



## CASE STUDY

Intellicus Enables Automated Reporting  
and Analytics for Better Sales and  
Supply Chain Management

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intellicus

*With the team of business analysts - at a leading scientific and healthcare product distribution company in South and Southeast Asia - lies the responsibility to consolidate the ever-increasing sales data. The data must be collated manually since they earlier relied on SAP SQL server and SFTP to manage all the data files, leading to scattered and siloed information.*

*With over 100 salespersons placed globally, each generating a separate spreadsheet to track sales, the teams in the Analytics, Life Sciences and Clinical Diagnostics departments had several individual Excel or CSV files in their hands. The entire process caused delays, created data trust issues and there was no way of meeting the deadlines with the current infrastructure - Excel being their only vantage point.*

Working with **200+ suppliers across seven countries**, the company is poised to transform revenues and growth potential for its customers, enabling them with the best services and product technologies. Leveraging a strong commercial network, deep industry knowledge and an understanding of the local/regional markets, they aim to revolutionize healthcare and science for end users.

To this end, they needed to spend more time on expanding the business and less effort on demystifying the numbers attached to the sales and revenues, consolidating nearly **five years of historical data** in the process. The time it took to prepare the reports and deliver meaningful insights could be better utilized in the actual sales effort.

The data analytics and business intelligence (BI) teams worked tirelessly to gather and cleanse data related to sales calls, gross profit margins, actual sales, open funnels and other key KPIs, including salesperson productivity and mapping a prospect's journey through the sales cycle. From scrutinizing

every nugget of information to deriving actionable insights, they needed to consolidate, accelerate and simplify analytical functions for the sales and marketing teams.

Since there was no common platform to update and analyze sales and productivity data, files shared by salespeople lacked proper formatting and were often delayed. Maintaining a tight hold over current and updated data was essential to match periodic assessments with actual figures. But data volumes were getting high enough to create hurdles in this path too. Excel - with all its multi-threads and processors - couldn't handle exploding data volumes, leading to inconsistent results.

The team was getting around 40% of CSV data over SFTP while the other 60% came from the SAP SQL server, their master database. The biggest challenge was merging this data to derive accurate insights. Manually, it took weeks to accomplish the desired outcomes. Without consolidated datasets, there were different versions of the same data, and each told a different story. The teams needed a single source of truth across the board to interpret and view the data in a standardized manner.

Besides the technical gaps, the non-technical teams like sales and marketing needed an easy-to-use platform that could offer more functionalities than Excel, particularly as and when data volumes grow. The need for faster analytics was real as every key operation relied on the promptness of decision-making, which again tied back to faster time-to-insight. The data extraction process had to finish within the required timeframe before reports could get published.

Furthermore, a lack of granularity in tables created an analytical logjam when tables used for daily transactions (sales) did not join accurately with tables created for monthly/yearly data (sales targets).

***Without timely data consolidation and granular data access, analytics were slow and inaccurate. Different versions of truth prevailed, especially when non-technical teams couldn't consume data as and when required.***

## The Ask

1. A common centralized platform for **simplified analytics** across user groups
2. **Easy integration** with existing systems to avoid extra cost, human resource or infrastructure investments
3. **Visibility** into demographic, geographic and period-over-period data for deeper insights
4. **Flexibility** to slice down to the lowest granularity
5. Complete **data engineering support** from data cleansing to analytics
6. **Accuracy in forecasting** data to make stronger strategies for growth

While exploring the available BI tools on the market, the company was keen on choosing a partner that would not only help cleanse and prepare their data but also automate analytics. This would reduce downtime while saving more time and human resources for core business tasks. The team needed a managed service for end-to-end support with the self-serve capability to empower every business user. Since the data ecosystem was on a hosted service, they wanted a simplified integration of third-party tools into their systems.

Intellicus Technologies offered a comprehensive solution to meet all these challenges head-on.

*The customer teams could store any volume of historical data for faster analytics with Intellicus. The initial ask was to store data from the last 5 years and the current year - until the date of adding data - in the Datamart at any given time.*

## With Intellicus, real-time information is now available as and when needed

After a rapid deployment, Team Intellicus got to work immediately and created a common portal for uploading individual data files, be it order values or sales targets. The source data integration involved metadata from offline sources like SAP and others including Phyzii and Funnel data pulled through an FTP server. This helped reduce infrastructure investments to manage siloed systems, eliminated manual effort for integration and helped optimize resources for more productive tasks.

A custom utility facilitated data uploads by fetching files from the SFTP server. SAP data was consolidated using in-house ETL flow to create unified dashboards for visualization. This common platform allowed real-time data views with timely updates over any period, weekly or monthly.

After consolidating all these datasets in a centralized location, sales and productivity teams from different departments could now see all their data in one repository and discern the same logic despite different underlying data sources. A single source of truth established by a semantic layer empowered all teams with accurate and timely insights.

## **Intellicus delivered easy, self-service analytics for all users**

With unified data views comes the ability to reinforce data literacy throughout the organization. The salespersons did not need to be tech-savvy to use Intellicus, making data consumption easy at the user level. The platform is easier to use than Excel and could handle much more data to facilitate data-driven decisions by business users. Complete data democratization via its easy interface enabled users to drag and drop any data hierarchy or dimension without needing any IT support.

## **Intellicus enabled better customer outreach with granular sales analytics**

With a unified platform where targets can be matched with achievements/revenues every month, customer teams could create better, agile business strategies based on live data. Outreach has improved with granular access to sales vis-à-vis geography and demography. Department heads can slice into individual sales numbers for each salesperson and make deeper analytics for every level, from region to department, salesperson, and product granularity.

## **Anytime, anywhere support with infrastructure managed services on the cloud**

With a private cloud hosted within their ecosystem, Intellicus covered both the production and support sides of the spectrum. The comprehensive solution enabled teams to start using the platform with minimal roadblocks. Intellicus' Professional Services (PS) team ensured that their customers get optimized performance and maximum uptimes when using the platform. Due to a cloud-based managed services protocol, the first dashboard was deployed within 10 days from the proof of concept (PoC), bringing speed to their analytical functions for better operational efficiency and management.

## **Intellicus ensured improved productivity and accuracy in strategic decisions**

By generating accurate sales reports in real-time on intuitive and interactive dashboards, the company could now conduct dynamic data modeling for what-if analytics on a wider database. Tracking the product-wise details helped them to draw actionable insights on product performance across geographies and measure sales accomplished by all salespersons, enabling streamlined marketing strategies and increased revenues.

The entire team has complete visibility into all datasets across the board with appropriate access controls to curb data leakages and improve productivity.

Connect with our experts at [Contact Us - BI Platform & Consulting \(intellicus.com\)](https://www.intellicus.com) to learn how Intellicus can help resolve your data management and analytical challenges with an advanced BI platform.