

Medical Supplier

Performance Management Dashboard

Challenge

The client needed a flexible and powerful, offline and personalised reporting system to deliver actionable insights to the sales and services teams and managers.

Solution

Tridant's consultants built an offline, mobile and automated Cognos BI dashboard solution, personalised to each sales and services individual.

Benefit

The solution provided the sales and services teams with accurate, timely and accessible personalised performance metrics, giving deeper insight into the business than had previously been available.

Background

A leading global provider of joint replacement technology employed Tridant to build a solution that would give their sales and services team easy access to their sales and performance metrics or key performance indicators (KPIs), whilst out on site in their everyday work environment of hospitals and practices.

The challenge

The client was facing a number of challenges relating to the reporting strategy for the sales and services teams. The client had Cognos reporting system which used transformer cubes published for reporting. This system allowed some of the users to download the cubes locally and do analysis.

Due to lacking internal skills and expertise, the client's finance department were downloading the data from Cognos BI into spreadsheets and manipulating the data into relevant performance metrics reports – an inefficient method of creating performance metrics reports. As well as this, in order to receive information on their KPIs, the sales and services teams were calling the office and having the information relayed to them over the phone.

The IT consultants also had access to legacy Cognos Cubes on their desktops, which leaves a lot to the interpretation of the individual user, which is unreliable. The client had been using legacy DTS solution, which was in need of being replaced with the latest ETL tool so that new features could be leveraged.

The system needed a flexible and powerful reporting interface to deliver actionable insights to the sales and services teams and managers. Due to the sales and services teams being on site with clients, access to the internet was intermittent – an offline, automated and personalised reporting system was necessary.

Our solution

Having used Cognos BI quite unsuccessfully previous to employing Tridant, it was necessary for Tridant to demonstrate the value of continuing to use Cognos BI. Tridant conducted detailed scoping exercises and interviews with the key information (IT) consumers.

Tridant's consultants built an automated Cognos BI dashboard solution, personalised to each sales and services individual. An overview would be sent to the managers (...) allowing managers to keep up to date.

Solution components

- Cognos BI Server
(Transformer, Framework Manager, Report Studio, Query Studio, Event Studio)
- SQL Server DTS
- SSIS

Technical consultant, Kanul Wadhwa

We had an agile consultative approach working with the client. We worked closely together to understand what they needed. It was a process of consultation and feedback to get a full solution.

Tridant promised to give adequate and quality Cognos BI training to business users and through a series of workshops identified the need to improve technical architecture of the data warehousing.

Tridant upgraded the existing DTS packages to the latest SSIS packages and created an ETL monitoring solution, allowing IT administrators to have a status report emailed to them every morning, allowing them to take swift action if problems arose with data loads.

Tridant's consultants built an automated Cognos BI dashboard solution, personalised to each sales and services individual. The dashboard would automatically be sent out each morning with updated information, tailored to each individual in the sales and services teams.

An overview of the performance metrics reports would be sent to the managers in a similar fashion, allowing managers to keep up to date with their sales and services teams' performance metrics as well.

The benefits

The offline, mobile and automated Cognos BI dashboard solution gave the sales and services teams accurate, timely and accessible personalised performance metrics, and rendered unnecessary the inefficient method of producing and communicating the metrics reports.

The Cognos BI dashboard solution allowed for better business decisions through more accurate, timely, and accessible sales information, giving deeper insight into the business than had previously been available.

The automated reports provided accurate information regarding the business, as they removed the human aspect which previously predisposed the reports to human error. The finance department were also able to devote more time to analysing the business as they were no longer inefficiently producing the performance metrics reports.

Each morning, an email 'burst' was automatically created and distributed to the sales representatives, who could then download the report on their mobile devices, giving them offline access to the metrics reports.

All in all, the Cognos dashboard solution allowed for better business decisions through more accurate, timely, and accessible sales information. It gave a deeper insight into the business than had previously been available.

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Looking ahead

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Why Tridant

Tridant had a genuine depth of talent and experience in their local team, offering the complete range of skills that were needed to deliver a successful solution. From technical architecture, solution architecture, functional analysis, technical developers, and support staff to ensure smooth operations.

Tridant consultants brought a solid methodology to the project which reduced risk. Tridant Solutions Implementations Methodology (TSIM) entails a step by step process following scope, design, project plan, build, test, and finally implementation. TSIM focusses on communication between the consultants and the client, nurturing client satisfaction.

About Tridant

Tridant is a leader in the design and implementation of technology solutions optimised for planning, reporting and analytics. In short, data driving decision making.

Implement a best-practice budgeting system, human capital planning, or a sales forecasting model. Deploy executive scorecards, or mobile reports designed to captivate your audience, an enterprise reporting solution.

We can help you predict what your customers will buy next, or detect patterns hidden within your data. We can show you a better way to compile your external narrative reports saving you time and avoiding exposure to unintended errors.

All our solutions are tightly integrated with key business processes and source systems, they are designed to work in harmony. Our services are integrated in the same way, we can support your investment from beginning to end, on-premise or fully remote and in the cloud, it's your choice.

Whatever the challenge, whatever the technology, we help our clients leverage their data assets to improve performance, increase revenue, reduce risk and make their businesses more responsive to market opportunities and threats.

Since inception Tridant has delivered successful data-driven technology solutions to public, private and government organisations. Find out why six out of the ten largest companies in Australia work with Tridant.

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