Grazitti Interactive®
Marketing for Digital Natives

CASE STUDY

Sales Forecasting With Tableau Dashboards for a Wearable Device Manufacturer

THE CUSTOMER

- U.S-based manufacturer of wearable devices
- Produces wireless-enabled wearable technology, physical fitness monitors & activity trackers
- Including smartwatches, pedometers, monitors for heart rate, quality of sleep & stairs climbed

THE CONTEXT

With data residing in two different sources, the customer was unable to create one view of a single data source. They were representing data from SAP and Salesforce on Tableau with their data warehouse on Snowflake.They wanted to build a one-stop data center to build their sales forecast dashboard.

KEY HIGHLIGHTS

- Dashboard performance improved by 90% from 10 to 1 second
- Single data center built from two heterogeneous data sources to get rid of manual effort spent on sales forecasting dashboards
- Sales forecast interactive dashboard visualization built

The customer was unable to carry out data analysis due to the high volume of input data. This was leading to performance issues, as well as time spent on generating manual reports.They were neither able to see data nor integrate it. They wanted to automate the entire process for smooth running of dashboards.

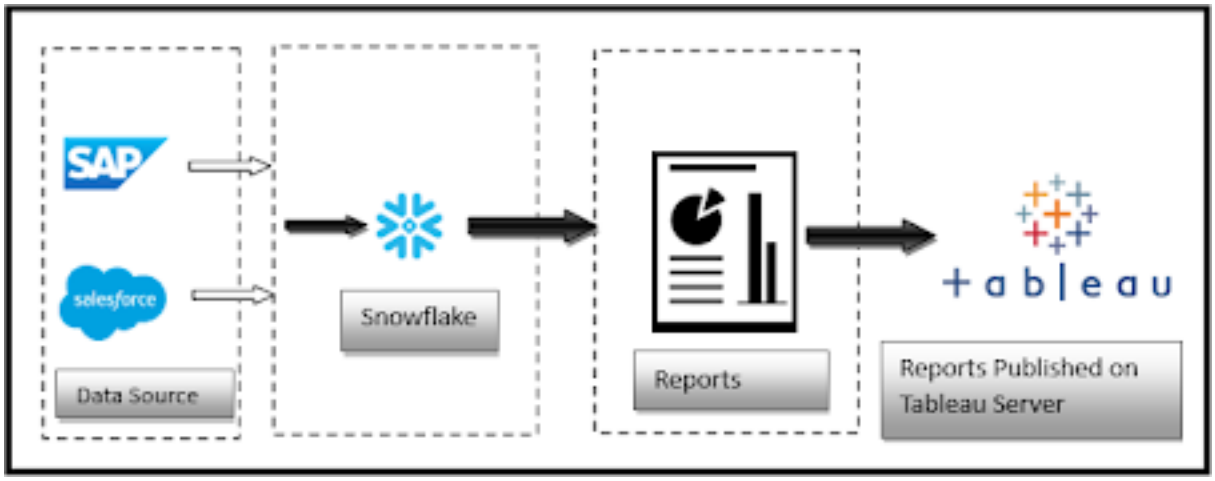
THE OBJECTIVE

- The objective was twofold. First, to create a single data source from two heterogeneous data sources, SAP and Salesforce.
- Second, to improve the performance of Tableau reports.

THE SOLUTION

Here's the solution Team Grazitti implemented for the customer:

- Built a one-stop data center on the cloud from two data sources, SAP and Salesforce, and automated data extraction.
- Developed interactive automated visualization of sales forecasting reports in Tableau, including:
    - Comparison of Net Shipment (Actual Sales) and Quota (Target Sales) on yearly, quarterly, monthly & weekly basis to determine attainment percentage and refer to an increase or decrease in trends
    - Coloured indicators on the dashboard to highlight trends
    - Increased analytical coverage via filters
    - Touch and feel experience on dashboards of a specific product or method of selling
    - Multiple regions, countries and currencies covered for deeper insights
- Improved dashboard performance
- Implemented row level security so that only sales representatives with required privileges can see their quota



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Sales Forecast Dashboard

Net Shipment	Quota Amount	Quota Attainment	Orders
$1,482,706 (▲5.7%)v PYTD	$688,954 (▲12.4%)v PYTD	134.28% (▲49.7%)vPYTD	32,641 (▲35.4%)v PYTD

Sold to Name by Net Shimpent and Quota

Sold to Name	Q1 2023 Net Shipment	Q1 2023 Quota	2023 Quota Attainment %
Crona, Labadie and Upton	38,402	66,358	57.87%
Greenholt and Sons	5,860	22,651	25.87%
Hermiston Inc	59,530	28,599	208.15%
Konopelski - Russel	60,576	20,471	295.91%
Prohaska Inc	117,086	83,988	139.41%
Schiller, Monahan and McCl..	27,258	26,678	102.17%
Thompson - Batz	41,882	12,346	339.24%

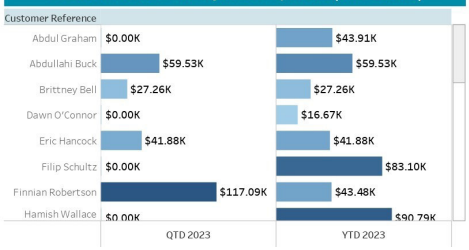
Sold to Name by Net Shimpent and Quota (YOY Qtr)

