

# Executive KPI dashboard

Privileged access management (PAM) software company

- Built Executive Dashboard that provides visibility into Sales and Marketing, HR, Finance and R&D
- Integrated and consolidated data from Salesforce, Workday and flat Excel files for generating the dashboards

# Access management software company needs a robust KPI dashboard

## Picture this...

You're looking to augment the reporting capabilities through automated processes and create an executive dashboard with KPIs across all the departments of both the entities. Currently you do not have visibility into the company's overall performance due to lack of structured timely reporting after recent merger of two large entities. Existing reporting is based on several sources across different functions and needs to be consolidated.

## You turn to Accordion.

We partner with your team to integrate and consolidate data from salesforce, workday and flat excel files and build an executive dashboard that provides visibility into sales and marketing, HR, finance and R&D, including:

- 1) Creating a consolidated data model in Power BI that stores the data from various data sources (salesforce, workday and flat excel files) leveraging intermediate PostgreSQL database
- 2) Building a dashboard to provide a holistic view of the entire organization by reporting KPIs across sales, marketing, HR, finance & R&D to the C-Suite
- 3) Developing a dynamic, interactive and automated dashboard with the ability to drill down at region, area and business type level across various years and quarters
- 4) Adding targets along with achievement percentage to be able to track status and progress of each KPI at a glance

## Your value is enhanced.

You have HR KPIs providing visibility into headcount and attrition, especially in sales department to ensure appropriate number of representatives are employed to hit the revenue budget, sales KPIs such as pipeline coverage and booking linearity enabling to take proactive actions to boost the sales efforts and financial KPIs such as Annual Contract Value (ACV) and share of renewal & non-renewal bookings allowed the team to undertake suitable measures to grow their subscription business.

## EXECUTIVE KPI DASHBOARD

### KEY RESULT

### VALUE LEVERS PULLED

- Headcount and attrition analysis
- Sales analysis
- Pipeline coverage
- Financial performance analysis

# KPI dashboard for a B2B technology services company

## Situation

- Client lacked visibility into the company's overall performance due to lack of structured timely reporting after recent merger of two large entities
- Existing reporting was based on several sources across different functions and there was need for consolidated reporting across all functions
- Partnered with client to augment the reporting capabilities through automated processes, and create an Executive dashboard with KPIs across all the departments of both the entities

