

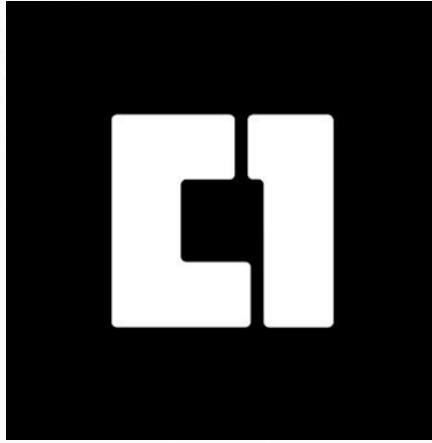
# Enterprise BI Strategy & Revenue Integrity Transformation

Building a Single Source of Truth & Elininating  
Forecasting Distortion at Converge 1

by Khanjan Patel



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- forecast_model();  
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## Context

The organization operated with fragmented data systems, manual reporting cycles, and inconsistent pipeline reporting practices. Sales and marketing operated in silos. Finance lacked reliable attribution visibility. Forecasting discrepancies were recurring. Inflated pipeline figures and policy loopholes had historically distorted revenue projections.

## My Role

I architected and implemented an enterprise-wide BI ecosystem designed to:

- Establish a Single Source of Truth.
- Eliminate forecasting distortion.
- Align Finance, Sales, and Marketing.

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# Intervention 1

## Enterprise Data Architecture

I engineered an integrated Sales and Marketing data mart aligned with Finance data.

Key outcomes:

- Automated manual reporting workflows.
- Reduced reporting cycle time.
- Ensured 100% cross-functional reconciliation.

This unified previously siloed departments into one analytical framework.

# Intervention 2

## Revenue Attribution Model

I developed an attribution model linking marketing campaigns to realized revenue.

This enabled:

- Precise ROI calculation.
- Resource reallocation toward high-performing campaigns.
- Elimination of vanity metrics.

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# Intervention 3

## Forensic Revenue Analysis

Conducted deep forensic data audits to uncover:

- Inflated pipeline entries.
- Non-existent leads.
- Policy exploitation.

In partnership with Sales Directors, I:

- Instituted mandatory pipeline validation protocols.
- Removed invalid opportunities.
- Standardized reporting discipline.

Forecasting discrepancies were eliminated by grounding projections in verified data.

# Intervention 4

## Revenue Concentration Strategy

Through revenue concentration analysis, I identified that:

10% of customers contributed 87% of revenue.

This insight triggered:

- Strategic pivot toward high-value accounts.
- Targeted resource allocation.
- Leaner, ROI-focused sales operations.

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# Intervention 5

## CRM Migration & Continuity

Led BI transition from Dynamics CRM to NetSuite.

Responsibilities included:

- Designing a new Power BI architecture from scratch.
- Reconciling incomplete historical data.
- Ensuring 100% data integrity post-migration.
- Developing real-time dashboards for backlog and fulfillment tracking.

Business continuity was maintained throughout the transition.

# Impact

- Established enterprise-wide data integrity.
- Eliminated pipeline inflation.
- Enabled C-level real-time visibility.
- Improved forecasting accuracy.
- Increased sales efficiency by reallocating resources to high-ROI segments.
- Reduced reporting latency significantly.

This transformation repositioned BI from reporting support to strategic governance infrastructure.

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