BI REPORTING CASE STUDY SUMMARY

BI Reporting and infrastructure projects for PE clients			
Project Name		**Brief Description**	**Key analyses**
1		▪ **Built new Data Warehouse using team u**sing data from various sources such as internal ERP tools, finance and accounting data suites etc. Transitioned **from legacy SQL tabular data models into this new Data warehouse.** ▪ **Developed several new KPIs and build a robust analytical and reporting BI infrastructure** to generate customer-level and product level insights such as customer **churn rates**, **salesforce productivity, etc.**	

CASE STUDY – DEVELOPMENT OF KPIS AND PERFORMANCE REPORTING FOR A/V EQUIPMENT RENTAL CLIENT

merilytics
AN ACCORDION COMPANY

ABOUT THE CLIENT

Dummy text is also used to demonstrate the appearance of different typefaces and layouts, and in general the content of dummy text is nonsensical. Due to its widespread use as filler text for layouts, non-readability is of great importance

SITUATION

- Client is a PE-owned **A/V equipment rental company** with operations in U.S., Canada and Europe

- Revenue was growing at a fast pace, but there was a lack of clarity **on details on customer level, product level performance due to complexity of business model and data structures**

- Management wanted to **validate the financials with the operational databases that contained transaction level data** and also understand the various drivers of revenue and asset performance

- Merilytics partnered with the company to **mine the transactions database** (100m rows) using **cloud-based SQL tabular models**, to do a bottoms-up estimate of the revenues and identify customer-level and product level insights

VALUE ADDITION

- **Cleansed the data** to

  - Account for cancelled orders, unrealized revenues, non-revenue generating customers, data entry issues, currency mismatches etc.
  - Allocate order-level revenues to specific equipment, transactions and customers

- Identified customer-level and product-level **asset utilization and rental yields**

- **Developed a lifecycle view of each asset** based on transactional level data to understand the life time value, age of assets and required capital expenditures

- Helped client understand customer **churn rates**, **salesforce productivity**, share of growth from existing customers, and **levers of future growth**

IMPACT

- Helped the company **better understand its asset performance** allowing it to make **strategic decisions on capex and optimization of its product** portfolio

- Was able to develop **relevant incentives for the sales force** as their performance could be tracked more accurately.

CASE STUDY: PERFORMANCE REPORTING INFRASTRUCTURE FOR A/V EQUIPMENT CLIENT

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ABOUT THE CLIENT

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SITUATION

- Client is a PE-owned **A/V equipment rental company** with operations in U.S., Canada and Europe
- There was a lack of clarity **on its operations, customer/product level performance due to complexity of business model and data structures**
- Management wanted to **validate the financials with the operational databases that contained transaction level data** and also **understand the drivers of revenue and asset performance**
- Merilytics partnered with the company to **transition legacy SQL tabular data models into a new Data Warehouse** to **build a robust analytical and reporting BI infrastructure** to generate customer-level and product level insights

VALUE ADDITION

- **Built the Data Warehouse in partnership with the Client's IT team u**sing data from various sources such as internal ERP tools, finance and accounting data suites etc.
- **Developed several new KPIs** such as allocated revenues, asset utilization, rental yields, asset life time value, age of assets and capital expenditures
- Helped the client understand customer **churn rates**, **salesforce productivity**, share of growth from existing customers, and **levers of future growth**
- Built **BI reports (on Power BI) to track various KPIs** for sales team, operations team, marketing team and executives

IMPACT

- Helped the company **better understand its asset performance** allowing it to make **strategic decisions on capex and optimization of its asset** portfolio
- Was able to develop **relevant incentives for the sales force** as their performance could be tracked more accurately.