

# BUSINESS INTELLIGENCE SUITE INTEGRATION FOR HEXAGON-3D COMPANY

**SPECIFICATION REPORT** 



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# 1. PROJECT OVERVIEW

Project Name	Business Intelligence (BI) Suite Integration Project	
<b>Project Company</b>	Hexagon-3D Company HEXAGON-3D	
	Hexagon-3D company would like to improve the process of	
	relating and managing their customer engagement, automate	
	the process of getting insights and analysis based on the	
Project Purpose	historical information of their customers. Currently there is no	
1 Toject I di pose	aggregated platform to engage their customers and efficiently	
	track cases of customers plight to resolve in time. Also, it	
	takes too long to generate data insights for the management.	
	Thus, making their business process reactive.	
	The business intelligence team has been tasked to provide a	
	scalable, low-cost business intelligence suite with a short time	
	to deploy. The proposed BI suite to be developed for this	
	project will provide insights to the business performance and	
	customer support in real time. This solution will be used to	
<b>Project Description</b>	setup a central source of intelligence, create instant knowledge	
	on the company's workforce and supply chain, enhance	
	flexibility of the company to collaborate anywhere and on any	
	device. The application will also consolidate some of the	
	business processes to support the digital transformation	
	strategy of the company	
<b>Proposed Start Date</b>	June 01, 2020	
<b>Proposed End Date</b>	June 15, 2020	
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Role	Business Intelligence Team	
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### 2. BACKGROUND INFORMATION

Hexagon-3D Company is a Dublin-based company providing sales of 3D printers, software installations and routine maintenance to colleges, organizations and individuals. The company was founded in 2013 with 5 employees and currently operates with a staff strength of 48, across two countries (Ireland and United Kingdom). Business operations commenced fully by January 2015. Hexagon-3D places high priority on providing the best products on time to their customers.

# **Marketplace**

Hexagon-3D operates as a retail company in the printing and information technology industry. The company is fast becoming one of the largest retail stores for 3D printers in Ireland, as they are known for their readily available products, up-to-date technology and customer friendly prices. The 3D printing space is mostly for a niche market and its rapidly growing. It is expected to be worth over US\$42.9 billion by 2025.

# 3. PROJECT SCOPE

Hexagon 3D aims at improving their customer relations and business processes as they seek to expand to other countries in Europe and Africa. They intend to change their manual system to an agile business process. To achieve this digital transformation, the management has decided to optimize the Enterprise Resource Planning (ERP) system and Customer Relations Management (CRM) system of the company. This will improve efficiency, collaborations workflow, customer service and revenue in the long run.

# 3.1 Project Objectives

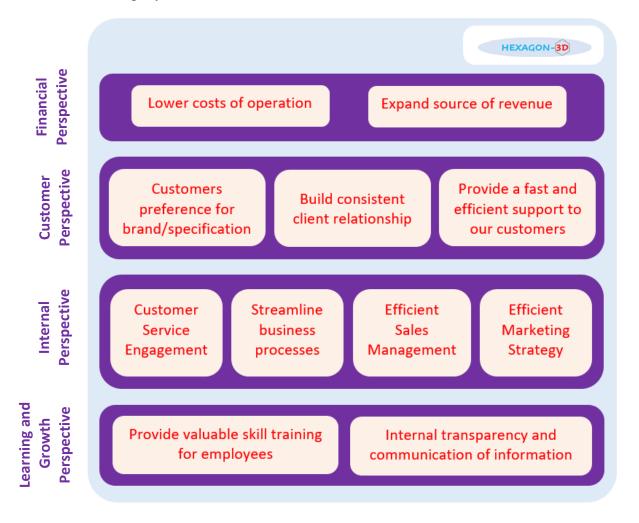
- To provide a unified system to aid communication (enhancing accessibility and transparency of information) across key business processes of the company
- To increase efficiency in customer engagement and support
- To provide timely reports and dynamic dashboards to aid strategic business planning
- To optimize the overall business process and monitor some key business performance

# 3.2 Balance Scorecard

The balance scorecard shown below is a designed strategy map to highlight the important objectives in each perspective for the leadership of the company.

• *Financial Perspective*: This is the first section of the balance scorecard. It is concerned with financial metrics such as sales, expenditures and income. It mainly focusses on revenue with a goal to increase the number of business and broaden the spectrum of revenue

- *Customer Perspective*: This is the second section of the balance scorecard. This part is concerned with anticipating the customers expectation and perception of the products and services of the company.
- *Internal Perspective*: This is the third section of the balance scorecard. This part focuses on addressing key business processes of the company in other to satisfy the customer.
- Learning and Growth Perspective: this is the last section of the balance scorecard. Its focused on the things the company needs to improve or learn to become successful. The employees benefit here as they gain new knowledge for the development and growth of the company and themselves.



