



BI Infrastructure design & implementation

SaaS based HR software company

- Integrated data from multiple sources into a data warehouse and automated ETL processes for loading data from the sources
- Deployed dashboards enabling the business functions to track critical KPIs related to product usage, customer success, product development, sales & marketing, and finance

SaaS based company needs to design its data infrastructure

Picture this...

You’re looking for designing and building data warehouse & reporting dashboards to provide visibility and track critical KPIs related to product usage, customer success, product development & delivery, sales & marketing, and finance.

You turn to Accordion.

We partner with your team to integrate data from multiple sources into a data warehouse and automated ETL processes for loading data from the sources and to deploy dashboards enabling the business functions to track critical KPIs related to product usage, customer success, product development, sales & marketing, and finance.

- 1) Automating data extraction from ERP (NetSuite), CRM (Salesforce), project management systems (JIRA & Nikabot), customer experience system (Qualtrics), internal PostgreSQL database, and Google Sheets for various analyses and reporting.
- 2) Collaborating with various department leaders to identify and define KPIs. Configured a data warehouse (Snowflake) and developed customized dashboards in Power BI for governing board, finance, customer success, product delivery, and sales & marketing departments.
- 3) Performing various analyses such as monte carlo simulations for predicting EPIC modules completion dates, pattern recognition analysis of unstructured customer survey data, cost & revenue appropriation to estimate regional and module level P&L, competitor analysis by market and industry, customer churn risk prediction, squad/team productivity analysis, etc.

Your value is enhanced.

You have a customized dashboard for accurate reporting to make appropriate investment decisions and enable strategic cost management and comprehensive dashboards, health score calculations, and analysis of customer usage patterns across industries, enables you to identify customers at risk and provided insights to capitalize on up-sell and cross-sell opportunities. You have also enabled product delivery team to better plan the development & delivery of the EPIC modules through various analyses such as average cycle time, delivery risk, and context switching analyses.

KEY RESULT

- Impact 1...
- Impact 2...

VALUE LEVERS PULLED

- Competitor Analysis
- Pattern Recognition Analysis
- Customer Churn Risk Prediction
- Team Productivity Analysis, Etc.
- Power BI Reporting

BI infrastructure design & implementation

Situation

- Client had limited visibility into cross-functional areas related to product development, customer usage, customer engagement, etc., which hindered strategic and operational decision-making process
- Partnered with the client to design and build their data warehouse & reporting dashboards to provide visibility and track critical KPIs related to product usage, customer success, product development & delivery, sales & marketing, and finance

