

CASE STUDY

FINANCIAL DASHBOARD SOLUTIONS FOR ONE OF CANADA'S BIGGEST RETAILERS

Client Background

Our client is one of the biggest retailers in Canada which sells a wide range of automotive, hardware, sports and leisure, and home products.

Business Challenge

The client was experiencing visual design challenges with its inventory and financial dashboards, making it difficult to quickly and accurately ascertain information to make informed retail operations decisions. They needed clean and informative data visualization to assure easy and quick access to all slices of data, communicate the company brand. The client's CFO and CTO felt the needed speed and impact was lacking and adoption was limited.

Project Description

The client consulted SoftServe to leverage its comprehensive, end-to-end success framework for outside-in and crowd sourced ideation, market validated concept development, and commercialization.

During research and information gathering, SoftServe utilized a number of ideation techniques, including user interviews, journey maps, report life circle, and features brainstorming to better collect and understand what the main flows were, and prioritize requirements.

These ideas needed to be refined into market-validated concepts ready for implementation. The concepts, assumptions, and market feasibility had to be verified through an iterative process. Nonfunctional clickable prototypes gave SoftServe engineers the ability to test the solutions before actually building them, which helped to avoid mistakes and thus saved time and money. Each flow was prototyped and tested before development. The Invision app was used as a prototyping tool.

A responsive design of dashboards provided an optimal viewing and interaction experience -easy reading and navigation with less need for resizing, panning, and scrolling - across a wide range of devices, from desktop computers to mobile phones. To provide a timely implementation of a solution, SoftServe maximized existing tools and built the design on top of existing backend components which greatly accelerated development and saved previous investments into existing backend tools.

A unified UI components library was created which communicates existing reusable components with their states inside the team and for other projects in order to provide common user experience across the organization. Using a Zeplin tool provided developers with sizes and attributes for all layouts and components, including color, font size, margin and grid settings.

Creating and delivering a well-planned and executed implementation approach is key to driving outcomes and value for the business. SoftServe brought its engineering expertise and human-centric experience design knowledge to create a range of dashboard and visualization solutions including:

- **Finance Dashboard** - this provides users with short and long term views of finance performance on key metrics such as sales, shipments and margins. Users can compare results vs. prior year or budget. They have the ability to drill into the results based on dimensions such as product, deal type, channel and province, and product attributes such as seasonality and product profile.

- **Inventory Management Dashboard** - highlights risk areas to allow the user to quickly identify what areas require immediate attention. It provides historical and projected views to key inventory management metrics such as shipments, receipts and projected inventory; and gives the ability to drill down based on dimensions such as product, deal type, channel, and product attributes.
- **Financial Explorer** - provides users with short and long term views of CTR retail performance on key metrics such as sales, shipments and margins.
- **Report Repository** - is a unified reports library, which provides users with an easy access to financial data and centralized access to reports. The goal is to transition from pushing data to employees to pulling it in when needed. This saves the time by providing discovery capabilities to find reports, manage them, and keep efforts from being duplicated. It keeps records up to date and accurate across the entire organization.
- **IT Capital Reporting** - this tool provides users with short and long term views of IT Capital Projects performance on key metrics such as GROSS, CAP, OPEX and CAP Rate. Users can drill into the results based on dimensions such as EVP, IT VP, Portfolio, Lens and others.
- **Margin Building Blocks** - this tool provides users with short and long term views of margin drivers. Users will have the ability to review biggest EGM Rate Drivers and Top Net Cost Impact SKUs. Users have the ability to drill into the results based on dimensions such as hierarchy, brand, SKU status and others.

Value Delivered

To achieve better data visualization, the client consulted SoftServe to understand and transform the how analysts were interpreting the data versus how they were getting it. SoftServe built custom dashboard charts and a flexible filtering system that supported the business needs.

The primary strategic goal of our involvement was achieved – enhancing the speed and impact that was requested. SoftServe has changed the way the client consumes reports and they use these in their decision-making process.

Key achievements realized from implementing these dashboard solutions include:

- Up to 4x faster and cheaper - Re-using some of the work from the initial project helped ensure that later projects were delivered 4x faster and cheaper, without sacrificing quality or functionality.
- Widespread internal adoption by 300+ employees.
- Proof-of-Concept (PoC) Factory - The first initial project “Financial Explorer” was so successful so that it gave our client’s stakeholders credibility to suggest and implement projects they want, which evolved into PoC factory where they work with SoftServe to gather requirements, build a clickable prototype, demonstrate it to executives and seek funding, and then implement it. Many of the systems mentioned above are a result of this Proof-of-Concept Factory.

ABOUT US

SoftServe is a global digital authority and consulting company, operating at the cutting edge of technology. We reveal, transform, accelerate, and optimise the way large enterprises and software companies do business. With expertise across healthcare, retail, financial services, software, and more, we implement end-to-end solutions to deliver the innovation, quality, and speed that our clients' users expect.

SoftServe delivers open innovation – from generating compelling new ideas, to developing and implementing transformational products and services. Our work and client experience is built on a foundation of empathetic, human-focused experience design that ensures continuity from concept to release.

Ultimately, we empower businesses to re-identify their differentiation, accelerate market position, and vigorously compete in today's digital, global economy.

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