



From Reporting to Real-Time Decision Intelligence:

Transforming Executive
Decision-Making with Tableau



Key Project Highlights

- **Unified Executive Intelligence:**

Merged CRM data, customer engagement history, and 6sense buying-intent signals into a single, cohesive Tableau experience.

- **Automated Data Consolidation:**

Leveraged Salesforce Data Cloud to eliminate manual data aggregation across multiple objects and external systems.

- **Proactive Risk Detection:**

Built real-time analytics dashboards that identify at-risk opportunities 50% faster, allowing immediate commercial intervention.

- **AI-Assisted Business Reviews:**

Integrated automated weekly business review insights to highlight critical pipeline movements and operational risks.

- **Single Source of Truth:**

Replaced static, manually prepared slides with dynamic, live dashboards for executive and sales leadership.



Quick Glimpse

A leading architectural systems manufacturer operating a consultative, multi-stakeholder sales model replaced manual report gathering with a real-time Tableau and Salesforce Data Cloud decision-intelligence platform. By unifying sales performance, customer engagement, and 6sense intent signals into a single view, leadership reduced reporting prep time by 75% while boosting forecast accuracy by up to 20%.

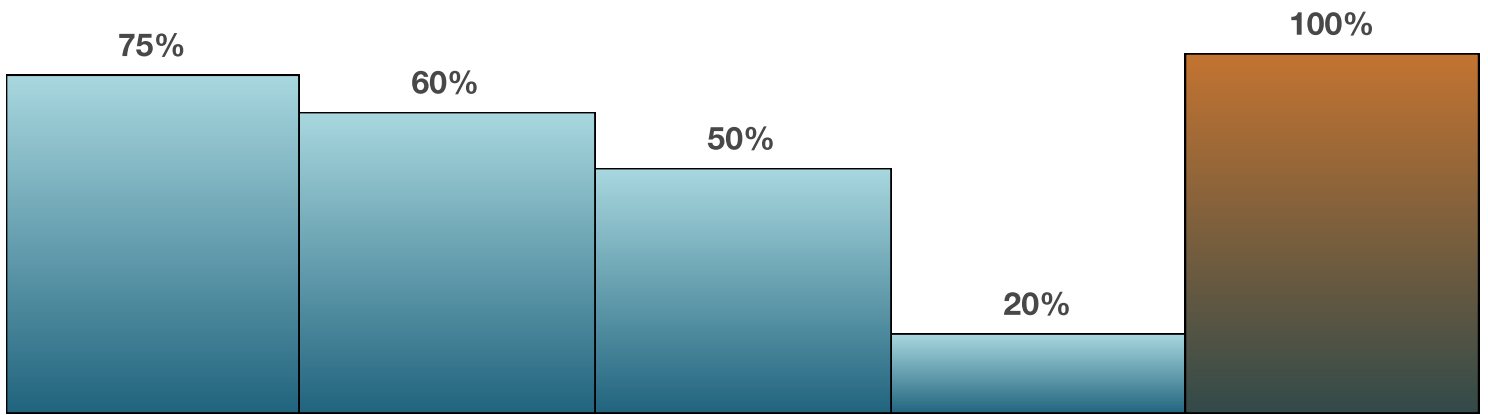
Tableau

Salesforce Data Cloud

Sales Cloud

CRM Analytics

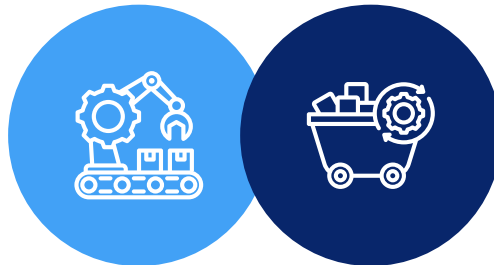
Business Impact



- **75% Reduction** in Executive Reporting Preparation Time (hours cut to minutes)
- **~60% Faster Access** to Commercial Insights via Near Real-Time Dashboards
- **50% Faster Identification** of At-Risk Opportunities for Proactive Intervention
- **15–20% Improvement** in Forecast Accuracy using Unified CRM & Intent Data
- **100% End-to-End Visibility** across Pipeline Health, Engagement, and Intent

Industry

Manufacturing



Building Materials

Technology Stack

Tableau

Salesforce Data Cloud

Sales Cloud

CRM Analytics

Quick Glimpse

A premier manufacturer of architectural opening glass wall systems operating a consultative, project-based sales model involving architects, dealers, contractors, builders, and regional sales teams.

The Challenge

Before this engagement, preparing for weekly business reviews required manually gathering and cross-referencing information scattered across Salesforce objects, engagement channels, and third-party intent tools.

Manual Reporting Overhead:

Leadership spent hours assembling static reports before strategic discussions could even begin.

Fragmented Pipeline Insights:

No single view combined historical CRM activity with real-time buyer behavior or 6sense intent signals.

Delayed Risk Visibility:

Pipeline issues and drop-offs were identified reactively after manual review rather than proactively.

Inconsistent Forecasts:

Data from different sources created fragmented views of commercial health across regional teams.

How We Helped

1. Unified Data Foundation via Data Cloud

We connected disparate operational data streams—CRM records, project updates, customer engagement logs, and 6sense buying-intent data—into Salesforce Data Cloud, creating a harmonized backend for real-time reporting.

2. Interactive Executive Intelligence Platform

We built a dynamic, interactive Tableau platform designed around strategic business questions rather than static charts. Leaders can instantly drill down into:

- Overall pipeline health and opportunity progression.
- Executive KPIs and sales performance benchmarks.
- Customer engagement trends over time.
- 6sense buying intent analytics matched with CRM accounts.

3. AI-Driven Business Review Summaries

We integrated AI-generated weekly summaries directly into the analytics experience, surfacing emerging account risks, notable intent spikes, and velocity changes requiring immediate attention.

The Outcome

The organization successfully shifted from retrospective, manual reporting to an active System of Insight.



Focused Executive Reviews:

Leadership meetings now focus 100% on strategic decisions, rather than debating report numbers or waiting for data to be aggregated.



Proactive Account Strategy:

Sales leaders spot stalled deals and intent signals early, intervening before opportunities drop off.



Aligned Organization:

A single, real-time source of truth aligns sales managers and executives on pipeline priorities and forecasts.

"We didn't just build another dashboard pack. We brought our CRM, engagement data, and intent signals into a single analytical experience, turning hours of report prep into real-time decision intelligence."



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