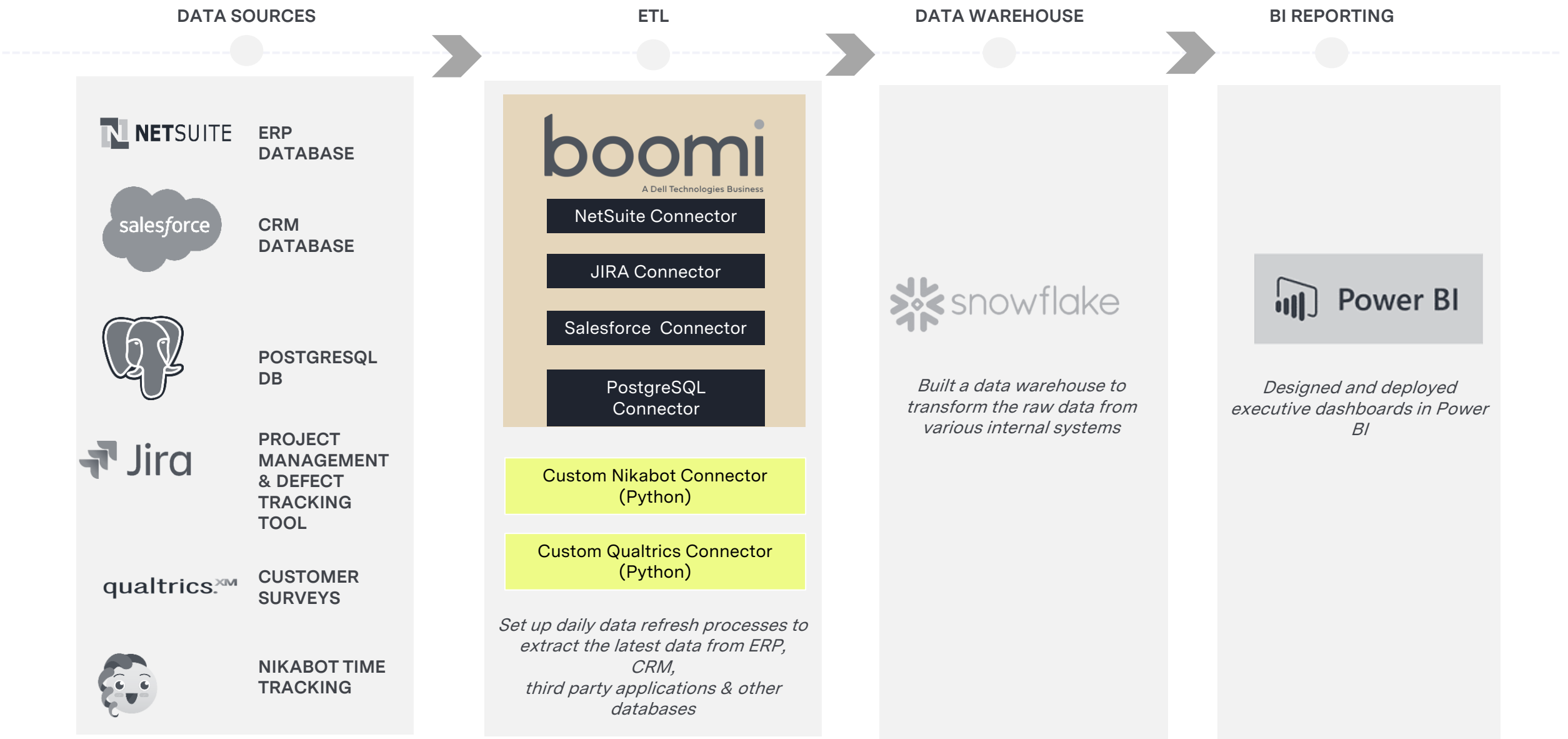
Accordion Value Add

- Automated data extraction from ERP (NetSuite), CRM (Salesforce), project management systems (JIRA & Nikabot), customer experience system (Qualtrics), internal PostgreSQL database, and Google Sheets for various analyses and reporting
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Impact

- Customized dashboards and accurate reporting helped the C-Suite executives to make appropriate investment decisions and enabled strategic cost management
- Comprehensive dashboards, health score calculations, and analysis of customer usage patterns across industries, enabled the company to identify customers at risk and provided insights to capitalize on up-sell and cross-sell opportunities
- Enabled product delivery team to better plan the development & delivery of the EPIC modules through various analyses such as average cycle time, delivery risk, and context switching analyses

Business intelligence architecture executed



Examples of key performance metrics



PRODUCT DEVELOPMENT

- Epic Analysis
- Cost of delivery
- Context switching analysis
- Cycle Time Analysis
- Predictability metrics (completion date by epic)
- Initiative schedule adherence
- Delivery Risk assessment
- Burn-Up/Burn-down chart



SALES & MARKETING

- Opportunity conversions
- Lost clients & lost modules
- Sales Productivity
- Bookings by Sales team
- Revenue per customer/ module
- Competitor Risk by market (win-loss metrics)



CUSTOMER SUCCESS

- Module usage analysis
- Feature adoption analysis
- Super User feedback
- Customer facing dashboards
- Support analyses (based on raised tickets)
- Customer Health Scorecard (churn risk analysis)
- Client engagement analysis



FINANCE & ACCOUNTING

- Profit and Loss report by Market
- Balance Sheet
- EBITDA Bridge
- Monthly Financial Package
- AR Ageing report
- Outstanding and Turn over ratios
- Cost of Support

