

POLESTAR 

A Fortune 500 Medical Devices

Manufacturer Embraces Data-led Sales Forecasting With QlikQ



www.polestarllp.com

Client Overview:

Our client is a health technology giant headquartered in the Netherlands. The company firmly believes in innovation for people and constantly strives to devise new and improved healthcare devices .

The global footprint of the conglomerate allows them to operate in over **100+ locations across different countries**. With more than **80,000+ individuals**, the company has a diverse **4,500 patents and portfolio** that includes everything from health monitoring to various surgical equipment.



Problem Statement:

Our client faced various bottlenecks in their sales operations due to data dispersed around different sources like **SharePoint, Salesforce.com**, and many more. The client also faced problems in strategizing their sales planning and demand forecasting because of constant errors and the unavailability of intelligent insights.

The core pain area of the client was to gather intelligence throughout their operation areas. As the company operated on such a big scale and has a presence in numerous different regions (Domestic and international), executives were not able to see the whole picture that their data painted.

The data was not comprehensible and dispersed in silos, making it difficult to cultivate meaningful insights specific to region, BG (Business Group), or department. The client needed a holistic view of the sales process to address the gradual decline in growth. This meant the need for insight-driven sales analytics was dire and imminent.



Key Challenges:

Inability to communicate process initiatives and receive feedback from across the ISC landscape.

01

Unable to forecast market trends leading to loss of opportunities, visibility, and market share.

02



Difficulties collecting and standardizing master data to align with the hierarchies established.

03

Ineffective collaboration between Sales, Finance, IT, and HR-owned processes and maintenance.

04



Objective:

The goal of our clients is to streamline their Order In-take (OIT), improve visibility and market share, get real-time updates on revenue **AOP (Annual Operating Plan)**, and automate leads and call management by amalgamating data analytics in their sales planning and execution process via a holistic dashboard. The dashboard covered converting data from multiple sources and creating actionable dashboards to drive insights and facilitate data-led business decisions.

An End-to-end Sales Analytics Implementation:

To deliver a groundbreaking solution to the client, we conducted several workshops, interactions, and brainstorming sessions with business and IT heads, to formulate an extensive report of the client's vision and also the **To-Be state**. A thorough audit was carried out to identify the pre-existing inaccuracies, inefficacies, and errors in the system.

We understood at an early age that the Legacy systems are sub-optimal and need to be changed. To achieve this, the Eagle Eye initiative was created.

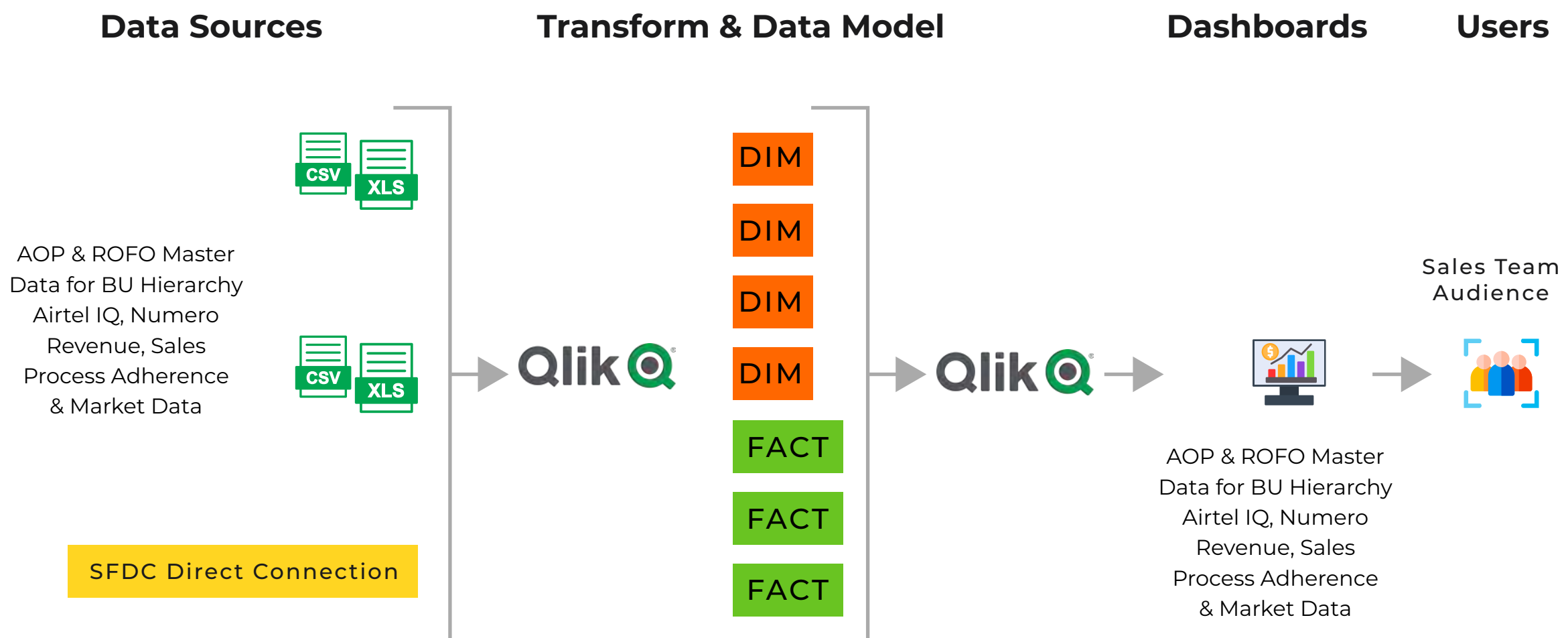


1 Accumulating and cleansing data from more than **50+ data files including excel dumps from SharePoint, Salesforce.com** to enable automated data management and delivery.

2 Implementing **eagle-eye dashboard with true KPIs** that gave executives a birds-eye view of the sales processes, enabling a real-time view of reports spread across departments, BUs, and regions.

3 Fed data into Qlik's ETL infrastructure to carefully define, model, and process datasets using advanced analytics to curate a refined result ready for visualization.

4 Increased adoption between teams and built materials to facilitate proper knowledge transfer and training within the organization.



Impact Delivered:

01

The company achieved a **17% improvement in forecast accuracy**, minimizing data inconsistencies in revenue forecast.

02

Real time data processing of market data and SFDC **helped improve the market share over the next 90 days, proactively, by 4%**.

03

Revenue realization time (from OIT to Revenue Billing) was drastically reduced **from 16 days (about 2 and a half weeks) to 3 days**.

04

Automated data massaging and preparation thereby saving 100s of hours of manual effort



Client Say:



Qlik has been nothing short of transformative for our sales operations. We gained unprecedented visibility into our market and sales funnel. The analytics dashboards and reports allowed us to track the entire customer journey, from lead generation to conversion, with ease.

Director - Sales Transformation



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