

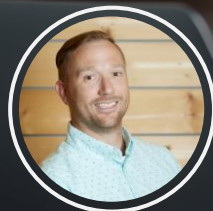
PARADIGM **INSIGHTS**

Omni Data Insights

Making Informed Business Decisions



Daniel Cardin
Product Manager, Insights



John Wheeler
Sales Engineer



Agenda



1. Business Intelligence Overview

2. Insights Today

3. The New Insights

4. Improved Architecture and Future state

5. Getting Help!

6. Building a Digital Strategy

The Story

- ✔ **Business Intelligence has been around since 1958**
 - Practical application : “LA Clippers Arena installs chips into seats”
- ✔ **It's in Paradigm's culture to analyze data**
- ✔ **What DON'T you know today?**
 - SALES: New customer's activity for the first 90 days? 6 months? Year?
 - MARKETING: On renovation quotes, which options are selected more often?
 - OPERATIONS: Could you tell me which series generates the highest rate of warranty claims? And focus on a specific defect?
 - LEADERSHIP: Which customers are underperforming and why?
- ✔ **Other challenges Paradigm helps with**
 - Not sure where to start
 - Not sure of the tools or skills needed
 - Stuck in Excel



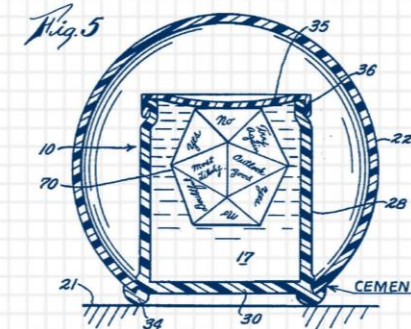
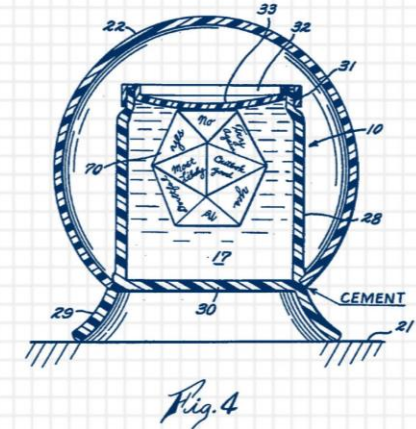
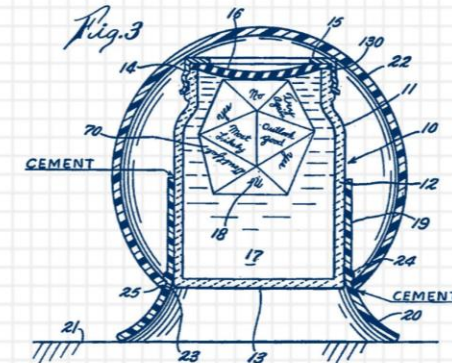
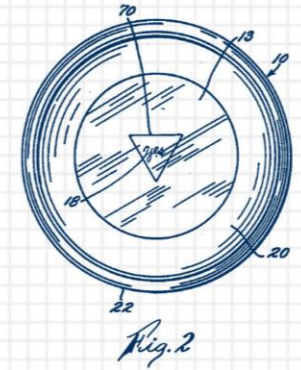
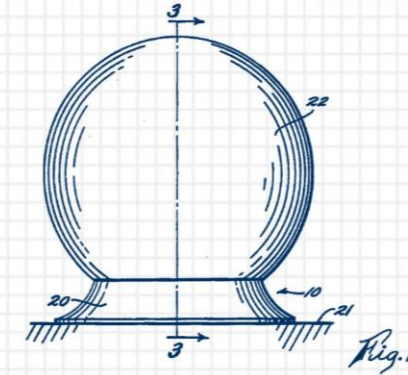
The Incentive

- ✓ No More Magic 8 Ball®
- ✓ Paradigm enables you to be PROACTIVE
- ✓ You don't need a super team of data analysts or high-priced tools
 - *Practical Application: Simple dashboards in your sales reps' pocket*
- ✓ Discover bottlenecks, missing sales, user frustration
 - *User frustration is difficult to discover*