Monthly finance tracker

Item	Actual	Budget	Variance	PY Actual	YTD Amo...	YTD Budg...	YTD Variance
ARR Bookings	\$450,000	\$1,000,000	-\$550,000	\$1,600,000	\$1,250,000	\$2,200,000	-\$550,003
NRR Bookings	\$400,000	\$800,000	-\$400,000	\$1,400,000	\$1,125,000	\$1,800,000	-\$400,003
NRR/ARR Bookings %	88.9%	80.0%	8.9%	87.5%	90.0%	81.8%	8.2%
Recurring Revenue	\$2,635,000	\$2,435,000	\$200,000	\$2,400,000	\$17,535,000	\$17,000,000	\$199,999
Non-Recurring Revenue	\$527,000	\$787,000	-\$260,000	\$480,000	\$3,507,000	\$4,600,000	-\$260,003
Total Revenue	\$3,162,000	\$3,222,000	-\$60,000	\$2,880,000	\$21,042,000	\$21,600,000	-\$60,004
Expenses	\$2,456,000	\$2,500,000	-\$44,000	\$2,854,000	\$7,245,000	\$7,500,000	-\$44,002
EBITDA	\$305,490	\$350,000	-\$44,510	\$495,000	\$1,373,500	\$1,300,000	-\$44,512
Cost of Sales/Revenue	24.8%	24.0%	0.8%	2140.0%	2620.0%	2380.0%	240.0%
OPEX/Revenue	63.6%	64.8%	-1.2%	65.9%	63.0%	64.9%	-1.9%
S&M/ARR Bookings (3m avg.)	\$1.7	\$1.6	\$0.1	\$1.3	\$1.8	\$1.6	\$0.2
Revenue Productivity (3m avg.)	\$233,500	\$219,000	\$14,500	\$214,000	\$225,000	\$212,500	\$14,499
CDT/NRR Revenue (3m avg.)	61.1%	52.6%	8.5%	46.7%	63.3%	57.9%	5.5%
(Inf, Supp, TAMS)/ARR Rev	18.7%	18.1%	0.6%	16.2%	19.0%	17.7%	-2.4%
Rule of 40	25.4%	24.4%	1.0%	20.8%	21.7%	20.9%	0.0%
Ending Cash Balance	\$4,120,600	\$5,210,800	-\$1,090,200				
HeadCount	335	290	45	275			

Monthly Executive Summary

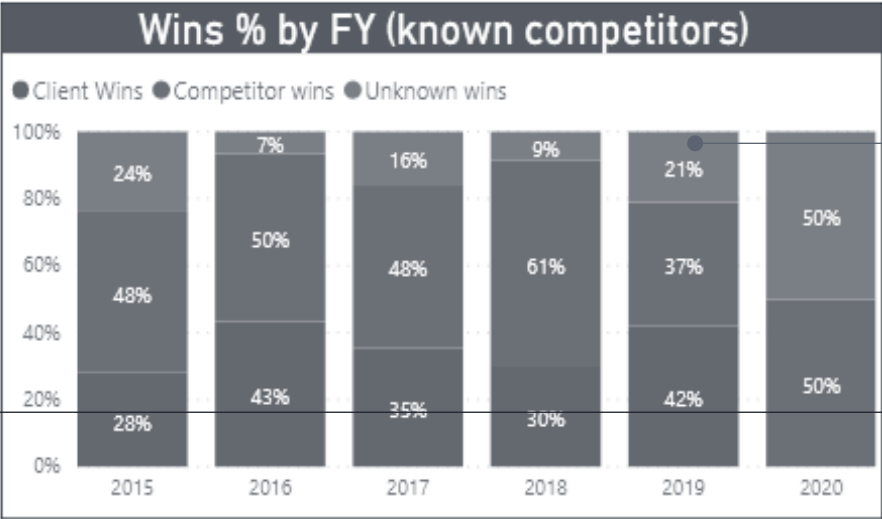
Visual indications for positive and negative variances

Competitor analysis

All Opportunities				
Opportunities	Client wins	Competitor wins	Unknown wins	
180	70	64	46	

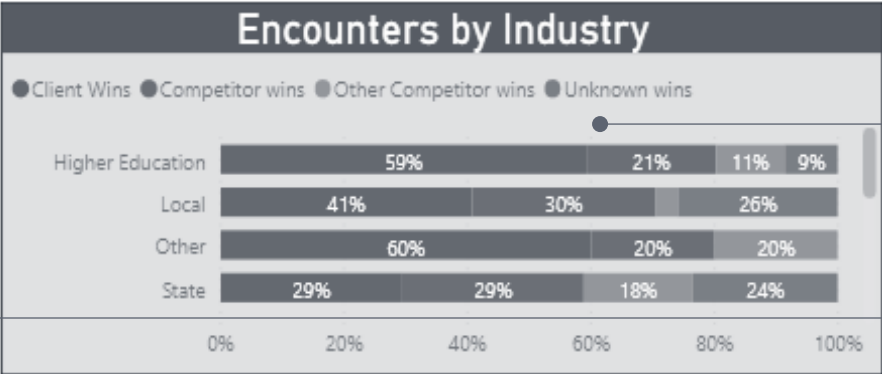
Opportunities with Major Competitors				
Opportunities	Client wins	Competitor wins	Unknown wins	
130	46	64	20	