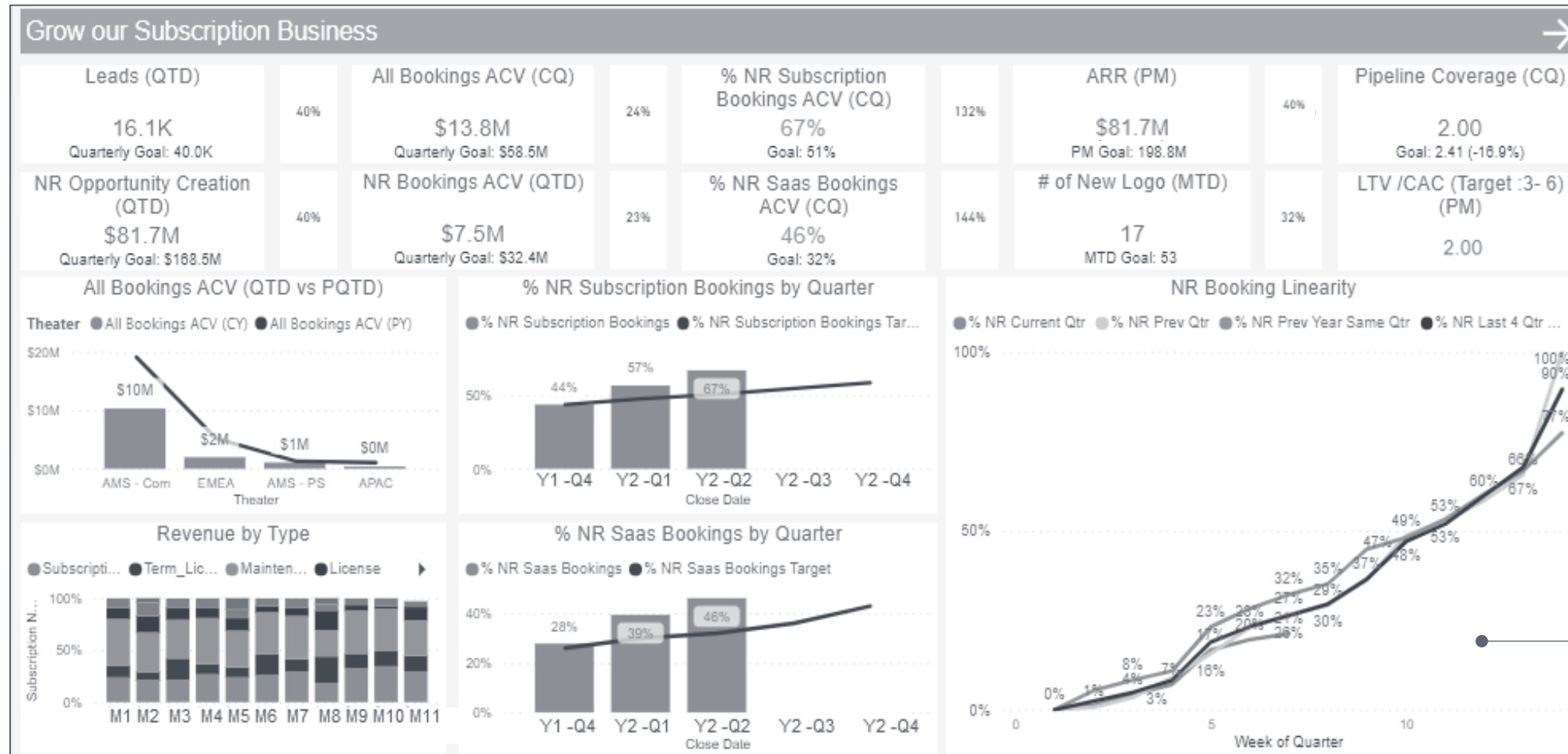
## Accordion Value Add

- Created a consolidated data model in Power BI that stored the data from various data sources (Salesforce, Workday and flat Excel files) leveraging intermediate PostgreSQL database
- Built a dashboard that provides holistic view of the entire organization by reporting KPIs across Sales, Marketing, HR, Finance & R&D to the C-Suite
- Developed a dynamic, interactive and automated dashboard with the ability to drill down at region, area and business type level across various years and quarters
- Added targets along with achievement percentage to be able to track status and progress of each KPI at a glance

