



Channel partner performance analytics

(Telecommunications company)

Developed a comprehensive reporting suite for channel operations to derive real-time insights into the performance of channel partners and take decisive actions

Telecommunications company needs channel partner performance analytics

Picture this...

You're looking to build structured data models, set up automated reporting, and create dashboards on Tableau refreshed daily to track the performance of all channel partners. Currently, you have no visibility into the performance of its 6,500+ channel partners, which hindered their ability to reward high-performing partners and address the issues with underperformers due to the absence of structured data and timely reporting.

You turn to Accordion.

We partner with your team to develop a comprehensive reporting suite for channel operations to derive real-time insights into the performance of channel partners and take decisive actions, including:

- 1) Designing a comprehensive channel partner performance assessment framework that evaluates channel partners based on their revenue generation and compliance with the client's global partner program
- 2) Ingesting data from multiple sources such as Salesforce, SAP, Microsoft SQL Server, Zuora, Cost Guard, Marketo, and OneDrive using Fivetran into a Snowflake-based data warehouse
- 3) Consolidating the data from all data sources and built the fact/dimension tables within Snowflake to create ready-to-serve data marts for reporting
- 4) Developing and deploying a reporting suite of automated Tableau dashboards, including partner performance, partner leveling, and partner scorecards, which are refreshed daily to provide visibility into the performance of over 6,500 partners distributed across over 100 countries

Your value is enhanced.

- The increased reporting frequency of channel operations data from a monthly to a daily cadence empowered the channel operation managers and partners with real-time insights generation and decision-making
- You have reduced 4 FTE days per month through consolidation of data and automation of modeling
- You have also provided a competitive advantage by improving the ease of doing business for channel partners by providing them with visibility into their performance measurement, leading to better insights on incentives

KEY RESULT

- Reduction of 4 FTE days

VALUE LEVERS PULLED

- Channel analytics
- Automation & consolidation of channel operations data

Channel partner performance tracking for telecommunications company

Situation

- The client lacked visibility into the performance of its 6,500+ channel partners, which hindered their ability to reward high-performing partners and address the issues with underperformers due to the absence of structured data and timely reporting
- Partnered with the client to build structured data models, set up automated reporting, and create dashboards on Tableau refreshed daily to track the performance of all channel partners

Accordion Value Add

- Designed a comprehensive Channel Partner Performance Assessment Framework that evaluates channel partners based on their revenue generation and compliance with the client's global partner program
- Ingested data from multiple sources such as Salesforce, SAP, Microsoft SQL Server, Zuora, Cost Guard, Marketo, and OneDrive using Fivetran into a Snowflake-based data warehouse
- Consolidated the data from all data sources and built the fact/dimension tables within Snowflake to create ready-to-serve data marts for reporting
- Developed and deployed a reporting suite of automated Tableau dashboards, including Partner Performance, Partner Leveling, and Partner Scorecards, which are refreshed daily to provide visibility into the performance of over 6,500 partners distributed across over 100 countries

Impact

- The increased reporting frequency of channel operations data from a monthly to a daily cadence empowered the channel operation managers and partners with real-time insights generation and decision-making
- Reduced 4 FTE days per month through consolidation of data and automation of modeling
- Provided a competitive advantage to the client by improving the ease of doing business for channel partners by providing them with visibility into their performance measurement, leading to better insights on incentives

Methodology/ Approach

Requirements Gathering

- Analyzed existing reports and **finalized key metrics** to indicate Partner's performance, and identified dimensions to stratify the data
- Gathered and documented requirements of the end users for appropriate dashboard design

Architectural Design

- Determined the necessary datasets for establishing KPIs and integrated them with **Snowflake using Fivetran**
- Generated historical data snapshots, aggregated data, and developed a **cohesive data model leveraging data build tool (dbt)**