Competitor	#encounters	% Client wins	% competitor wins	% other competitor wins	% unknown wins
Competitor-1	37	32%	32%	19%	16%
Competitor-2	28	39%	29%	14%	18%
Competitor-3	20	40%	15%	40%	5%
Competitor-4	16	38%	13%	25%	25%



Win/Loss Analysis trends

Summary of Win-Loss Analysis

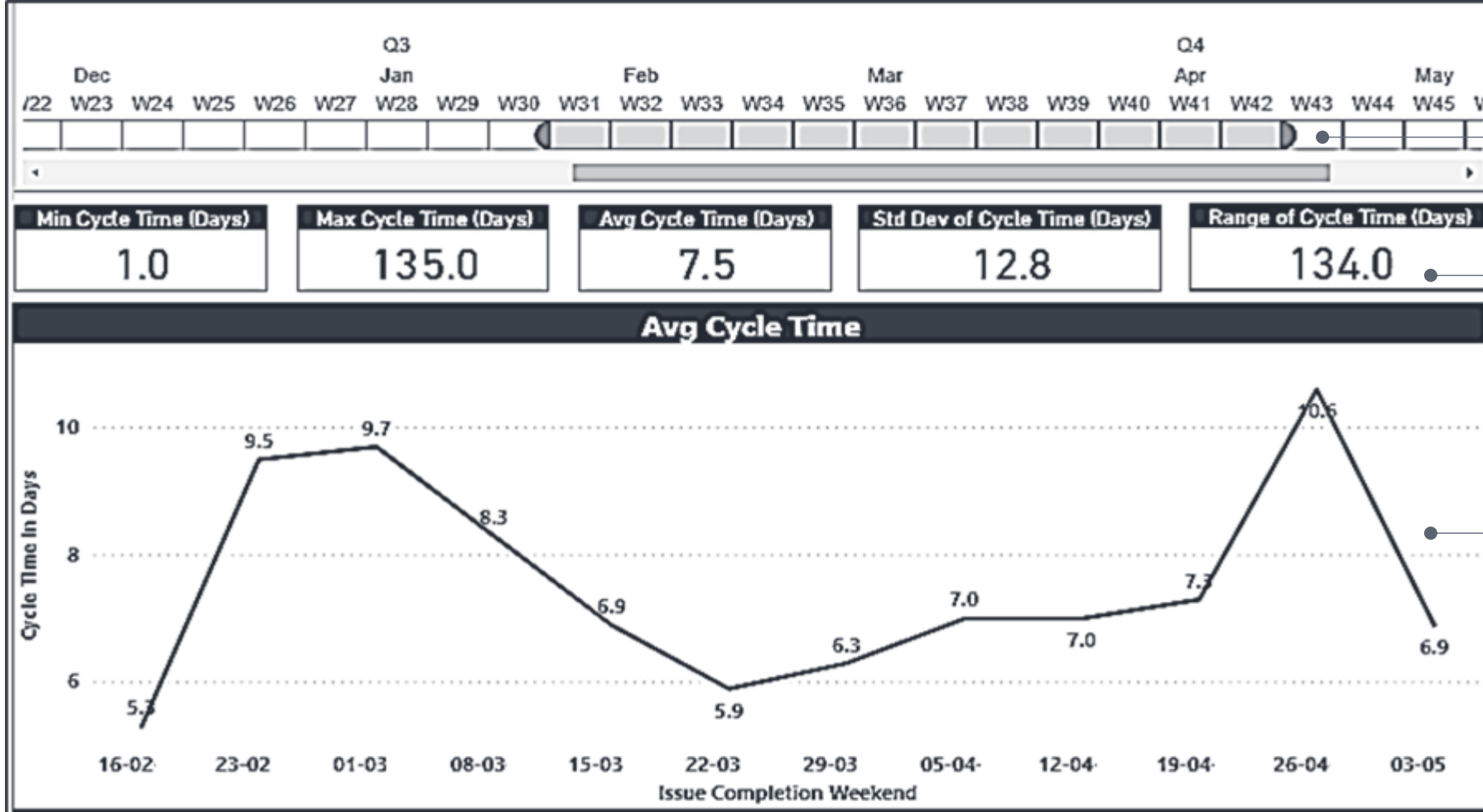


Encounter Analysis (by Industry)

