Marketing Dashboard
(Original Equipment Manufacturer (OEM))

- Built a reporting suite to track metrics related to **Leads and Opportunities** like MQLs, SQLs and Handovers by different dimensions like Country, Lead stage, Lead Source, etc.

- To track the metrics related to Google Analytics such as Users Traffic, Goal Conversions, Bounce Rate, etc. by different dimensions like Channel, Country, etc

MARKETING DASHBOARD (B2B) FOR EQUIPMENT MANUFACTURER

ABOUT THE CLIENT

Client is a leading Original Equipment Manufacturer (**OEM**) of **electric vehicle (EV) charging station/box** in Europe and with a growing presence in North America.

SITUATION

- Client **lacked real-time visibility into Marketing & Sales Team performance** as they used to create reports on Excel with long turnaround times, limiting their reporting to a monthly cadence.
- Merilytics partnered with the client to **build a reporting suite to track Marketing performance and help identify gaps in the Pipeline.**
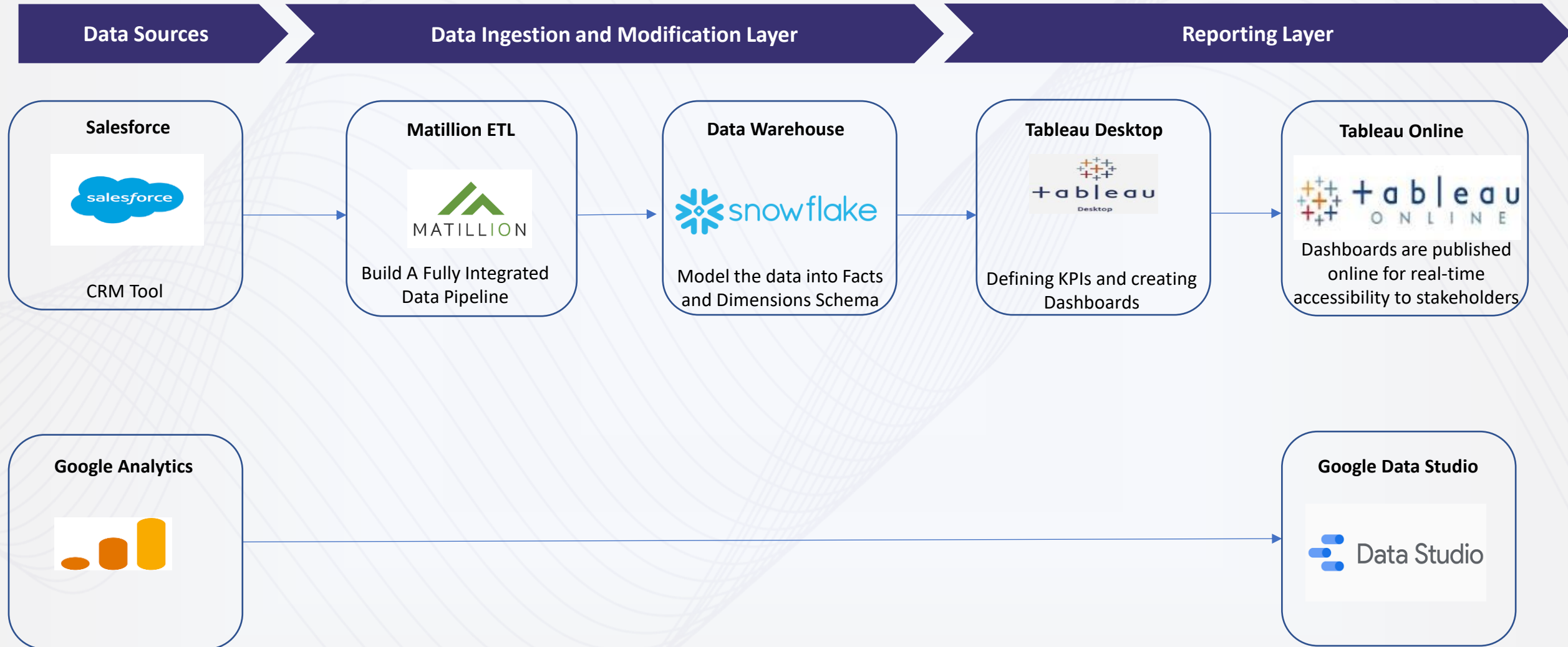
VALUE ADDITION

- 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 & Google Data Studio with dashboards that provide real-time visibility into
  - Leads & Opportunities (MQLs & SQLs)
  - User Traffic
  - Channel Analytics
  - Goal Conversion
  - Bounce Rate

IMPACT

- Real-time availability of the dashboards **saved 40 hours/week man-hours consumed in creating reports.**
- Identified key drivers of goal conversion which were leveraged by the business to **improve the lead conversion ratios**.

