Enterprise data warehouse implementation

Medical spa and aesthetic services provider

Built an automated and scalable Enterprise Data Warehouse to improve the speed and efficiency of analyzing various datasets coming from all acquisitions and act as the single source of truth for comprehensive data analytics and reporting. Integrated key practice management systems and other supporting systems such as Paylocity and HubSpot

Medical spa company needs a scalable data warehouse

Picture this…

You're looking to build a scalable and automated enterprise data warehouse to handle increasing data and reporting requirements from new acquisitions. Currently, the reporting relies on manual Excel extracts which is time-consuming and error prone.

You turn to Accordion.

We partner with your team to build an automated and scalable **enterprise data warehouse** to improve the speed and efficiency of analyzing various datasets coming from all acquisitions and act as the single source of truth for comprehensive data analytics and reporting, including:

1) Assessing the existing data sources and developing automated data ETL pipelines to extract data from different data systems (Payroll Systems, POS, MedSpa EMR) using Fivetran and ingesting into Snowflake
2) Cleaning and transforming the raw data in DBT as per business requirements and building data marts for analytical and reporting purposes
3) Developing a robust customer mapping algorithm and building a customer database to accurately identify unique customers from all EMR systems & HubSpot
4) Migrating the existing sales and customer analytics dashboards on Power BI to feed off the new data warehouse on Snowflake
5) Deploying the Power BI dashboards with entity-based security using RLS (Row-level Security) and set up the Power BI service environment for end-users

Your value is enhanced.

- Pre-built data marts in the data warehouse reduced the Power BI dashboard refresh time by ~90% (from 20 mins to < 2 mins)
- You have automated pipelines and data source integration removed the manual intervention of data extracts that saved ~20 person-hours a month
- You also have a robust enterprise data warehouse that has scalability to manage the increasing volume of data resulting from forthcoming acquisitions

ENTERPRISE DATA WAREHOUSE IMPLEMENTATION

KEY RESULT

- ~20 person-hours savings
- ~90% reduction in dashboard refresh duration

VALUE LEVERS PULLED

- Enterprise Data Warehouse Implementation
- Power BI Dashboard Reconfiguration
- Golden Customer Record

Enterprise data warehouse implementation for MEDSPA company

ENTERPRISE DATA WAREHOUSE IMPLEMENTATION

Situation

- Client was growing through strategic acquisition opportunities across the U.S. but lacked a scalable and automated system to manage its growing data and reporting needs from multiple sources. The existing reporting relied on manual Excel extracts which was time-consuming and error prone.
- Partnered with the client to build a scalable and automated enterprise data warehouse to handle its increasing data and reporting requirements from new acquisitions

Accordion Value Add

- Assessed the existing data sources and developed automated data ETL pipelines to extract data from different data systems (Payroll Systems, POS, MedSpa EMR) using Fivetran and ingested into Snowflake
- Cleaned and transformed the raw data in DBT as per business requirements and built data marts for analytical and reporting purposes
- Developed a robust customer mapping algorithm and built a customer database to accurately identify unique customers from all EMR systems & HubSpot
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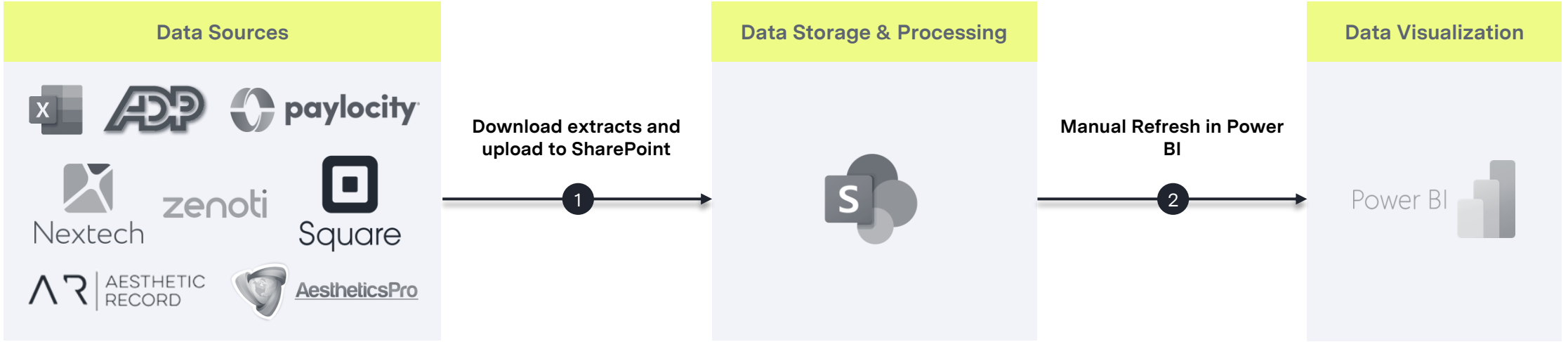
Impact