## Impact

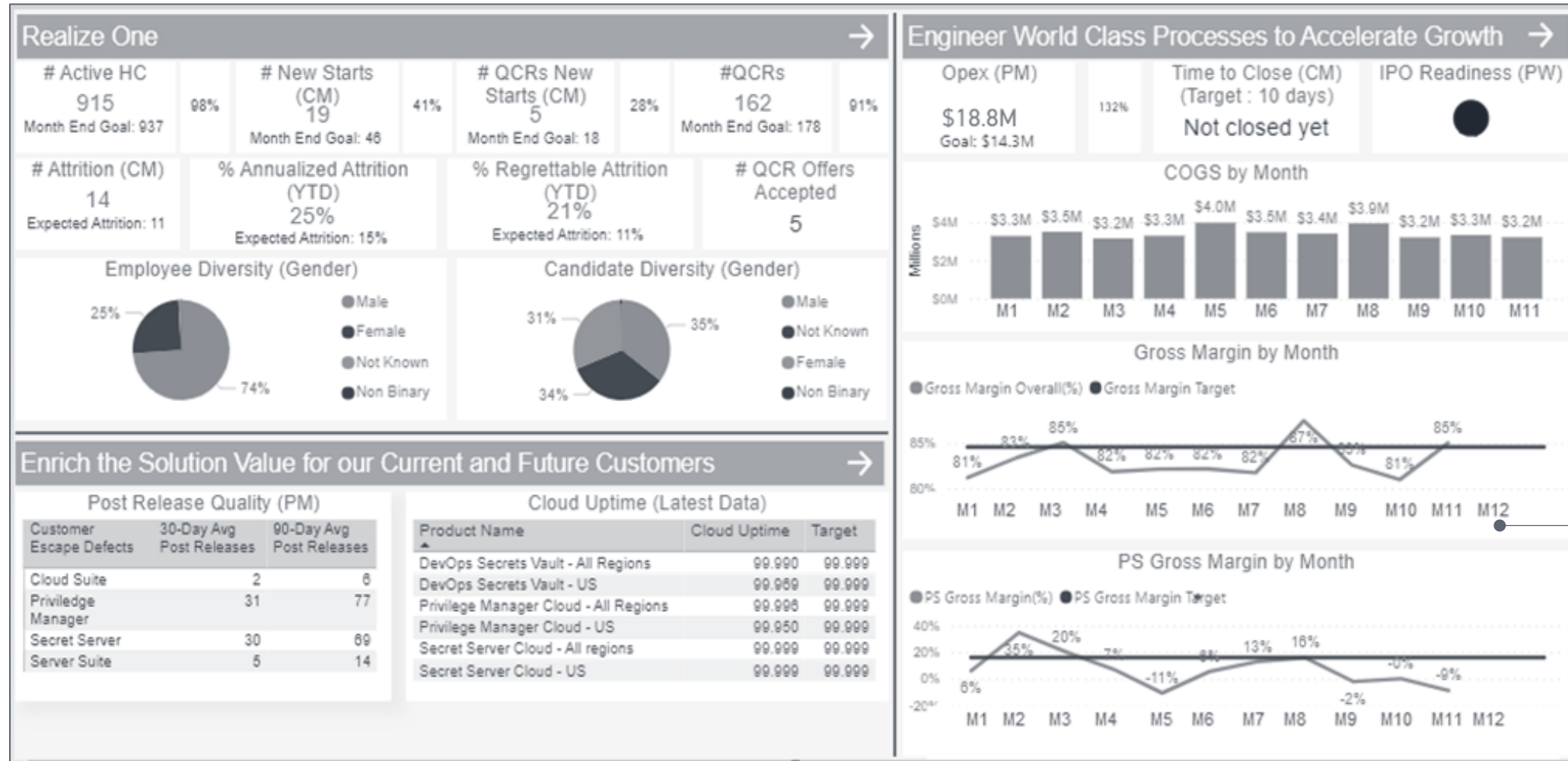
- HR KPIs provided the executive team visibility into Headcount and Attrition, especially in sales department to ensure appropriate number of Reps are employed to hit the revenue budget
- Sales KPIs such as Pipeline Coverage and Booking Linearity enabled the executive team to take proactive actions to boost their sales efforts
- Financial KPIs such as Annual Contract Value (ACV) and share of Renewal & Non-Renewal bookings allowed the team to undertake suitable measures to grow their subscription business