Feb. 2, 1965
Filed July 10, 1961

A. C. BOOKMAN
AMUSEMENT DEVICE

3,168,315

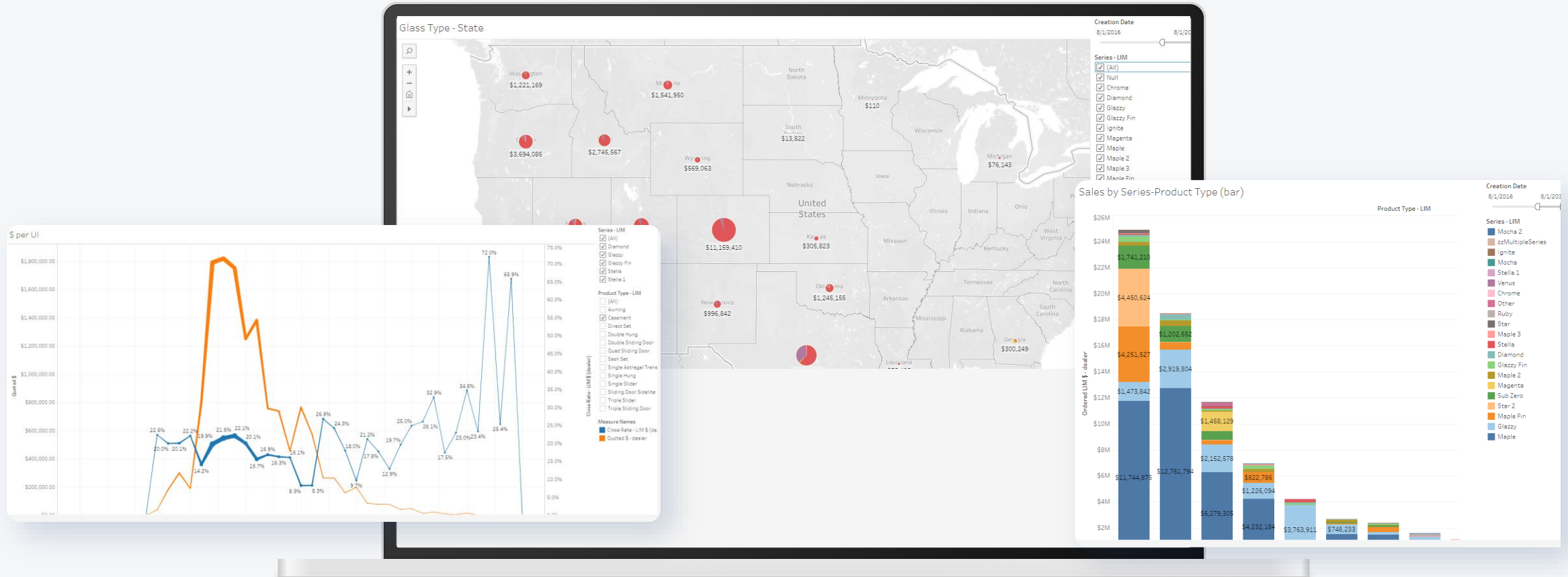


INVENTOR
Abe C. Bookman

BY
Hatter Shuman
ATTY.
Stars
by
Nature

Picture is worth 1000 words

Making it simple



Finding underperforming customers

- Shows all dealers with **# of Quotes**, **# of Orders**, and **Close rate**
- Want to find underperformers
- Show me dealers with at least 1000 quotes
- Show only those with **40% close rate or less**
- Filter that by **Series**
- And a **different Series**
- And a **different Series**

The screenshot shows a data visualization interface with a table of dealer information and a sidebar of filters. The table has columns for Client Name, # of Quotes, # of Orders, and Close Rate. The sidebar includes filters for Creationdate, Seriesname, Client Name, and Quote Close Rate.

Client Name	# of Quotes	# of Orders	Close Rate
ProBuild - Store 16	2,458	768	31%

Filters:

- Creationdate:** 12/22/2014 to 8/22/2014
- Seriesname:** ☐ (All), ☐ Null, ☐ Chrome, ☒ Diamond, ☒ Glazzy, ☐ Glazzy Fin, ☐ Ignite, ☐ Magenta, ☐ Maple
- Client Name:** ☐ (All), ☐ Null, ☒ 123 ABC Windows ..., ☒ 123 Home Store, ☒ 511 Glass Company, ☒ A Glass, ☒ A+ Glass and Mirror, ☒ AB Supply and Ho..., ☒ ABCD Home Impro...
- Quote Close Rate:** 0% to 40%

What is our service and warranty velocity?

