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**Colgate-Palmolive Customer Development
Year-Long Internship Project**

by

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**An Honors Thesis in partial fulfillment of the requirements for the degree Bachelor of
Science in Business Administration in Finance and Accounting.**

**Sam M. Walton College of Business
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Introduction

From June 2021 to May 2022, I had the privilege of being the Customer Development Intern in the home care department at Colgate-Palmolive. In this thesis I will unpack the experience of working with Colgate Palmolive, specifically as it pertains to my largest project for the company.

The genesis of the project was informed by observations of the company over the course of the internship. The company had a noticeable gap in the data collection tools it was utilizing. I, along with the manager and analyst of the home care team, identified a solution by using Walnut in Google Data Studios to curate and sift through all the data stored across platforms into one. Doing this would increase productivity in communication and cut out the extra steps in the data storage process. This was a far-reaching project with even broader advantages once completed. During the process of setting up a Walnut in Google Data Studios, I had to become familiar with software like Atlas, Retail Link, and Nielsen IQ, and learned that businesses need a central location for their data storage and analysis to increase efficiency and ensure that data is up-to-date and filed properly. The advantages of relocating the company's data to a central and all-encompassing software like Walnut in Google Data Studios include increasing efficiency in communication team-wide, centralizing data for easy analysis, and eliminating unnecessary resources that waste company time, money, and energy. Far-reaching software, like Walnut in Google Data Studios, is essential for any company and worth the necessary time it takes to set up as a tool. It was imperative I take on this project to better support the home care team and show initiative as a young professional, and I succeeded in transforming the way the team operates and communicates daily.

Background

Hiring and Onboarding

At the February 2021 virtual career fair at the University of Arkansas, the present Colgate-Palmolive associates were knowledgeable and passionate about their company. They emphasized that successful employees of Colgate-Palmolive were motivated and sought to take on projects for the betterment of their company. It was obvious that Colgate-Palmolive was not only a company that valued self-driven and passionate employees but was also a place that valued and welcomed those who wished to modernize their company's workflow and technology. It appeared to be a great place for young professionals to start their careers and prioritize growth via taking initiative on projects. After the career fair, I was interviewed and offered the position as a year-long Customer Development Intern on the home care team.

The internship with the home care team commenced on June 7th, 2021. At the time, Colgate-Palmolive was still operating under work-from-home restrictions. Because of this, all onboarding was conducted virtually via Google Meet. At the time, April Anderson was the Customer Development Team Manager for Walmart home care and Hadley Harper was the Customer Development Analyst for Walmart home care. Both would be vital resources for the implementation of this project.

The onboarding process consisted of training in the reporting tools and resources the company works most frequently with including Nielsen IQ, Atlas, Retail Link, Impira, and Numerator. During onboarding, I noticed the various tools we used had differing functions and could be confusing and tedious to utilize. The onboarding process would later inform the decision to take on the Google Data Studio project.

Company Overview

Colgate-Palmolive was founded in 1806 when William Colgate created a small business selling soap and candles in New York City. They built their corporate headquarters in 1956 on Park Avenue and since then have recorded 17.42 billion dollars in revenue for 2021 and employ 34,500 employees. The business is now over 200 years old and sells products in over 200 countries and counting. Although it started with soap and candles, Colgate-Palmolive has added products ranging from cleaners, perfumes, toothpaste, pet food, body wash, deodorant, and fabric softener. Colgate-Palmolive has household brands in oral care, home care, and personal care categories. A few of their brands include:

Oral Care	Home Care	Personal Care
Colgate	Suavitel	Irish Spring
Elmex	Murphy's Oil Soap	Speed Stick
Meridol	Fabuloso	Lady Speed Stick
	Palmolive	Softsoap
	Ajax	
	Fleecy	

Table 1. Colgate Brands

In addition to these brands, Colgate acquired the natural brand Tom's of Maine in 2006 and Hello products in 2020. Although Colgate-Palmolive is known for its brands in the oral, home, and personal care categories, they also own Hill's Pet Nutrition and have been a staple brand in pet food since 1948. They are looking to expand into skincare and acquired high-end skincare brands PCA Skin, Filorga, and Elta MD in 2017.

