

Talent and Resource Utilization Dashboard with Salesforce Einstein Analytics

Company

Digital Transformation
Solutions Provider

Country

USA

Industry

Professional Services

Implementation Partner



Teaming with the best



The client is a hi-tech professional services firm with the sole goal and aims to cater the best class services. They have a cultivated proven set of processes, methodologies, deliverables, and techniques to ensure their solutions and support services yield the best results for our clients.

Their program management and delivery methodologies are designed to fast track customer success.

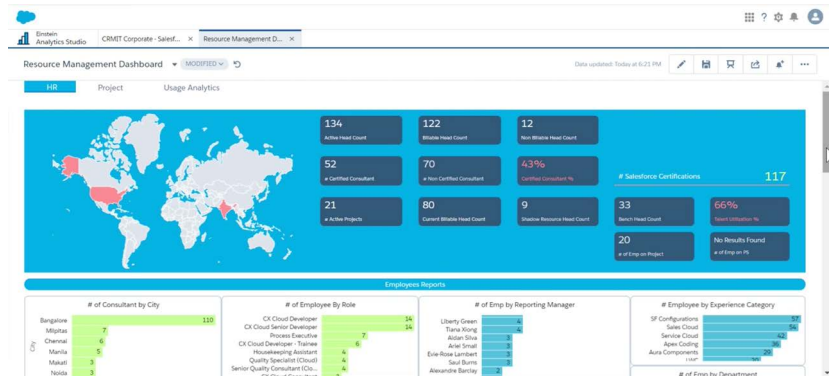
Challenges

- An expanded ability to fulfill the demand for services in the partner channel
- Ability to curate a professional services portfolio that is value-driven
- Map the strengths of resources and track their service portfolio
- Determine bench strength for capacity planning
- Optimizing services and sales collaboration to increase revenue growth
- Focus increasingly on value and outcome services

Solution

An AI-powered Einstein Analytics (now Tableau CRM) dashboard was created to show leaders how much they can expect from their teams so they can conduct better resource planning, identify possible gaps, and allocate resources where they're most needed.

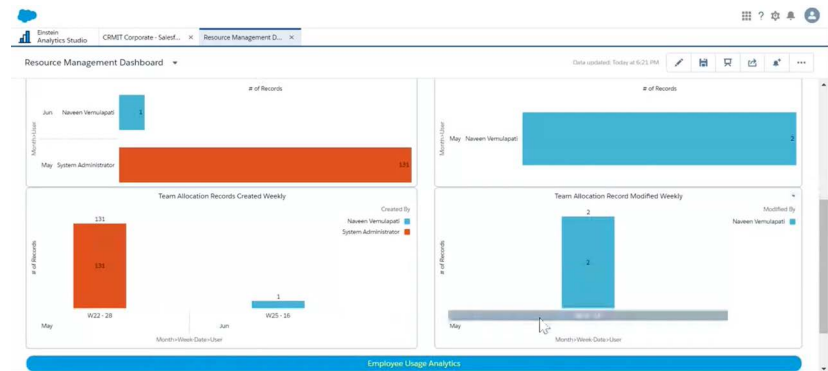
- Adding the custom fields to show different employees data in a single dashboard
- Configuring the project section in the dashboard to visualize project details
- Enabling resource utilization matrix to let clients get detailed information about project teams
- Resource management dashboard overview was added to enable visualization of employees demographics & certifications
- Adding visual scenarios to prepare for unforeseen circumstances like budget changes or loss of resources



Talent Pool Reports



Project Management Dashboard



Usage Analytics

Benefits

Talent utilization dashboard enabled effective managing of entire resources improving employee contribution and productivity with the following benefits:

- Smarter scheduling and hiring decisions were made after analyzing the utilization of resources
- Each resource's utilization score can be viewed for any selected timeline - be it a particular day, week, a month, or more
- Projects were managed with better visibility and transparency, reducing the risk of oversights
- Monitoring team's productivity and utilizing resources to their maximum potential helped derive a better ROI
- It paved the way for operational analysts to compare billable and non-billable utilization of resources
- Understanding the overall resource allocation and planning future engagements based on the availability of the employees
- The talent and resource utilization dashboard offer one source of the truth