

BACKGROUND



Magenta executives are noticing that **churn** within their customer base has been higher than usual, and they want to understand the customer journey as their clients flow through the three teams.



Fulfillment Center



Sales Reps



Servicing Team

Magenta put Atrium in touch with a Senior Sales Representative, Elaine Gadget, so we could get an idea of the current sales process and its pain points.



Elaine Gadget
Senior Sales Representative

ISSUES

- 1 Siloed teams, separate systems
- 2 Miscommunication
- 3 Lack of insights



Fulfillment Center



Elaine Gadget



Salesforce



Servicing Team

When Elaine closes a deal, she loses visibility because order fulfillment is tracked in a separate system. Her customers are either new leads or existing customers calling to purchase new widgets. After the call, she puts in an opportunity in **Salesforce** to track the opportunity and produce quotes for her customers. However, once that opportunity is closed, Elaine is in the dark.

Fittingly, the Customer Service system also uses a different system, and they can't see her Salesforce information either.

This is preventing Elaine and the servicing team from meeting the customers' needs and leading to missed cross-selling opportunities. To keep from losing more of Magenta's customers, they need better insights and communication.

SOLUTION



Snowflake



Salesforce

Tableau CRM

Elaine needs data from other systems to be front and center in her system of engagement (i.e., Salesforce). In the past, this involved some complex data integration to accomplish.

Here's how Atrium uses a centralized data hub like **Snowflake** to make getting that external data into Salesforce easier.

In addition, the Atrium team will use the power of Tableau CRM to present this data to Elaine and her team within their daily workflow.



SOLUTION CONT.



Jake Custer
Senior Data Architect



Elaine Gadget
Senior Sales Representative

Jake Custer is the Senior Data Architect at Magenta, after listening to Elaine's issues, he has **identified the systems that need to be integrated below** and **produced the following diagram that details his desired integration architecture:**

Jake's goal as Senior Data architect was to bring Elaine's order data to Salesforce to give her a holistic view of her customers. Jake decided to use **Snowflake** as a data hub, bringing in data from AS400 via AWS.

While Elaine is ecstatic to have order data in Salesforce, she needs an easy way to consume and interact with this information.

Thankfully, Magenta has teamed with Atrium to help solve her problems. Atrium has a defined methodology around using statistical models to identify trends in data, build predictions, and surface them for end users in Salesforce.



Order Management: AS400



Amazon Simple Storage Service (S3)



Snowflake



Tableau CRM

Salesforce



Salesforce



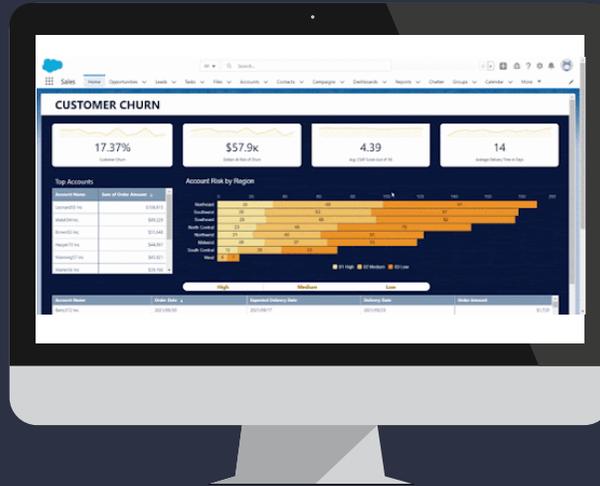
At Magenta, not all the relevant information for understanding customer behavior is in Salesforce—but thanks in part to Jake Custer's brand new integration between Snowflake and Salesforce, many of the most important pieces of information are now available to be explored and easily accessible in a single location.



Using Magenta's customer data, Atrium built a model to predict which customers were at risk of churning. This allows Elaine to identify these clients and take care of their needs before they leave.



Now that all of the external data is in the same Snowflake table, **Magenta can use the Snowflake Input Connector to sync the data from Snowflake to Tableau CRM.**



Interested to learn more about how Atrium can help you tackle customer churn with predictive insights?

Contact us!

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RESULTS

Being able to connect the data from Snowflake to Tableau CRM is a game changer; it reduces data silos, lets Magenta access all its data in one place, and unifies Magenta's insights.

Using the dashboards Atrium created in Tableau CRM, Elaine can quickly look at where she was in December of 2020 and toggle between customers that our model has determined are of high, medium, or low risk to churn.

