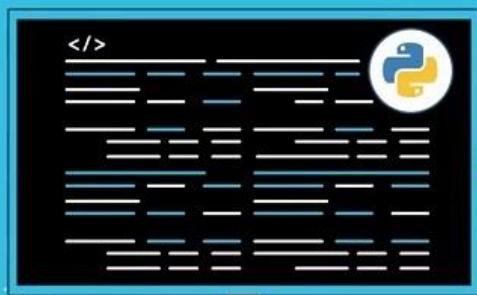


# Machine Data Analytics Platform Modernization Using Snowflake



**TECHNOLOGIES USED:**  
Matillion, Snowflake Data Cloud, Salesforce, Text and Tableau Online.

Our customer is a cloud-based (SaaS) machine data analytics company focusing on security operations and analytics use cases to drive differentiated customer experiences. They must integrate data across source systems like Salesforce, NetSuite, Coupa, Zuora, Marketo, Google Analytics, and SUMO-On-SUMO with the data cloud.

## Objective:

The main objective was to build a scalable data cloud platform to collect, consolidate, cleanse data across ERP CRM, Billing, Marketing and SUMO platform data to provide a 360-degree view of their business to executives, operational managers, and trusted data to data scientists for predictive and perspective analytics. The key focus area for the initial phase was to build KPIs and Dashboards for Finance, Sales, and Marketing functions.

Customer wanted to eliminate the complete manual excel based reporting process to generate the KPIs and Dashboards for Executive briefing and SEC reporting and to manage day-to-day operations.

This initiative was to automate/replace the huge manual (laborious) excel-based reporting to generate a monthly executive summary including Revenue, ARR, Pipeline, Headcount, Opex, Capex, Marketing spends, etc.

## Challenges:

The customer needed a complete technology stack, including a Data Cloud platform, Data Integration Tools (ETL/ELT) and an analytical platform for visualization and Ad-hoc analysis, which led to so many challenges, including:

- Infometry had to perform data discovery & assessment activities which involved interviewing business leaders, IT, and the Data Security team to understand requirements, the current landscape to propose enterprise data strategy and architecture, including tools and technologies, along with best practices to deliver analytics solutions.
- It was very challenging for the IT and Data team to support frequently changing business processes and enhancements.
- It also added complexity with the acquisition of companies and the merging of data with the customer system. The Finance and Sales team needed a snapshot-based historical comparison of hundreds of matrices.
- Lack of documentation on excel-based reporting and needed a reverse engineering effort.
- The business process was complex.
- Operational support needed a workaround due to customization

Our customer's purpose-driven data analytics platform needed modernization to reduce overall maintenance and faster delivery of features with improvement to the customer experience with Tableau & Snowflake Data Cloud.

*"Infometry helped us migrate our data to Snowflake Data Cloud and Tableau, by which we were able to reduce our overall maintenance and got faster delivery time increased by as much as 90%." — Director, Data Management and Analytics*



## Solutions:

Customer asked Infometry to redesign and modernize its complicated business model using Snowflake data cloud solutions.

- We provided Enterprise Data Strategy and Data Cloud Architecture which involves Snowflake, Matillion and Tableau Online.
- Worked closely with the infrastructure, security, and IT leadership to procure product licenses, installation, and configuration.
- Integrated Salesforce, NetSuite, Coupa, Zuora, Marketo, Google Analytics, Sumo-on-Sumo and File Systems like Excel and CSV in near real-time with Snowflake Data Cloud.
- Designed and developed Dimensional Modal, Physical and Semantic layer with business metrics, KPIs, and Snapshots for as-of reporting and analysis.
- Built ARR (Annual Recurring Revenue) framework and modelled the complex logic embedded in excel to derive metrics such as New Logo, Upgrade, Downgrade, Churn, and ARR across multiple dimensions.
- Addressed data quality issues by performing data profiling on-and-on going basis and built dashboards to showcase data quality problems and ongoing improvements.
- Built multiple models for sales forecast, pipeline, revenue, earning binders and executive briefing decks.
- Worked with the marketing team to design dashboard templates leveraging customer branding, color pallets, logos, and design patterns.
- With automation, the customer could eliminate 80% of the manual process and rely on a single source of truth for all business metrics.

## Results:

By engaging with Infometry, customers could build an Enterprise Data Cloud and Analytics solution to automate data collection and processing and build operational and executive dashboards leveraging historical and real-time data. Customer was able to close the books on time and also integrate acquired company data smoothly into the Snowflake Data Cloud.

*“Once Infometry helped us to move all of our data to Snowflake Data Cloud and Tableau Online, we could eliminate 80% of the manual process and get an improved data processing model.” — Director, Data Management and Analytics*

## Future:

Now the customer is better positioned with a scalable Data Cloud Integration and Analytics platform to expand further to include engineering, customer support, marketing, and partner management.

*“Data Analysts can now get quarterly and monthly snapshots leveraging Infometry’s automation model to integrate acquired company data smoothly into the Snowflake Data Cloud without worrying about marketing, customer support, and engineering.” — Manager, Machine Data Analytics and Management*

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## About Infometry

Infometry is a world-class Data Management, and Data Analytics solutions provider focused on delivering end-to-end solutions for Data Warehouse Implementations, Data Governance, Big Data Analytics, AI/ML, Salesforce Implementation, and Product Engineering. Headquartered in California with its offshore branches in Bangalore and Canada. Infometry has evolved itself into an innovative market leader by determinedly serving the data domain for over ten years. With a singular focus on AI/ML since its inception, Infometry has a proven track record of delivering data integration and analytics solutions like Snowflake Migration, PC to IICS, Data Strategy, and Architecture, EPM, etc.