

Trifecta Research Deploys Dapresy for Fortune 500 Building Materials Firm to Dramatically Increase Efficiency of Production, Effectiveness of Reporting



“Dapresy’s dynamic nature provides the flexibility we need to adapt to our clients’ changing business situations, so we can quickly and effectively provide them with the reports they need to make well-informed business decisions.”

Angel Roberts
VP, Finance & Administration, Trifecta

ABOUT TRIFECTA

Trifecta is a leading research and advisory firm serving Fortune 1000 companies. They specialize in the integrative analysis of hindsights, insights and foresights for both B2C and B2B clients. Through the integration of published intelligence, subject matter experts, market intelligence, and customer/consumer insights, Trifecta informs the ‘what?’, activates the ‘why?’, and advises on the ‘Now what?’

THE CHALLENGE

When Trifecta Research won the client account of a large building supply firm four years ago, it also inherited that firm’s cumbersome method of producing yearly wave-over-wave trending reports via Excel. And the problems creating the reports represented only the tip of the iceberg for the research agency and its client.

The initial Excel report Trifecta inherited was unsophisticated and static. Originally, Trifecta

believed that it might be able to use an interactive Excel model created by Angel Roberts, VP of Finance and Administration, which would enable the client to slice and dice the data. But problems accumulated after each survey year.

“Every year they would change the questionnaire slightly, causing me to remap everything in Excel,” Roberts said. “It became difficult to manage it efficiently, especially with one-off ad-hoc requests from multiple stakeholders. It also became difficult sharing with business heads across the world due to file size restriction issues, differing computer speeds and lack of knowledge about pivots, etc. Eventually, the Excel file became too unstable because of its large size.”

In fact, the files became so large, the client’s email system wouldn’t accept them, so they had to try other means, which often proved frustrating.

She said Trifecta might have gotten away with the interactive version she created if this had been a one-time project and the client didn't have complex needs. But this turned into a yearly exercise with the clients' business heads in different regions seeking their own unique views. Eventually, to ensure that each person only had access to appropriate data, she needed to create 15 different files. Then she had to customize each version. It became clear that beyond the enormous amount of work required to accomplish this, Trifecta would still be unable to provide the precise information that was requested individually.

Meanwhile, she'd invariably get follow up requests from client stakeholders for new reports based upon updated information she received from them. Each of these might take a few days to turnaround and, with 15 versions in the field, this follow up work became overwhelming.

And each year the client changed the reporting structure, i.e. which markets rolled up into which regions. One year, Mexico would roll up to North America, the next year it wouldn't. The net effect was that the report had to be significantly revamped annually.

On top of this, with 15 files floating around various client groups, someone would invariably share a "for your eyes only" version outside the group, creating confidentiality issues.

At that point, Trifecta understood that the Excel approach was inefficient, ineffective and unsustainable.

THE SOLUTION

After extensive research in 2018, Trifecta invested in Dapresy, a 'best-in-class' data visualization solution designed to transform market research data into more visually compelling insights tailored to end-users through interactive, easy-to-use online dashboards. This is particularly helpful in visualizing wave-over-wave trending.

Roberts noted three characteristics of Dapresy that helped make the decision. First is [flexible reporting](#). Dapresy enables Trifecta to track KPIs globally or easily filter by country, region, segment or competitor over time in a single online platform with complete control of user access across the world.

Next is meaningful [dashboards](#) that allow Trifecta

to provide information directly related to areas of interest, allowing them to easily drill down into specifics and take action.

And finally, is the fact that Dapresy allows them to communicate information in a visually appealing manner. It transforms tedious data and tables into appealing infographics that motivates end-users to engage with the data, understand it and grasp insights. This was vital because the building supply client pushed for an increased use of infographics, something that wasn't possible with the Excel approach.

One of her favorite features, which she didn't fully appreciate until after using Dapresy is the MyStories function, which enables users to configure personalized dashboard views for online presentation or download to PowerPoint. This has enabled product managers to print out key slides, pass them out to business heads or teams and use for discussion.

After Trifecta licensed Dapresy, it uploaded the historical file results as well as 2018 trending results to the dashboard, which was then shared with the client. Dapresy's support organization aided Roberts as needed along the way.

The dashboard was deployed for global use across the client's regions and business units to help them dig deeper and quickly get to the root cause of issues they identified. It reported on such areas as KPI performance, Net Promoter Scores, Value for Money, Competitive Benchmarking and more.

Instead of creating 15 separate Excel reports, Trifecta was able to use Dapresy filters to create unique views from a single dashboard that reflected different job titles, regions, market segments, etc. This eliminated the various one-off reports for business units that hurt agency profitability and reduced the time it took for important information to reach business units and regional heads. It also ensured that confidential information remained confidential.

"It instantly became four times faster to create the initial trending report and the client was empowered to handle almost all of the follow up requests by stakeholders," Roberts said. "Follow up that previously took days per requests could be accomplished in a few minutes. And overall, instead of spending an additional three months to support the project once it was delivered, I was free to focus on more strategic issues at the agency."



FUTURE PLANS

Another important benefit Dapresy has brought Trifecta is that it can now take on new business that may not have been as easy to serve in past.

"We considered this first client as a true test for Dapresy," Roberts said. "Having exceeded our expectations, we're now using it as a differentiator as we expand business with current clients and pitch new business. We've found it to be a real eye opener as we show potential clients what is possible."

OUTCOMES ACHIEVED BY DAPRESY

- Increased the efficiency of producing original and follow up reports. It's now four times faster to create reports and follow up requests take minutes, not days, to fulfill.
- Increased the effectiveness of reporting. Clients now get the exact view of data that they want and need. And they can quickly and easily print out slides for presentation or discussion.
- Reduced support needs and empowered client. Dapresy eliminated three months of follow up requests for new reports, allowing the VP, Finance & Administration, to spend time on more strategic matters. Meanwhile, the client received the exact information it needed in minutes instead of days or longer.

ABOUT DAPRESY

Dapresy, a Confrimit company, is a global provider of data analysis and visualization software for market research and customer experience management. Its SaaS solution offers users flexibility and choice in delivery from standard cross tables, PowerPoint and PDF downloads, to highly visual and interactive dashboards. Market research agency and enterprise professionals in more than 30 countries utilize the Dapresy platform to clearly communicate complex data from markets, users, and customers. Founded in 1999, Dapresy's global headquarters is in Sweden with North American headquarters in Portsmouth, NH. In addition, it has client service offices in Germany, United Kingdom, Bosnia and Herzegovina, and Australia.