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Tom Vance
Vice President of
Operations
SWK

SWK Technologies Builds Data Certainty in Economic Uncertainty with DataSelf

Data insight results in YTD growth and six new sales hires during the Coronavirus pandemic.

Business application and IT consulting firm SWK Technologies has made a name for itself by delivering solutions and resources to fulfill information and business management needs across the organization. The New Jersey-based company provides everything from accounting software to ERP, CRM to warehouse management and more. Clients rely on SWK for support and development, and SWK relies on sales and customer feedback data to continually improve services.

Disparate Data Reveals Need for Centralized Data Warehouse

Early reporting structures for SWK included a mixture of products, including Microsoft® Excel, SWK’s own managed service provider solution, ConnectWise, and their ERP. Easy-to-read dashboards were in demand but writing their own SQL queries in order to populate pie charts and bar charts was inefficient.

What SWK truly needed was a solution that would enable them to pull multiple data sources—including their ERP, ConnectWise, Smile Back customer satisfaction ratings, and more—into one centralized database that could be easily queried over and over again for hundreds of different insight needs and custom requests.

DataSelf Connects the Dots between Sources

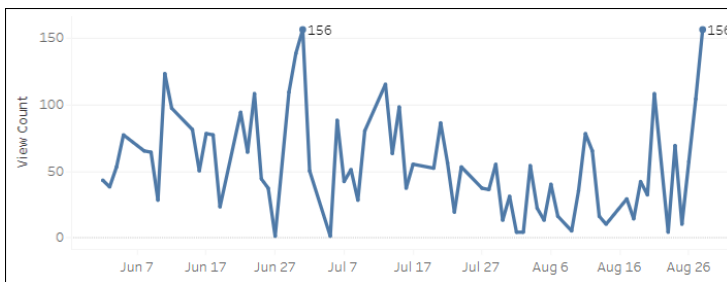
It was at this crossroads that SWK’s Chief Technology Officer, BJ O’Reilly began looking for a solution. Early on, he had the opportunity to compare popular mid-market BI solutions and DataSelf, looking to see which one held the answer to SWK’s pain points.

“When I assessed DataSelf with its data warehouse capabilities, I could immediately see how easy it would be to finally collect insightful data across our data silos with a clean, reliable and scalable platform, and DataSelf’s integration with Tableau providing easy to understand and distribute pictures of our trends for our teams to act on,” said O’Reilly.

Tom Vance, Vice President of Operations for SWK recalls, “DataSelf was up against another popular mid-market BI tool that we already owned,” Vance added. “And DataSelf won.”

Despite not having worked with a data warehouse before, Vance found the implementation and ramp process smoother than anticipated. “I found DataSelf to be intuitive. Being familiar with relational databases, DataSelf’s data warehousing wasn’t foreign to me,” Vance admitted. “Thankfully, the DataSelf team were excellent at walking me through.”

Once DataSelf was implemented, Vance was able to connect larger data sources, extract data sets as needed into a centralized database, and reproduce those data sets as needed for other requests. “These true enterprise level data cubes allowed me to not have to rewrite things from scratch every single time,” Vance said. The chart below shows the team’s usage of the system for the past 90 days.



Building Data Certainty in Economic Uncertainty

The increased insight into data has profited SWK, even in a time of economic uncertainty. Chief Revenue Officer Andrew Nunez remarked, “During the COVID pandemic, we’ve continued to grow by acquiring other companies and hiring six new sales people. All this is because we were able to manage our pipeline analysis and focus on the right customer base to sell more. In fact,” Nunez added, “year to date, we are up over this time last year. DataSelf has been a far better solution for our pipeline than what we’d used in the past.”

With DataSelf’s easy integration to ConnectWise, ERP, and other data sources, now SWK has a clearer picture of what is happening within the company. “I get requests all the time for new things,” Vance said. “I use DataSelf daily and have not encountered any limitations on scale as long as we can get the source of the data into either DataSelf or Tableau to combine.”

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About DataSelf Corp.

DataSelf Corp. provides turnkey business intelligence and analytics solutions to mid-sized organizations. From basic dashboards to complex reporting, DataSelf’s solution is scalable and integrates with dozens of ERP and CRM systems including Acumatica, Sage, Microsoft, Salesforce, NetSuite, Infor, QuickBooks and Everest. DataSelf focuses on empowering key stakeholders through the visualization of critical data across their business. DataSelf is powered by DataSelf ETL, data warehousing, Tableau, Power BI, and templates delivering critical and actionable reports, dashboards and KPIs on day one.