



Engineering a Multi-User Level Sales Dashboard

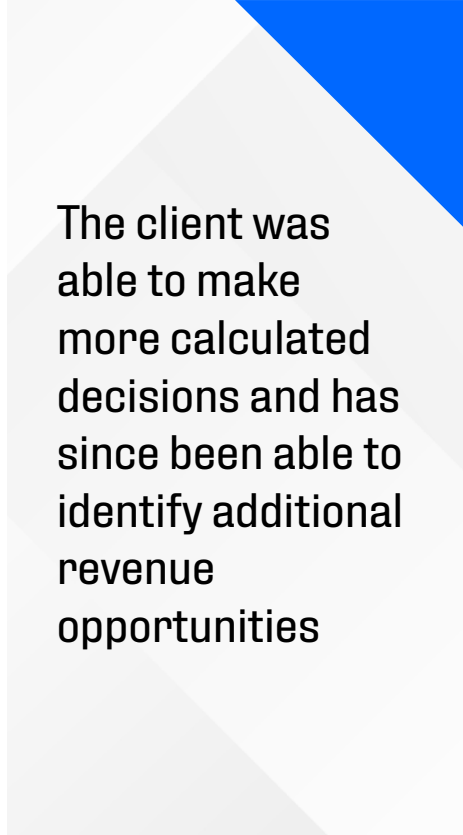
Challenge

A Fortune 1000 information technology leader needed a robust sales management platform that would enable executives, managers and sales associates to access information relating to different stages of the sales funnel. The project required data from multiple warehouses to be merged with the Salesforce CRM. This data would also need to be integrated into an intuitive, visually impactful mobile-friendly dashboard to help the sales department hierarchy make strategic decisions regarding sales representatives, products, and additional confidential KPIs. Lastly, the client also required that this global solution show data by region and territory with an expanded set of administrative functions for executive control.

Solution

Due to the importance of the project and previous unsuccessful attempts by other consulting firms, the client needed a technology solutions partner that could be trusted. They turned to INSPYR Solutions because of our proven track record of delivering solutions for over a decade. As the client expected to demo the product within a short timeframe for a conference, INSPYR Solutions understood the urgency posed by the request and was able to deliver the first phase of the solution within a two and a half month timeframe during the holiday season.

INSPYR Solutions had a history as the client's number one talent solutions provider. This background gave INSPYR Solutions a deeper



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understanding of the client's technical environment and individual team structures, allowing us to successfully meet the client's unique needs in a timely manner.

With the deployment of a team of eleven qualified individuals as well as a partnership with Tableau, INSPYR Solutions rapidly created an interactive data management system with a user-friendly sales dashboard. INSPYR Solutions continues to partner with this client to provide professional talent solutions to help grow the client's brand and deliver results beyond the client's goals.

Outcome

Through the allocation and acquisition of multiple data sources as well as the placement of a talented team of data architects and developers, INSPYR Solutions created an interactive data management dashboard that allows the client's global sales team of over 5,000 associates and company executives to view KPIs by region and territory.

In addition, the client's sales leadership team was given the ability to view sales performance by region,

territory, and/or individual sales associate. This information updated on a daily basis, while goals were attributed on large and small scales with the option to compare monthly, quarterly, or within a desired custom timeframe. Through the use of algorithms and programmed functions, the dashboard was able to display lead opportunities and score them by rank, providing invaluable intelligence reporting to help position the company for added sales revenue.

As a result, the client was able to make more calculated decisions on individual sales associates, territories, and regions. The client has since been able to identify additional revenue opportunities, a valuable return on the client's investment in this project.

Client Profile

As a leader in Workspace as a Service (WaaS), the client pushes the limits of productivity with its innovative products. Specializing in cloud computing software that allows for visualization, mobility management, and secure networking applications and software, the client enables businesses and individuals to have easy access to applications, desktops,

data, and communications on any device or network. With continual efforts to become the preferred solution for enterprise, the client is consistently expanding and creating integrated technology services that anticipate and meet the needs of their enterprise customers.

Technologies Supported/ Created

Salesforce and Tableau.

About INSPYR Solutions

Technology is our focus and quality is our commitment. As a national expert in delivering flexible technology and talent solutions, we strategically align industry and technical expertise with our clients' business objectives and cultural needs. Our solutions are tailored to each client and include a wide variety of professional services, project, and talent solutions. By always striving for excellence and focusing on the human aspect of our business, we work seamlessly with our talent and clients to match the right solutions to the right opportunities. Learn more about us at inspyrsolutions.com.

