



# Tableau Maintenance and Support Services Enable a Transportation Services Company Cater to New Business Requirements with Ease

## CASE STUDY

**Customer:** A leading provider of multimodal transportation services

**Size:** 51-200 employees

**Location:** Chicago, Illinois

**Industry:** Logistics and Supply Chain

**Profile:** The company provides logistics solutions to freight forwarders and customers across the United States.

**Services:** Tableau Maintenance and Support

## Business Need

The logistics company has been operating since 15+ years with the goal of providing logistics solutions to freight forwarders and customers in a variety of industries across the United States. With focus on simplifying logistics and optimizing transportation solutions, the client is always on the lookout for adopting the latest technologies to run business smoothly and exceed customers' expectations.

Given the rich portfolio of transportation and logistics services the client provides to its customers, getting insight into day-to-day operations had become challenging. Although the client was already using Tableau for data visualization, as business needs change, the client was struggling to identify patterns or spot trends to improve customer experience.

The client was, therefore, looking to engage with a partner who could maintain and support their existing Tableau reports while making changes and developing new reports within Tableau as per business user requirements. The client wanted to improve the efficiency of their Tableau tool to achieve end-to-end visibility into daily operations in the form of interactive dashboards.

Because Synoptek has been involved in several other IT-related projects in the past such as TMS solution implementation as well as data migration services, the client wanted Synoptek to once again take up the Tableau maintenance and support project.

## Solution and Approach

*The client has been using Tableau to create interactive graphs, charts, dashboards and worksheets across several metrics including goal tracking, score cards, gross margin, gross revenue, and more. The client also built daily and monthly salesperson-wise KPI tracking reports to measure performance of their sales team and take steps to improve their efficiency.*

To meet client's new data visualization requirements using Tableau, Synoptek began the engagement by carrying out a thorough assessment of existing Tableau capabilities, usage, challenges, and issues. This helped us in getting a detailed understanding of what problems the client was facing, what problems it wanted Synoptek to address, and what new requirements it wanted to accomplish.

Synoptek carried out a host of activities to improve data visualization efficiency using Tableau Desktop, Tableau Online, and MySQL Database:

- Understood existing issues across data refresh, incorrect calculations etc

- Provided support and maintenance on existing Tableau reports
- Implemented new changes and developed new reports as per business users' requirements using MySQL database and Excel as source.

Synoptek also developed executive (EOS) scorecard reports which included following KPIs:

- New customers
- Customer served this week
- Average loads, gross margin
- Average tracking time etc

## Business Results

*With Synoptek's Tableau maintenance, support, and report development services, the client has been able to:*

- Easily integrate data from numerous data sources
- Build appealing yet functional data visualizations to pave the way for performance improvements
- Create interactive dashboards and reports to enhance sales/ carrier rep productivity
- Spot business trends easily and improve operational efficiency

## About Synoptek

Synoptek is a global systems integrator and managed IT services provider offering comprehensive IT management and consultancy services to organizations worldwide. Founded in 2001; headquartered in Irvine, CA, we have offices and resources across North America and delivery centers in Asia.



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