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Brooke

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Brooke is a leading Australian owned consultancy that helps organisations achieve their digital and service-led transformation aspirations by enabling the broad range of services and products within the Salesforce & MuleSoft ecosystems. As a certified Salesforce partner, the Brooke team has deep technical expertise in developing solutions on this platform, often dealing with legacy systems to facilitate data migration and integration.

Challenge

One of Brooke's long-standing clients, a leading wireless infrastructure company, engaged them to develop a new customer portal within Salesforce.

The aim of the project was to create a consistent platform whereby customers, contractors, and sub-contractors, could log-in and see the status of their projects. Previously this was achieved by direct contact with individual account managers, which did not deliver the degree of visibility or consistent level of service their customers required. The new portal would streamline and enhance the customer experience by providing a real-time, single source of project information.

Developing the customer portal not only required a technical solution, but it also involved the migration of complex project data from the wireless infrastructure customer's legacy system.

The data would be moved over to an application called 'Sitetracker', a leading project and asset management solution which was integrated within Salesforce.

Solution

Brooke needed a solution that offered the necessary flexibility and capability to enable the transition to take place as efficiently and smoothly as possible.

The data extraction also had to be repeatable in multiple stages of the project, from proof-of-concept to staging environments and dry runs until go live.
In the case of simple datasets, this would typically be achieved manually, however in this case, taking this approach would be incredibly time consuming and highly prone to error.

"The entire project was turned around in just 4 weeks and the support we received from Experian's technical teams throughout was incredibly helpful and flexible.

- Ben Bates,
  Technical Practice Lead, Brooke

To facilitate the migration, Brooke chose Aperture Data Studio, Experian's powerful data management suite. The drag-and-drop visual workflow builder gave Brooke the flexibility to quickly and easily manipulate and transform the data from the .csv file to extract and display the data in the structured way they required within Sitetracker.

Once the process was confirmed, it was repeated multiple times in different environments, with the parameters easily and quickly changed as required.

Results

By choosing Aperture Data Studio, Brooke experienced significant benefits when developing the Salesforce customer portal for their client:

One single tool
Chosing Aperture Data Studio removed the need to go through multiple toolsets, the data could be extracted directly from Aperture into Sitetracker.

Repeatability of the process
Brooke prides themselves on providing their clients with a best-practice DevOps approach. Having the ability to replicate the data across all testing environments was invaluable.

Self-serve on data
Aperture Data Studio provides the ability for staff to self-serve and run data management in-house and retain that knowledge for future projects, rather than rely on an external contractor.

Saved time and effort
Despite the custom workflows taking a couple of weeks to build, following this the data took only an hour to extract, something that previously took 3 days. This helped meet the 2-week testing window, keeping the project timeline on track.

Reduced costs
Implementing Aperture Data Studio removed the need for a ETL specialist, saving an estimated 20% of the total cost for this resource.

Confidence in the data
Aperture Data Studio gave Brooke and their client confidence that the quality and accuracy of the data was maintained during the migration.

Looking Ahead
Having experienced building custom workflows in Aperture Data Studio, Brooke is committed to continue to expand their knowledge of the solution by taking part in Experian's complementary training sessions so they can take full advantage of the features and capabilities for future projects.

"The main benefit of using Aperture Data Studio was the repeatability of the process between the different environments. This is incredibly difficult to achieve without a tool to support the processes. Having the ability to change the environment parameters and press 'play' to extract from the source spreadsheets, with the data available 20 minutes later was amazing and a big win for us and our client."

- Ben Bates,
  Technical Practice Lead, Brooke