ANALYZING VISUAL DATA TO TRACK SHIPPING TRENDS

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EXECUTIVE SUMMARY:

CTSI is the world's largest privately held freight audit and payment services provider, specializing in supply chain management expertise and technology. Each day they process between two and four million freight invoices and, with that amount of data, their customers were interested in reporting and analyzing it.

CTSI's Development Manager, Todd Winton, was eager to find a way to visualize the data so customers could pull key information and trends. After coming to Sisense he found that they could begin to easily visualize data to show shipping trends, provide a deep analysis into customers' transactions and invoices, and create a system that encouraged team members to login and examine the data.
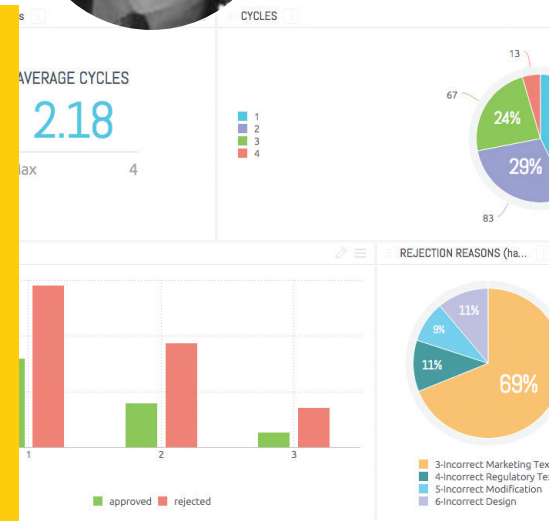
THE CHALLENGE: TRACKING TRENDS IN A VISUAL WAY

With the vast amount of data that CTSI was pulling in each day through millions of invoices and bills, they wanted to find a system that could visualize this data for their customers and provide a place where they could track key trends in the shipping industry.

They were not able to provide any kind of deep view into transactions and wanted to offer their customers the chance to see what was going on with their bills on a day to day basis.

But taking it one step further, they needed a platform that their customers would actively sign into in order to track those trends. For Todd, getting their services personnel on board and regularly checking the data was a must in order to provide the best analytics and data information.

THE SEARCH IS ON

CTSI went through a lengthy process to identify the right vendor for their needs. Eventually they scoured a top ten list of providers and went with Sisense because of how easy it was to implement and how simple it was to embed the tool into their TMS application.

After finding they could embed Sisense within their SaaS application they were soon deploying it on a single customer who acted as a guinea pig. Through this, they learned a lot about Sisense and how they could implement it further to gain the best results and the most detailed data for their customers.

With Sisense, they also had the option to let their customers design their own dashboards on a higher membership plan. In addition, Sisense allowed CTSI to give their customers a deeper view into the transaction data and provide them with visuals of their bills on a day to day basis by storing invoices in process as well as historical data.

USING VISUAL CUES TO DRIVE BEHAVIOR

Sisense has been a huge hit at CTSI. Even in the early stages the team could see how it was able to take incredible amounts of data and turn it into something that allowed their customers to clearly see shipping trends – including who their vendors were and what their end customers were looking for.

With Sisense's ability to access data in real time, customers can view data by the hour and regularly determine whether they are on track to hit their daily billing goals. With a test group of around 20 members, CTSI managed to glean a good idea of what data was most important to their clients and figure out more ways to mine this information. What's more, CTSI are positive that they'll have ROI on the application after the first year based on sales trends and, with the advanced features, are now able to drive behavior with simple visual cues.

HERO MOMENT

Todd found that, even once Sisense was installed and their customers had access to their dashboards, they struggled to get internal services personnel to login and track data. The answer? The lightbulb feature in Sisense Bulb, which shines red when less than nine users are logged in, yellow when 10 to 19 are logged in, and green when more than 20 services personnel are logged in.

Without logged in users, CTSI couldn't see whether the system was working and how their customers were using it, but the light bulb kicked people into action. Early adoption was low, so Todd took the lightbulb system to the management team to show just how simple it was to get more people to login with a simple visual system. This meant CTSI could get a better understanding of their customers' needs and their customers were able to make the most of the data they had at hand.

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> " SISENSE HELPED REITERATE THAT TRAINING MENTALITY WE NEEDED. "