

AT YOUR LIMIT WITH EXCEL REPORTING? IT'S TIME TO AUTOMATE WITH SAS



A Digital Transformation Case Study: Win-Loss Reporting

A tech company generated thousands of sales cycles per year across many products. Their goal was to leverage win-loss data into insights: products sold, opportunities lost, and sales team performance. This intelligence would inform product direction, optimize sales staffing, and launch new campaigns.



Challenges

Data was scattered across multiple databases and the cumbersome **3.5 day - 34 step process** to generate their win-loss report happened quarterly at best, due to limited resources. Often by the time the report was complete, data was outdated, and decisions were made by 'gut feel'.

Solution - Process Automation in Two Phases

The business analyst elected to tackle automation in two phases. Below is an overview of how the tech company navigated to 'always on' daily insights with interactive web-based dashboards.



34 Steps - 3.5 Days Quarterly
BEFORE

Queries, Exports, Vlookups and Manual Manipulation



Insert columns
Copy data from report
Create 7 Vlookups
Re-categorizing data



21 pivot tables
32 graphs



Copy data to create charts
Presentation distributed

Since the tech company's customer and sales data resided in 3 databases or reports, the business analyst ran queries and produced exports for Excel. Next the analyst inserted columns, copied data from multiple report sources, re-categorized data, created 7 vlookups for a consolidated view, and conducted manual comparisons for multi-select fields. Manual categorization of products was especially taxing as it was time intensive, error-prone, and subjective.

Once armed with a single source of win-loss data, the business analyst created 21 pivot tables and 32 graphs for further analysis. The graphs provided insight on win-loss data including product, customer size, operating system, existing customers, new clients, and number and value of opportunities. Then the analyst copied and pasted charts into a PowerPoint presentation that was shared with management and the broader team. The win-loss data provided the foundation for new insights but, by the time it was created, it was no longer current. Plus intel for the new questions the report inspired couldn't be quickly generated.

13 Steps - 0.5 Day monthly
AFTER - PHASE ONE

Eliminated Excel Pivot Tables, Graphs and Reports



Insert columns
Copy data from report
7 Vlookups



Upload Excel to SAS Monthly
Re-categorizing data
1 time dashboard set up



Live, interactive web-based dashboards

The analyst turned to SAS to automate pivot table creation. Once the Excel was compiled in the 'before' process, data was imported into SAS. Dashboards were created using advance filtering, interactions, and drag and drop functionality, which eliminated the need to create pivot tables and graphs.

The initial set up took ~2 days. But unlike the previous pivot and graph process, the creation of live, interactive web based dashboards was a completely automated, hands-off process.

Always On & Interactive
AFTER - PHASE TWO

Eliminated Excel Completely



1 time set up of data sources



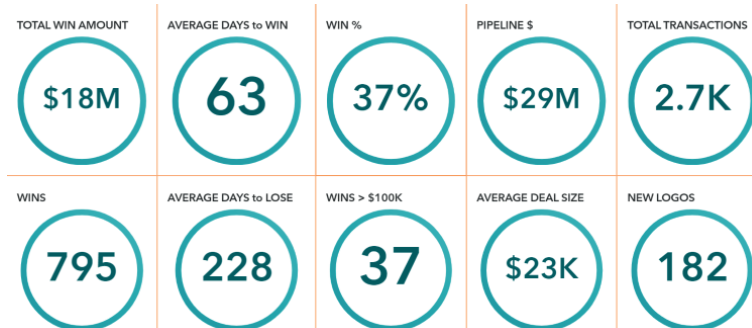
21 Interactive Self-Service Dashboards with daily data refreshes via a hands-free, automated process



Live, interactive web-based self-service portal

The last phase eliminated the Excel spreadsheet by setting up live connections to the source data. The first step was to determine the proper data fields and to collaborate with the database administrator to map 30 data fields from the 3 data sources used in the consolidated Excel file. The extraction, transformation, and loading (ETL) process to bring raw data into report-ready data was initially tedious - 20 hours - but the rewards were tremendous as it formed the foundation for automation and deeper insights.

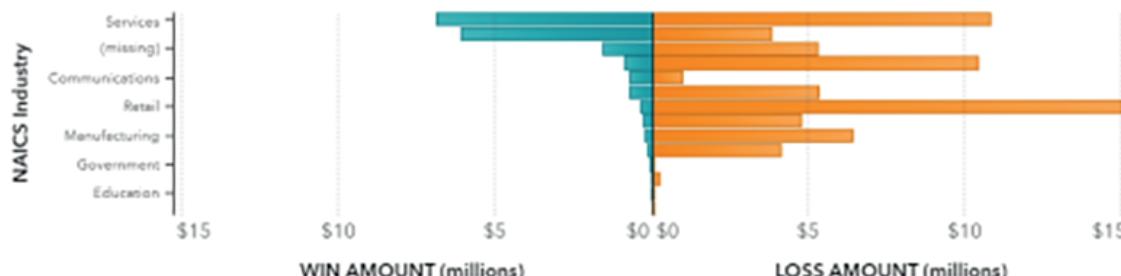
With live source data, the analyst was able to extract the data directly and eliminate the manual process. Once ETL jobs were created and dashboards were live, the entire refresh process was scheduled. Results are pushed directly to the SAS data repository, so that the dashboards are always live and up to date.



Benefits and Insights: Double-Digit Revenue Growth and More

Decisions are now made with confidence and driving results: double-digit annual revenue growth and year-over-year monthly revenue growth. Product analyses prompted a need for tighter product family focus and informed conversations with product management. A new prospect campaign was quickly initiated, targeting a promising product family with repeatable offers. To maximize sales effectiveness, teams were shifted and staffed commensurate with customer and industry opportunities. With new insights, new and more in-depth questions can quickly be answered. Now the analyst can focus on the next case study on their digital transformation journey.

HIGHEST REVENUE GENERATION TOTALS



Talk with SAS about supporting your digital transformation initiatives, reach out to the **contact center**.