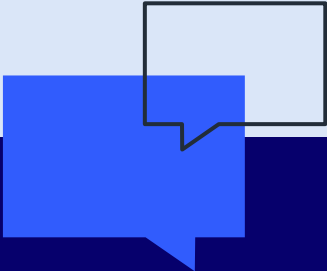




Marketo Dashboard Data Migration to Snowflake



8/08/2022
James Kong

Agenda

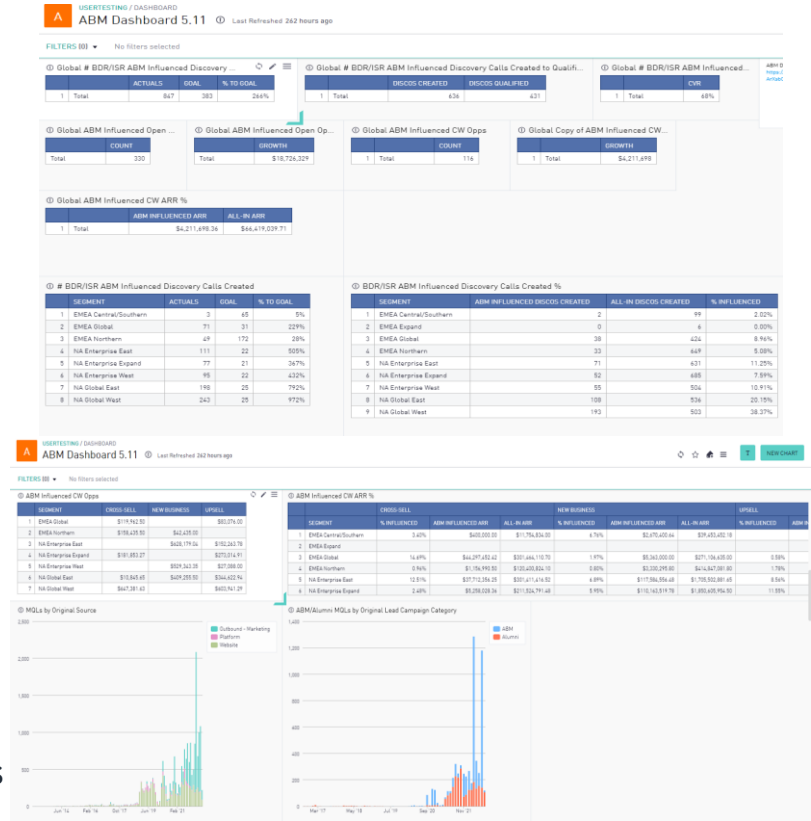
1. How Things were Done Before
2. Challenges
3. Current Stages
4. Dependencies
5. Steps toward Data Migration
6. Timeline
7. Marketing Data Mart Long Term Vision



