

### Client Case Study: **Bundle**

# CONNECT + BUILD RELATIONSHIPS

Enhance your culture and connectedness. Personalized team events, competitions, and tournaments, created and facilitated for your company.

#### About Bundle

Bundle is a company who recognizes that the way people live, work, and communicate is changing, and how this is impacting the way employers support their evolving workforce. Bundle delivers live, interactive 1-on-1 and private group digital sessions that improve employee wellbeing, connections, growth, and performance.

**Company:** Bundle

**Industry:** Employee benefits & performance enhancement

**Mission:** To help organizations empower employees to be their best in all aspects of their lives with unparalleled experiences-- improving employee engagement and retention.

<https://bundlebenefits.com/>

**Bundle's all-encompassing solution grows and transforms employees no matter where they need it or how they work, remote, hybrid, or in-office. They offer three employee solution options:**

- Break Solution: Everyday live digital sessions to help employees, their teams and family members.
- Events Solution: Companies host live events that their company needs with less work and higher employee satisfaction.
- Customized Solution: Customized events that take the stress out of planning and developing a virtual live or on-demand event that bring employees together.

**VIRTUAL + LIVE  
I-ON-1 + GROUP  
GLOBAL**

We deliver live, digital sessions to employees, their teams, and their family members, allowing employees to enhance wellbeing, improve performance, + connect with others.

**Session topics include:**

- Team Building
- Health & Wellness
- Personal growth
- Skill-building
- Professional Development
- Diversity + Inclusion
- World Languages + more

**Services included:**

- Personalized concierge support for bookings and requests
- Marketing advisor assistance with employee engagement
- Extended learning resources
- Complimentary events
- Mobile application + more

*Bundle Employer Solutions*

### **The Need for Better Data Management**

Bundle Benefits was looking for a solution that would enable its Customer Experience (CX) team to better manage data for booked sessions. The company was using a non-normalized Content Management System (CMS) database which made it challenging for the CX team to gather and use customer and session-related data. This left Bundle's CX team with no choice but to follow a tedious process involving the exporting of all session data and later manually importing it into Excel spreadsheets.

To enable better data management and analytics, Bundle Benefits sought TrackIt's help to implement an Extract, Transform, and Load (ETL) pipeline, a three-step interdependent process used to pull data from one database and move it to another, and a data warehouse along with analytics dashboards to help visualize this data.

*"The CX team was half the reason why we wanted the data warehouse. They were losing a tremendous amount of time by having to manually enter data into Excel spreadsheets. The other major reason for the implementation was to be able to capture live data and implement live analytics dashboards."*

*- Tyler O'Connor, Data Analytics Lead, Bundle Benefits*

*"We wanted something that would allow different departments to see live analytics on their own and be able to track metrics that would enable better decision making. Basically, a solution that makes departments more independent and allows them to quickly pull data that they need when they need it."*

*- Tyler O'Connor, Data Analytics Lead, Bundle Benefits*

### **Solution - ETL Pipeline and Data Warehouse**

The TrackIt team implemented an ETL pipeline:

1. **Extract:** Draw out structured and unstructured data from multiple sources. Raw data is injected into a staging environment.
2. **Transform:** Data is normalized and refined to meet business and technical needs. All the data is stored in a curated S3 bucket to enable further data processing if necessary.
3. **Load:** Loading data into the Data Warehouse built for Bundle's use case. Essential data required for business analytics is loaded into the data warehouse, and all other data remains stored in the curated S3 bucket.

TrackIt leveraged AWS Lambda and Amazon S3 to implement the ETL pipeline. The team created a Lambda function for each of the three steps. Data coming from the main application and other sources enters the pipeline and is stored in different S3 buckets to ensure cost-efficiency. Once processed, the data is loaded into an Amazon Aurora MySQL data warehouse matching Bundle's needs for scalability and efficiency.

TrackIt also implemented an Amazon CloudWatch event that triggers the Extract lambda function once every ten minutes to ensure automated extraction from the CMS database.

## Dashboards To Visualize Data

TrackIt leveraged Tableau to implement three initial dashboards that would enable Bundle to visualize data collected from the ETL pipeline:

### 1. CX Dashboard

The CX dashboard is the primary dashboard used by Bundle. It has a filterable table with columns that display information on booked sessions such as session dates, instructor details, participant information, etc.

