

Data Lake, Tableau - Customer Analytics

The Client

Our Client is a Cloud B2B software product company that primarily caters to project-driven organizations. They offer Professional Services Automation (PSA) and Project Portfolio Management (PPM) software integrated with Financials to help organizations that need to reliably plan, track and manage projects and people. The Project ERP software is an integrated system to address resource management, budgeting & forecasting, project management, timesheets, expense reports, project accounting, billing, workforce collaboration, CRM and financials with cost pool calculations.

Objective

To overcome the issues, Customer launched an initiative to build a single source of truth of their customer data that provides full visibility of all their touch points. It was proposed to build analytics solutions using the consolidated data to

- Enhance customer experience leading to customer retention and revenue additions
- Provide visibility and access to required & accurate customer data to all their employees

Challenges

The Solution needed to collate customer information from several sources such as different Oracle databases of their product and from different applications such as HubSpot, Salesforce and Freshdesk. The solution had to be capable of handling heavy data volumes of 1.3M usage data records per day. The visualizations should be simple, intuitive and facilitate analysis on multiple parameters.

Solution

Congruent suggested an approach using Oracle Data Lake and Tableau 2019.

Congruent designed a robust and extensible data hub framework comprising of three critical components:

- A custom ELT tool with pluggable subscriber and publisher adaptor architecture - Custom subscriber adaptors were developed for each of the data sources, to pull data from the data origin systems, using interfaces such as REST API, database access or screen scraping
- Central Data Hub – to store the collected data in raw format, harmonize the data, deliver the data for further consumption
- Integration with external data sources such as Zoominfo to validate and update critical customer data

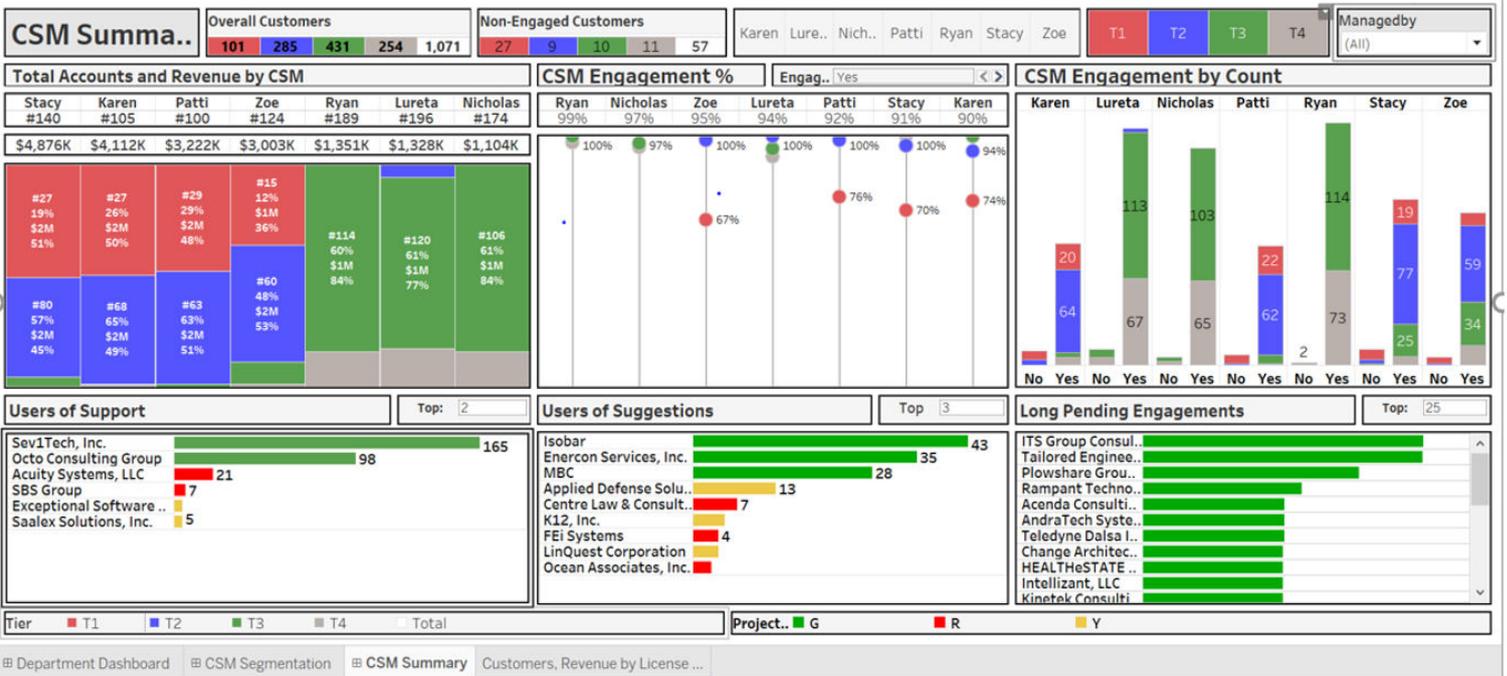
The solution was architected to be extensible, so as to support retiring of current data sources and addition of new sources.

Congruent created several dashboards using Tableau 2019 to analyze customer engagement, risks, churn, product usage, user threshold limit reach and referenceability. Custom code was developed for algorithms implementation and calculations. Customer had the options for analyzing across dimensions such as Customer Service Representatives, Tiers, Product, Timelines etc.,

Benefits

- Customer had a 100% reliable single source of truth of their end customer data.
- Through effective use of the dashboards, managers were able to track their customer experience, assess their engagement levels, identify upsell opportunities, monitor risks and analyze product usage, placing realistic business insights and decision making at their finger tips.

Sample Dashboards



For more case studies please visit <https://congruentglobal.com/resources/>