- Showing warranty requests by issue, type, and series
- Filter to only show **1000+ total orders**
- Add **calculations**
- Maple 2 is a **new series**
- **And** has the highest warranty rate
- **And** grid Problems is the highest which is unique

Service Metrics by Customer

Request Type	Product Type	Glass Issue	Chrome	Diamond	Glazzy	Glazzy Fin	Ignite	Magenta	Maple	Maple 2	Maple 3	Maple Fin	Mocha
None	Null	Null	134	410	12,514	1,965	39	21,718	53,961	1,183	524	15,241	
Warranty Request	Complete U..	Null			46	13			248	21	5	45	
	Frame Only	Null		2	18	4			69	11	2	50	
	Glass Only	Debris Insid..		15	28	4			42	178	25	1	21
		Failed Unit		4	155	9			25	575	27	3	43
		Grid Problem		3	42				25	227	59	6	6
		Other		21	106	9			22	489	47	5	63
		Pressure Br..	1	2	218	15	1		57	1,408	18	4	227
		Scratches		1	55	7			89	312	17	1	56
	No Vent	Null			5				18	3	1	9	
	Parts	Null											3
	Screen Only	Null	1	7	137	20			275	15	3	64	
	Vent Sash ..	Null		1	11				38	4	4	6	
	Vent Sash ..	Null	3	8	160	22	2		698	15	2	98	
			8%	5%	5%	8%	22%	5%	0%	7%			

Creationdate
12/22/2014 8/22/2014

Seriesname

- ☒ (All)
- ☒ Null
- ☒ Chrome
- ☒ Diamond
- ☒ Glazzy
- ☒ Glazzy Fin
- ☒ Ignite
- ☒ Magenta
- ☒ Maple
- ☒ Maple 2
- ☒ Maple 3
- ☒ Maple Fin
- ☒ Mocha

Client Name

- ☒ (All)
- ☒ Null
- ☒ 123 ABC Windows ..
- ☒ 123 Home Store
- ☒ 511 Glass Company
- ☒ A Glass
- ☒ A+ Glass and Mirror
- ☒ AB Supply and Ho...
- ☒ ABCD Home Impro...
- ☒ ABE Windows
- ☒ ACE Glass and Sup...
- ☒ Affordable Doors ...
- ☒ Affordable Glass f...