Project Assignment

Recognize Need

For the Summer portion of the year-long internship, I took on a smaller project for the team. Using advanced Excel knowledge to analyze Palmolive billboard data across Arkansas, California, Georgia, Illinois, Louisiana, Oklahoma, and Texas, I translated the findings and presented a recommendation to the team. The manager formally assigned this project, and when beginning work on it, I noticed an inefficiency in the way the home care team sourced data. During the data collection process, Colgate-Palmolive uses a plethora of data reporting tools that each have a different purpose. In order to get all the data needed to perform their jobs effectively, the home care department would have to utilize their time pulling from multiple sources instead of one.

The oral care department had utilized Walnut in Google Data Studios previously, so I approached the team manager about optimizing it for the home care department. I pitched the idea to them; by revitalizing and centralizing the existing Walnut database, our productivity and efficiency as a team would greatly increase. I set up an individual meeting with them and created a deck that demonstrated that by creating a dashboard in Google Data Studios, our team would no longer have to spend time pulling from multiple sources and could utilize Walnut as a central hub for all our data needs. This would increase efficiency in the home care department by freeing up company resources including employee time, energy, and digital space to be utilized for other projects. The manager was impressed with the project and agreed that a Walnut in Google Data Studios would be an appropriate solution to the identified problem. She allowed me to make the

dashboard as a secondary project for the year and gave me access to the time and resources needed to properly set our team up for success with this software.

Steps to Completion

To properly execute this massive transfer of data within the team as it pertains to how they interact with data and use software, I created a plan and timeline for steps to track the project's progress. It was important for this project to successfully implement long-lasting change within the team, to succeed in two ways. First, the Walnut in Google Studios had to be properly updated and optimized for functionality within Colgate-Palmolive and our team. Second, the Walnut in Google Data Studios had to become the primary method of data storage for the home care team, which would require a change in how the team normally interacts with software. I outlined an action plan to accomplish both goals for this project, which had steps as follows: (1) Set bi-weekly meetings with my manager April to check project progress (2) Meet with the creator of the original oral care Walnut in Google Data Studios (3) Create the infrastructure of the dashboard (4) Design the source sheets and connect them to the dashboard (5) Create the reports and pull the data from each data source (6) Implement the dashboard by presenting the new database to the home care department for feedback (7) Make final adjustments and onboard team members to the software.

Literature Review

Stefanie Buck, the director of Open Educational Resources at Oregon State, and Mark Lane, the production manager at Oregon State, created two Google Data Studio dashboards to visualize their departmental data. One dashboard was created to visualize data regarding low and no-cost courses offered at the university, and the other was created to display data regarding how the Open Educational Resources textbook was used by students (Buck, Lane, 2021). The goals of these projects were to increase accessibility and transparency of information so that teachers have more information regarding class success and to increase efficiency in the department.

The dashboard for OER textbook use displayed a variety of metrics regarding the textbook's application. It displayed metrics such as when the textbook is opened, where the textbook is accessed, what chapters are being read, how many are returning readers, and who is reading the textbook (Buck, Lane, 2021). This tool was created and distributed to teachers to gain insight into students' habits so they could adjust their teaching approach to better match student learning styles. The tool was also used to determine how textbook use contributes to test scores and to measure classroom success.

The dashboard visualizing low and no-cost courses was used to visualize metrics regarding class offerings and enrollment. The dashboard is one page containing five components. These are the overview bar, the low cost and no cost sections by college pie chart, the low cost and no cost sections by school and department pie chart, the enrollment and credit hour pivot table, and the historical progress line graph (Buck, Lane, 2021). This dashboard was specifically helpful in aiding the school in aligning with the Affordable Learning Plan and creating actionable, data-driven goals for their plan.

To complete these dashboards, both Buck and Lane conducted research on Google Data Studio capabilities. After understanding this they collaborated with their department and combined data from many sources in their dashboard. The limit of these projects is that both dashboards contain only one page, so all visuals and data live in the same place. The tool could be improved if visuals and data were separated by topic, so the user could view the desired category of information with little distraction. This is an example of Google Data Studios use in

a small capacity as each dashboard only measures one function of the department. The dashboard could be enhanced by expanding to include department-wide metrics in all functions or combining the two dashboards to further increase efficiency and accessibility.

