



Addressing Revenue Visibility and KPI Challenges for an Indian Investment Platform

ABOUT CLIENT

- India-based investment platform, on a mission to help every Indian achieve financial freedom and pursue a life of purpose.
- With a team of over 200+ employees, the company ensures every investment decision aligns with their shared vision. Their focus extends from securing quality education for children to enabling a comfortable retirement, exploring, and making meaningful societal contributions via its clients and customers.

PROBLEM STATEMENT

When sat for the first round of discussion, the client highlighted their struggles with uncovering profit opportunities and the right KPI selection.

Uncovering Revenue Sources and Profitability:

- The company struggled to pinpoint which channel partners and sales channels were driving the most revenue. They needed detailed visibility into the profitability of each channel to make better resource allocation decisions and optimize their strategy.

Revenue Tracking and KPI Selection:

- Additionally, the company lacked clarity on which revenue schemes were performing well and had no consistent framework to track the most critical KPIs. Without this clarity, it was difficult to align their financial strategy with long-term business goals.

SOLUTION

Our team stepped in to bridge these gaps by designing a Power BI dashboard tailored to their unique needs. Here's how it went:

Revenue Data Consolidation and Visualization:

- We developed a centralized Power BI dashboard that integrated data from multiple channels and partners. This provided a unified view of their financial performance.

Profitability Analysis and Strategic Insights:

- Using the dashboard, we analyzed revenue contributions and margins to identify the most profitable channels and partners. This allowed the client to focus resources where they mattered most.

KPI Recommendations for Continuous Monitoring:

- We identified and implemented critical KPIs such as revenue growth, partner performance, and scheme ROI to ensure the client could monitor their progress.

Optimization of Underperforming Areas:

- Through detailed insights, we highlighted underperforming channels and schemes, providing actionable recommendations to improve or phase them out.

TECHNICAL IMPLEMENTATION

We worked closely with the client to ensure seamless integration and usability of the implemented dashboard and visualization structure in place.

- Data Extraction and Transformation:** Leveraged MySQL to Power Query pipelines to extract and clean data.
- ETL Workflow Creation:** Built ETL workflows to prepare structured, high-quality data for analysis.
- Data Modeling:** Designed an optimized data model to ensure accurate relationships and insights.
- Interactive Dashboard Development:** Developed a user-friendly Power BI dashboard for channel-wise revenue, profitability, and scheme performance tracking.
- Real-Time Deployment:** Published the dashboard to Power BI Services, enabling scheduled refreshes for up-to-date information.

BUSINESS IMPACT

Revenue Boost:

The identification of high-performing channels and partners led to better resource allocation, driving a 15% overall revenue increase.

Optimized Underperforming Channels:

Optimizing underperforming channels and phasing out ineffective schemes improved profitability by 12%.

Sales Growth from Top Channels:

Concentrated efforts on the most effective channels led to an 18% increase in sales from these sources.

Ineffective Schemes Reduction:

Through detailed analysis, we identified and removed underperforming schemes, reallocating resources to initiatives with higher ROI.

Faster Reporting:

The new Power BI dashboard reduced reporting time by 30%, enabling faster decision-making and better goal tracking.

100% Goal Alignment:

Our efforts successfully aligned the client's channel strategies with their financial objectives, ensuring sustainable business growth.

All-in-all, by integrating real-time insights through Power BI, we enabled them to identify high-performing channels, optimize underperforming areas, and track the effectiveness of revenue schemes. These improvements not only enhanced profitability but also streamlined their operations, aligning their strategy with long-term financial goals.

Industry

Technology & Software

Services Used

- Business Intelligence (BI)
- Data Analytics
- Digital Transformation
- ETL
- Power BI
- Recommendations and Insights

Region

India

Function/Department

- Accounting and Finance
- Financial Planning and Analysis (FP&A)
- Operations Management
- Sales and Business Development
- Strategy and Planning

Engagement Model

End to End Project Lifecycle Management



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