Encounter Analysis (by Competitor)

Development cycle time

Average time taken to complete the tasks on week-on-week basis

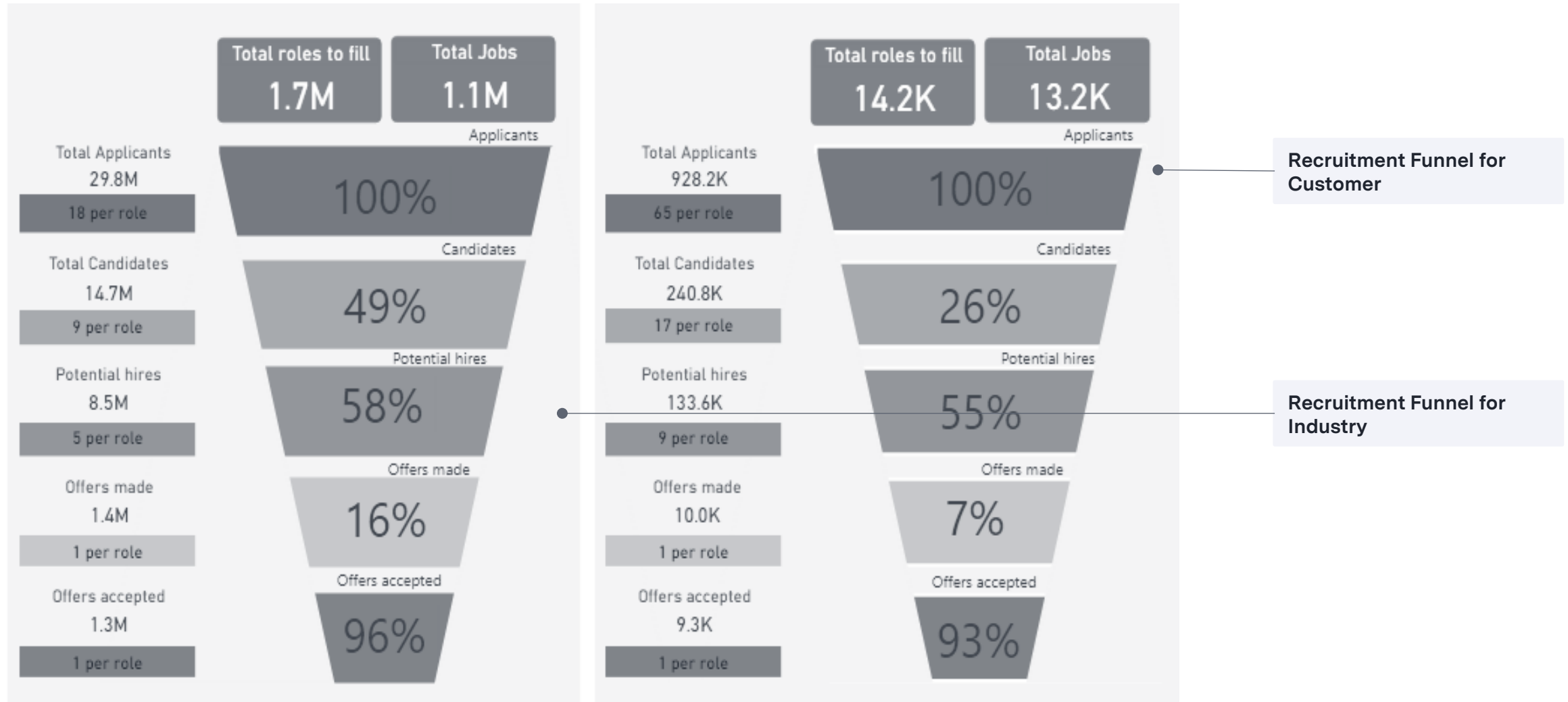


Slider to choose desired timelines

Summary of Cycle Time statistics from JIRA for selected teams and timeline

Trends of Cycle Time (Average) of tasks completed during the week

Development cycle time



Note: Reports / views that can be shared by the client with their customers during the regular discussions or up-sell meetings