When developing and implementing new technology in a firm there is often a disparity between the full advantages a software has to offer, and how the company actually implements it. Simply put, companies are not fully utilizing everything their tools have to offer them. In a study of the problems encountered when new technology is implemented in firms, researchers found the 6 main problems to be “[managers] inescapably dual role, the variety of internal markets to be served, legitimate resistance to change, the right degree of promotion, the choice of implementation site, and the need for one person to take overall responsibility.” (Leonard-Barton, Kraus, 2014)

The design and implementation of a new work tool or software creates a “dual role,” which is when, preferably, the person who designed the software is also the person who implements it (Leonard-Barton, Kraus, 2014). Unfortunately, this is not often the case in companies, and the tool ends up being designed and created by an individual and then given to someone within the team that will utilize the tool to implement it. This handoff is a difficult and key step in the process, and the fact that two separate people handle a software’s journey within a company often results in the aforementioned disparity. The user organization is not invested in the project and is unwilling to assume responsibility for a tool they do not have the technical skill to run. To combat this problem, the creator and user should work parallel throughout the creation of the tool so that when the transition takes place, it is almost invisible. When users are incorporated into the design process, they can help enhance the tool to accurately fit the team’s needs, prepare the user to teach the application of the tool, and naturally hand over the ownership of the tool.

When creating a new tool, it is important that the creator has a framework for the information by having a deep understanding of the realistic needs within the team and historical knowledge of the functionality of the team and its work. For a creator to understand this, they should spend time observing the current jobs on the team, pay attention to the specificity of tools needed to acquire information or make decisions, discuss with employees which workplace practices work well and which don’t, and analyze how this relates to the larger picture (Leonard-Barton, Kraus, 2014). Developers who create tools without considering these factors, create new tools and software that solve a certain set of problems while creating an entirely new set.

Another problem that arises is “the many versus the one.” This refers to the idea that when an individual creates a new tool without the support of their team or a manager, it will be difficult to implement effectively (Leonard-Barton, Kraus, 2014). To combat this, the tool creator should assemble an implementation team to garner support and resources for the project. The team should consist of 4 roles; they are: sponsor, champion, project manager, and integrator. These are roles rather than positions, so one person can take on more than one role, but it is important that a project has one person in charge of driving the project forward. When an implementation team is created for a project, the project will have holistic support as it becomes a part of the team’s workflow, and therefore be more likely to succeed.

Research and Planning

Walnut in Google Data Studios Explained

The project utilized a holistic data tool called Google Data Studios. Google Data Studios is a free data tool that can be used to customize dashboards and reports that transform raw data

into easily digestible and informative formats that are highly accessible. The capabilities of Google Data Studios include inserting charts to visualize the data in various forms such as geo maps, pie charts, bar charts, and pivot tables. Users can also create viewer filters and data range controls so that the dashboard is interactive and can be modified to fit the user's specific data pool they need. Users can insert clickable images and links to other sources such as product catalogs and video libraries and they can do all this in different styles and color themes that give the dashboard visual cohesion. The potential for Google Data Studios is endless and extends only as far as the creator's imagination.

Within Google Data Studios, I was specifically creating a dashboard called Walnut for the project. Walnut is a dashboard you can create in Google Data Studios that combines multiple reporting tools' data so that you can see your business' "Category Story in a Nutshell". With Walnut, users can seamlessly integrate data from all departments and create a tool that encompasses the entirety of the department's performance from all perspectives. Whether a company is looking for data pertaining to supply chain, marketing, sales, or finance or would like to analyze the business from a high-level or low-level perspective, Walnut has everything a company might be looking for to increase productivity and performance.