# 3.3 Project Budget

Expense Breakdown	Amount
Microsoft Dynamic 365 Customer service	€ 1,150 per year
Microsoft Dynamic 365 Sales	€ 1,150 per year
Microsoft Power BI	€ 200 per year

### 4. SYSTEM DESIGN

# 4.1 Proposed Solution Description

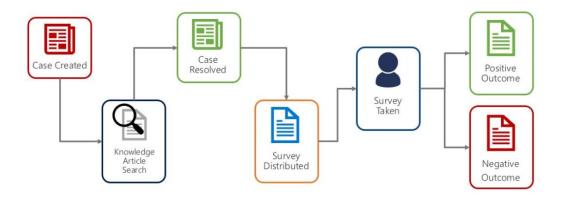
Microsoft Dynamics 365 is strongly recommended to better manage operations and enhance the company's ability to analyse customer data and share it across the front-office functions of marketing, sales and customer service. The platform and its intelligent business applications are built on four building blocks for digital transformation - modern, unified, intelligent, and adaptable.

- Microsoft Dynamics 365 Customer Service delivers fast, personalized service and makes it easy for customer service agents to meet rising customer expectations. This service enables end-to-end self-service for the customer and agent-assisted experiences on the customer's preferred terms, devices and channels, creating a seamless customer experience.
- Microsoft Dynamics 365 Sales leverages on the embedded intelligence to manage sales opportunities and convert more leads. Also, the company's sales lifecycle process is managed better from start to finish. An overview of what's happening with a customer is all captured all in one place.
- Microsoft Power BI provides an interface to turn raw data (excel workbook or local database) into interactive visualizations and business intelligence capabilities with an interface simple enough for end users to create their own reports and dashboards. Power BI is also robust and enterprise-grade, with capabilities for extensive modelling and real-time analytics.

## 4.2 Process Flow Diagram

• Customer Service: Using Dynamics 365 Customer Service

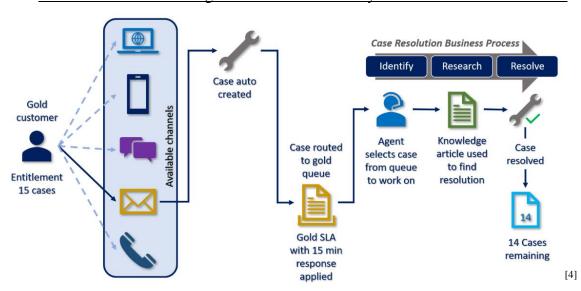
Process Flow for Customer Service Engagement



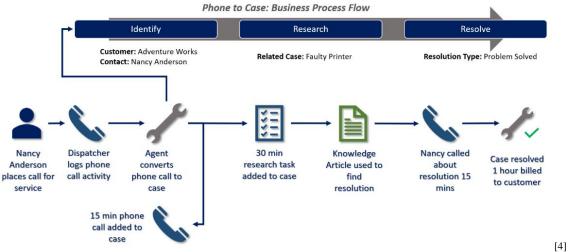
# Flow of Customer Support Journey

# Case Management Post Case & Resolution Engagement engaged directly with automatically created from multiple channels and then routed to specific support queues based on factors such as if they have a contract a customer, and follow a dedicated survey. Survey includes specifics taken from the case case resolution process while leveraging an internal knowledge base

Breakdown of Case Management with Microsoft Dynamics 365 Customer Service



# Workflow of Phone Call to Case Lifecycle



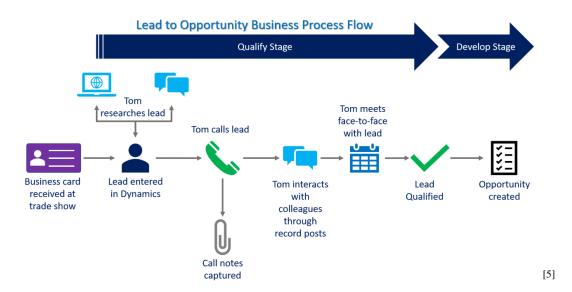
[4]

