

Custom BI Dashboards For The Sales Department Of a EU Corporation

How the adoption of Tableau with **six custom dashboards** for sales analytics, planning, and forecasting empowered a manufacturing corporation to back up sales strategies with real-time data and increase the number of won deals by **54%** and upselling deals by **16%**.

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Challenge

Our customer's business has been expanding rapidly for the past decade: new brands have been launched, new chains have been opened, new offices have popped up. In these circumstances, without proper up-to-date instruments, following the company's processes turned out to be a real problem. It was all the more obvious when came to the sales department. The existing methods of navigating through sales performance - with reports prepared on a monthly or quarterly basis - appeared to be ineffective and time-consuming.

Our customer wanted to improve the overall visibility of analysis and reporting activities across different business units and get a centralized view of the massive volumes of data.

Tasks

- to bring all the business units together to have a single source of information in an integrated set of tools
- the ability to "slice and dice" the information according to the user's needs
- to provide data security
- the possibility to scale up the solution as the business grows



Solution

We've developed a sales performance management solution, which not only contains all the necessary data but also combines analytics, planning, and forecasting capabilities.

The complexity of the whole sales optimization process has been wrapped into 6 dashboards, integrated with different sources of information. Each dashboard fulfills its own functions.

- A customer overview**
 Contributes to building up a complete, explicit view of the customer by collecting data from contract billing, the CRM and ERP systems, so that the sales representatives can easily identify the information, which is useful for their daily sales processes and customer relationship management.
- Sales Pipeline**
 Brings visibility to all the stages of a sales process within different channels or lines of business and makes overseeing and directing future sales much more data-based than they used to be.
- Sales process optimization**
 Takes the data out of the CRM system, measures these data against the targets, showing what activities need to be done to achieve the assigned goals.
- Salesperson focus**
 Clusters the information on customer sales activity and converts it into a user-friendly format. It shows sales representatives their month-to-date and year-to-date results and how these results correlate with their objectives.
- Account coverage**
 Helps to stick to customer retention strategy through the analysis of certain KPIs.
- Sales forecasting**
 Estimates the accuracy of sales forecasts, comparing them against actual results for both individual sales representatives and the whole teams.

Key features

- an integrated set of tools
- self-service analysis and reporting
- scalability
- data security
- cloud solution

Value

The BI solution allows our customer to explore the data without a hitch. Fragmented and disintegrated reports are replaced by one set of tools where all the necessary information is gathered. Thus, user groups get quick and easy access to real-time data and the analysis tailored to their needs, which increases the chances of the right decision making.

The visibility that has been brought to each stage of the sales cycle along with end-to-end analytics helps managers identify blind spots and, therefore, improve the performance.

"With **instinctools** solution, it's become possible to get a complete and honest answer to the question: "How are things?" either on a unit level or on the level of the whole company. We're happy to have accurate, up-to-date information on our sales processes and keep all our units in sync".

Judging by enthusiastic reviews of our customer, data harmonization within the sales department was a giant step (but just the first one) on the way to digital transformation. Apparently, there's more to come.

Technologies



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