Meeting with Experts

To begin the project, I scheduled a meeting with the creator of the oral care Walnut. While meeting with him, I was able to ask questions regarding his experience creating the oral care Walnut and for lessons he learned along the way. His advice was to divide and organize the source sheets by reporting source and to ask the home care team before beginning the building phase what their values and needs for the dashboard were so that there would be a clear vision for the dashboard's purpose from the beginning. A problem he encountered occurred when he was building and linking the source sheets. He advised me to take the necessary time and be precise, because it was a finicky process that required a lot of trial and error. Although it was beneficial to hear from someone with experience building a Walnut Dashboard, it was important to remember that oral care and home care are very different departments that have entirely different needs. Because of this, building the home care Walnut would require different skill sets and would bring a new set of problems that could not be predicted.

I set up a meeting with the home care department to determine their wants and needs for the dashboard. From the meeting, I was able to ascertain that the team had 3 main purposes for the dashboard. They wanted the dashboard to have the capability to view sales metrics for not only our products but also our competitors' products, to utilize the dashboard as a calendar for product features and promotions to inform their data analysis and to have a daily and monthly supply chain tracker with detailed in-stock reports. Now that I knew the team's specific requests, that information would drive the project's priorities in the physical dashboard creation and allow for fewer problems during the customization and implementation step of the project.

Sources and Data

The goal of the creation of a dashboard was to implement a data tool that would centralize information from all of our reporting tools so that employees could use it as their main source of insight and forgo the task of pulling reports from each individual reporting tool. To do this, I transferred data from the 3 main reporting tools the team uses. Each reporting tool has a unique purpose and functionality. Here is a breakdown of the 3 reporting tools and their specific uses:



Atlas is a reporting tool that allows users to create basic and advanced ad hoc reports covering supply chain, category management, sales, and store insights. They maintain 1,200 separate databases and represent over 1,000 different brands and categories. They gather analytics from retailers such as Walmart, SAM's, Target, Kroger, and Amazon. Their tag line is "Insights to Impact" and they aim to organize, harmonize, and make sense of analytics for CPG retailers. Atlas data is updated daily, so it is our main source of data and is best used for daily reporting and low-level analysis.



Nielsen IQ provides apps that can be categorized by business intelligence, data enrichment and integration, and planning, simulation, and activation apps. These apps provide detailed data sets and insights that measure customer transactions, performance snapshots, and competitor insights. Nielsen IQ's tagline is "We deliver the complete truth" and they strive to be clear, reliable, and lead teams towards true intelligence. Nielsen IQ is updated monthly and is best used for high-level analysis of competitor sales and metrics.



Retail Link is a data source provided to Colgate-Palmolive by Walmart. Its purpose is for Walmart to provide its vendors with data regarding their personal performance in Walmart stores so that they can optimize their sales techniques and back up their negotiations with buyers with data. Retail Link provides detailed brand performance and shopper insight data, but it does not provide competitor data in regards to market performance. Retail Link is updated daily with Walmart-specific data, so it is best used to understand our brand performance and shopper insights at Walmart stores and in online e-commerce transactions.

The home care team utilizes these reporting tools frequently to inform their decisions and create valid and actionable plans and presentations. As the first line of support for the home care team's data analytical needs, it is my job as a Customer Development Intern to be informed about the functions of these tools to conduct the necessary analysis requested of me. I used advanced knowledge in our reporting tool functionality to fuel this project.

Building Phase

Dashboard Infrastructure

The first step in the building process was to create the infrastructure of the dashboard. This process took around 1 month. Because I knew what information the team needed I was able to determine 11 categories of data and create pages for each of them in the dashboard. The categories were scorecard, sales growth, customer share, share trend, assortment, distribution, pricing, BEATS, mod cycle, shopper insights, supply chain, and features. The dashboard organized these categories in a bar on the side of the dashboard for easy navigation between pages. Here is what the pages bar looks like in Google Data Studios:



Figure 1. Walnut Dashboard Tabs

Each tab represents a different page in the dashboard, each with different information. Here is a breakdown of the information displayed on each page:

Scorecard: Scorecard is a summary slide that displays key performance indicators such as dollar and unit sales and overall share trend.

Sales Growth: Sales Growth displays dollar sales growth and unit sales growth for year-to-date, Walmart year-to-date, last 26 weeks, last 13 weeks, last 4 weeks, and last week.