Business Logic Implementation

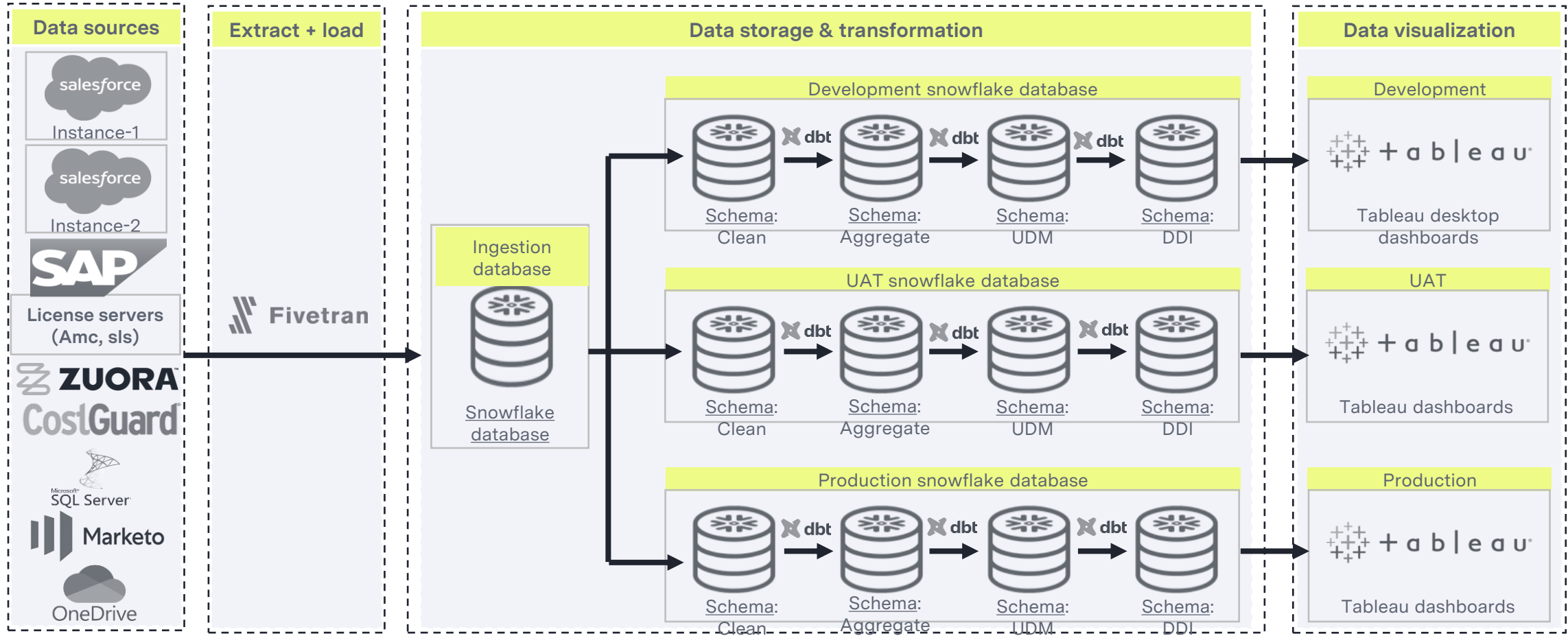
- Built **ready-to-serve reporting tables** with calculated fields for specific KPIs
- Validated the values for test cases and implemented modifications in logic for exceptions

Dashboard Development

- Developed the Partner Performance, Partner Leveling, and Partner Scorecard Dashboards to provide visibility of the **global partner program** at the executive level, channel operation manager level, and individual partner level, respectively
- Deployed the dashboards with **row-level security** on an internal server for executives & managers, and on an external server for partners

