



Integrating tools to increase customer insights

How Deloitte collaborated across solutions and countries to streamline access to customer data

THE CHALLENGE

In working with customers, insights and efficiencies count. When leaders at Olympus wanted to bring greater customer insights and efficiency to their customer team's reporting capabilities, they turned to Deloitte Germany for help.

Olympus is a leading medical technology company, with global headquarters based in Tokyo. Olympus EMEAs' sales teams in Europe use a Salesforce-based tool they call Advancing Customer Engagement interact (ACE interact) to track their interactions, leads, and opportunities. Olympus also uses Microsoft's Power BI platform for a wide range of analytics and reporting capabilities. These two systems are a powerful combination, enabling data-driven sales decisions and actions.

However, to get the most out of these two tools, sales managers had to log into each system separately, manually looking up data and insights in both the Power BI and the ACE interact platform. For example, sales teams could not search for their orders by sales order number within ACE interact. To search for an order, users had to open an entirely different tool (Power BI).

Users found it inefficient to log into a different system to do their reporting and analysis. They wanted the ability to drive insights directly within their primary customer relationship management tool: ACE interact. Olympus asked Deloitte Germany to make it possible for sales teams to search their Power BI data right from ACE interact, prioritizing two key reports: Orders and Billed Net Sales.

SOLUTION

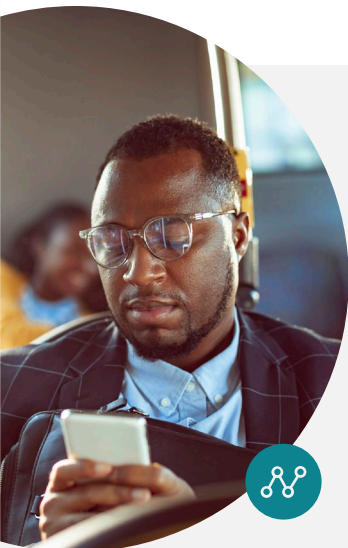
A solution backed by experience

Deloitte has clients all over the world. Chances are that whatever problem a given client might have, somebody within our world-wide network will have already faced a similar one—and solved it. That proved to be the case here. Not only did the Deloitte Germany Consulting team have the skills to integrate Power BI reports into Salesforce-based systems like ACE interact, but the team had done it before.

Another boost to the project was the fact that Olympus was working with teams from Deloitte Germany, India and USA, not only to establish the ACE interact solution, but also to build reporting capabilities based on Power BI. The Consulting team at Deloitte routinely coordinates with advisors from other firms, but the fact that Deloitte was already involved in multiple aspects of Olympus's IT tools meant we could collaborate even more tightly.

Together, our team was able to leverage the knowledge and experience from a previous project to quickly develop the integration Olympus was looking for, using the Azure service principal concept. We coordinated between the teams from all three products (Salesforce, Azure, and Power BI), helping them see what could be done by bringing their platforms together.

Because it was built on previous experience, the entire project, from requirements gathering to deployment, took just ten weeks, including only two weeks of core development.



“This is a big success and a very important step forward. This approach is user-friendly and is bringing reporting much closer to the end-user. Now we can access Power BI reports in ACE interact – without switching applications.”

Christian Pättsch, Customer Platform Lead, Olympus

OUTCOMES

A happy, more efficient sales team

Today, Olympus sales teams can access Power BI reports directly from within ACE interact any time, without shifting programs or logging in separately. They can now search their orders by sales order number and get a single view of all their orders.

Users at Olympus were very satisfied with the outcome, saying, “This is a big success and an important step forward!” and “This approach is user-friendly and is bringing reporting much closer to the end-user. Now we can access Power BI reports in ACE interact – without switching applications.”



3 separate tools
integrated



10 weeks from
initiation to launch



2 pilot reports
embedded

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