



Driving better data delivers better performance

Salesforce Einstein consolidates data and provides real-time insights into the business

Region: North America

Industry: Transportation

Technology solutions: Salesforce Einstein





Challenge

- Client needed to better visualize and use data from across sales, service, and marketing to make more informed data-driven decisions.
- Each account had no fewer than seven owners or part-owners. For example, a waybill lists the cargo owners, shipper, receiver, care-of owner, and more.
- No way to perform variance analysis using a mixture of Salesforce and external data; data was housed in siloed spreadsheets
- Needed better insights into marketing impact and return on investment



Solution

- A system that blends Salesforce data with the client's forecasting tool and transactional sales system, which included more than 50 integrations
- Flattened the multiple-owner model and customized solutions for account teams so users could filter by team member segment combination
- Salesforce Einstein Analytics dashboards measure performance over several timeframes and measurements to provide better analysis and insight. It can then be visualized across account, forecast, group, sub-forecast group, destination, and more.
- All data is reliant on the waybill, which has multiple owners including benevolent cargo, shipper, and receiver.
- With trend visualization the only exception, the solution has no-SAQL dashboards exposed to users.
- Created dashboards to show KPIs and variance analytics built on compare tables. Tables visualize measure, variance, and variance percentage



Results

- Users' access to data is controlled based on their ownership and hierarchy.
- Analytics application consists of three dashboards: My Portfolio, Overview, Account Detail. The My Portfolio and Overview are embedded on the Salesforce home page.
- With 23 billion combinations of pricing, a new tool created by the pricing team on the Einstein platform decreased the overall search duration by 97 percent.
- Dynamic calculations mean all columns for visualized data are sortable by clicking on the header, with a default that highlights the poorest-performing percentage.
- Data is presented on dynamic dashboards that show complex calculations but allow the user to view variations of the data. Users can gain insights in up to 50 different measures.
- Client users are able to cut their time spent on preparing for customer contact significantly (estimated to be as much as 85%).

[Read more about our Salesforce capabilities here.](#)

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Note: current conversion is €1 to \$1.09 (4/1/20)

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