

PENSION AUTO-ENROLMENT MARKET LEADER STREAM-LINES THEIR MANAGEMENT REPORTING

THE CHALLENGE

Our client is a market leader in enabling companies to setup and manage their company pensions. It is a complex business that integrates with many pension providers and sells to all types of industries and company sizes. They have a very well structured sales and account management organisation. They successfully use Sales Seek CRM (www.salesseek.com) to manage their sales pipeline. Their challenge was bringing data together from Sales Seek and their own internal customer and billing systems in order to get a real time view of their business. This was being carried out by the IT department and analyst staff to create and maintain Excel spreadsheets and PowerPoint reports for management. This was a costly process and difficult and time consuming to create new reports.



THE DDAAS SOLUTION

Ddaas setup data warehouse automation tasks to pull data from all of the systems through a combination of file extracts and API integrations. Our Sales Seek API integration is now available for any of our clients to take advantage of. Raw data is cleansed and aggregated automatically on a regular schedule.

Microsoft Power BI reports take this data to present management KPI reports on demand. The team can simply open Power BI and see the current state of the business at any time without any manual intervention. This has resulted in real value to our client with real time accurate reporting and a significant cost reduction in managing the process.