Insights Today

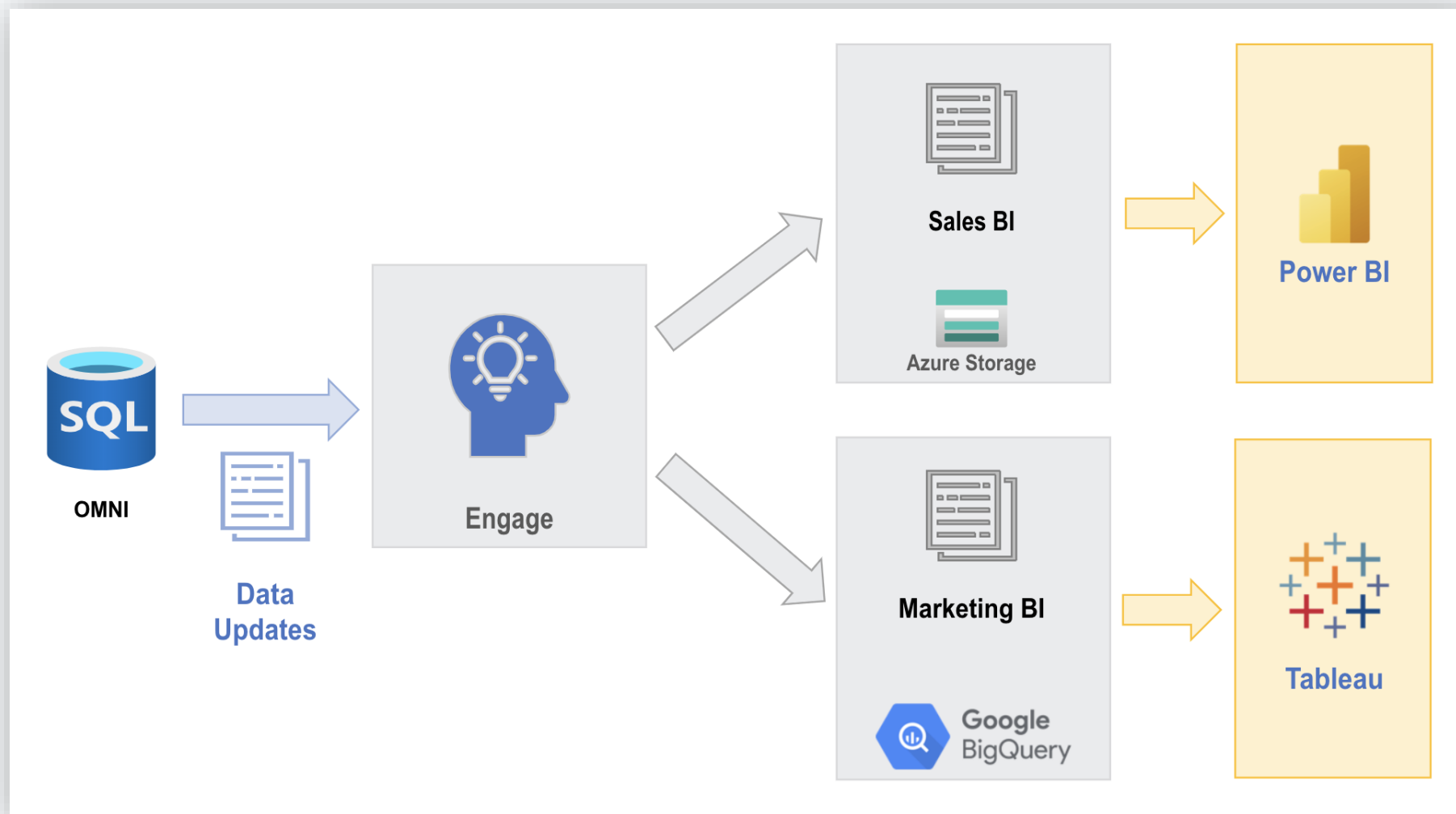
Sales BI

- 🗨️ **Included with Paradigm Omni™**
- 📄 **Access data** on Sales, Orders, Clients
- 🔧 **Microsoft Power BI** must be used.
- 👤 **Sales or marketing** typically.
- ⚡ **Training included** with your Paradigm Omni implementation team.
- ☁️ Hosted in a customer-specific Azure storage. Secured through **Paradigm Omni Authentication**.

Marketing BI

- 🗨️ Available through an **additional subscription**.
- 📄 **Includes all Sales BI data**, plus configuration details like door slabs, glass type — hardware and much more.
- 🔧 **Tableau** is the BI tool used normally
- 👤 **Data analysts** for others within the organization.
- ⚡ **Includes training** sessions with the Paradigm Data team.
- ☁️ Hosted in a customer-specific Google project. Secured using **Google authentication**.

Current Insights Overview



Improvements to **Insights**

Sales BI

Marketing BI

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Sales BI

Marketing BI



Access more data : Users, Groups, Line Items, Price Mods and more!

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You can now use the tool of your choice: **Microsoft Power BI, Tableau, Apache Superset, etc.**

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Easier integration with BI systems, such as **Domo, Snowflake, etc.**

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Authentication is now simplified: **One login to access both flavors of Insights**

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Marketing BI



Access more data : Users, Groups, Line Items, Price Mods and more!



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Easier integration with external BI systems, such as **Domo, Snowflake, etc.**