■ Sales: Using Dynamics 365 Sales

# Overview of the Sales Process Flow

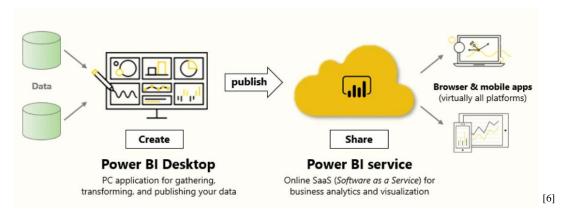


# Breakdown of the Sales Business Process Flow



■ Business Analytics: Using Power BI

# Process flow for the analytics platform



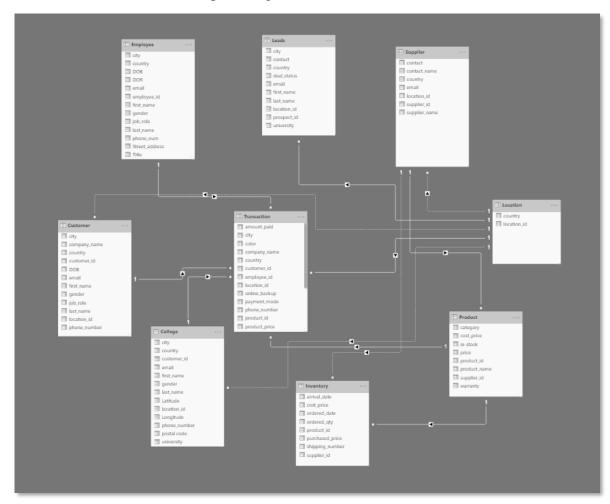
# 4.3 Data Dictionary

The company possesses various records, capturing historical information from 2015 to 2020. Based on these records the database of the company was revamped. The tables of the database are highlighted below:

- 1. *Employee*: This table contains relevant information about the employees of the company across the two (2) countries of operation. The unique primary key for this table is represented as "employee id".
- 2. *Supplier*: This table contains relevant information about the suppliers of the company's products (3D printers and materials). The unique primary key for this table is represented as "supplier id".
- 3. *Customer*: This table contains relevant information of the customers (individuals/researchers). The unique primary key for this table is represented as "customer id".
- 4. *College*: This table contains relevant information about the customers (colleges/universities). This category of customers is very important to the business, as they generate quality revenue for the business. The unique primary key for this table is represented as "customer id".
- 5. *Transaction*: This table contains relevant information about the day-to-day transactions carried out with the company. This table also shows if customers required and paid for tech support at the point of purchase. The unique primary key for this table is represented as "transaction\_id".
- 6. *Product*: This table contains relevant information of the available products of the company and its corresponding prices. The unique primary key for this table is represented as "product id".
- 7. *Inventory*: This table contains relevant information about the ordered products, quantity, purchase price etc. The unique primary key for this table is represented as "shipping\_number".
- 8. *Leads*: This table contains relevant information about the target customers, the company seeks to makes to. The unique primary key for this table is represented as "prospect id".
- 9. *Location*: This table contains relevant information about the location (country) of the customers, suppliers and business prospects. The unique primary key for this table is represented as "location id".

# 4.4 Database Schema Diagram

Database schema diagram, which can also be referred to as entity-relationship diagram illustrates below the relationships among entities/tables stored in the database.



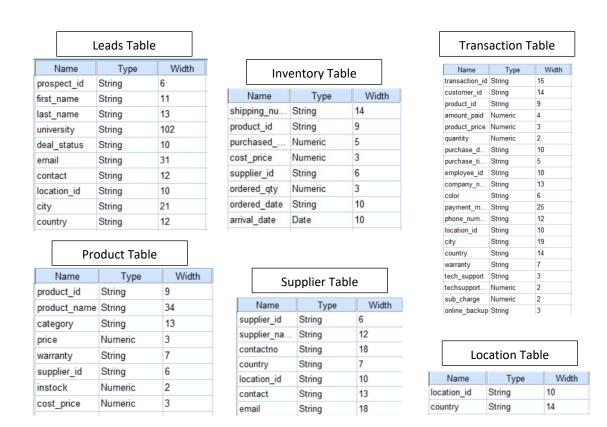
# 4.5 Database Design

The structure, data type and data size for the tables in the database are shown below

	College Table			
	Name	Type	Width	
C	:ustomer_id	String	14	
fi	rst_name	String	12	
k	ast_name	String	13	
е	mail	String	31	
g	ender	String	6	
C	ity	String	13	
C	ountry	String	14	
u	iniversity	String	70	
p	hone_num	String	12	
le	ocation_id	String	10	
p	ostalcode	String	4	
L	.atitude	Numeric	10	
L	ongitude.	Numeric	11	
_				

