

BIRD Analytics

A Seamless Full Stack Business Intelligence Platform

BANKING AND FINANCIAL SERVICES (BFSI)





About BIRD

- An agile and seamless full-stack data management platform that provides real-time access to any of your data
- Allows users to analyze the data using powerful KPI-driven dashboards or through augmented machine learning insights
- With BIRD, enterprises can build instant data pipelines with transformations and design data warehouses with logical data models
- With BIRD, you have access to the broadest range of structured, semi-structured, and unstructured data sources, like databases, ERPs, flat files, big data sources, and streaming and IoT devices
- BIRD helps reduce the BI team's efforts with its no-code or low-code transformation and universal data model framework
- BIRD Augmented Analytics integrates advanced data science capabilities into the platform, allowing for faster discovery and delivery of new insights to assist every business user in making better, more accurate decisions
- BIRD's intuitive, responsive, web-based client in mobile browsers lets you easily create and explore analytics on the device of your choice.

The Company

The customer is a consortium of companies consisting of several Small Business Administration (SBA)-certified Native American Tribal 8(a) and multi-certified organizations focused on providing information technology, management consulting, and general construction solutions to the federal government as well as the commercial sector.

Problem

The consortium has 3 companies catering to Services, Technologies and Constructions. Each of these companies maintain their financial accounting data in QuickBooks. The sales opportunities pursued by these companies are present in Salesforce application and yearly budget is being tracked in an excel sheet.

The executive team wanted to see an integrated analytics solution for all 3 companies that summarized the key financial metrics as well as performance metrics of the opportunities pursued in a single dashboard. Further they wanted a clearer picture of business performance and in-depth analysis of their financial insights at each company level.

Solution

- Three different source (Quickbooks, Salesforce and CSV) connectors of BIRD were used to connect and retrieve the data.
- The multi-source the data was standardized to be consumed for analysis using Workspace, the BIRD's transformation engine.
- A universal data model was developed to create the integrated view of quick books, salesforce and budget data.
- BIRD's visualization suite with its broad range of charts and reports was used to present the business results and share the key findings to the executive team.
- Creation of custom KPIs, profitability analysis, cash flow analysis and other financial metrics were analyzed and presented at each company level.
- Data integrity and security were established at every row and column level and data governance was at each qualified user to view the data and reports.

Result

- An overview dashboard summarizing and comparing the key financial metrics of all companies in the Organization
- Company specific in-depth financial analytics modules that are easy to use and flexible enough to slice and dice the needed information.

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Thank You.