SPACING ARROW -APPROACH & METHODOLOGY

Data Sources	Data Ingestion and Modification Layer	Reporting Layer

Salesforce

CRM Tool

Matillion ETL

Build A Fully Integrated Data Pipeline

Data Warehouse

Model the data into Facts and Dimensions Schema

Tableau Desktop

Defining KPIs and creating Dashboards

Tableau Online

Dashboards are published online for real-time accessibility to stakeholders

Google Analytics

Google Data Studio

EXHIBIT 1 – OPPORTUNITY AND LEADS SUMMARY

Filter Pane to provide flexibility to change Timeframe, Country, Opportunity type etc.

Clustered bar chart to show case monthly trend of Opportunity and Country

4

EXHIBIT 2 – LEADS

ILLUSTRATIVE

KPI Cards displays MQLs to Closed Won
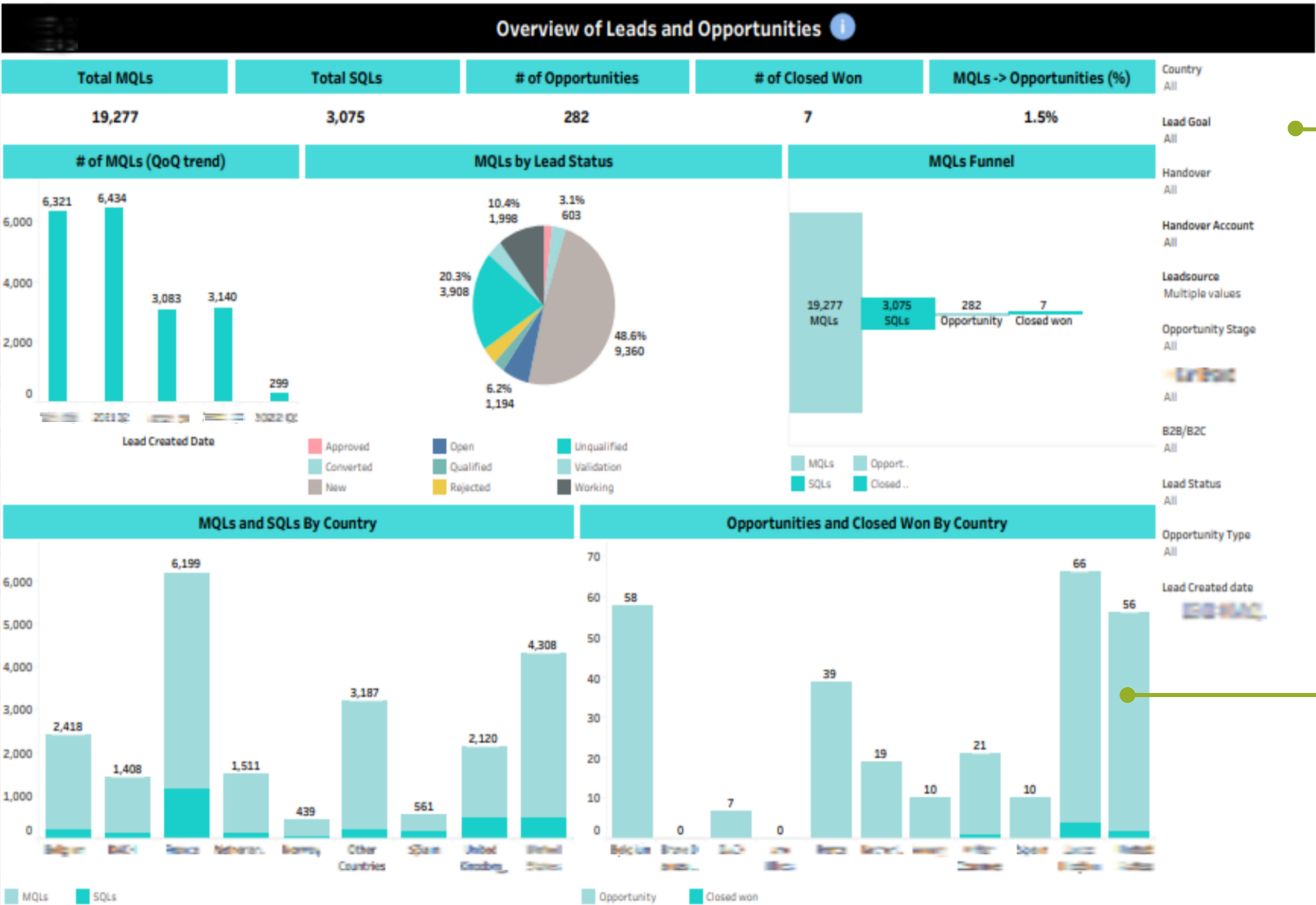
Visual to show Top 5 Lead source By MQLs
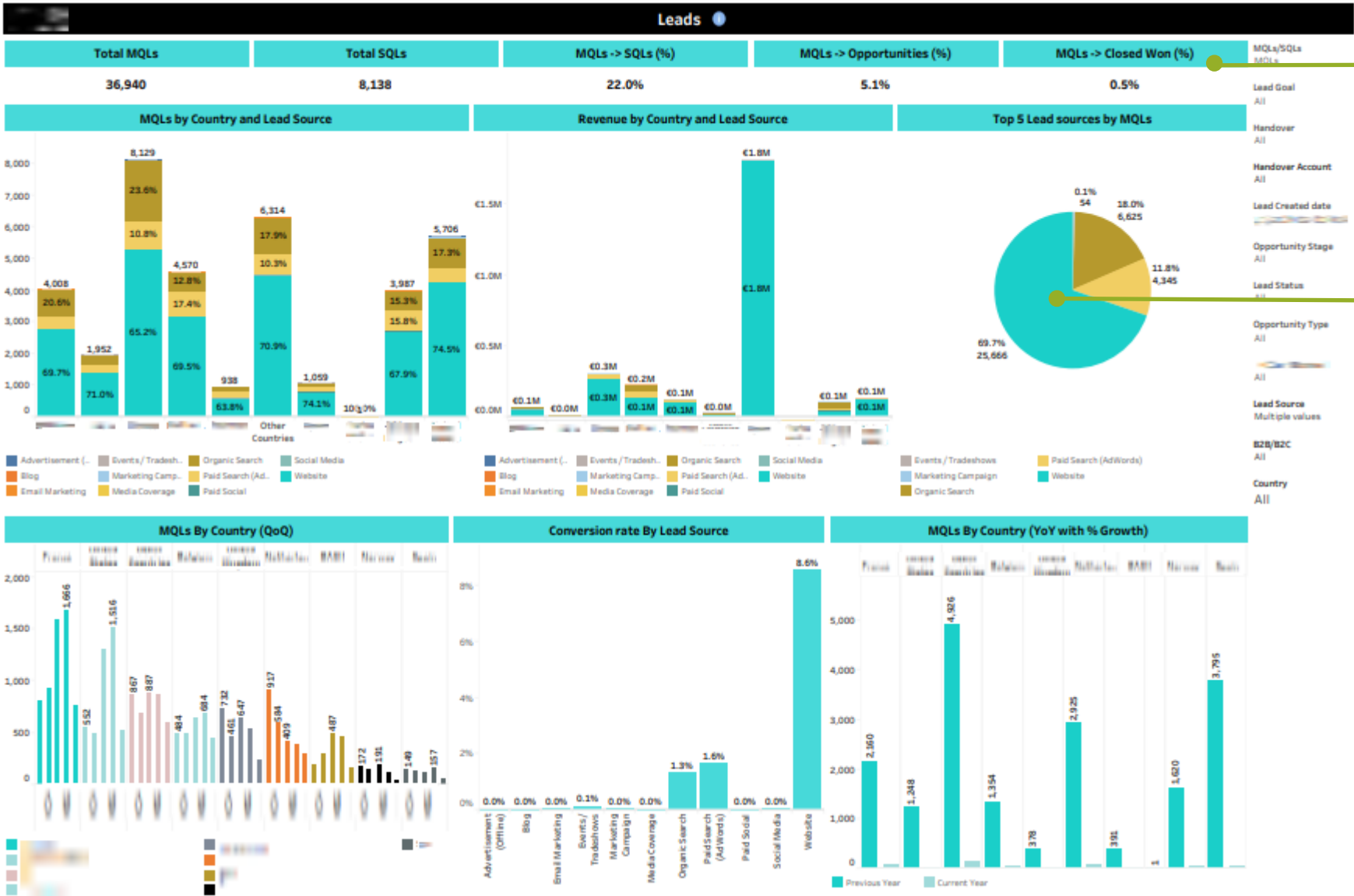
EXHIBIT 3 – WEBSITE TRAFFIC OVERVIEW