# KPI dashboard - Summary (1/2)



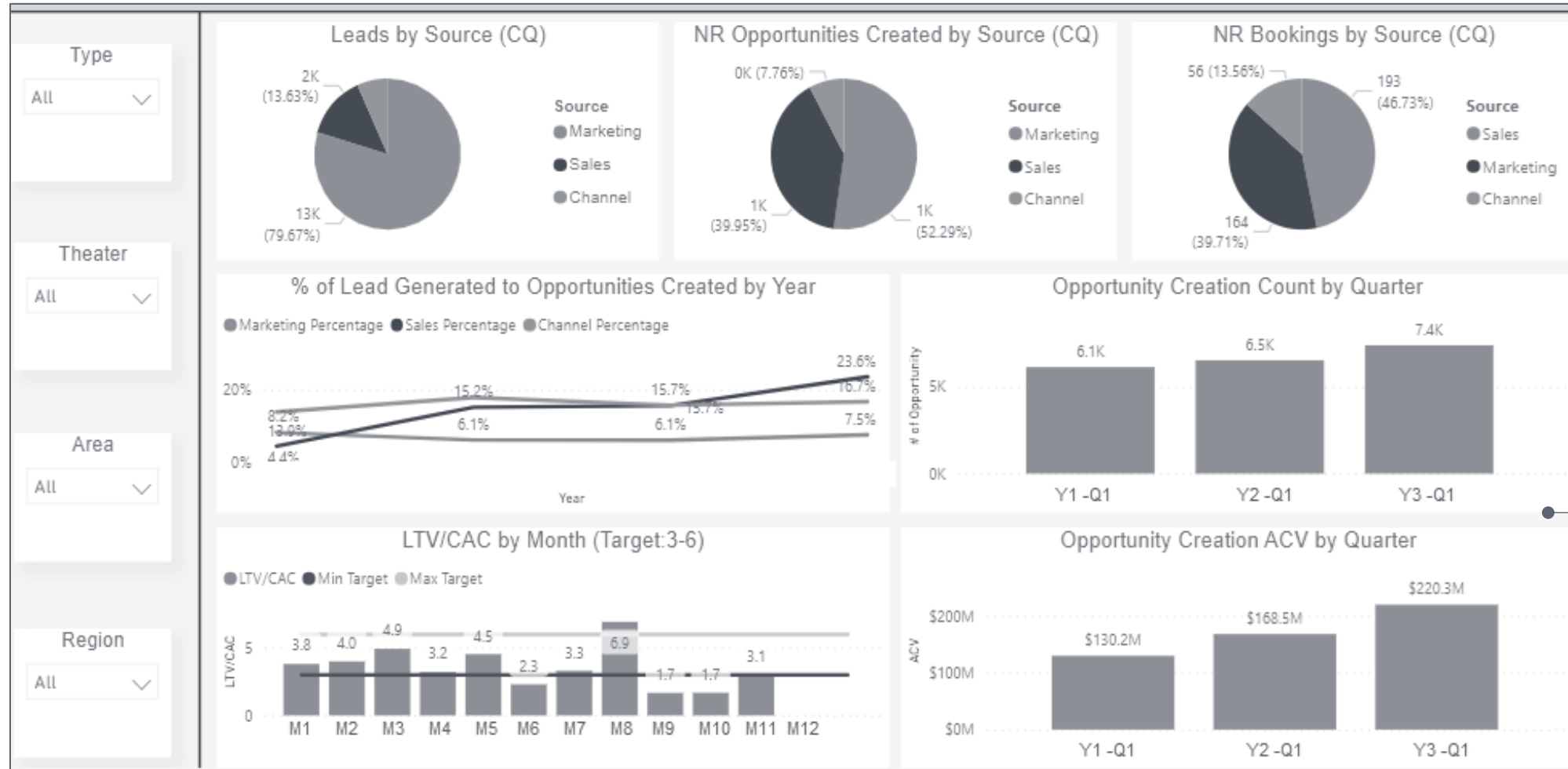
Summary of different types of Bookings along with their previous period comparisons and targets