Sold to Name	Q1 2022 Net Shipment	Q1 2022 Quota	2022 Quota Attainment %	Q1 2023 Net Shipment	Q1 2023 Quota	2023 Quota Attainment %
Crona, Labadie and Upton	0	0	0.00%	38,402	66,358	57.87%
Greenholt and Sons	99,534	22,651	439.42%	5,860	22,651	25.87%
Hermiston Inc	63,148	28,599	220.80%	59,530	28,599	208.15%
Konopelski - Russel	0	0	0.00%	60,576	20,471	295.91%
Prohaska Inc	0	0	0.00%	117,086	83,988	139.41%
Schiller, Monahan and McClure	90,750	26,678	340.17%	27,258	26,678	102.17%
Thompson - Batz	0	0	0.00%	41,882	12,346	339.24%

Sold to Name by ASP (YTD)

Sold to Name	Quantity	Q1 2023 Net Shipm..	ASP
Crona, Labadie and Upton	2,608	38,402	$2,410
Greenholt and Sons	3,270	5,860	$1,690
Hermiston Inc	4,160	59,530	$2,116
Konopelski - Russel	2,566	60,576	$1,012
Prohaska Inc	850	117,086	$1,300
Schiller, Monahan and McClure	3,294	27,258	$2,520
Thompson - Batz	3,344	41,882	$3,090

Customer Reference by Net Shipment (QTD & YTD)



Filters

Country
All

Sales Representative
All

Customer Name
Multiple values

Time Range
- Weekly
- Monthly
- Quarterly
- Yearly

Year
- 2022
- 2023

Quarter
- Q1
- Q2
- Q3
- Q4

Product Category
All

Product Generation
All

Product Type
- Refurbrished
- Replacement
- Retail

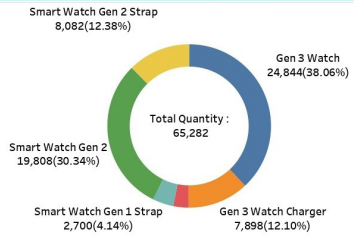
Quantity
To Null

Sale Method
- Bulk
- Storefront

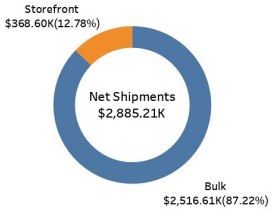
Reffered By
All

Net Shipment PY
To Null

Device Mix by Units



Method of Selling



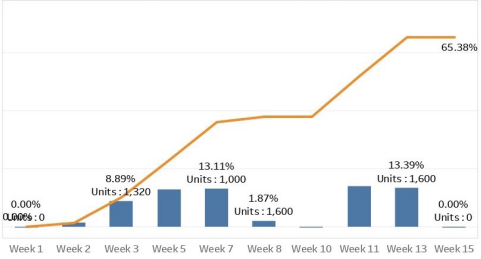
Net Shipment Weekly Run Rate (QTD)

Sold to Na..	Weeks Left ..	Net Shipme..	QTD Weekl..	End of Quar..	Quota QTD	QTD Forcecaste
Thompson - Batz	10.14	41,882	13,960.666..	183,483.05	0	0.00%
Schiller, Monahan a..	10.14	27,258	9,086	119,416.00	23,102	516.91%
Prohaska Inc	10.14	1,17,086	39,028.666..	512,948.19	0	0.00%
Konopelski - Russel	10.14	60,576	20,192	265,380.57	3,340	7945.53%
Hermiston Inc	10.14	59,530	19,843.333..	260,798.10	24,028	1085.39%
Greenholt and Sons	10.14	5,860	1,953.3333..	25,672.38	16,930	151.64%
Crona, Labadie an..	10.14	38,402	12,800.666..	168,237.33	0	0.00%

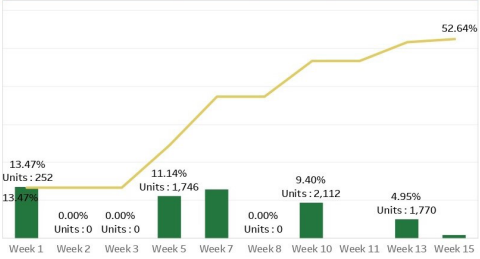
Net Shipment Weekly Run Rate (YTD)

Sold to Na..	Weeks L..	Net Shipment..	YTD Weekl..	End of Year F..	Quota YTD	YTD Forcecaste
Thompson - Batz	36.43	$41,882.00	$2,641.21	$138,097.41	$4,264.00	3238.68%
Schiller, Monahan a..	36.43	$27,258.00	$1,718.97	$89,877.73	$23,102.00	389.05%
Prohaska Inc	36.43	$43,478.00	$2,741.86	$143,359.89	$42,046.00	340.96%
Konopelski - Russel	36.43	$60,576.00	$3,820.11	$199,737.08	$37,602.00	531.19%
Hermiston Inc	36.43	$59,530.00	$3,754.14	$196,288.11	$24,028.00	816.91%
Greenholt and Sons	36.43	$5,860.00	$369.55	$19,322.16	$16,930.00	114.13%
Crona, Labadie an..	36.43	$34,542.00	$2,178.32	$113,895.24	$49,444.00	230.35%

Net Shipment % Forecast (PY)



Net Shipment % Forecast (CY)



THE OUTCOME

- The customer is now able to run Tableau forecasting reports with huge data sets that increase everyday.
- They have been able to improve their reporting and forecasting capabilities.
- The customer has been able to improve marketing operations by accessing accurate and timely data.
- They have been able to increase efficiency by automating processes.
- The customer has also been able to save time and money by creating reports quickly and accurately.
- The customer has had success with the implementation of agile methodology to automate their data pipeline and sync SAP and Salesforce with Tableau via a data warehouse.
- Manual intervention has been reduced by 90%, while man hours have been reduced by automating processes.
- The customer now has dashboards with access to real-time data.

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SCAN CODE