Emp	Employee Table		
Name	Туре	Width	
employee_id	String	10	
title	String	3	
first_name	String	10	
last_name	String	11	
email	String	29	
job_role	String	28	
gender	String	6	
phone_num	String	12	
DOB	Date	10	
Street_addr	String	22	
city	String	13	
country	String	14	
DOR	Date	10	

Customer Table		
Name	Туре	Width
customer_i	d String	14
first_name	String	13
last_name	String	21
gender	String	6
email	String	36
DOB	String	10
phone_nun	n String	12
location_id	String	10
city	String	19
country	String	14
job_role	String	36
company_r	n String	13



# 5. PROJECT REQUIREMENTS

## **5.1 Functional Requirements**

- The system should be capable of tracking customer historical information
- System should be able to provide timeline, status, visual insight and trend of activities
- System should enhance communication across the business

# 5.2 High-Level and Analytical Requirements

- Quality reports and dashboards to show key business insights
- Accessibility: Reports should be accessible via various platforms at any time
- Availability: The system should be available for operations with little or no down time
- Interpretability: Use of appropriate visuals to correctly depict business insights
- Colour distinction & less ambiguity in the visualizations

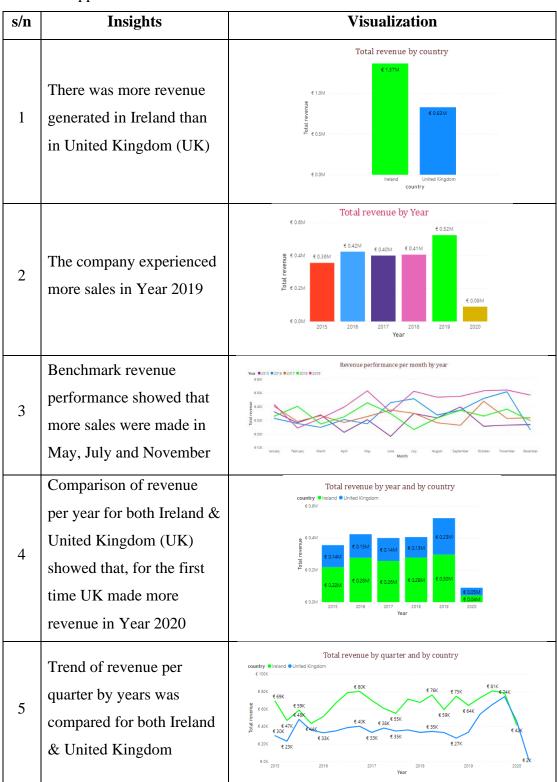
# 5.3 Non-Functional Requirements

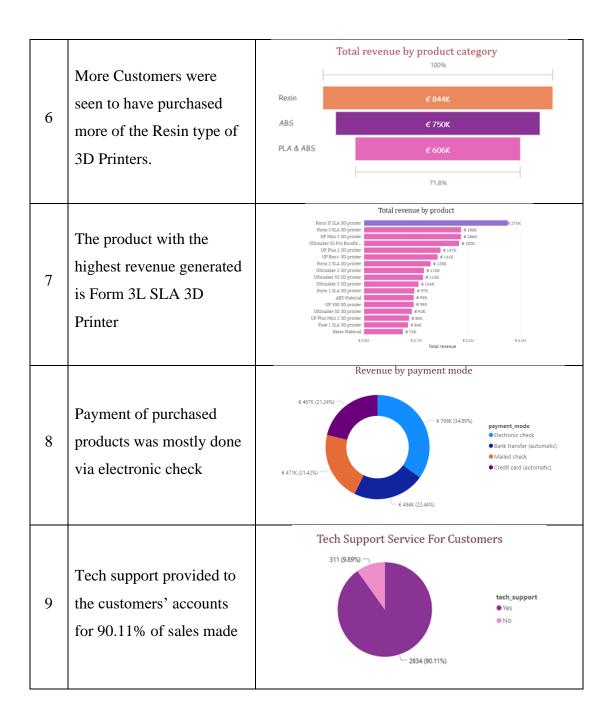
- Usability: The system should be relatively simple to understand and operate
- Reliability: The system should capable of working little or no operational errors
- Scalability: The application must be capable of being scalable without a negative influence on performance
- Performance: Responsiveness of the system should be of good speed
- Security: The system & customers data should be protected from unauthorised access

## 6. DATA ANALYSIS

# **6.1 Business Insights**

After carrying out data transformation on the historical data of the company, some analysis and insights were generated based on the data. This was done using **Microsoft Power BI** application.