# KPI dashboard - Summary (2/2)



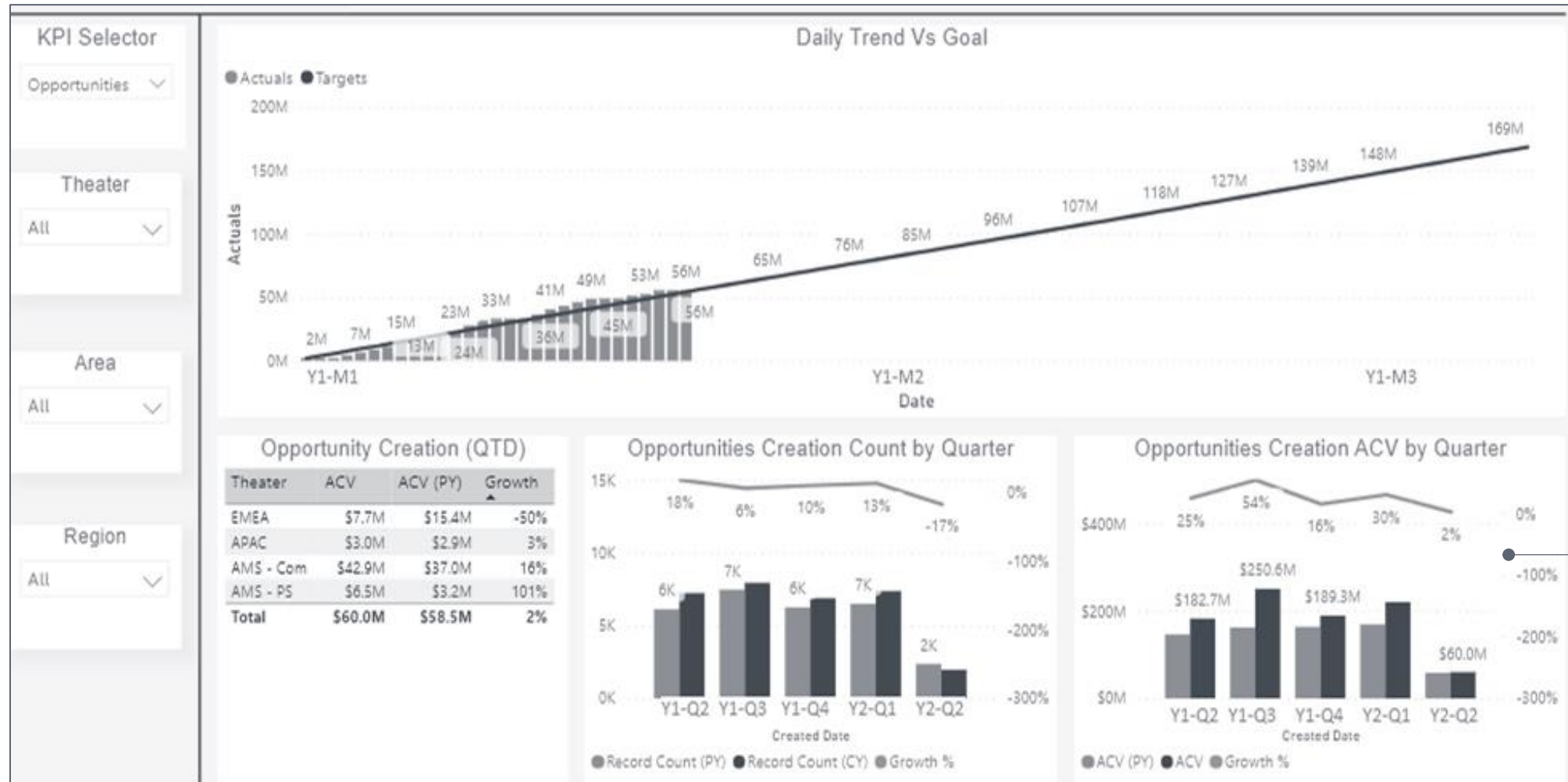
Summary of HR, Finance and R&D metrics

# KPI dashboard - Opportunities