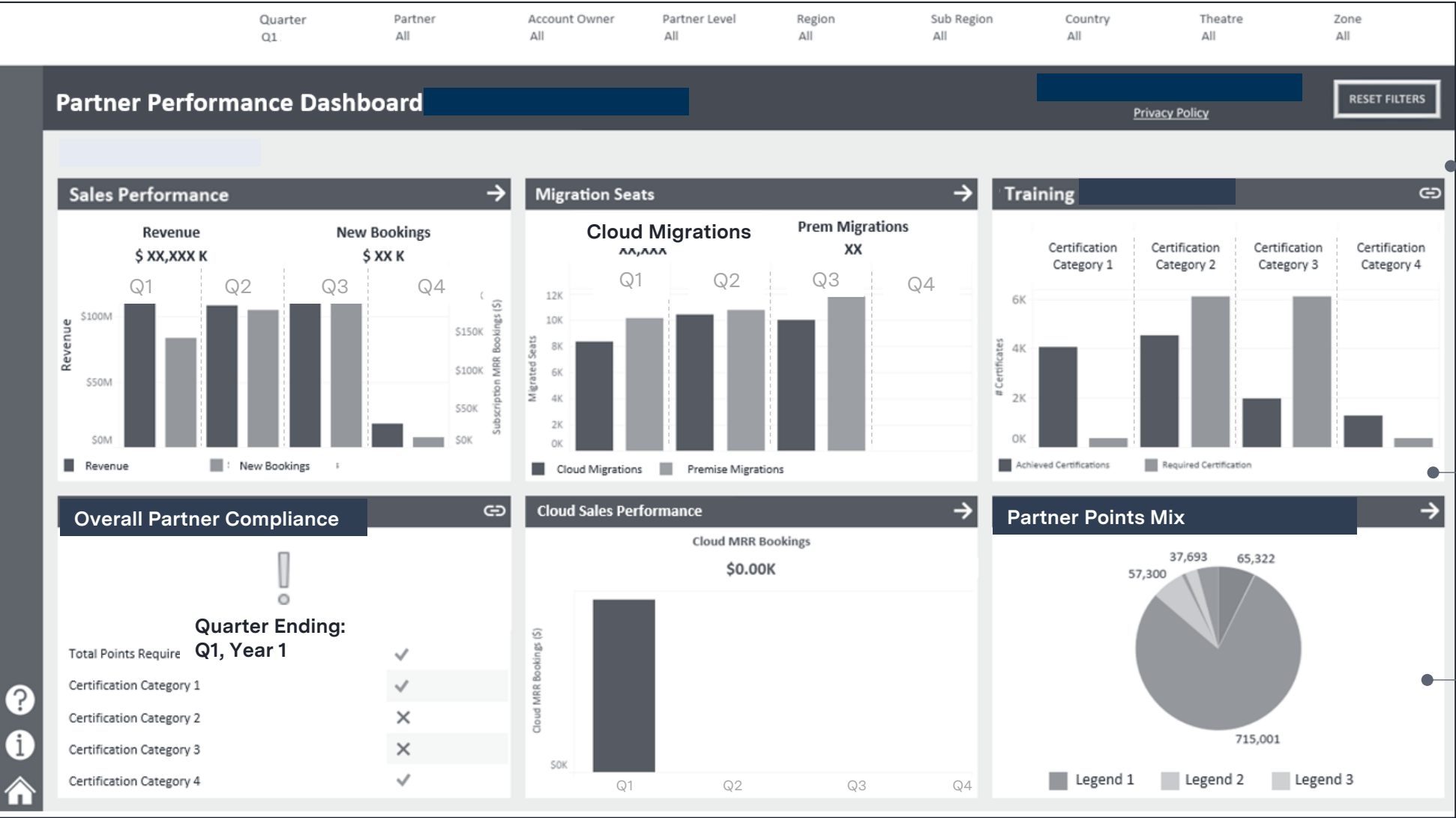
Data architecture

- Data from various sources integrated with Snowflake using Fivetran
- Pipeline to create reporting tables was set up using dbt following CI/CD process to reduce the development time



*UDM: Unified Data Model; DDI: Data Delivery & Interaction

Partner performance dashboard



- Provides visibility into KPIs to assess partners' performance
- KPIs include total revenue, revenue from new sources, revenue from cloud products, migration of customers to specific cloud products and no. of trainings completed

Provides visibility into the certifications achieved by the partners against the requirements

Distribution of points indicating partners' performance across various offerings

Partner leveling dashboard

[illegible]

