



Schneider Electric Drives Front-Office Efficiency with Alteryx

CHALLENGE

Schneider Electric wanted a faster and more efficient way to identify its high-potential customers and quickly deploy sales resources at the end of the year, enabling the company to close more business and drive revenue.

SOLUTION

Schneider Electric uses Alteryx to automatically gather, manage, and blend in-house and third-party data, delivering deep insights to its sales team in less than half the time as previously required.

RESULTS

- **Deeper Insights:** Improved data quality and incorporated more data sources, giving sales managers the insight they needed to optimize sales resource deployment on key customer accounts
- **Hours vs. Weeks:** Reduced data gathering and analysis from eight to just three weeks, resulting in faster deployment of sales resources to the right customers
- **Intuitive Workflow:** Shared and re-used analytic applications between analysts, increasing productivity and time-to-insight

Introduction

A global specialist in energy management with 150,000 employees and operations in more than 100 countries, Schneider Electric offers integrated solutions across multiple market segments, including utilities and infrastructures, industries and machine manufacturers, non-residential buildings, and data centers and networks. With sales of nearly 24 billion Euros in 2013, the company is focused on making energy safe, reliable, efficient, productive, and green.

“With well over 100 different data sources to manage, my team is the data hub of Schneider Electric in the U.S.,” says Tom Sturgeon, Director of Business Analytics at Schneider Electric US. “We work closely with the sales and marketing group, which depends on us to deliver insights from all of that data to help them sell and create demand for our products. We plug in customer data, sales data, channel sales data, market data, company financials, and more to get the answers we need.”

But it’s about more than just reporting. The analysis team at Schneider Electric oversees data quality, data accuracy, polling data and enhancing data.

Situation

Prior to 2008, Schneider Electric took a manual, painstaking approach to determining how and where to deploy its sales resources in the coming year. Sales operations and more than 20 sales managers would collaborate with the analysis team to collect data and evaluate numerous factors related to each customer account, including account size, vertical market, and growth and purchase history.

“We threw everything into ‘the meat grinder,’ as we called it, to see what came out,” recalls Sturgeon. “The process never started on time, and it never finished on time. We manually pushed data around in spreadsheets and exchanged emails to capture everyone’s input and feedback. The week between Christmas and New Year’s Day was an ordinary work week for us; we could never take the week off.”

For many years, while the sales team waited for the information it needed to hit the ground running in January, Sturgeon’s team, together with sales operations, couldn’t deliver the information until February, due to the inefficient manual input and feedback process. “A sales



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—Tom Sturgeon, Director of Business Analytics, IT Business at Schneider Electric US

force without a quota and account list is demotivated, and that is not the message we want to send at the beginning of the year.”

Solution

Having previously used *Alteryx Analytics* and seen the value it brought to other business operations at Schneider Electric, Sturgeon integrated Alteryx into the account selection process, immediately speeding up the creation of the company’s high-potential customer list. By delivering deeper insights from an expanded number of data sources sooner than ever before, Sturgeon’s team empowered the sales force to start the year strong.

“With Alteryx, we integrate data from channel partners, CRM, ERP systems, and market reports to understand how revenue data flows through the value chain,” Sturgeon notes. “Within three weeks, we go from collecting the data to generating insight, so that by early January our sales managers can optimize the deployment of sales resources to our key customer accounts.”

“We’re an international company, and Alteryx is the common language that we speak,” says Sturgeon. “I have people on my team in the United States, the Philippines, and in India, for example. The intuitive workflow in Alteryx makes it easy for one analyst to use a module written by someone else in another country and quickly be productive. Alteryx makes the transfer of information, knowledge, and process so much easier and less painful.”

Results

Using Alteryx, Schneider Electric shortened its account selection process from eight weeks to just three weeks, helping the company achieve its goal of having the sales focused on closing

new business by the second week of January. Thanks to Alteryx, Schneider Electric maximized the performance of its sales force, simplified sales operations, and converted a required process into a value-added one. Observes Sturgeon, “If there is a delay, it’s not because we’re waiting around for a report or lack of data. Now, the discussion is about which data to exclude, which is a good problem to have.”

Along with the sales force, the analysis team at Schneider Electric is happier these days. “Not only does Alteryx save our analysts hundreds of hours of time and enable us to deliver better, higher-value reports,” continues Sturgeon, “but also our analysts are doing less low-value work and more high-value, satisfying work, which keeps them energized and produces a greater return on investment of time for the company. We achieve much more with the same resources.”

Instead of shoveling data between Excel, SQL, or other programs, Schneider Electric’s analysts have become data flow managers, creating analytic workflows and managing analytic processes in Alteryx. Asserts Sturgeon, “We’re seven years into using the product, but I still feel we are just starting to scratch the surface of what’s possible with Alteryx.”

“For me, Alteryx is like email; you never hear anyone asking to justify the expense of email anymore,” Sturgeon concludes. “If you have a data or information worker and you’re expecting them to do really cool things with a hammer and a chisel, then you’re not empowering that employee. Alteryx lets me keep my employees inspired and engaged, and that is the best value I can get from any tool.”

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