Shaw & Smith /
Self-Service Analytics & Reporting

Challenges

A shortage of internal resources became apparent during a maternity leave absence. However, the need to complete an internal reporting project was still pressing.

Pick up pre-existing report development and re-factor the design for better business outcomes.

Initial budget constraint of 20 hours. Customer delight with the services provided led to continued work.

Solution

Build a Power BI based reporting platform for the business using data from multiple disparate sources, including Azure SQL Database, Google docs and web url.

The reporting covers sales, inventory and stock allocations.

Introduced business to the benefits of Microsoft 365, software for which they were already subscribed.

Benefits

The reporting solution provided:

- A single data model that acts as the source of truth for reporting.
- Reporting that automatically refreshes overnight.
- Self-service access to the data model for ongoing internal report development.
- Ability to self-service load budgets and other data from a Excel load files hosted in SharePoint (reducing external IT service costs and dependencies).

The services provided delivered the added benefits of:

- Focusing on not only delivering the required outcomes but also highlighted other opportunities for the organisation to leverage existing technologies that would lead to more efficient, robust and secure business outcomes.
- Highlighted and remediated sub-standard reporting approaches taken by a previous service provider.

Capabilities

Business analysis

Data modelling

Report design and development

Technologies

Power BI Desktop & Service

SQL Server

Google docs

Web url

SharePoint Onliine

Domains

Wine sales, Wine inventory management