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Case Study:

Data360 Analyze enables supplier to bring complex sales reporting in-house

Overview

Precisely enabled automated, centralized visualization of customer profiles, competitive threat tracking, and optimized sales routes on a per-customer basis. This automation reduced the number of person days from 20 to zero, significantly decreasing monthly operational costs while increasing accuracy, improving customer relationships and implementing nightly rather than monthly data updates.

As a global veterinary medical supplier, this Precisely customer provides a full range of veterinary medical supplies, covering pets, agriculture and equestrian uses. Each of these veterinary verticals has its own inside and outside sales teams, reflecting the different products, specialties and geographies of each vertical. In addition, other suppliers in the marketplace may provide the same services at different prices, requiring the company to be sensitive to competitive forces.

Bringing their sales team in-house, this client needed a comprehensive sales dashboard to streamline sales team operations and efficiency. This dashboard needed to track and display customer profiles, quarterly and annual sales targets, suspected competitive threats and customer revenue, down to the purchase level.

Data360 Analyze brought together the flexibility, power, scale and speed of development that the client needed to meet this challenge effectively.

Business challenge

This client had several systems that track the sales of medical products, separated into in-house diagnostics (medical analysis performed in the veterinary office) and labs (medical analysis performed for many clients in an off-site laboratory). Due to the number and age of systems involved, this data was spread across CRMs, medical lifecycle systems and billing systems. Many of these systems were at full capacity when this sales analysis was performed. Data360 Analyze needed to ensure that taking this process in house did not interfere with other system uses of the data within the enterprise.

Client
Global Veterinary Medical Supplier

Industry
Veterinary Medicine

Challenges
- A veterinary medical supplier with over US$2 billion in annual global sales decided to bring its entire sales team in-house, creating a need to develop in-house sales analytics to mitigate competitive threats.
- The data to track these threats was stored in 32 different legacy systems that were unable to support the volumes needed for daily reporting.
- Critical opportunity data was also siloed in Excel spreadsheets that were manually updated by various individuals.
- With nearly 250 million biannual sales transactions in just a single region, reporting strained many visualization tools.

Solution
Precisely Data360

Results
- With Data360 Analyze, this Precisely customer unified disparate data sources to proactively address competitive threats with their in-house sales staff, establishing more granular control over the sales process and responses.
- The customer created a single dashboard for their sales team, reporting per-customer revenue goals, threat potentials, customer profiles and sales patterns, down to the purchase level.
- All four sales roles within the organization could set and manage their sales goals within a single dashboard.
- The sales teams proactively optimized travel plans by revenue, ensuring that smaller customers got appropriate attention.
- Reporting on over 250 million biannual sales transactions strained even the best visualization tools. Data360 Analyze was nimble enough to work iteratively with their visualization partner to help the application scale up.
- The report was now refreshed nightly rather than monthly.

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In addition, the veterinary market is heavily influenced by patent law and the need for flexible pricing models. Processing of the latest medical analysis usually takes place in a lab setting, and generates higher margins. Once that test or process is no longer under patent or has been replicated by a competitor, in-house options are available at a more competitive prices. Thus, companies are particularly sensitive to competitive threats, knowing that some cost flexibility is possible and that revenues for products can fluctuate from year to year. This competitive threat data was found in no less than 32 different legacy systems, making it difficult to track and manage.

Solution

Data360 Analyze merged these 32 data sets into a single sales dashboard for the client's largest region. Each day, all customers were analyzed on 50 indicators to identify product lines with potential defections or expansions. The previous two years of sales data were included in the report in order to provide both per-customer revenue totals and show sales patterns during the previous 24 months. Since these source systems were not built for such heavy-duty analysis, Data360 Analyze limited the load on these systems so that other business critical functions were not hindered.

Tracking the sales of this whole region over the previous two years required reporting on more than 250 million individual sales. While Data360 Analyze could easily process this data set in four hours, the company's visualization partner struggled to scale. Using Data360 Analyze's powerful agile development lifecycle, we were able to move more and more of the reporting calculations into Data360 Analyze until the visualization application could scale up.

Results

The client was able to successfully bring their sales team reporting in house without losing the valuable sales analytics and dashboarding of their previous sales contractor, allowing a standardized, centralized view of sales goals and status. Competitive data from dozens of legacy systems was also accurately tracked and managed, with frequent data updates to ensure critical competitive information didn't slip through the cracks and have a negative impact on future revenue.

This agile, scalable solution was successfully implemented for a region with hundreds of millions of sales transactions, enabling accurate and reliable analysis of data in a matter of hours. With Data360 Analyze, this global supplier could accurately track sales and potential revenue threats to protect their competitive advantage.

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