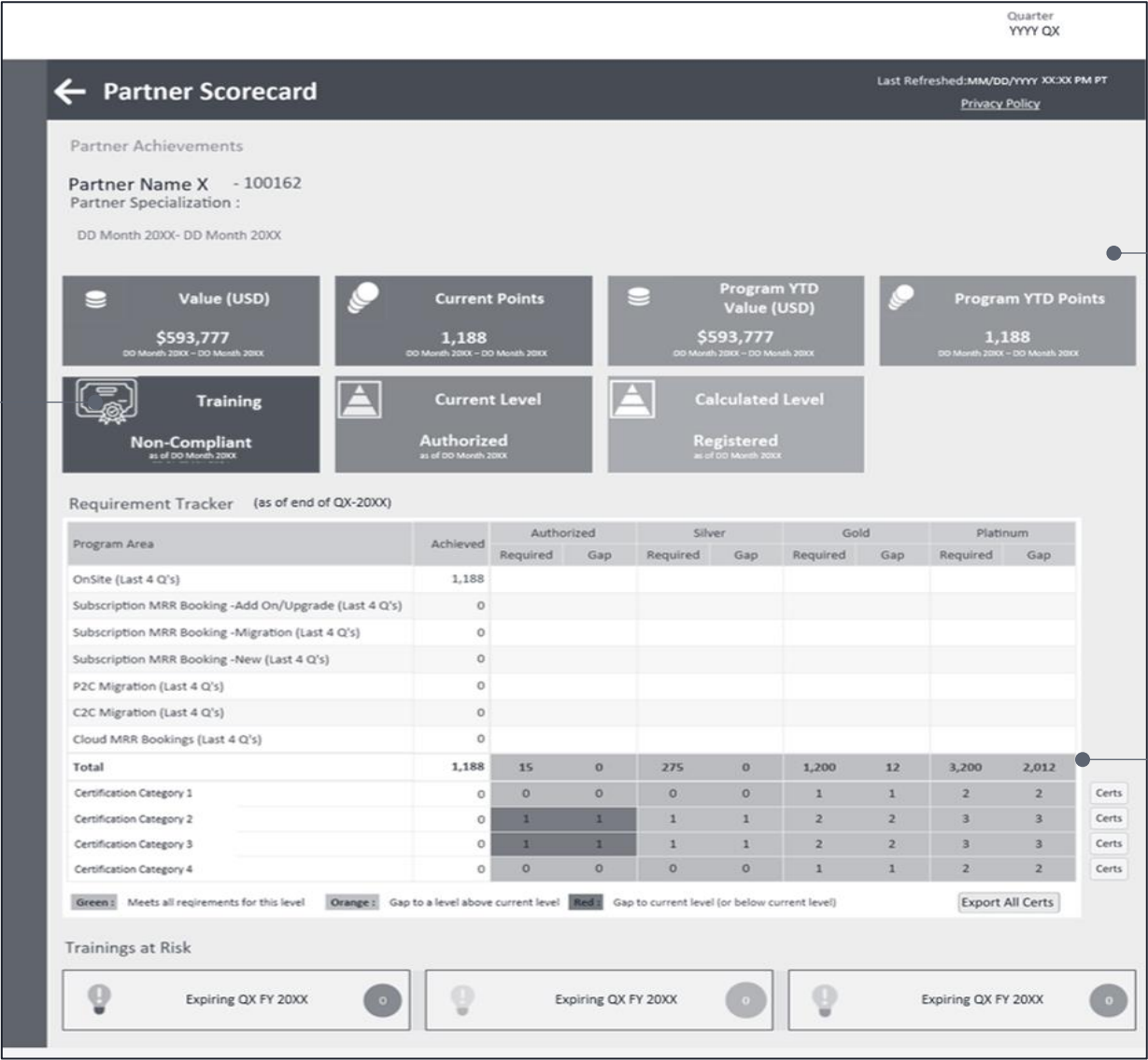
Summarizes the performance of partners for each Channel Operation Manager/Account Owner

Provides visibility into change in performance of a partner as compared to previous year

Button to select a partner and view detailed scorecard for the selected period

Functionality to download the data in an Excel file

Partner scorecard



Provides visibility into compliance status of training requirements

Provides visibility into points calculation for a specific partner in the selected time frame

Enables partner to track completion status of trainings under various categories