summary (1/2)



Trend of Leads and Opportunities over time

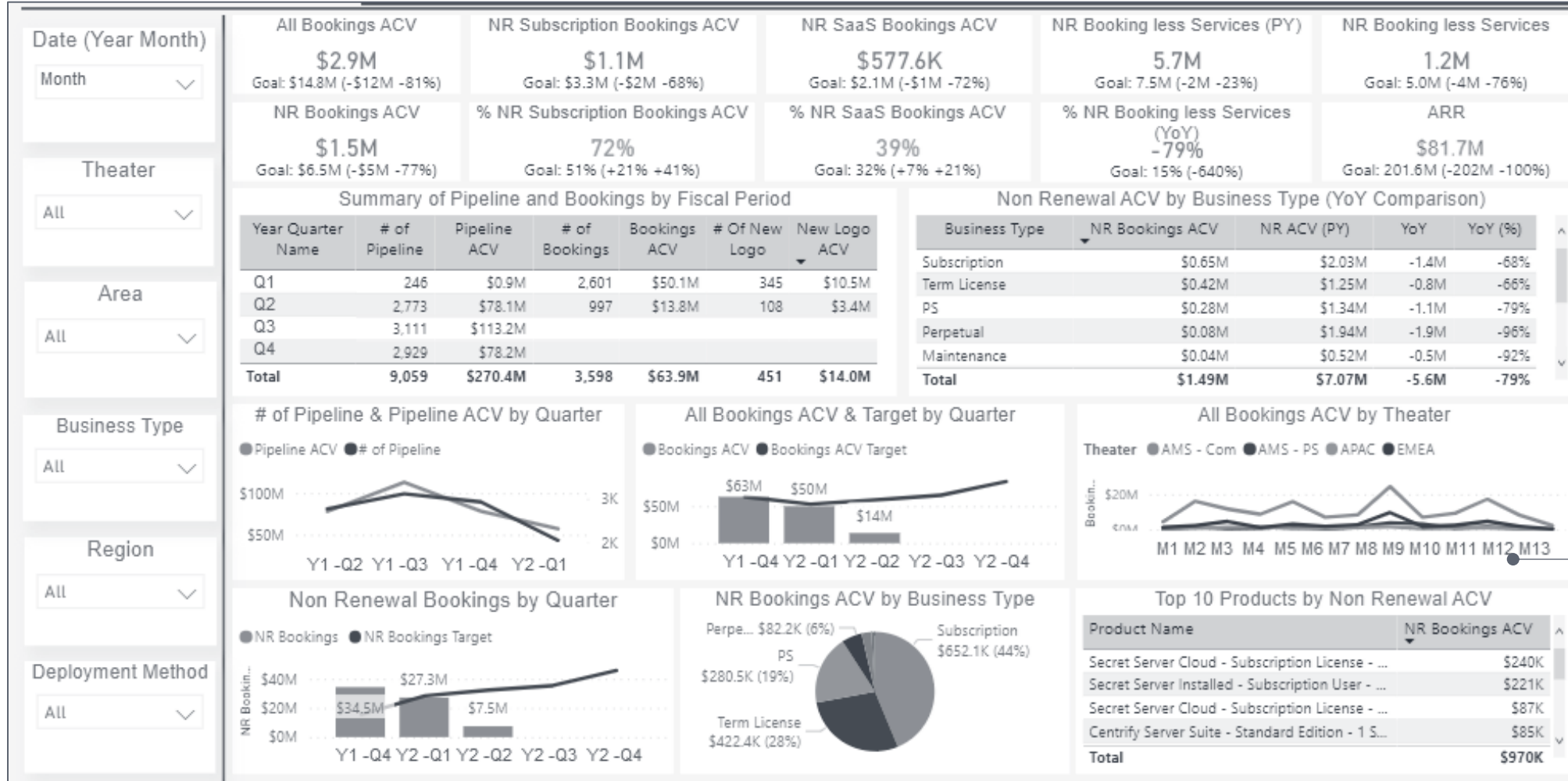
# KPI dashboard - Opportunities summary (2/2)



