QBurst

Performance Reporting Using Tableau

Project Overview

The one-stop visual analytics solution enabled our client to monitor and track progress and outcomes of omni-channel marketing activities, website performance, sales trend by demography, and top selling packages, to name a few. Using Tableau Desktop, we created an executive summary dashboard as well as detailed dashboards with drill down functionality by connecting multiple data sources such as Salesforce, Google Analytics, PostgreSQL, and Google Sheets. Dashboards were published on the Tableau Server to facilitate sharing and collaboration between teams in the organization.

Client Profile

Our client is a leading retailer of products for events, operating several company-owned and franchise outlets in the US and Canada. One of their online service offerings is a one-stop-shop for event planners to book rentals and services from pre-screened suppliers.

Business Challenges

- Disparate systems for reporting technical, marketing, product, sales, supplier, and fulfillment metrics made it difficult to get a complete and centralized view of the business and marketing performance.
- Lack of real-time insights in existing reports led to inefficient and flawed decision-making.
- Existing reporting process involved manual gathering of information from multiple data sources which was time and effort intensive.

Business Requirement

- A reporting interface that integrates business and marketing data from disparate data sources

- Reports to display latest data from various data sources
- Selective user rights for end-users
- Ability to create dashboards easily without technical support
- Responsive reports that can be accessed on multiple devices
- Information such as offline marketing spend and budget details (not trackable via Google Analytics) to be included in the reports

QBurst Solution

Tableau was used as an end-to-end tool for internal and external reporting purposes. Tableau Desktop was used to prepare interactive dashboards that offer insights into traffic funnel, marketing costs, Salesforce data (for customers and suppliers), supplier listings (per market), and sales per day.

Large amounts of data were integrated from multiple sources — Google Analytics, Salesforce, and PostgreSQL into Tableau. The collected data was blended using common fields, and the results were combined to generate reporting dashboards. Information such as offline marketing spend and budget details that could not be tracked via Google Analytics were consolidated by the client separately and shared with us via Google Sheets. The information from Google Sheets was also fetched into Tableau reports.

The dashboards created using Tableau Desktop were published on the Tableau server hosted by the client and data refresh was scheduled at regular intervals to display near real-time data. Switching was done between live and extract connections to reduce report load time.

Advanced custom date filters were set up so that users could filter by date range and view data by month, week, or day. Drill down features were enabled in Tableau to allow users to switch to a more granular view.

When integrating data, the time zone difference between Google Analytics and Salesforce server posed a challenge in matching Google Analytics goal completions and Salesforce leads accurately. Custom calculations were done in Tableau worksheets to solve the issue.

In order to visualize supplier offerings and product sales across locations in map view, a mapping table was created in Tableau to map each market area with the corresponding zip code.

Custom queries were written in Tableau to fetch customer count based on booking status and to filter out irrelevant records based on conditions. Selective user rights were set for different end-users/groups to limit access. Users who were granted edit permission were able to use the drag-and-drop functionality and easy-to-use interface to create dashboards directly from the Tableau server. This helped to extend the value of data across teams within the organization. All dashboards were designed to be responsive for different device layouts.

Key Reports

- 360-degree summary dashboard provides a view of the entire business at a glance and displays data on top selling markets, total bookings (over a period), average booking cost, sales per day (by market), visitor count, total leads, and more.

- Key Performance Indicators Report facilitates measurement and analysis of important business performance indicators such as leads conversion percentage, average leads/day for ecommerce and landing page, market penetration percentage, and booking proximity.

- Funnel View Report tracks the count of users moving from one web page to another, the number of bookings made, and the sum of package price of such bookings. Users can compare figures of the present day, week, and month with figures of previous day, week, and month. The differences are indicated using colored up/down arrows.

- Lead Conversion Report provides insights into total quotes sent, percentage of quotes sent over total leads, and percentage of sales over total leads.

- Daily Progress Report tracks progress made by marketing agents in receiving leads, sending quotes, and converting them to sales.

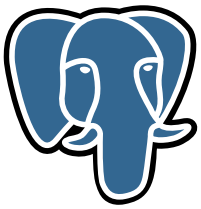
Technologies Used

Tableau

Google Analytics

Microsoft Excel

Salesforce


PostgreSQL

Impact

- Integrated Tableau dashboards enabled the client to get an overall view of customers and suppliers in real-time.

- Automated reporting processes significantly reduced time and effort.

- Faster insights into KPIs helped to quickly analyze sales in each market and identify top selling markets/products.

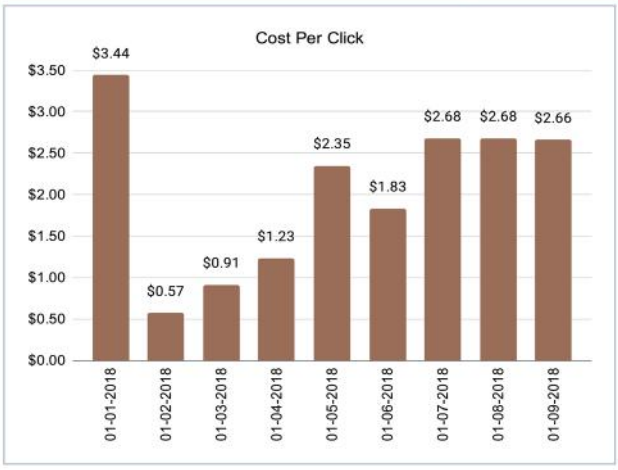
- Data-driven insights led to informed decision-making and enabled the client to invest in supplies that were in demand and launch in new markets.

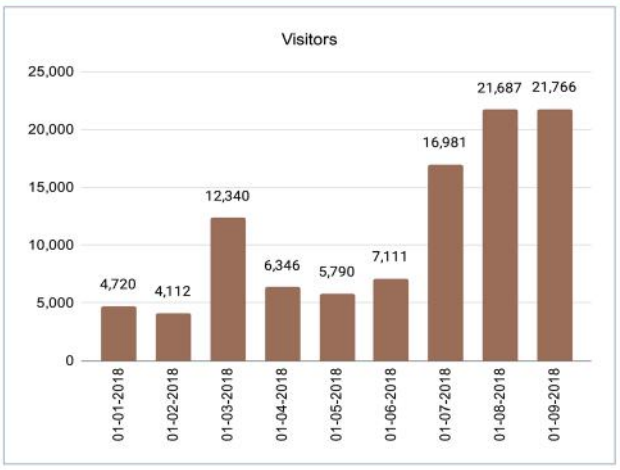
- Lead progression report analyzes activities that agents are spending more time on and helps to streamline such areas.

- Business teams can explore and analyze data easily, extending the value of data throughout the organization.

360 Degree Summary Dashboard

Key Metrics - Cost Per Click and Visitors





Daily Progress Report

Funnel View Report