



Business Challenges and Objectives

- **Limited Data Extraction:** The client had trouble extracting Salesforce reports due to high data volume, limiting the data retrieval for over a month.
- **Slow Query Processing:** Queries within the Salesforce platform ran sluggishly, hampering data analysis and decision-making processes.
- **Inability to Compare Long-Term Trends:** The client could not compare long-term trends in agents' activities, customer cases, resolutions, and other critical analytics.
- **Costly and Complex Licensing:** Managing numerous Salesforce licenses posed financial burdens and administrative complexities for the client.
- **Data Isolation and Transparency:** The Sales Team's achievements get impacted by data isolation, hampering evaluation and planning.
- **Lack of Integration:** Inability to analyze reports with SAP, Nice, POS, Sales data, and other sources hindered business insights.

Client

- Our client is an American worldwide manufacturer, marketer, and distributor of consumer and commercial products. Their portfolio includes storage and trash containers, home organization, and reusable container products, among many products.

Industry

- Manufacturing

Function

- Customer Experience

Technology

- MS Azure



The Solution

- **Azure Data Migration:** Used Azure Data Factory (ADF) for Salesforce data extraction to Azure Data Lake Gen2 and SQL Data Warehouse (SQL DW).
- **API and Platform Fixes:** Implemented logic for delta loads, addressing issues like duplicates, timeouts, schema differences, and validations.
- **Upgraded Power BI Reporting:** Designed a new Power BI Dashboard for better analysis and insights extraction.
- **Centralized Data from Various Sources:** Merged sources into SQL Views, feeding Azure Analysis Services (AAS) Table partitions.
- **Enhanced Accessibility:** Azure migration enabled analysis with SAP, Nice, Carelines, Avaya, POS, and Sales data.
- **Streamlined Processing:** Optimized solution by consolidating calculations for efficient large data processing.
- **Strengthened Security:** Introduced data encryption for compliance, especially with personally identifiable information (PII).
- **Improved User Experience:** Implemented row-level security for better user experience, privacy, and access control.



Outcomes and Benefits

- **Customer Interaction Insights:** Solution captured global interactions, revealing needs and support effectiveness.
- **Targeted Improvement:** Solution highlighted service areas for focused projects.
- **Year-on-Year Reporting:** Facilitated YOY reporting, overcoming standard setup limits.
- **Centralized Dashboard:** Global sites used a centralized dashboard, avoiding individual reports.
- **Expanded Data Access:** The solution enabled wider access beyond the client's group.
- **Rep Performance Tracking:** Activity Tracker and Case Data improved understanding of reps' focus and performance.
- **Cross-selling Opportunity:** The solution offers sales insights from customer history and patterns.