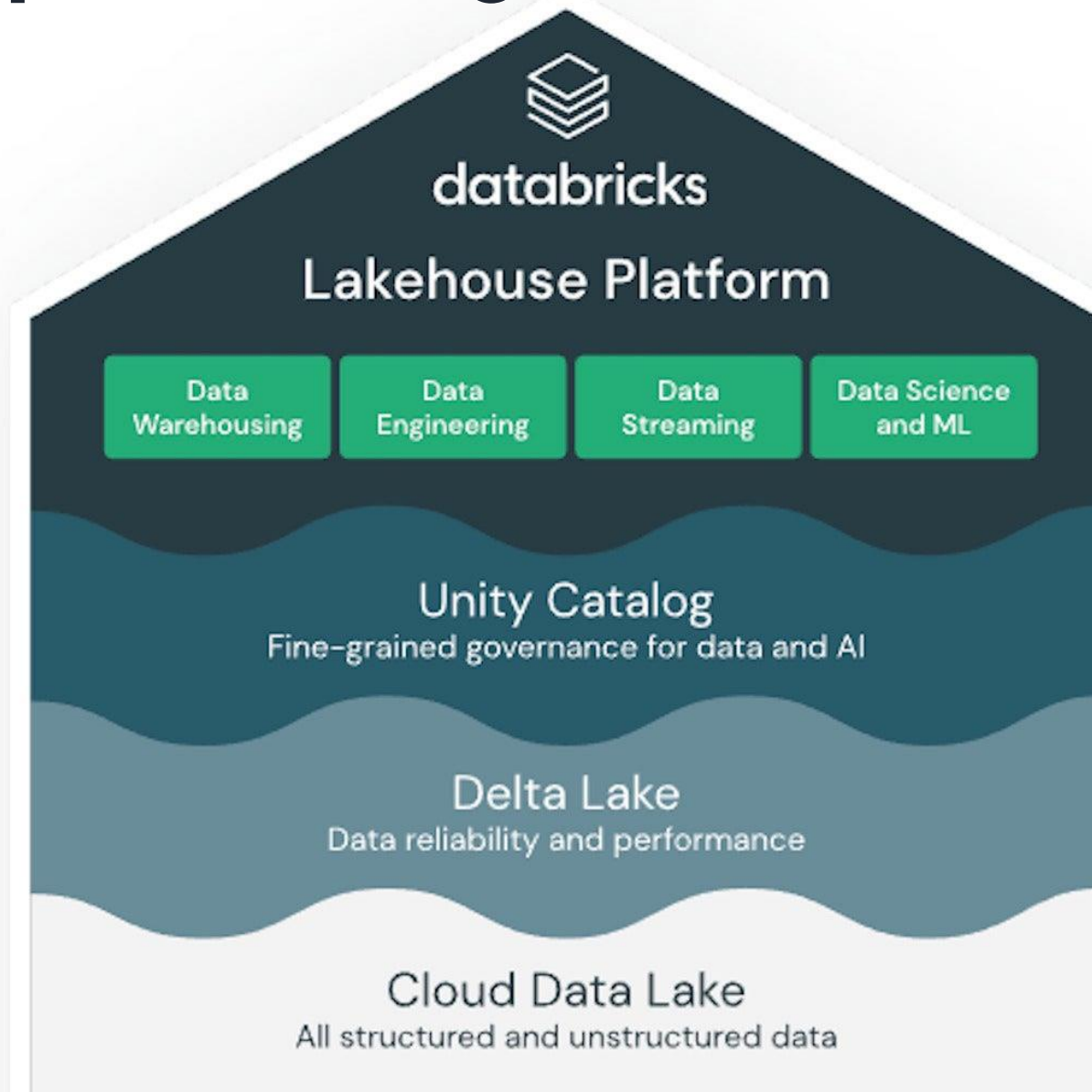


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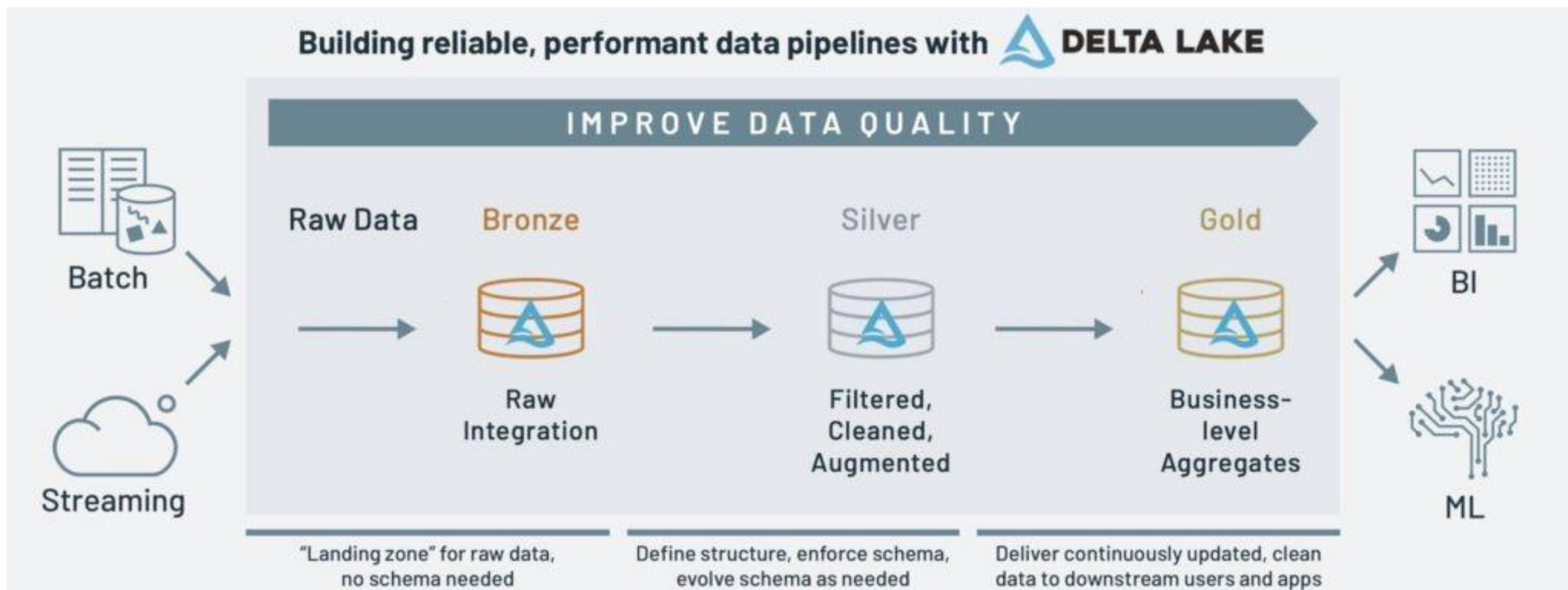


