Engineer 1	66.7%	3	3	0	0.0%	0	0.0%	3	100.0%
Engineer 2	100.0%	12	10	2	16.7%	1	10.0%	11	91.7%
Engineer 3	54.7%	26	25	1	3.8%	9	36.0%	26	100.0%
Engineer 4	100.0%	24	18	2	8.3%	0	0.0%	24	100.0%
Engineer 5	66.7%	3	2	0	0.0%	0	0.0%	3	100.0%
Engineer 6	90.5%	28	21	2	7.1%	4	19.0%	27	96.4%
Engineer 7	91.4%	33	27	9	27.3%	7	25.9%	28	84.8%
Engineer 8	100.0%	78	72	11	14.1%	16	22.2%	76	97.4%
Engineer 9	88.9%	3	3	1	33.3%	1	33.3%	3	100.0%
Engineer 10	100.0%	32	23	8	25.0%	2	8.7%	32	100.0%
Engineer 11	57.6%	11	11	0	0.0%	3	27.3%	11	100.0%
Engineer 12	41.7%	8	8	0	0.0%	6	75.0%	8	100.0%
Engineer 13	33.3%	1	0	0	0.0%	0	0.0%	1	100.0%
Engineer 14	66.7%	10	4	2	20.0%	0	0.0%	10	100.0%

Provides visibility into the performance of partner engineers for timely resolution of customer tickets

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