Performance Reporting Using Tableau

Consolidating disparate retail data sources into a centralized Tableau platform to deliver real-time, data-driven insights for marketing and sales optimization.

Overview

- Delivered a one-stop visual analytics solution using Tableau to monitor and track omni-channel marketing and sales activities.

- Integrated and blended large datasets from Salesforce, Google Analytics, PostgreSQL, and Google Sheets into centralized, dynamic dashboards.

- Automated the previously manual reporting process, significantly reducing time and effort.

- Enabled data-driven insights that improved sales analysis, market identification, and resource investment, leading to informed strategic decisions.

Client Profile

Our client is a leading retailer of products for events, operating several company-owned and franchise outlets in the US and Canada.

Challenges

- **Fragmented Reporting:** Disparate systems for technical, marketing, product, and sales metrics prevented a complete, centralized view of performance.

- **Outdated Data:** Lack of real-time insights in existing reports led to inefficient and flawed decision-making.

- **Time-Intensive Process:** The existing reporting required manual gathering of information from multiple data sources, consuming significant time and effort.

- **Incomplete Picture:** Inability to include crucial offline data (e.g., marketing spend/budget) alongside digital analytics.

QBurst Solution: Centralized Tableau Analytics

QBurst implemented Tableau as an end-to-end visual analytics solution to meet the client's need for a real-time, integrated, and accessible reporting interface. We used Tableau Desktop to build interactive dashboards offering insights into traffic funnels, marketing costs, supplier listings, and sales.

- **Multi-Source Integration:** Integrated large amounts of data from Google Analytics, Salesforce, and PostgreSQL. Offline budget and marketing spend data were also consolidated via Google Sheets and merged into the reports.

- **Near Real-Time Delivery:** Dashboards were published on the client's Tableau Server with scheduled data refresh using optimized live/extract connections to ensure near real-time data visibility.

- **Granular Visualization:** Created a mapping table in Tableau to visualize supplier offerings and product sales geographically by market area/zip code.

Technical Highlights

- **Drill-Down Capability:** Enabled users to switch from executive summaries to more detailed and granular views.

- **Self-Service Reporting:** Selective user rights allowed permitted users to create new dashboards directly from the Tableau server.

- **Custom Filtering:** Implemented advanced custom date filters to view data by day, week, or month.

- **Responsive Design:** Dashboards to be responsive for access on multiple device layouts.

- **Key Reports:** Development of critical reports, including the 360-degree Summary Dashboard and the Funnel View Report with previous period comparisons.

Impact

- **Real-Time Visibility:** Achieved an integrated, real-time overall view of customers and suppliers.

- **Operational Efficiency:** Automated reporting processes dramatically reduced manual effort and time by over 60%.

- **Strategic Growth:** Faster insights into KPIs enabled quick analysis of sales, identification of top-selling markets/products, and informed investment in new markets.

- **Process Streamlining:** Lead progression reports helped analyze agent activities to streamline specific operational areas.

- **Data Democratization:** Business teams gained the ability to explore and analyze data easily, extending the value of data across the entire organization.