How Things were Done Before

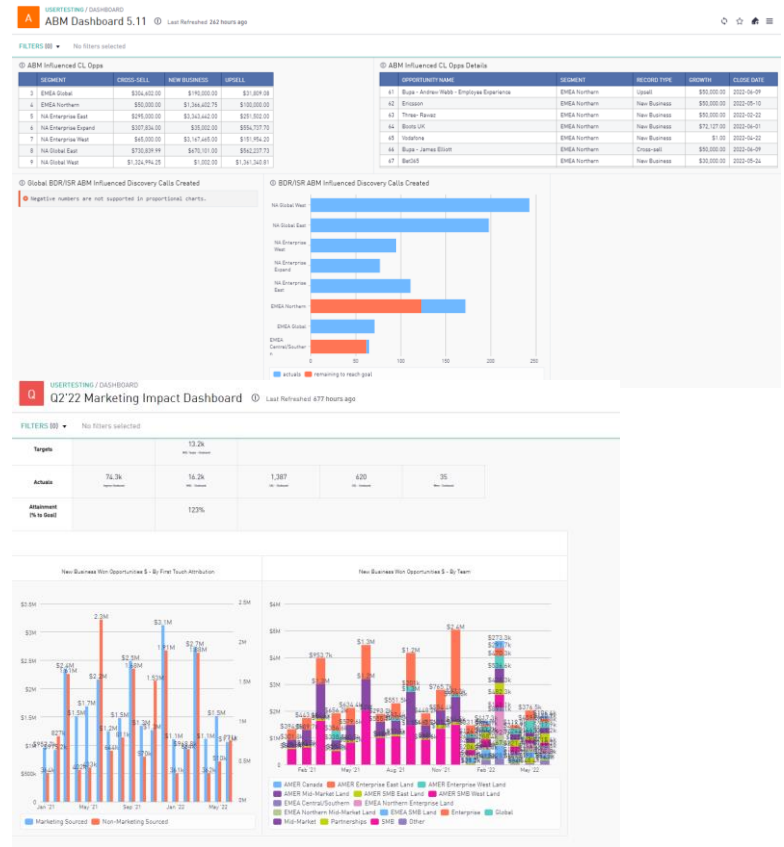
Pericope visualization limitation

- Each table and chart required a SQL query
 - I.e. 10 tables = 10 SQL queries
 - Utilized the same tables/views multiple times
 - Queries were similar to other queries
- Embedded too many charts and tables in one dashboard
 - I.e. Messy and congested views in one page/tab
- Dashboard owner(s) may no longer be with the company
 - No documentation or notes to revisit dashboards



Challenges

- BI team isn't the owner of the Periscope logics
- Too many queries in one dashboard
 - Hard to maintain and update if there were any changes (i.e. filter changes)
 - Difficult to scale
 - Cannot categorize charts and tables into tabs
- Some charts and tables popped up error messages
- Data labels overlapped or stuck together causing difficulties to see data labels
- Not easy to customize data labels and dashboard



Dependencies

- BI team depends on the Marketing team
 - Guidance and understanding of business requirements and needs
 - Data relevance on Periscope logics
 - Institutional knowledge
- Point of contact: Tyler Rittmaster
 - Reach out to other stakeholder(s) within or outside of the marketing team if necessary

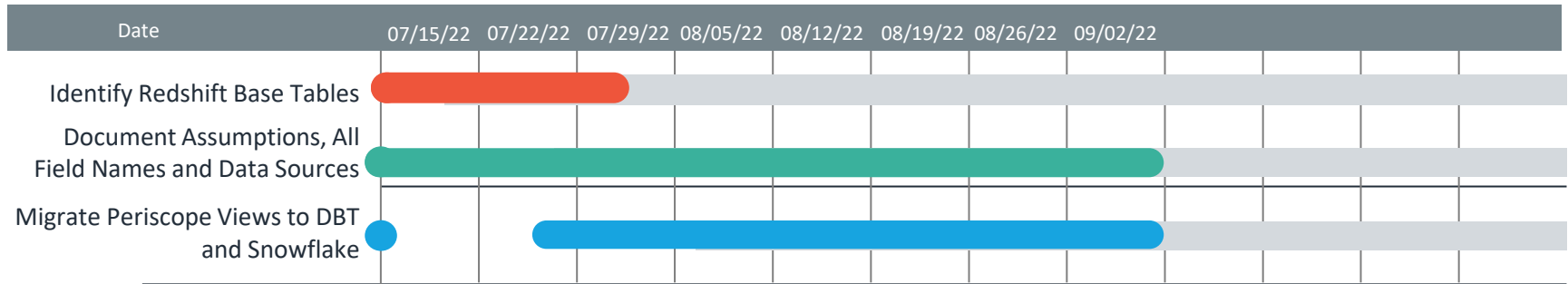


Steps Toward Data Migration

Steps	Advantages
<ol style="list-style-type: none">1. Identify Redshift base tables/views on Snowflake2. Document assumptions including Periscope logics, all field names, location of data sources, CSV files, SQL queries, etc3. Migrate any Periscope views (custom SQL queries) to DBT and then to Snowflake4. Turn hard coding into mapping tables<ol style="list-style-type: none">a. I.e. case statements (100+ lines), redundant codes, etc5. Once all data sources migrate to Snowflake, we can join the most commonly used tables into one view in Snowflake that can power multiple dashboards	<ol style="list-style-type: none">1. Fewer data connections with one or two views powering the entire dashboard2. Data quality and version control on DBT before pushing any updates to Snowflake<ol style="list-style-type: none">a. Ensure consistency, accuracy and integrity3. Enhance dashboard performances on joining mapping tables on Tableau rather than using redundant codes that degrade dashboard performances4. If we need to troubleshoot, we can trace back to the root tables on Snowflake5. Make it easy for teams to create dashboards on Tableau<ol style="list-style-type: none">a. Easy to recreate and retrace stepsb. One query powers a dashboard vs 10 queries for 10 charts / tables



