



# Enhancing Financial Visibility and Forecasting in Healthcare

## ABOUT CLIENT

- A South Korea-based specialized professional services firm helping healthcare companies navigate market access challenges.
  - With a team of over 100+ employees, the company provides integrated solutions for regulatory approvals, clinical research, reimbursement processes, market research, distribution, and logistics—ensuring seamless market entry into the Korean healthcare market.
- Our client struggled with fragmented financial reporting, making revenue forecasting and budget tracking across departments a challenge.
- They lacked a centralized view of financial data, making it difficult to monitor revenue trends and generate real-time forecasts.
  - Their existing process didn't support the structured analysis of month-to-date and year-to-date performance.
  - Budget tracking was inconsistent, limiting their ability to allocate resources effectively.
  - They faced difficulties in identifying client acquisition trends, affecting their ability to refine pitching and growth strategies.

## PROBLEM STATEMENT

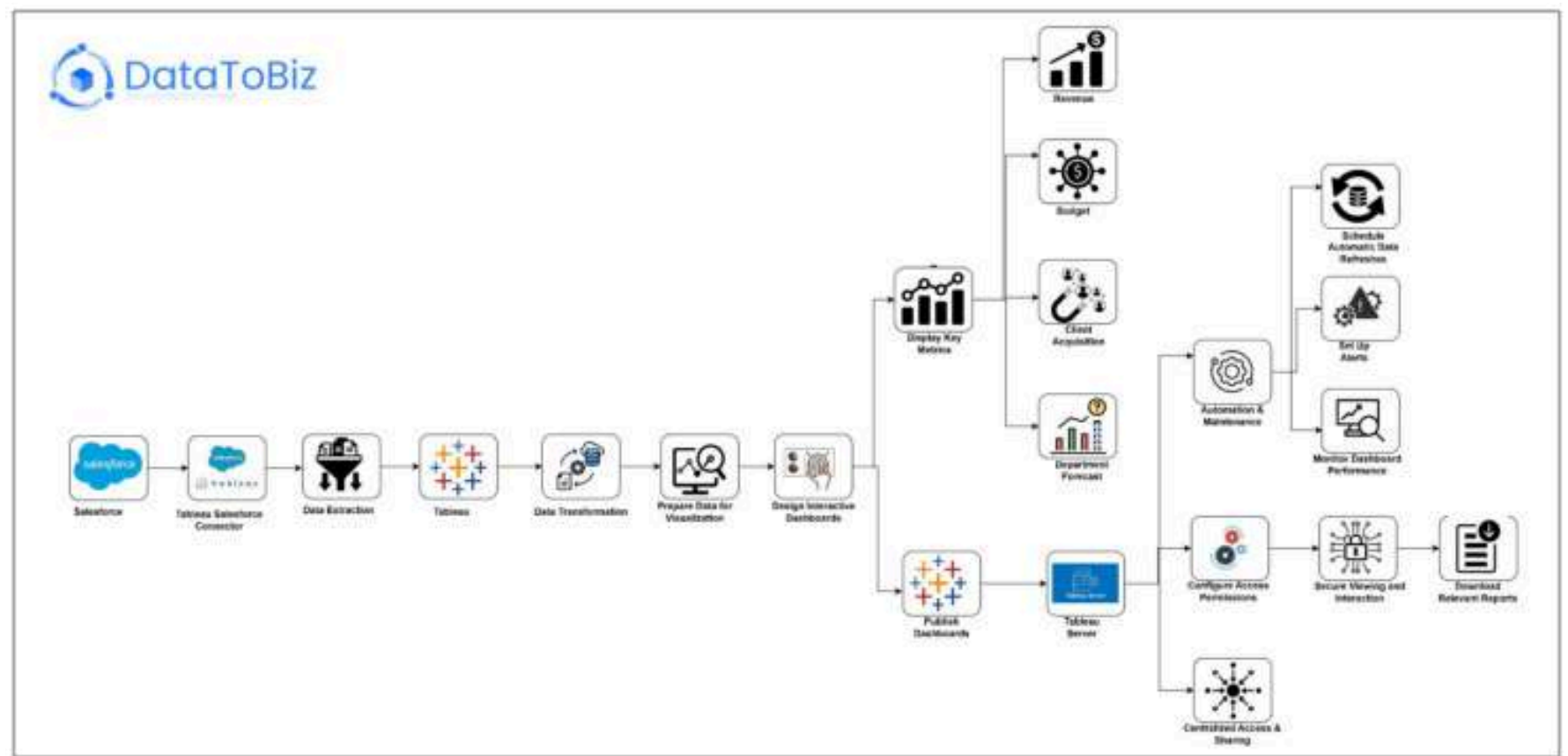
## SOLUTION

- After understanding the client's needs, our development team designed a comprehensive, centralized financial visualization platform using Tableau to eliminate inefficiencies and enhance forecasting capabilities.
- Unified Financial Reporting Platform:**
- Our team consolidated all financial data into a single, real-time reporting system, enabling accurate month-to-date and year-to-date forecasting across departments.
- Structured Contract & Budget Tracking System:**
- We developed an automated budget monitoring system for precise financial planning and integrated real-time client acquisition tracking to improve pitching strategies.
- Interactive Tableau Dashboards:**
- Our team designed visual dashboards to track revenue, forecasts, budget allocations, and client trends, providing drill-down insights for better financial decision-making.
- Scalable Reporting & Automation :**
- We implemented automated data extraction and transformation from Salesforce to Tableau and set up scheduled refreshes to ensure continuous real-time insights.

## TECHNICAL IMPLEMENTATION

- The chatbot solution leverages advanced technologies and frameworks to deliver real-time, reliable patient engagement.
- Data Integration from Salesforce to Tableau**
