



Trends International Centralizes and Transforms their Data Strategy with AllCloud



Trends International is a leading publisher and manufacturer of licensed posters, calendars, stickers and social stationery products. Trends manages every aspect of the route-to-market for major institutions and organizations looking to get their branded merchandise in the hands of the end consumer. The company previously managed a significant portion of their business in Excel and were experiencing operational inconsistencies due to a lack of streamlined processes, absence of a centralized customer database and usage of different operational metrics across the business.

Summary

Trends International was previously using PeopleSoft (ERP) as their standard reporting tool with most report manipulation being performed in Excel. The team wanted to improve sales efficiency, increase visibility on pipelines, and grant wider access to their sales data across teams. They approached AllCloud to leverage Salesforce.com, Tableau, and a data warehouse solution to allow their business to take strategic control of day-to-day decisions. Considering that they were selling significant volumes directly through Amazon, they wanted to also include sales data from the Amazon marketplace within the Salesforce platform. They needed to decrease the cost of B2B transactions and increase B2B topline sales, with their main goal being to reduce the cost-to-scale of the business by future-proofing it with replicable processes powered by a firm digital foundation.

Like many organizations, Trends had a large volume of data in their back-office that was previously only manipulated for reporting in Excel and did not provide accurate KPI reports that were timely and updated. It was time consuming to add business logic and pull reports that were standardized and accurate. So much manual data analysis meant the team could not focus on revenue generating activities as the disconnected systems created gaps in the customer lifecycle. The need was to have a data warehouse that contained

all of their product and sales information within a single centralized repository. The goal being to achieve real-time data analysis with dynamic dashboards to allow them to manage their B2B customer lifecycle on a single digital platform.

Challenges

Trends International struggled with their sales reps lacking real time access into key accounts and relying on the developer team to extract reports from PeopleSoft (ERP). Reps spent the first part of each month manually analyzing their own account data to optimize store assortment or introduce new product listings, with the ultimate goal of increasing store performance.

Creating sales reports was cumbersome because salespeople and decision makers were dependent on the IT team for the data to drive KPI calculations. They required a centralized repository with standardized dashboards where they could access their data and run reports seamlessly comparing the same metrics across teams.

Solution

Working with AllCloud, the Trends International team realized that the most obvious solution was to consider centralizing their data footprint within a modern data warehouse and then selectively persisting key data sets and metrics within Salesforce Consumer Goods Cloud via scheduled ETL activities. The project team selected Matillion as the preferred ETL to extract data from their source system and insert to Snowflake. This would involve loading data, adding business logic, and enabling it to allow straightforward report building and visualizations via Salesforce CRM Analytics for data visualization. They also planned to utilize AWS EC2, SNS, and S3 for data warehouse hosting. With a firm plan in place, the project kicked off with an initial evaluation process - the resulting design and engagement phases took place over the span of the next 6 months.

To establish an efficient and logical data model within the salesforce platform, AllCloud utilized the Consumer Goods Data Model for visibility and access into customer accounts, retail stores, products and retail execution data. They also enabled the team with a standardized approach for sales reporting including consistent collection and retention of customer, product, and store data. The primary objective



being to centralize key account data and provide real-time visibility into products and retail execution data to glean standardized insights from the valuable retail account data. The team also provided closed loop reporting with all enterprise data managed within a singular data warehouse - this has enabled near real time visibility into attainment of KPIs for macro and micro level reporting flexibility.

For the **Data Warehouse Project**, AllCloud built a data analytics foundation that supported the company's business goals through granular requirements gathering to understand the true business objectives. The project focused on acquiring data from the transactional source system of record, PeopleSoft, various file sources as well as the Amazon API. The newly acquired data within Snowflake was modeled into a Data Mart including the build and deployment of ninety-two (92) KPIs within Snowflake. A Foundation was set on AWS platform for additional growth and workloads to be migrated in the future. Trends International had already established an AWS S3 footprint before the AllCloud team began work and wanted to retain that data value. AllCloud worked to set up a site to site VPN, deployed Matillion on AWS, built their warehouse on Snowflake on AWS.

Results

The biggest win for Trends International was the implementation of 92 metrics for their sales reporting and data activation activities. AllCloud implemented a fully functional Matillion pipeline from PeopleSoft, Amazon API, and a file based ingestion process for various CSV files to be acquired regularly, landing all previously disparate data into a unified Snowflake data mart.

The AllCloud team also provided 30-hours of solution education, demonstrations and know-how, including training for Tableau CRM to all Trends International stakeholders.

"The biggest benefit we achieved from our partnership with AllCloud was having a solution that did not require us to create reports from scratch each week using different metrics. AllCloud set us up for automation, saved time for IT and business users, and charted a path for scalability."

- Brian Grile - VP Sales Planning & Analytics, Trends International