

BUILDING INSIGHTLY'S DATA ARCHITECTURE WITHOUT A TEAM AND BUDGET

SOFTWARE



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INSIGHTLY DATA STACK



CUSTOMER INTRODUCTION

Insightly provides cloud-based customer relationship management (CRM), project management, and marketing tools for small and medium-size businesses. They use advanced technology, coupled with diverse integration and data tools, to enhance business value, promoting ongoing growth and service improvement.

EXECUTIVE SUMMARY

The Insightly team was looking to build their data architecture. Their biggest challenge was the absence of technical resources combined with a limited budget to develop a dbt Core platform. The Insightly team set out to build an enterprise data platform from scratch. This was to tackle existing process deficiencies that kept them from effectively using data for operational and strategic decisions. Datacoves addressed Insightly's needs by providing a managed dbt Core solution with an intuitive interface and seamless end-to-end data tool integration. With the implementation of Datacoves, Insightly was able to create a cohesive data infrastructure, faster dashboard delivery, and an improved production environment. Insightly is now able to focus on delivering business value rather than building or integrating SaaS services into a cohesive data platform.

THE CHALLENGE

Initial Infrastructure Limitations:

Insightly encountered several challenges while attempting to establish their data stack from scratch. Their data stack was a database with some data, but nothing was automated. Almost nothing ran on a schedule; the few things that did were managed by the software engineering team and not the data engineering team.

Resource and Expertise Challenges:

They lacked platform engineers to establish a robust data stack, and having the data team focus on platform creation would have resulted in a lengthy process of learning and setting up the infrastructure. Alternatively, hiring consultants to set up their data stack would have been both costly and time-consuming.

SaaS Tools Consideration and Budgetary Concerns:

Insightly considered using different tools like Fivetran for data loading and dbt Cloud for data transformation. However, using multiple SaaS tools would involve creating a cohesive process along with creating and managing separate SaaS subscriptions. Additionally, budgetary worries arose due to potential cost overruns. Fivetran's costs as well as dbt Cloud price increases raised concerns. Since these tools charge on a data row or per data model basis, the cost would increase drastically as the company scales. The pricing model of the tools resulted in price uncertainty and made it difficult to predict budgets accurately.

THE SOLUTION

Insightly came across Datacoves while looking for a one-stop shop solution to build their data infrastructure. **"I chose the Datacoves solution because it eliminated the need for multiple cloud purchases; everything was available in one**

spot. It perfectly fit into our existing business processes, ticking all the boxes we needed", said Nate.

Datacoves enabled a rapid setup of their data infrastructure. The process was smooth, and the Datacoves team ensured seamless updates and upgrades. Unlike the typical six to nine months Nate had encountered at another company, this setup was accomplished in just a week or two. Highlighting the efficiency, Nate mentioned, **"It's important to be able to quickly get someone up and running in their environment. That is a huge deal as your team expands. The speed is remarkable because none of the usual setup complexities are present."**

The convenience of having everything from managed dbt Core and the VS Code environment in the browser to tools like Airflow and Airbyte in one place was invaluable. Without Datacoves, Insightly would have had to juggle multiple SaaS subscriptions, but Datacoves consolidated everything into one. Additionally, Datacoves' pricing model, which charges for a cluster and offers reduced prices with scaling, ensured cost-effectiveness. This pricing approach also gave Insightly a predictable expense to budget for.

“ Datacoves made it possible for me to leverage best-in-class open source tech without needing to spend weeks to months standing it all up and maintaining it in perpetuity myself. ”

THE RESULT

Rapid Transformation and Cost Efficiency:

Datacoves took Insightly from their initial use of Google Sheets into a sophisticated and mature data platform with all the pieces of the modern data stack. The speed of setting up the data infrastructure with Datacoves was noteworthy. Without them, Insightly would have faced a 6-9 month timeframe at a much higher cost.

Enhanced Delivery Speed and Autonomy:

Datacoves significantly improved Insightly's time-to-market. While initially lacking basic metrics, Insightly can now promptly deliver to the business. Dashboards, which previously took longer, are now ready within days or weeks, equipped with automated refreshes. Additionally, the responsibility of regular updates doesn't burden the Insightly team; Datacoves manages platform upgrades on their behalf.

Refocusing on Core Business Deliverables:

Datacoves enabled Insightly to center on core business activities rather than technical aspects of the data stack. Handling the platform's intricacies, Datacoves ensured Insightly delivered business value efficiently. As Nate put it, **"Datacoves is a perfect fit for teams seeking to empower their analyst teams or analytics engineering without a large budget or extensive technical resources."**

CONCLUSION

Datacoves proved to be the ideal solution for Insightly's data infrastructure challenges. With an easy-to-use, one-stop managed dbt Core solution, Insightly swiftly overcame the hurdles of starting from scratch, expensive licensing, and limited team members. The implementation process was smooth, leading to a quick setup in just a week or two. Datacoves' unique pricing approach offered cost-effectiveness and scalability, transforming and empowering Insightly's data operations and enabling them to focus on essential business tasks. This successful partnership has allowed Insightly to evolve into a more agile and effective CRM provider for small and medium-sized businesses.

WHAT IS DATACOVES?

Datacoves is an enterprise DataOps platform with managed VSCode for dbt development and Airflow. We enable you to implement data management best practices without compromising data security.

We believe in open standards so companies are not locked into proprietary solutions, and we give you the flexibility to "opt out" of parts of our stack.

Find us at datacoves.com