- Used Tableau's built-in Salesforce connector for secure data extraction.
  - Set up automated data refresh schedules to maintain real-time accuracy.
- Data Transformation & Visualization in Tableau**
- Processed and transformed raw financial data into structured insights.
  - Designed interactive visualizations displaying revenue forecasts, budget requirements, and client acquisition trends.
- Publishing & Access Control via Tableau Server**
- Deployed Tableau dashboards on Tableau Server for centralized access.
  - Configured role-based access control, ensuring secure data-sharing across teams.
- Automation & Performance Monitoring**
- Established automated alerts for key financial metrics.
  - Implemented performance tracking to ensure dashboards remain optimized.

## TECHNICAL ARCHITECTURE



## BUSINESS IMPACT

- Increased Reporting Efficiency:**
- The centralized reporting platform reduced manual effort by 30%, enabling teams to generate financial reports faster and with higher accuracy.
- Improved Forecasting Accuracy :**
- Month-over-month and year-over-year forecasting improved by 25%, allowing for more precise budget allocations and financial planning.
- Enhanced Budget & Client Metrics Visibility :**
- A structured contract reporting system increased visibility by 40%, helping teams track financial needs and client acquisition trends more effectively.
- Faster, Data-Driven Decision-Making :**
- With access to real-time insights, stakeholders made quicker, more informed financial decisions, reducing delays by 35%.
- Reduction in Data Fragmentation:**
- Consolidating financial and contract data into a single platform minimized information silos by 50%, improving accessibility and collaboration across departments.

In conclusion, the centralized reporting platform helped the client streamline financial operations, eliminating data silos and improving forecasting accuracy. With better visibility into budgets and client trends, their teams could plan more effectively, while real-time insights enabled stakeholders to make faster, more confident decisions.

### Industry

Healthcare & Life Sciences

### Services Used

Data Analytics  
Data Warehousing  
Digital Transformation  
Tableau

### Region

Asia-Pacific

### Function/Department

Accounting and Finance  
Legal and Compliance  
Strategy and Planning

### Engagement Model

Managed Analytics



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