

Migrating from Salesforce Reports and Dashboards to Einstein Analytics to Reduce Report Generation Time by 60%

HIGHLIGHTS



Successful Migration of Salesforce Reports and Dashboards to Einstein Analytics Cloud



Reduction in Report Generation Time by 60%



Increased Data Analysis Efficiency



Improved Decision-Making

THE CUSTOMER

A renowned global leader, the customer is recognized for their cutting-edge and secure enterprise-grade open-source solutions. Their extensive clientele includes over 60% of the Fortune 500 companies who rely on their offerings to support mission-critical workloads. They specialize in Business-critical Linux, Enterprise Container Management, and Edge solutions. Additionally, the customer's significant presence is reflected by their listing on the Frankfurt Stock Exchange.

THE CONTEXT

The customer was using Salesforce as their CRM. However, their sales team faced a significant hurdle when extracting meaningful insights solely from Salesforce Reports & Dashboards. This process of generating reports and insights proved to be time-consuming & resource-intensive and introduced the risk of errors and inaccuracies in their data analysis.

THE OBJECTIVE

The customer wanted to eliminate the manual processes of extracting actionable insights from their data. Their primary objective was to ensure that sales teams can make informed decisions, reduce time consumption in data analysis, and ensure data accuracy. They wanted to partner with an organization with extensive expertise in Salesforce that could help them gain deeper insights into the data and make data-informed decisions.

THE SOLUTION

After analyzing the customer's goals, our Salesforce experts proposed integrating Einstein Analytics into their reporting process as Einstein offers better reporting capabilities in comparison to Salesforce Reports & Dashboards.

Post their approval, our experts created and executed a migration roadmap that enabled them to use Einstein Analytics efficiently. Here's what we did.

- **Data Mapping and Preparation:** We analyzed customer's data structure, relationships, and relevant key performance indicators. This enabled us to map data from existing Salesforce Reports and Dashboards to align with the data model in Einstein Analytics.
- **AI-Driven Data Preparation:** We enabled Einstein Analytics' AI-driven data preparation tools to automate data cleansing and transformation processes. Advanced algorithms autonomously detected and resolved data quality issues.
- **Dashboard and Report Redesign:** We redesigned their existing Salesforce Reports and Dashboards with Einstein Analytics' interactive visualizations, dynamic charts, and graphs for better data visualization.

THE OUTCOME

With Grazitti's assistance, the customer was able to successfully eliminate manual processes of generating insights that aren't visible in the Salesforce Dashboard and harness Einstein Analytics' AI capabilities for data exploration and analysis.

Here's what they witnessed:

- **Reduction in Report Generation Time:** Einstein's AI algorithms seamlessly processed and analyzed vast amounts of data, identifying patterns and trends within the dataset. This automated analysis eliminated the need for manual data sorting and analysis, streamlining the report generation process. As a result, the average time required to generate reports and gain insights was reduced by approximately **60%**.
- **Improved Decision-Making:** Einstein Analytics' predictive models enabled their sales teams to forecast outcomes, identify trends, and anticipate customer behavior. This allowed management to make informed decisions, resulting in optimized marketing strategies.
- **Increased Data Analysis Efficiency:** The NLP capabilities of Einstein Analytics allowed their sales teams to ask questions about the data using natural language queries. Thus, simplifying data exploration and analysis processes. The automated insights and recommendations enabled users to make data-driven decisions quickly.
- **Enhanced Data Accuracy:** Einstein Analytics extracted data from Salesforce with precision, eliminating errors that could arise with manual inputs.