Customer Share: Customer Share displays market share in dollars for the current year and the year before. The graphs can be modified to show data for year-to-date, Walmart year-to-date, last 26 weeks, last 13 weeks, last 4 weeks, or last week.

Share Trend: Share Trend displays a table listing specific product share of category sales by year-to-date, last 26 weeks, last 13 weeks, last 4 weeks, and last week. The table directly compares Colgate-Palmolive and competitor product share.

Assortment: Assortment displays our quarterly SKU (Stock-Keeping Unit) counts by year. The SKU counts are divided by brand and reflect our current product offering at any given time.

Distribution: Distribution displays our total distribution point growth and change. Distribution points are important because they tell a company how many stores their products are sold in and how many of their products are sold in each of those stores.

Pricing: Pricing displays the retailer's average sales price and price growth for Colgate-Palmolive and competitor products over the last 26 weeks, the last 13 weeks, the last 4 weeks, and last week.

BEATS: BEATS displays which retailers have better prices on Colgate-Palmolive products than Walmart. It details how big the price gap is, how many units the retailers sold at that price, and which products are the culprits.

MOD Cycle: MOD Cycle displays current MOD layouts for our various sized MODs.

Shopper Insights: Shopper Insights breaks down a leakage tree into how many people have shopped at Walmart, how many have purchased that category of product at any retailer, and how many have purchased that category of product at Walmart specifically.

Supply Chain: Supply Chain displays replenishable in-stocks for the last 90 days and the last 10 days.

Features: The Features page is utilized as a calendar that displays what product features we have coming up at Walmart, when they are, and how much product we have set aside for them.

After creating the pages, I then determined what filters to put in the dashboard so that users could customize and manipulate what data is shown. The data can be filtered by manufacturer, market, category, brand, item, UPC (Universal Product Code), size, segment, and scent. These filters would be used later during the report creation step of the building process. Here is what the filters look like in Google Data Studios:



Figure 2. Walnut Dashboard Filters

Source Sheets

The next step was to make a formatted template in Google Sheets for the data to go in. As advised from the meeting with the oral care Walnut creator, the dashboard divided the source sheets by each reporting tool. I created two source sheets, one that contained all the data from Nielsen IQ, named “Nielsen Walnut Input – HC”, and one that contained data from Atlas and Retail Link, named “Walnut Input – HC”.

The Nielsen Walnut input sheet had 7 tabs in it, and each tab would be linked to a different item in the Walnut dashboard. The tabs are Category Master, Sales Growth, Unit Growth, Distribution, Share Trend, Trend Totals, and Category Totals. Category Master is the only tab that isn’t linked to the Walnut in Google Data Studios. Its purpose is to contain all of our product’s details so it can be utilized for VLOOKUPs in the other 6 tabs. Here is what the “Nielsen Walnut Input – HC” source sheet looks like in Google Sheets:

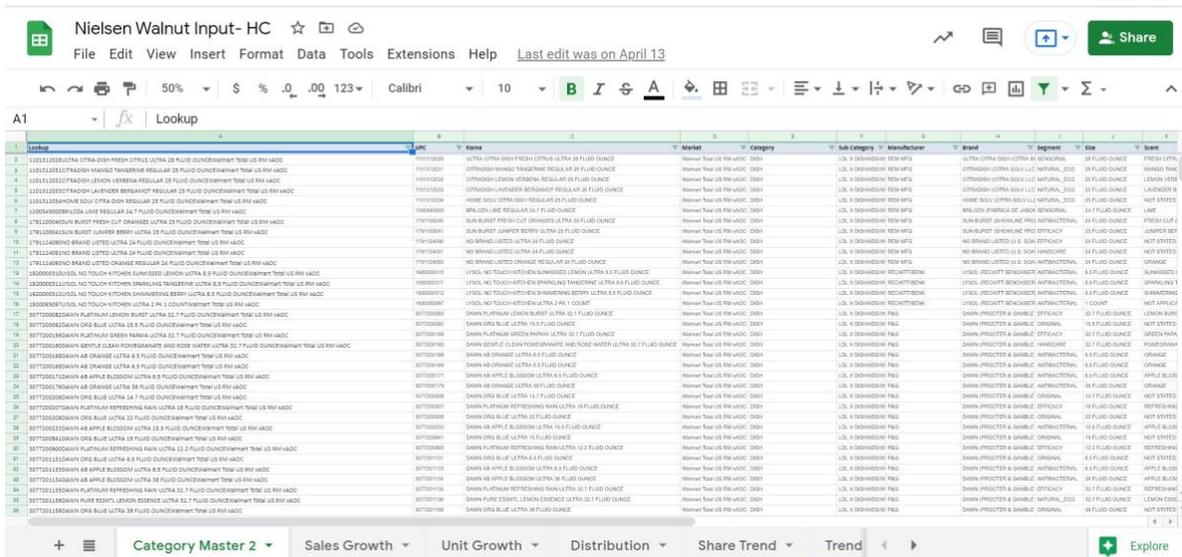


Figure 3. “Nielsen Walnut Input – HC” Source Sheet

The Atlas and Retail Link Walnut input sheet is the second source sheet and is separate from the Nielsen input sheet. This sheet is smaller than the previous one and only has 4 tabs in it. The 4 tabs are Category Master, Assortment, Shopper, and Replenishable In-Stocks. The

Category Master in this Google Sheet contains the exact same information as the Category Master of the Nielsen Google Sheet. Here is what the “Walnut Input – HC” source sheet looks like in Google Sheets:

The screenshot shows a Google Sheet interface with the title "Walnut Input - HC". The menu bar includes File, Edit, View, Insert, Format, Data, Tools, Extensions, and Help. The toolbar shows various icons for undo, redo, print, zoom, and other functions. The data table has columns for UPC, Name, Market, Category, Sub-Category, Manufacturer, and Brand. The rows contain detailed product information, including UPC numbers and product names like "ULTRA ORANGE FRESH COTTON ULTRA 23 FLUID OUNCES".

Figure 4. “Walnut Input – HC” Source Sheet

In addition to the Google Sheet source sheets, I utilized another Google Data Studio dashboard that I created as a linked source in the Walnut. The dashboard is called the BEATS dashboard and it details our product pricing across every retailer that carries Colgate-Palmolive and determines what percentage of other retailers' prices beat Walmart prices and how often. This is necessary because Walmart is a low-price guarantee retailer and requires us to monitor these numbers so that other retailers are not beating our prices. By linking the BEATS dashboard, I did not have to consider BEATS data when creating the source sheets. Here is what the BEATS dashboard looks like in Google Data Studios:

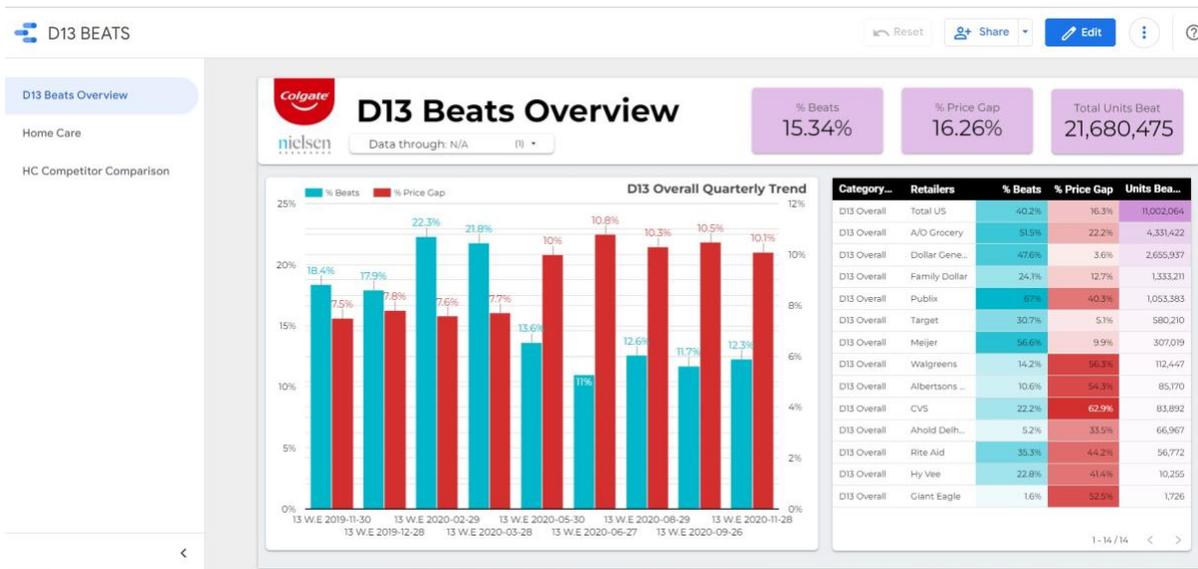


Figure 5. BEATS dashboard in Google Data Studios

The features page is another page that does not require a source sheet or data. Since that page is utilized as a calendar and is housed in Google Slides, I linked the slides where we keep those details to the dashboard. When the slides are updated with new features, the page in Google Data Studios displays the same information. Here is what the features page looks like in Google Data Studios:

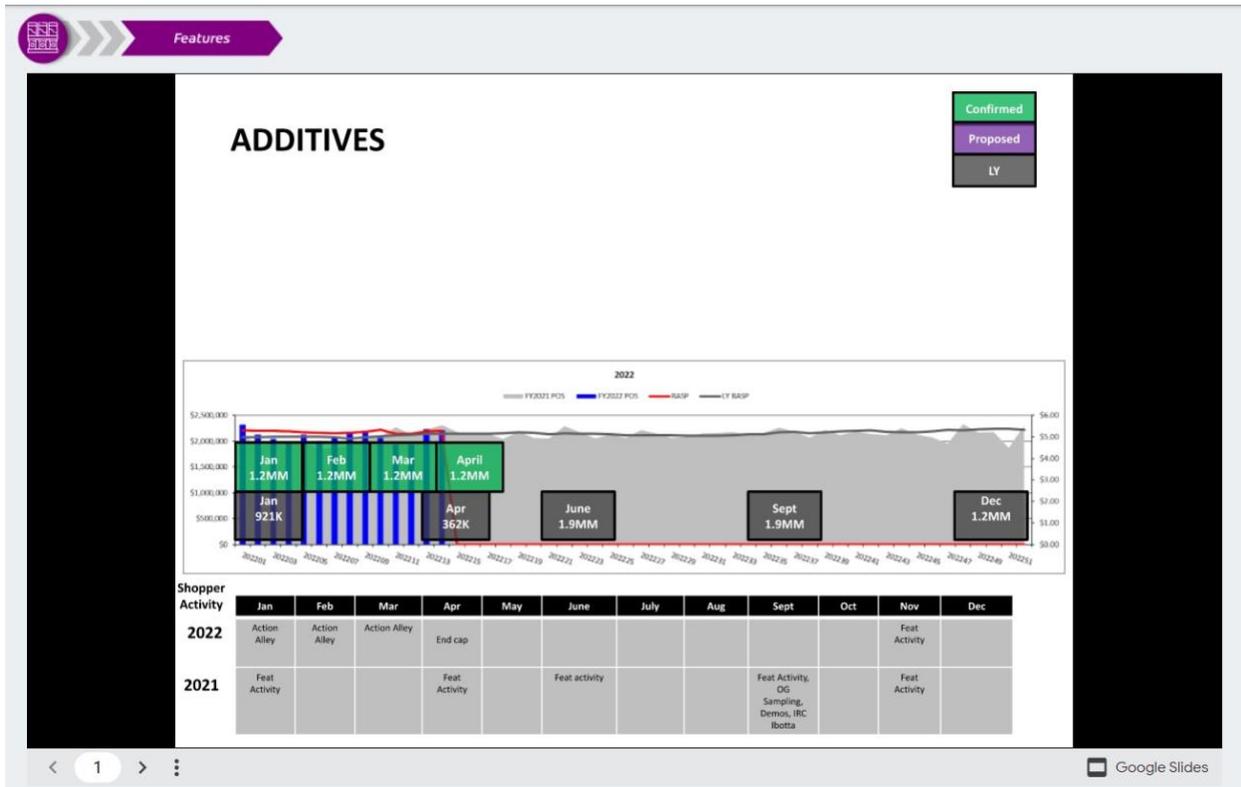


Figure 6. Features Page in Google Slides

Report Creation

After creating the dashboard infrastructure, it was time to start the process of collecting data to fuel visual aids. This process, along with the creation of the source sheets, took 2 weeks. Before this could happen, however, the reports had to produce an output that pulled the necessary data. This was a trial and error process that required multiple attempts to get the desired format.