Trend of Opportunities created over time



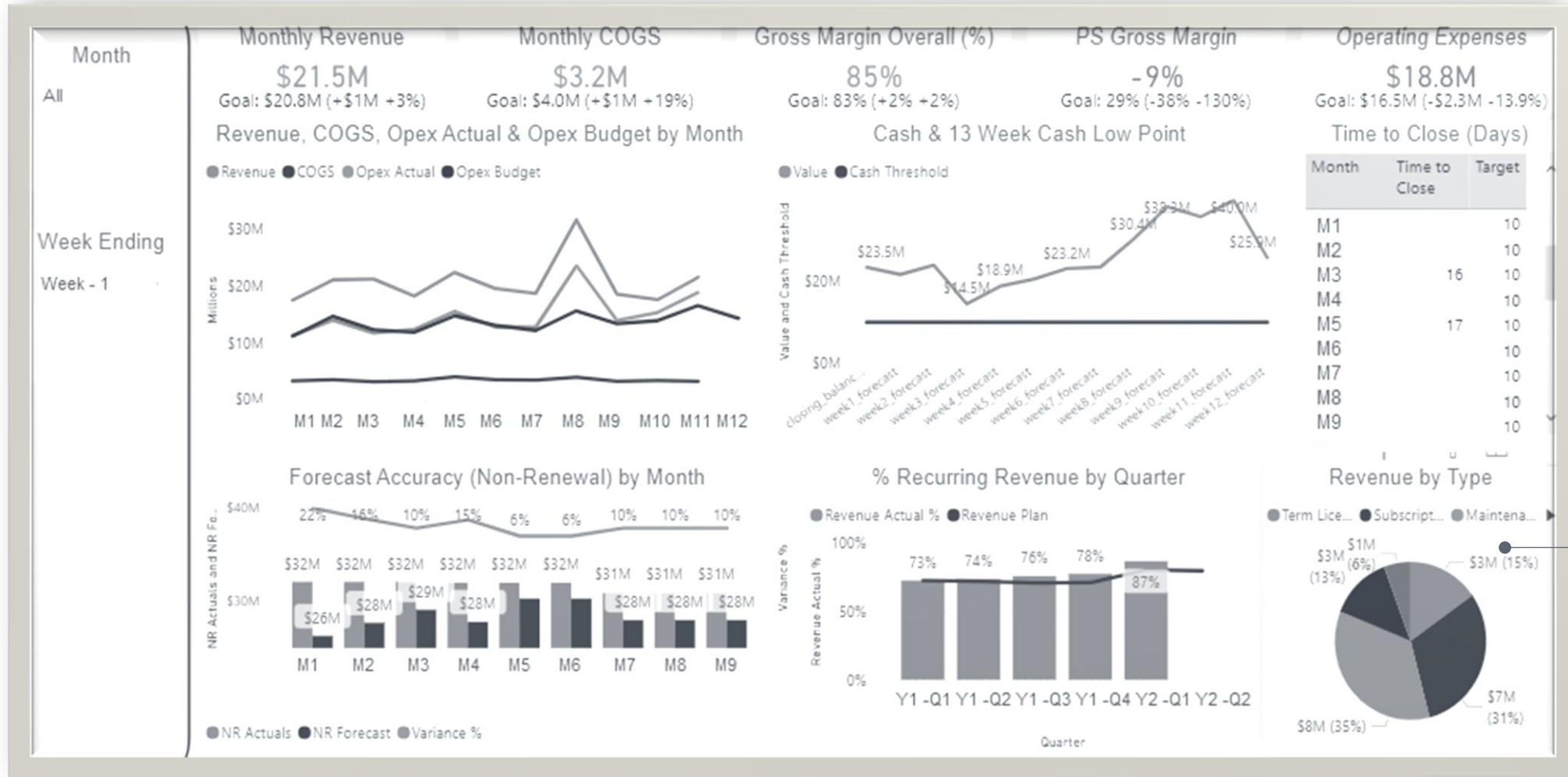
# KPI dashboard - Bookings summary



Summary of Bookings compared with targets



# KPI dashboard - Finance summary



Summary of Financial metrics