Pie Chart show casing user traffic by channels
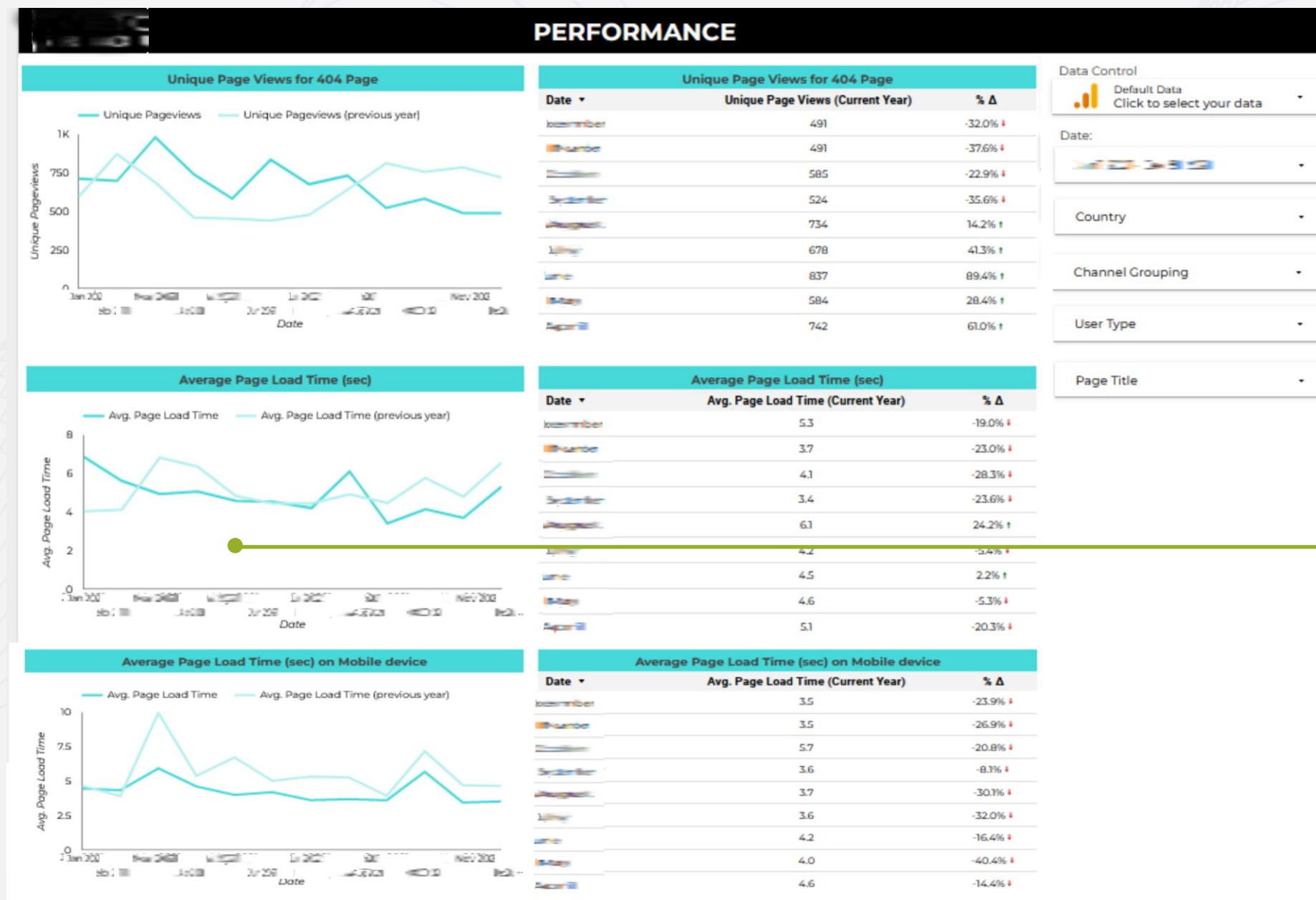
Pie Chart showing share of Users by different devices

Table to find month vise traffic

EXHIBIT 4 – WEBSITE LOAD ANALYTICS

Visuals to showcase Average page Load time

7