

# Power BI Migration for Reporting and Salesforce Ticketing in Consumer Intelligence

## ABOUT CLIENT

- One of the world's leading consumer intelligence companies, providing collective insights into consumer behavior through advanced analytics.
- With a presence in 100+ international markets, they cover over 90% of the global population (as consumers), delivering analytics services into retail and consumer buying patterns.

## PROBLEM STATEMENT

The company highlighted multiple challenges in its physical outlet sales performance when we first sat together for a discussion. Here are the key issues we identified:

### Migration from Google Studio to Power BI:

The client faced performance issues with Google Studio for reporting, which impacted the speed and functionality of their analytics. As a result, they sought a more reliable and scalable solution.

### Salesforce Ticket Visibility and Closure Tracking:

The client lacked visibility into Salesforce ticketing data, particularly in understanding the status of open tickets and closure rates. This hindered stakeholders' ability to track customer service progress to spot bottlenecks.

## SOLUTION

Our experts implemented the following steps to manage and optimize their TikTok marketing efforts:

### Smooth Transition to Power BI:

- We successfully moved the client's reporting system from Google Studio to Power BI with no data loss and no downtime. This change gave them a more flexible, high-performance solution that fit their needs better.

### Efficient Data Integration:

- We brought together multiple data sources into Power BI, centralizing the client's reporting in one platform. This made data analysis easier across different areas of the business, improving both accessibility and consistency.

### Salesforce Ticket Tracking:

- We built a custom tracking tool within Salesforce to monitor ticket statuses, including open tickets across departments and locations. This helped stakeholders spot service delays and allocate resources better to resolve them.

### Custom Dashboards for Ticketing:

- We created custom Power BI dashboards to visualize ticketing data, such as ticket closure rates, open tickets by department/location, and resolution times. This made it easier to track performance and spot trends.

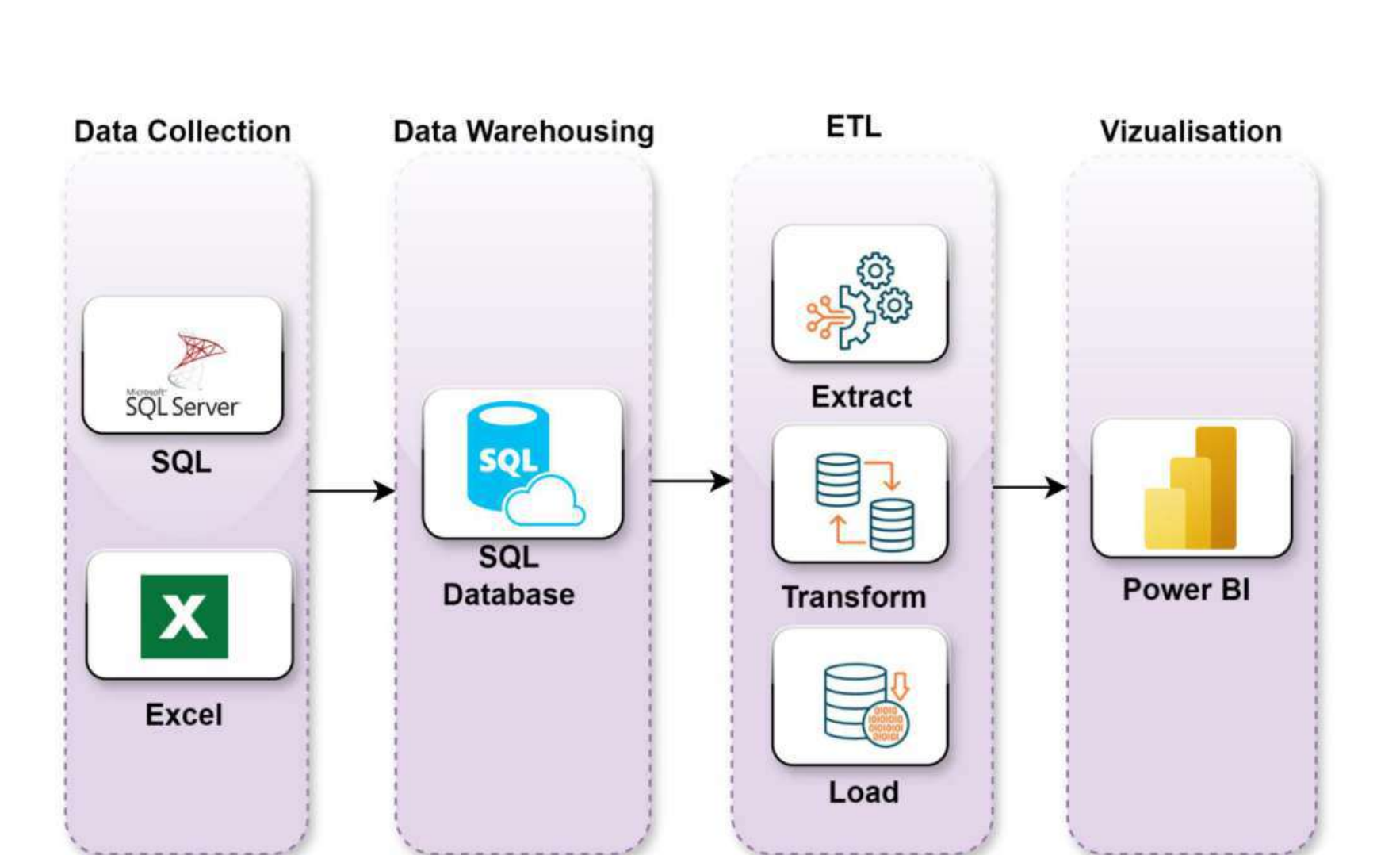
### Better Stakeholder Visibility:

- The new system gave stakeholders real-time visibility into ticket progress. This led to faster identification of delays and improved resource management to resolve tickets on time.

### Secure Access Control:

- We set up role-based access to ensure only authorized personnel could access or modify sensitive data like ticketing and operational metrics, enhancing the system's security and integrity.

## TECHNICAL ARCHITECTURE



### SQL Data Extraction:

We extracted data from the client's SQL databases by writing optimized queries for operational, sales, and ticketing metrics. This ensured the necessary fields were selected for reporting purposes.

### Data Export to Excel:

Extracted SQL data was initially staged in Excel for cleaning, transformation, and basic calculations before being loaded into the data warehouse.

### Data Warehousing Setup:

A cloud-based data warehouse was set up to centralize all transformed data, ensuring scalability and performance for large data sets. This repository facilitated seamless querying and analysis in Power BI.

### ETL Process:

An automated Extract, Transform, Load (ETL) pipeline was established to ensure regular data refreshes, consistency, and accuracy as the data moved from SQL to the data warehouse.

### Power BI Integration:

We connected Power BI directly to the data warehouse for real-time syncing, enabling the creation of dynamic, interactive dashboards and reports.

### Visualization and Reporting with Power BI:

Custom Power BI dashboards were designed to display key metrics, including ticketing status, sales data, and operational insights, providing stakeholders with actionable, real-time insights.

## BUSINESS IMPACT

- Enhanced Performance Visibility
- The advanced data visualization features of Power BI helped the client extract 40% more insights from their data, providing deeper insights into trends across departments and improving decision-making.
- The integration of various data sources into Power BI resulted in a 35% increase in data accuracy, providing a clearer, more complete view of company operations.
- The new tracking solution led to a 45% improvement in visibility into ticket statuses, enabling faster identification of bottlenecks and improving resolution times.
- With real-time insights into ticket status and service delays, the client saw a 30% reduction in ticket resolution times, allowing for more efficient customer service and better resource management.
- By gaining visibility into ticketing operations, the client was able to optimize resource allocation by 25%, ensuring that teams focused on high-priority tickets for quicker closure.
- The enhanced reporting and visibility led to a 20% improvement in stakeholder satisfaction, as they were now able to make informed decisions with real-time access to critical data.
- A more robust system for tracking individual sales performance led to a 10% improvement in sales staff productivity.

Migrating from Google Studio to Power BI helped the client tackle their reporting and ticketing challenges, speeding up reporting, improving data visualization, and providing real-time insights. The new Salesforce ticket tracking solution gave them better visibility into customer service, leading to quicker resolutions and better resource allocation. Overall, the project made a real difference in performance, stakeholder satisfaction, and operational efficiency, setting the client up for continued success in the consumer intelligence space.

### Industry

Technology & Software

### Services Used

- Business Intelligence (BI)
- Data Analytics,
- Data Migration,
- Digital Transformation
- ETL
- Google Data Studio
- Power BI
- Recommendations and Insights

### Region

North America

### Function/Department

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

### Engagement Model

Staff/Resource Augmentation