I created two reports in Nielsen IQ and scheduled them to run monthly on the days that Nielsen conducted data updates. The first report was the Category Master and the second contained data for sales growth, unit growth, distribution, and share trend. In Retail Link I created one report and scheduled it to run daily. This report pulled daily replenishable in-stock percentages for all items. The report was created in Atlas to pull shopper insight metrics and scheduled it to run weekly. By creating and scheduling reports, the process became further automated and simplified the maintenance of the project by updating the source sheets when new data was sent.

Problems

Similarly, to the creator of the oral care Walnut, the biggest challenge occurred during the linking process. Once the dashboard was created, the source sheets set up, and the data pulled,

the only thing left to do was to link the source sheets to the dashboard. The process required precision, so it was difficult to achieve on the first try. In order to link them I had to go into each sheet visual and link them to their specific data set. If something was off with either the source sheet or the visual in the dashboard it would display an error and the process would not complete. From there it was a matter of validating both the dashboard and source sheet components and ensuring no piece is incorrect. One way to avoid this problem is to have been more detail-oriented during the building process. If I had spent more time getting to know how Walnut works or reviewed how to properly link sources, I would have been better equipped to complete the task, save time in the final steps, and run into fewer errors.

Implementation and Results

Upon completion of this project, the Walnut dashboard had to be integrated into the home care department’s daily operations. I set up a meeting with the home care department with the purpose of teaching them the dashboard functions and distributing it for them to use. In the meeting, I went through each page in the dashboard and described their functions and answered questions along the way. I informed the team of the dashboard timeline and told them when the data would be updated with new information. The home care team understood that the dashboard is very flexible and that they could request new components and modifications if they noticed anything after using it for some time. After the meeting, the team had a full understanding of Walnut’s capabilities and how to make it work for them. Here is what the completed dashboard looks like in Google Data Studios:



Figure 7. Walnut Dashboard Overview

Once the Walnut dashboard was utilized by the team, the only job remaining was to update the data daily and monthly. With the project finished, I continued to do these tasks and checked in with the team to see if they thought the dashboard was working properly. They gave feedback and the only modification request was to add a subcategory filter at the top of the

dashboard so they could filter the data by this metric. The necessary changes were made by adding this metric to the source sheets, reports, and dashboard and then refreshing the dashboard.

To ensure the longevity of the project, I taught the home care analyst how to maintain the dashboard and shared the necessary reports with her. She understands how to modify and update the dashboard so it can be functional even after the internship ended in May. The home care team has been using the dashboard consistently and it has greatly reduced the amount of data the team has had to pull themselves. It has also cut down the amount of time spent switching between reporting tools.

Conclusion

I began this project in November 2021, and it took around three months to build, perfect, and implement in the home care department. The project concluded at the end of March 2022 and has seen success since. The dashboard has been fully functioning for over one month now, and there has been a multitude of positive results from the project. The project has fulfilled the home care department's need for a more efficient way to gather, analyze, and visualize data.

To complete the project, I had to conduct research and plan, spend time building the components, and educate the team on its capabilities. This project taught me a lot about data analytics as well as the specifics surrounding our multiple reporting tools. I became well-versed in Google Data Studios and feel confident in my ability to replicate this dashboard or apply my newly acquired knowledge to other projects. I was able to sharpen my professional skillset and show initiative to make a difference in the team's workflow.

While at Colgate-Palmolive I completed countless projects, in addition to creating the Walnut dashboard in Google Data Studios, and learned communication skills, teamwork, problem-solving, critical thinking, and data analysis concepts. This project was a huge asset to the home care department and made a lasting impact through the creation of the Walnut in Google Data Studios.

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