Faster Refreshes: When once a night is not enough!

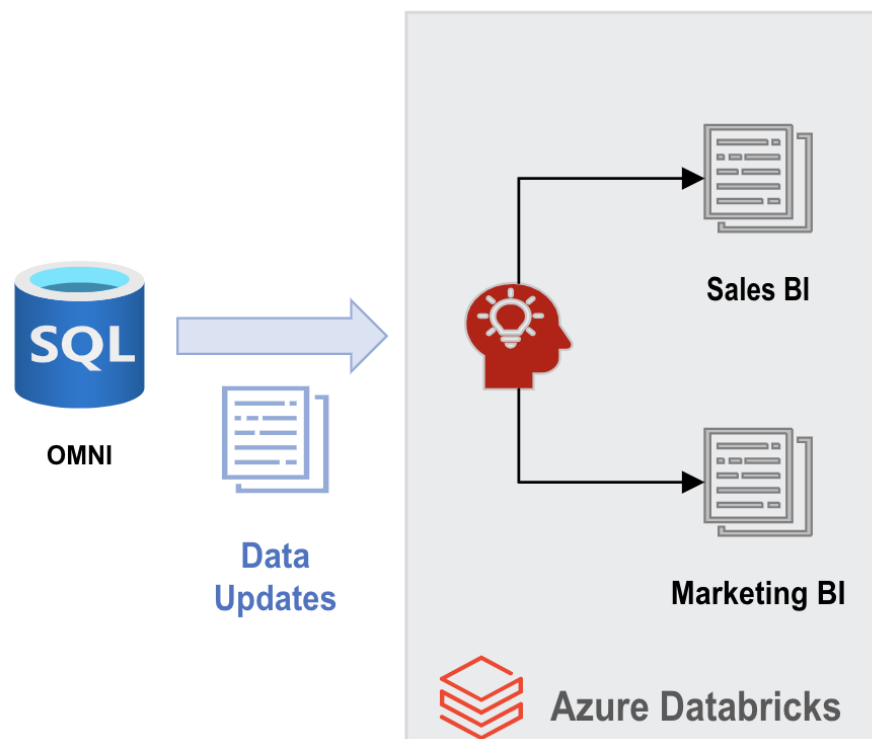
Updated Insights **Architecture**



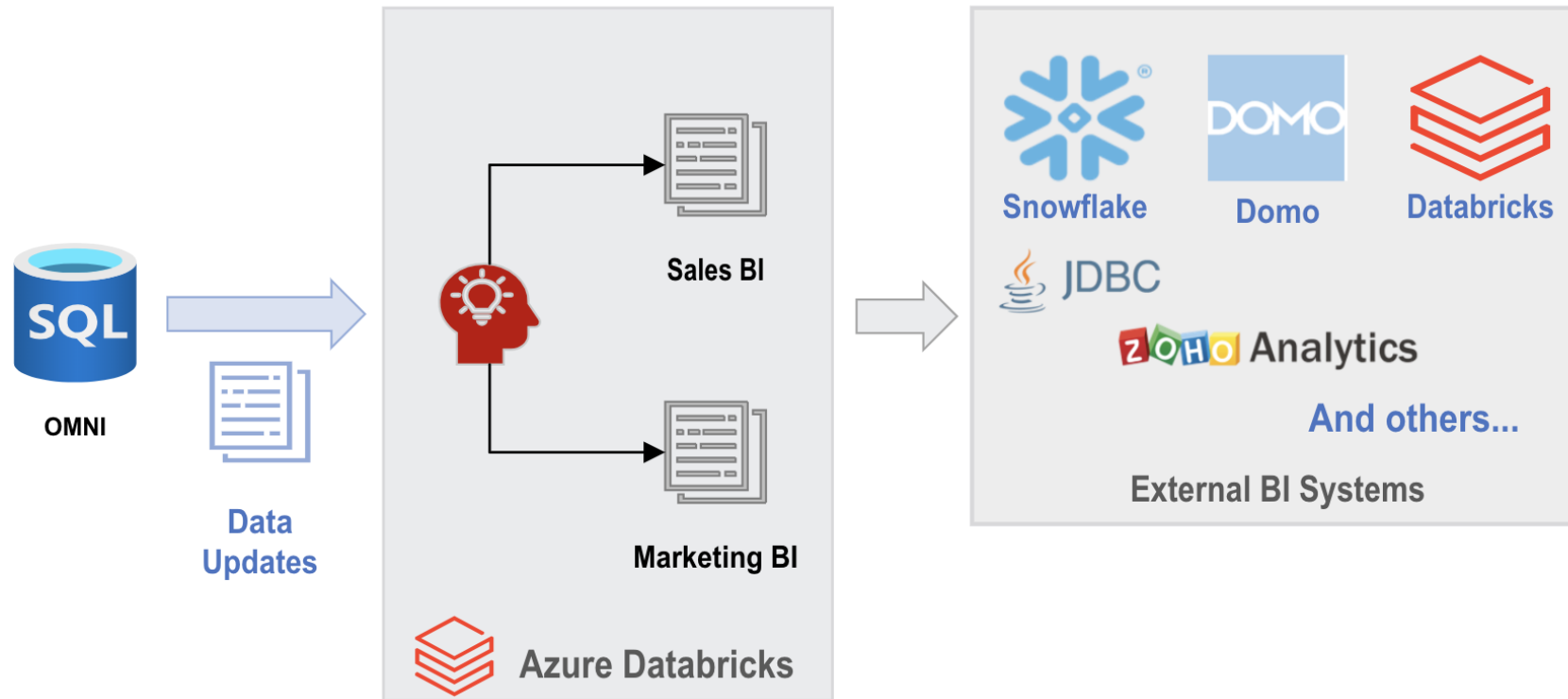
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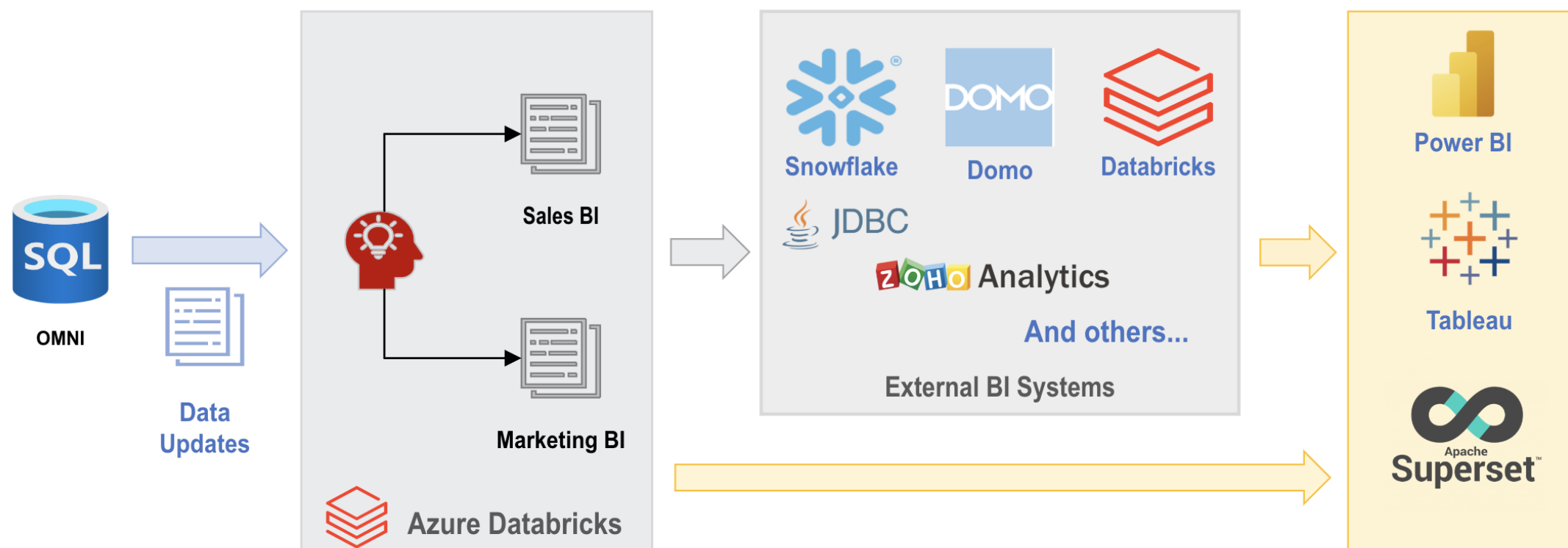
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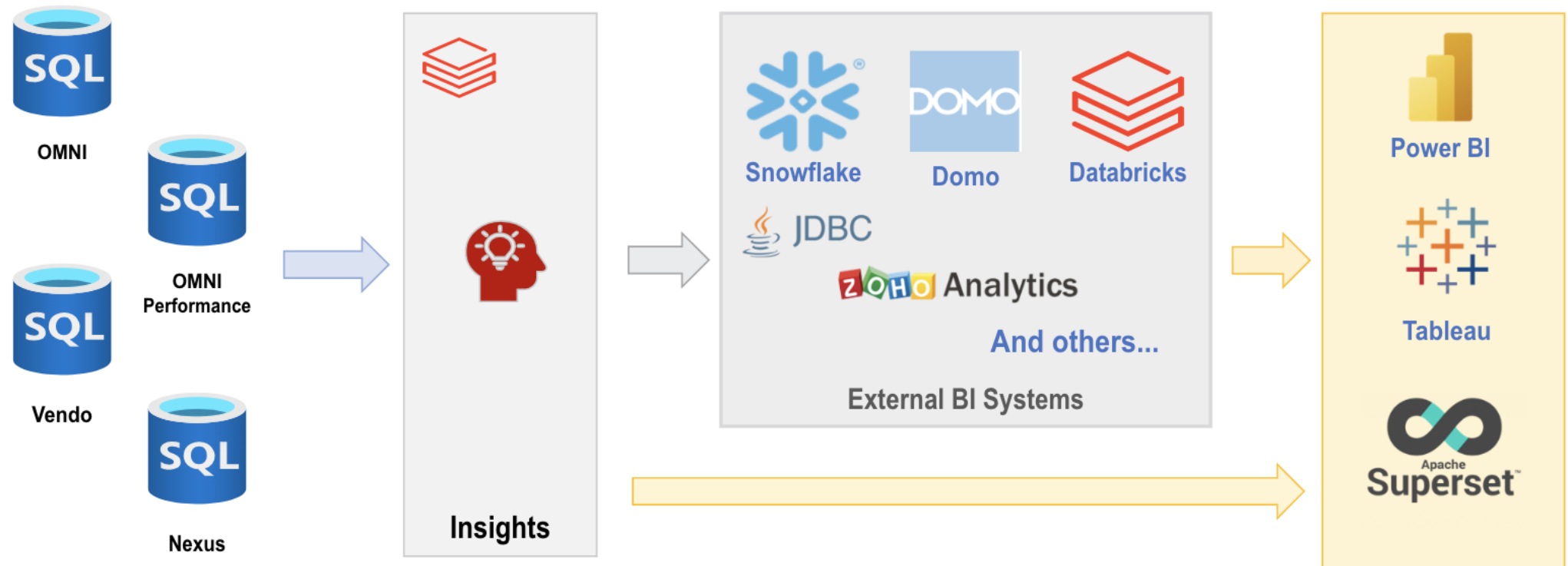
Updated Insights **Architecture**



Updated Insights **Architecture**



Future Insights **Integrations**



The Process

- ✓ **Listen to your business**
- ✓ **Start small**
- ✓ **Make a plan**
- ✓ **Leverage Paradigm**
 - Reach out to your account manager
 - Jira / Confluence
 - Learning Center
 - Insights Support Tickets
- ✓ **Execute**
- ✓ **Repeat**



Getting Help

<https://portal.myparadigm.com/servicedesk/customer/portals>

Paradigm Help Center

What do you need help with?

bi support



Search help

Need Assistance from a Paradigm Representative?

Learn how to submit issues, requests, or questions through Jira Service Desk here:

[Submitting a Ticket in the Paradigm Help Center](#)



Sales & Marketing BI Support Request · Paradigm OMNI Support

Need to request access to data? Have a data or reporting question? Click here for assistance.

Questions?

Daniel Cardin

daniel.cardin@myparadigm.com

John Wheeler

john.wheeler@myparadigm.com

Thank you!

Join us in the Hub for a delicious lunch!