The screenshot displays the 'CX Dashboard' in Tableau. The main view is a data table with the following columns: Company Name, Member Name, Break Lesson Title, Break Participants, Break Type, Sub Category Name, Break Session Time ET, Instructor Name, Start Date, Break Price, Break Created At ET, and Price. The table contains numerous rows of data. On the right side, there is a filter pane with the following sections: Start Date (with a date range selector), End Date (with a date range selector), Member Name (with a dropdown menu), Break Type (with a list of options: All, Adult, Child, Inf, Kid, Teen, Youth), Cancelled (with a list of options: All, No, Yes - 1-30d, Yes - 3-30d), Refunded (with a list of options: All, No, Yes), Instructor Name (with a dropdown menu), Company Name (with a dropdown menu), Category Name (with a dropdown menu), Sub Category Name (with a dropdown menu), Break Price (with a list of options: All, Fixed, Not Fixed).

CX Dashboard

## 2. Pivot Table Dashboard

The pivot table dashboard consolidates information from the data storage created by the ETL process and displays instructor and session information in sortable tables.

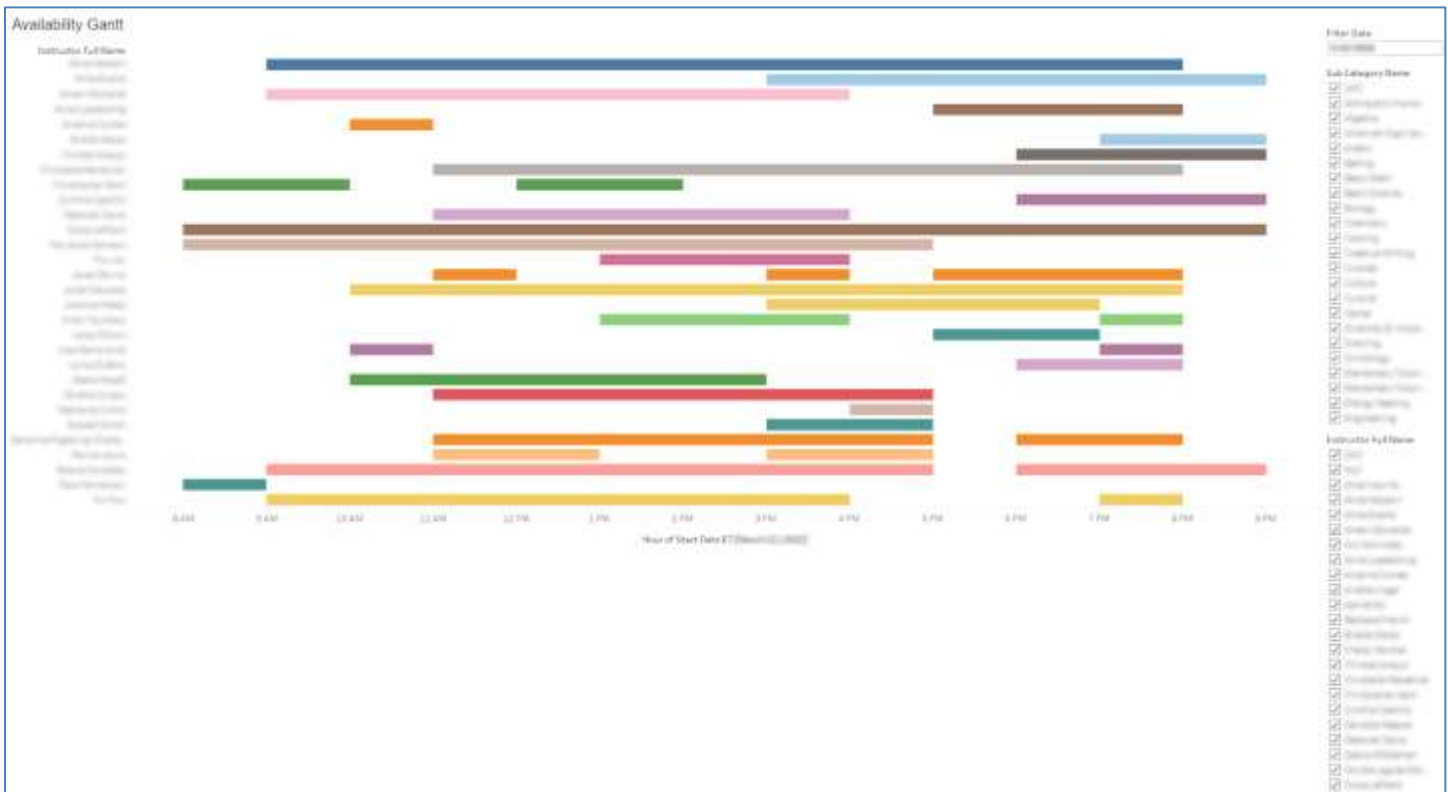
The dashboard consists of three panels, each with a dropdown menu and a table of data:

- Topics:** The dropdown is set to "[All]". The table has columns for Instructor Name, Instructor Topic Break Type, and Topic Name. It lists various topics such as "History", "World History", "American Sign Language", "Math", "Science", etc.
- Instructors:** The dropdown is set to "[All]". The table has a column for Topic Name and lists various topics such as "Writing and Reading", "Math", "American Sign Language", "Science", "History", etc.
- Break Type:** The dropdown is set to "[All]". The table has a column for Instructor Break Type and lists various break types such as "Lunch", "Break", "Class", "Study", etc.

Pivot Table Dashboard

### 3. Instructor Availability Dashboard

The Instructor Availability Dashboard displays Gantt charts that help visualize instructor schedules.



*Instructor Availability Dashboard*

**Our solutions deliver real results.** We help elevate your people to fuel your organization's transformation and growth.



**82%**

OF EMPLOYEES EXPERIENCED INCREASES IN ENGAGEMENT, MOTIVATION, AND CONNECTEDNESS.



**79%**

OF EMPLOYEES ELEVATED ACUMEN AND DEVELOPED PROFESSIONAL SKILLS.



**91%**

OF EMPLOYEES HAD GREATER FOCUS AND IMPROVED PERFORMANCE.

### Results

The ETL pipeline and data warehouse implemented by TrackIt ensured that all the essential data was grouped in a single place and formatted in a consistent way to enable effective data analytics. The usage of CloudWatch also helped Bundle to realize time savings by automating the process of data extraction from the CMS database.

The dashboards implemented using Tableau are now assisting Bundle in visualizing data to improve productivity and enhance decision making.

### TrackIt's Expertise

Tyler O'Connor, Data Analyst Lead at Bundle praised TrackIt's expertise, responsiveness, and commitment to Bundle. Tyler was particularly impressed with TrackIt's patience during interactions with non-technical staff during the implementation.

### Ensuring a Seamless Flow of Information Throughout the Organization

*"The cohesiveness within the organization has improved thanks to the implementation of the data lake. There are fewer back-and-forths involving asking someone to check if they have the same numbers in an Excel spreadsheet as someone else. And personally, for me, making dashboards for other departments has been made significantly easier by having a data lake."*

*- Tyler O'Connor, Data Analytics Lead, Bundle Benefits*

#### **Q. Qualities of the TrackIt team that stood out to you?**

*A. "The TrackIt team was very responsive to the needs we had. They were also very patient. When you are implementing something like this, it can sometimes feel like there's a barrier when you're trying to explain technical concepts. A lot of the people we have on our team aren't data-centric and the TrackIt team was very patient in making sure we understood what was being done."*

*- Tyler O'Connor, Data Analytics Lead, Bundle Benefits*

#### **Q. Would you recommend TrackIt to other companies? Why?**

*A. "Yes, I would. I think they did a very good job in terms of implementing this data warehouse. They did an exceptional job in terms of being patient with non-technical people. This was a very complicated project and the data in our company is very difficult to manage but the TrackIt team made sure that everyone was comfortable at each step of the implementation."*

*- Tyler O'Connor, Data Analytics Lead, Bundle Benefits*



### Challenge(s):

- *Non-normalized CMS Database that made it difficult to gather and use customer data*
- *The need for dashboards to visualize data*

### Solution(s):

- *ETL Pipeline and Data warehouse built using AWS Lambda, Amazon S3, and Amazon Aurora*
- *Dashboards implemented using Tableau*

### Outcome(s):

- *All essential data grouped in a single location*
- *Automated data extraction from CMS*
- *Data visualization enabling improved productivity and enhanced decision making*



TrackIt

<https://trackit.io>