

DASHBOARD CUSTOMER MANAGEMENT



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& SONS

ISSUE: William Grant & Sons' data source was a jumble of Excel spreadsheets, sourced from several disparate platforms. Manual downloads and analysis fraught with risk of human error made for untimely and unreliable reporting.

IDEA: Promoting customer retention and building distribution through the lens of customer management metrics, such as calls per day, coverage, sales and growth vs targets, and capability to flexibly view data at diverse dimensional levels such as sales rep, geography, outlet type, etc. Understanding of retained, new and lapsed customer mix. Ranking of sales rep performance using weighted scoring methodology; customer acquisition and retention.

EXECUTION: By cleansing data, building sustainable dynamic table joins, and educating the client towards better data governance, we produced a cohesive and highly interactive series of Power BI dashboards.

RESULTS: Activity is monitored much closer to real time, with a multitude of cuts accessible with a few clicks. The reporting was released to great fanfare in Australia and has gained global traction in William Grant & Sons.

