

Client

Multi-Channel Retailer

Problem

- > 15+ years of data in a custom order processing application
- > Some of that data imported from a legacy application
- > Messy data due to legacy import and operational work-arounds
- > No database documentation
- > Need for cross-channel reporting and analytics

Project Gestalt Scope

- > Data discovery and documentation
- > Develop plans for business intelligence solution
- > Design and build foundation for data warehouse
- > Develop initial reports for operational insight

Technology

- > Microsoft SQL Server 2008
- > Microsoft SSRS and SSIS
- > Microsoft Dynamics CRM
- > Tableau Data Visualization

Solution

Project Gestalt dove into 15+ years of customer sales data generated by 2 separate custom-developed systems to find out what data was available, what the data meant, where the data was complete and where it wasn't, and how the data could be more easily analyzed to answer both day-to-day and strategic business questions.

Working with line managers in sales, warehouse, purchasing, marketing, and eCommerce, Project Gestalt determined unmet reporting and analytics needs. Project Gestalt then developed a data analytics solution to satisfy the unmet needs. The data analytics solution extracts and cleanses data, combines customer purchases across sales channels, implements business rules to adjust data to account for point of sales and order management system shortcomings, and organizes the data in a data warehouse so that it can be easily analyzed and reported on.

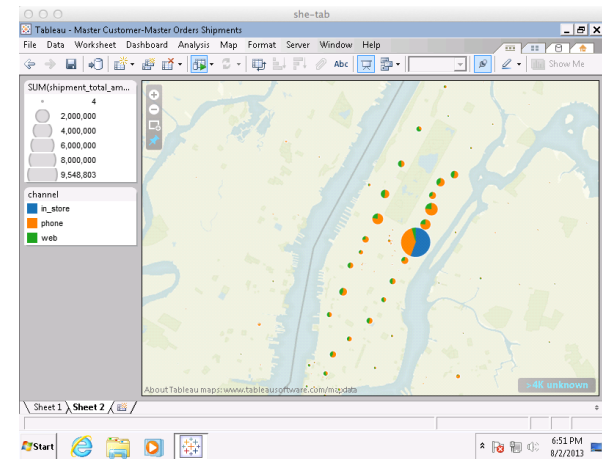


Figure 1: Sales by Channel by Zip Code Analysis

The data warehouse is now the source for inventory, purchasing, and sales activity analysis and reporting. Users access Microsoft Excel tables and pivot charts connected to views from the data warehouse that are refreshed through daily extracts from the production system. The data warehouse is also being used as the data source for ad hoc sales and marketing analysis using Tableau data visualization tools.

Project Gestalt built the processes that synch the data warehouse with the client's Microsoft Dynamics CRM On Line. Their Microsoft Dynamics CRM instance is integrated with ExactTarget and used to manage the company's email and mailing marketing campaigns.