Risk Analytics Dashboards in Tableau and Salesforce

Client

Our Client is a leading provider of customized, integrated, and managed communications solutions for enterprise customers. Combining their comprehensive offerings and project management capabilities, the client offers a portfolio of customer-centric solutions that boost enterprise productivity, reduce costs, and simplify operations.

Objective

The client's aim was to build dashboards that would enable them to identify high-risk customers and track their engagement activities.

The challenges

Though the client wished to spot customers at risk, the challenge was with respect to that identification. The underlying data that is required to flag a customer as 'At risk', was buried in the meeting notes of account managers. After critical meetings with customers, the engagement managers update the meeting notes on Salesforce, and it was not possible to decipher account risks from this text data.

The Solution

Congruent designed a solution using Salesforce and Tableau to resolve this problem.

We developed intuitive & responsive user interfaces as part of Salesforce that enabled engagement managers to easily log and track meeting updates. Risk categories and risk reasons were codified and were made as mandatory inputs during meeting updates. Depending on the risk category, managers were also required to fill a questionnaire that provided further relevant details.

Based on these inputs, the application automatically generated meeting minutes and sent it to customers, which reduced the workload of engagement managers and also increased application usage.

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Leveraging the data now available in Salesforce, Congruent developed rich dashboards in Tableau, to help the management team easily locate & track customers at risk.

Some highlights of the solution design are:

- Technology was leveraged to capture data in analyzable format and drill down dashboards were developed
- The tableau dashboards were made accessible within Salesforce, which was highly useful for the managers.
- The solution was compatible across all devices including mobiles and tablets, which helped in real time data capture, either during or immediately after the meeting.

Benefits

- Improved visibility of customers at risk for the management team
- Analysis of risk reasons and customers so as to identify risk patterns – in future, this could further help to predict customers who would be at risk

Technology Used

- Visualforce
- Lightning Design System
- Lightning Process Builder
- Flow Component for email notifications
- CSS
- Bootstrap
- JavaScript
- Apex
- Salesforce Object Query Language (SOQL)
- Tableau Desktop
- Tableau Server

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