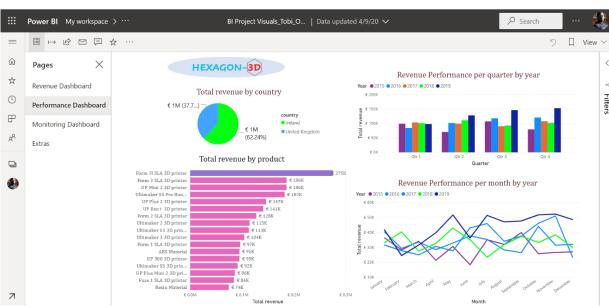


# 6.2 Reports

- Revenue Report: This report will go out to the top management and the finance team. It will provide insights on historical trend as well as help with proper planning and business strategy
- Performance Report: This is a high-level report which will go out to the top management at specific times (configurable) or upon request
- Operations Report: This report is applicable to the Sales team and Marketing team
- Customer Service Report: This report goes out to the customer service team and its
  Manager. It also captures the customer service performance

# 6.3 Dashboard (Desktop View)

The dashboards were designed with keen focus on clarity, ease of use and quick understanding. Choice of colour, chart type and layout were all taken into consideration to achieve this, as per requirements. Dashboard can be viewed for customer service and sales on its corresponding application. Other business analytical requirements are carried out using power BI application. Below is a sample dashboard created using power BI.



Desktop View for the Dashboard

# **6.4 Dashboard (Mobile View)**

The developed dashboard can also be accessed via a mobile device. By publishing the created dashboards, a user can view reports or dashboards by logging unto the shared portal. The mobile view for the developed dashboard is shown below.



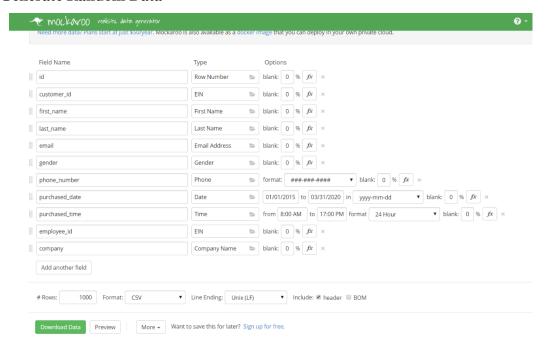
### 7. DATA SOURCE

Using the sample data acquired from **mockaroo** (a random data generator application), the data was extracted, transformed using excel & then loaded into the database and power BI.

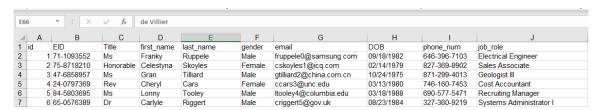


Highlighted below are the steps used to prepare the data.

# 7.1 Generate Random Data



## 7.2 Evaluate Downloaded Data



# 7.3 Transform to Realistic Data

- The IDs were customised to reflect a uniqueness to its corresponding table
- Product names were obtained from sample 3D printers on the web

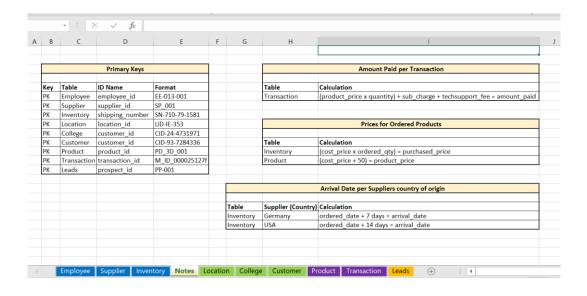
- Using Excel VLOOK-UP function, corresponding values for the looked-up values were obtained to fill up the table
- Duplicate records were removed
- Unique transaction records were created for each customer
- Quantity purchased, tech support was evenly distributed across the record



# 7.4 Balance Account (Prices and Dates)

In order to achieve ideal and proper visualizations for the business, much effort was made to ensure the mocked-up numbers and dates added up. Highlighted below is an account summary for the 5 years of operation of the company.

- Transaction table with QTY (9381) The total revenue was at £2,199,605
- Inventory table with QTY (9921) The total cost price was at £1,719,306
- Product table had a total of QTY (540) products left in-stock



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