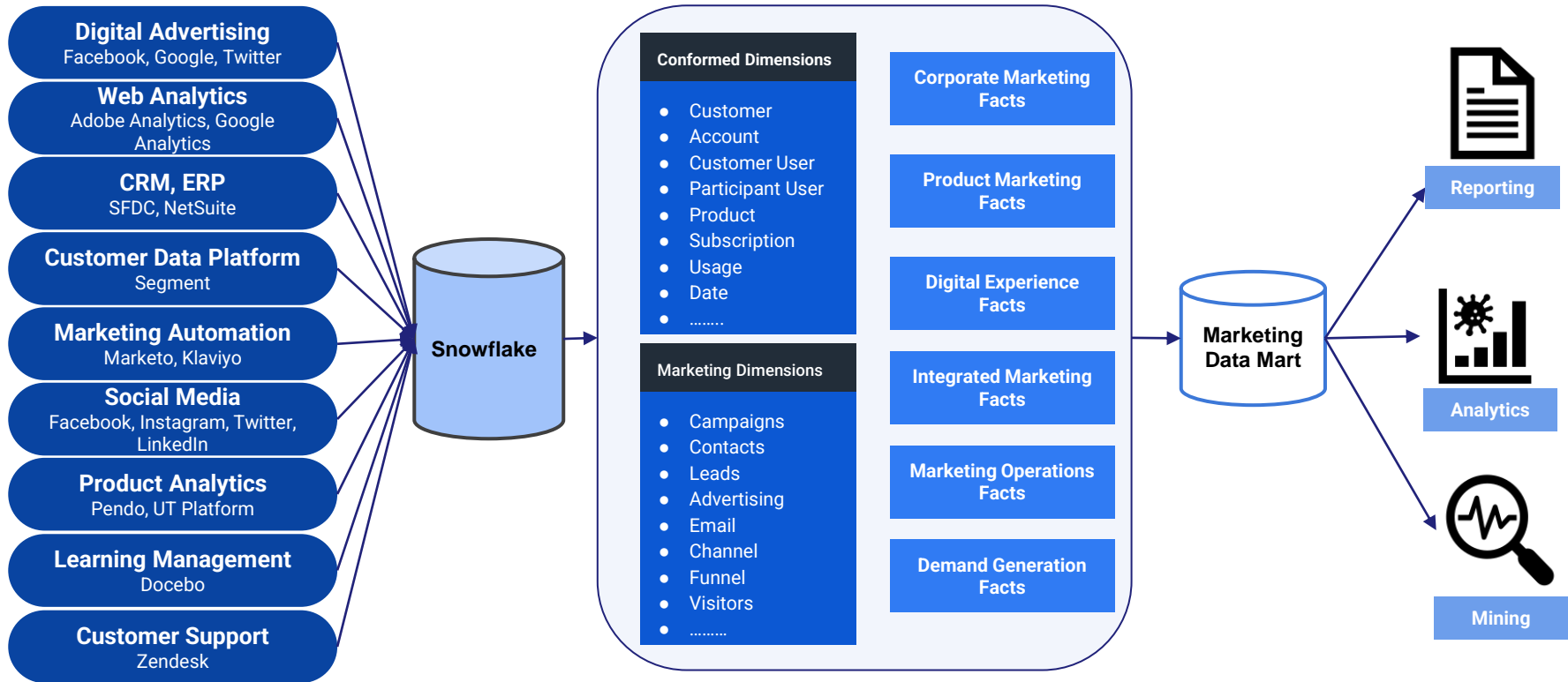
Timeline



Where we are at



BI - Marketing Data Mart Long Term Vision





Appendix

