



HOW SALESFORCE MARKETING CLOUD INTELLIGENCE HELPED THIS HEALTHCARE CLIENT GAIN INSIGHTS AND MAKE VALUABLE DECISIONS

ABOUT THE CLIENT

The healthcare client, a prominent organization in the medical industry, sought to enhance their data management and reporting capabilities. Their diverse data sources and the need for streamlined reporting necessitated the adoption of a robust data integration and visualization platform. To address these challenges, they engaged with Genetrix to implement Datorama, a leading marketing intelligence solution known for its advanced data integration and analytics capabilities.

SOLUTION

- 1. Connecting Data Sources:** Our team successfully connected 10 different data sources from various systems, platforms, and databases to Datorama, ensuring a comprehensive data landscape.
- 2. Configuring Data Sources:** As part of the implementation process, our experts meticulously configured 20 data sources to ensure seamless data extraction and integration within the Datorama environment.
- 3. Configuring TotalConnect for Agency-Provided Files:** TotalConnect, a feature of Datorama, was set up to handle agency-provided files, enabling efficient data exchange and collaboration between the healthcare client and their associated agencies.
- 4. Creating Reporting Data Model:** We developed a robust reporting data model tailored to the client's specific requirements, laying the foundation for accurate and meaningful insights.

OBJECTIVE

The project's primary goal was to leverage Datorama's capabilities to consolidate and harmonize data from various sources, enabling the healthcare client to make data-driven decisions and gain valuable insights.

- **Connecting Data Sources**
- **Configuring Data Sources**
- **Configuring TotalConnect for Agency-Provided Files**
- **Creating Reporting Data Model**
- **Unifying Data Sources**
- **Automating Data Source Refreshes**
- **Setting up Data Transformation Rules**
- **Creating Custom Reporting Dimensions & Measurements**
- **Daily Leads Dashboard and Custom Dashboards**

- **Unifying Data Sources:** Leveraging Datorama's capabilities, we unified all disparate data sources into a single, comprehensive report data model, facilitating holistic analysis and reporting.
- **Automating Data Source Refreshes:** Our team designed and implemented automated workflows to refresh data sources at regular intervals to ensure data accuracy and real-time reporting.
- **Setting up Data Transformation Rules:** Custom data transformation rules were established to harmonize and standardize data from different sources, ensuring consistency across reports and dashboards.
- **Creating Custom Reporting Dimensions & Measurements:** We tailored reporting dimensions and measurements according to the client's unique business requirements, providing deeper insights into key performance indicators.
- **Daily Leads Dashboard:** A dedicated dashboard focusing on daily leads was created, enabling the client to monitor and analyze lead generation metrics in real time.
- **Custom Dashboards:** In addition to the Daily Leads Dashboard, we designed and developed 10 additional custom dashboards, each catering to specific aspects of the healthcare client's operations, thereby enabling comprehensive data visualization.

OUTCOME

The successful implementation of Datorama transformed the healthcare client's data management and reporting capabilities significantly. With a unified and harmonized data environment, the client now benefits from:

- Real-time access to critical data insights from various sources.
- Streamlined reporting processes, saving time and effort for their team.
- Enhanced decision-making based on accurate and reliable data.
- Improved collaboration with associated agencies through TotalConnect integration.
- Actionable insights through customized reporting dimensions and dashboards.

In conclusion, our expert implementation of Datorama empowered the healthcare client to harness the full potential of their data, driving better business outcomes and supporting their mission to deliver high-quality healthcare services. The successful completion of this project showcases our company's expertise in data integration, analytics, and visualization, underscoring our commitment to helping clients achieve data-driven success.