- The pre-built data marts in the data warehouse reduced the Power BI dashboard refresh time by ~90% (from 20 mins to < 2 mins)
- The automated pipelines and data source integration removed the manual intervention of data extracts and helped save ~20 person-hours a month
- The robust enterprise data warehouse provided the scalability to manage the increasing volume of data resulting from forthcoming acquisitions

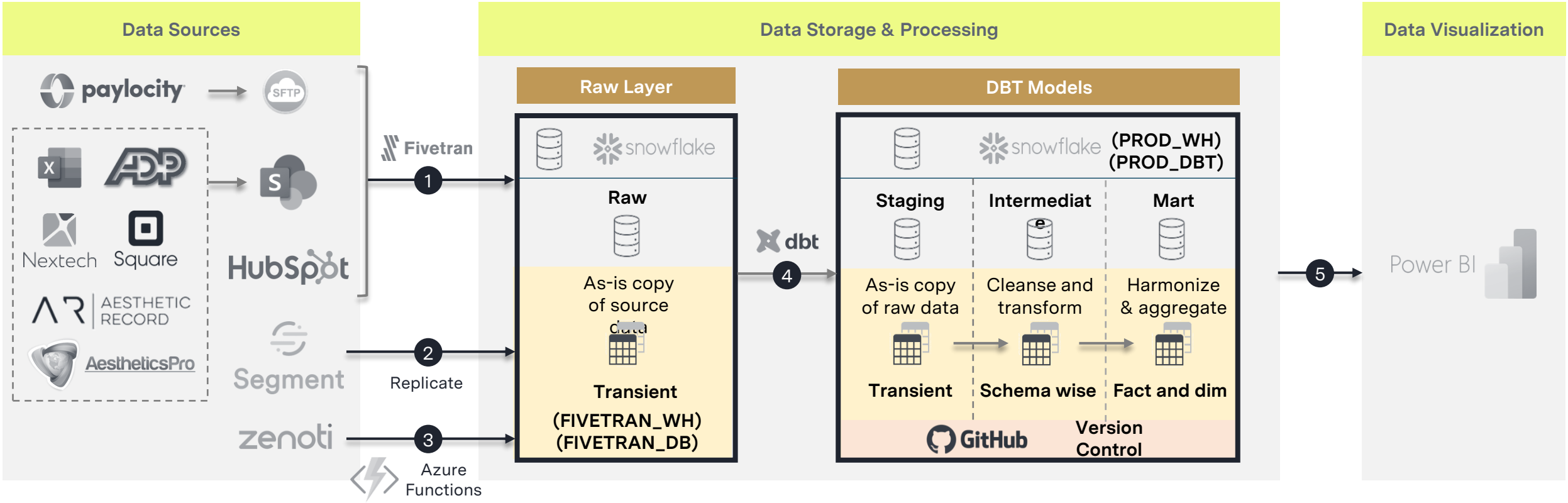
Previous reporting state



Limitations of Previous Reporting State:

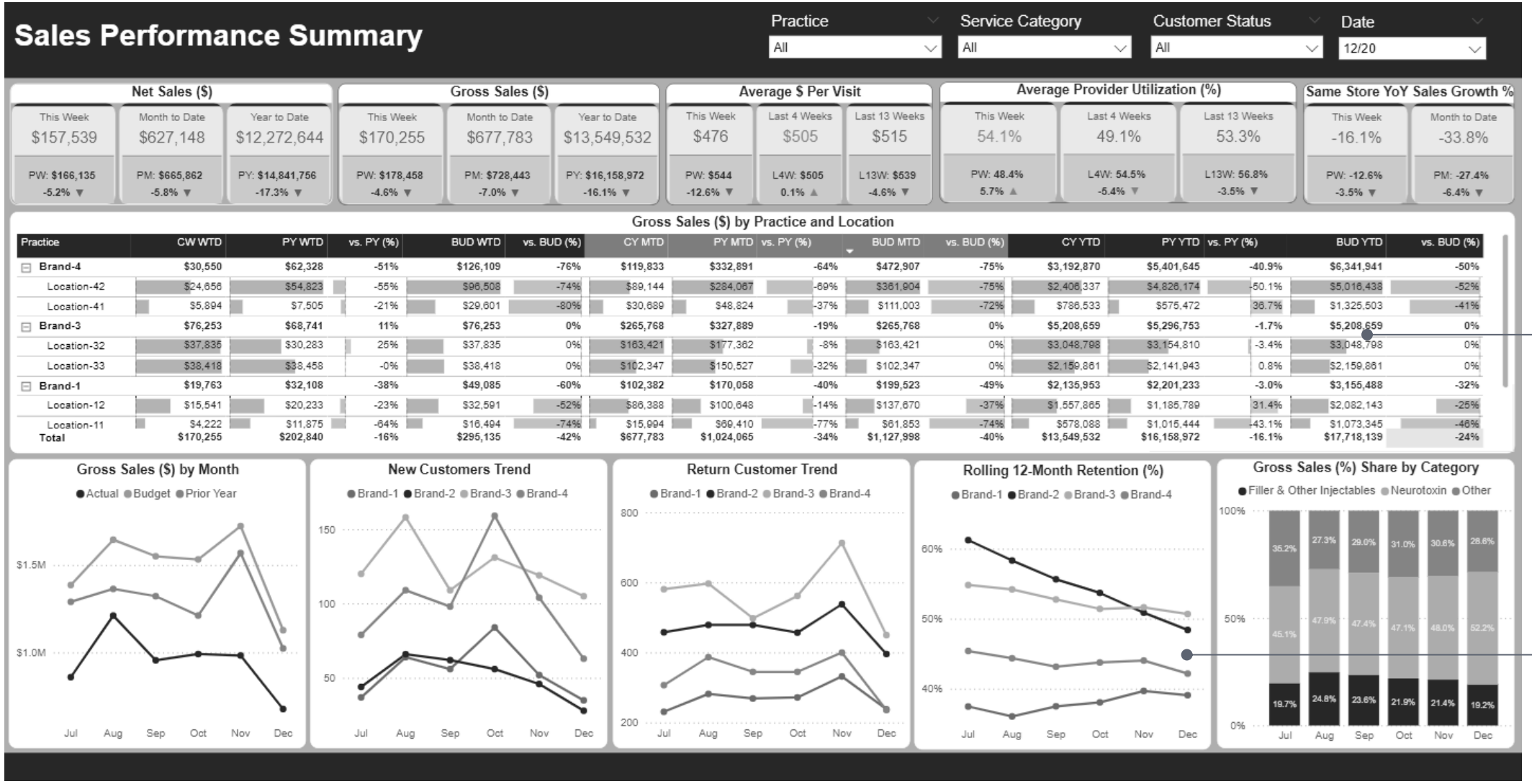
1. Accuracy issues arising from manually holding current data sets in Excel/data model while layering data from multiple practices on top of each other (data not in one place)
2. Managing data in separate Excel files for each year led to scalability challenges as the volume of data grows over time
3. No established system for historical data maintenance. Challenges with Excel cataloging include needing to upload/maintain in a data model for Power BI use, versioning, etc.
4. Redundant columns within the data models, potentially leading to increased model size
5. Need for manual intervention in downloading from the data systems and uploading into SharePoint to be used in Power BI

Implemented data architecture



1. Data is ingested from different data systems (Payroll Systems, POS, MedSpa EMR, HubSpot) **using Fivetran into Snowflake** using automated ETL pipelines
2. The CRM data from **Segment** is replicated directly into Snowflake as a virtual database instance
3. The POS and CRM data from **Zenoti** is ingested into the Snowflake using its API by leveraging **Azure functions**
4. All the raw data is transformed in Snowflake using **dbt** in three layers – Staging, Intermediate and Mart, and segmented into data marts in the final reporting layer
5. The reporting data marts are used to feed off the **Power BI dashboards** for data visualization and analytics

Sales performance dashboard



Tracks sales by each practice and location each WTD, MTD, & YTD, compares them against the same period last year, and the budget

Compares the key sales and customer retention metrics by practice and their trends over months