

# CHALLENGES

For one of our retail clients, quick access to data and insights is a key pillar in enabling decision-making. Data drives all aspects of their business, from production to inventory to sales. Competing within a rapidly changing market, our client relies on quick and effective access to high-quality data to drive business value.

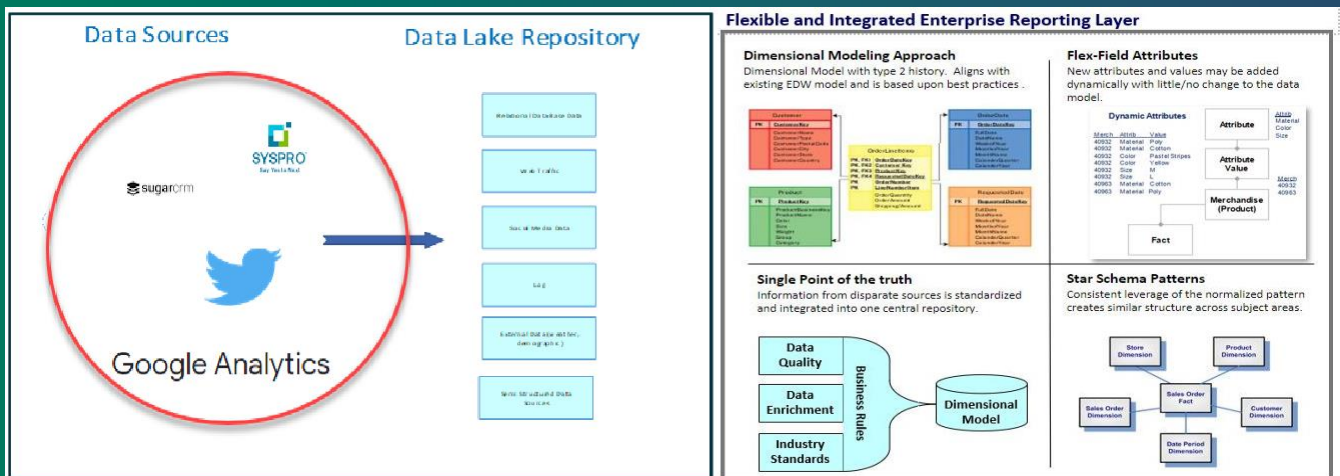


With the current platform on Tableau being overloaded, the team focused on migrating the backend to Snowflake and developing an end-to-end solution that could increase accuracy and delivery speed. The team sought a solution to expand reporting and add extra features, like machine learning, to a new platform. The solution would deliver relevant data to users with sub-second responses in an end-to-end automated solution pulling from a centralized data source. The team realized that its long-term automation goal would require moving all its data from its existing platform into a new Snowflake enabled solution.

## Creating an Automated Foundation for Reporting

The team used Snowflake sandbox methodology - a method that allows the BI team to use the performance of SQL Sandbox for data transformations & calculations while using Power BI for the visualization.

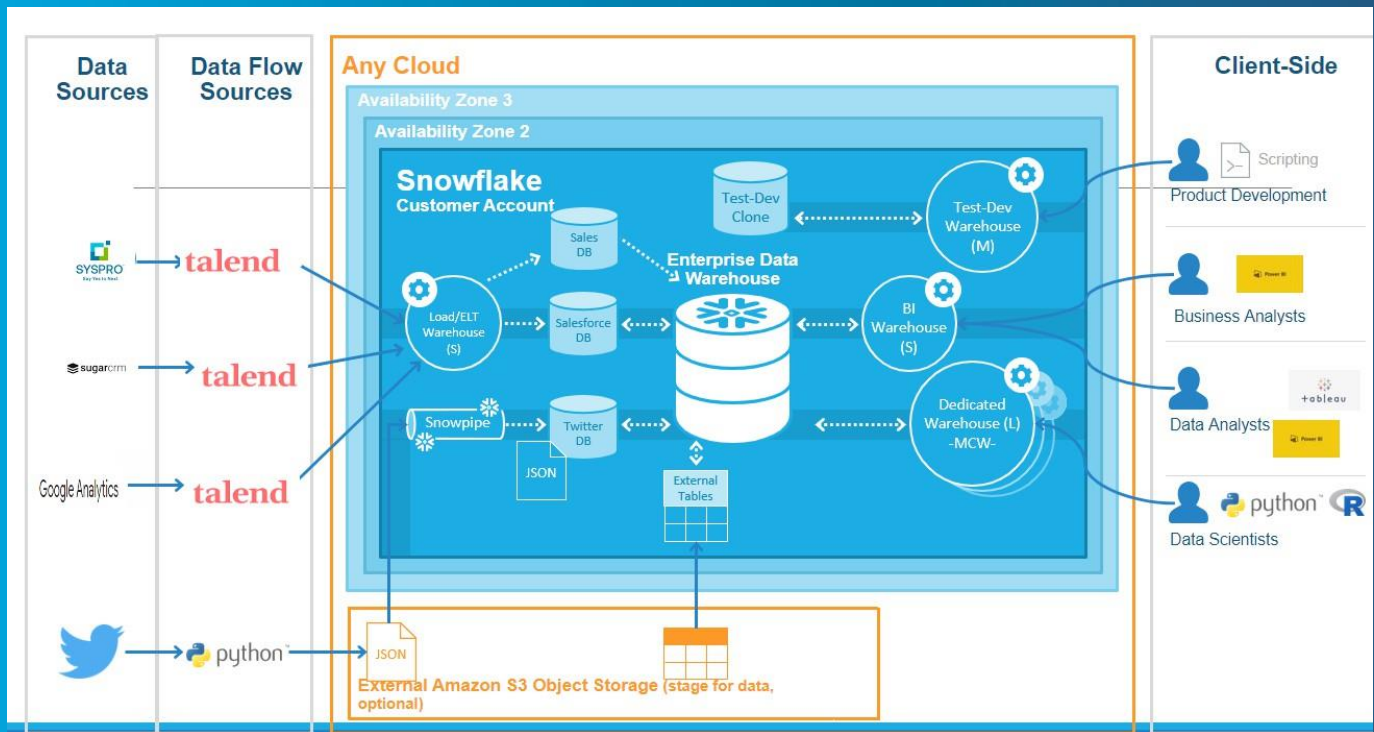
When building out the Sandbox solution, the first step was consolidating the data. To prevent the increase in manual work, a high priority was given to automate the movement of Excel files, Source data consolidations & Vendor information uploads. Users across the organization upload their Excel files to a SharePoint drive for WIP, Plan & Forecast.



Once data is properly processed, it is moved into the Snowflake repository. A SQL script is then run to create a final data table and subsequently notify admins via e-mail that the ingestion is ready. Based on a successful notification trigger, Power Automate will automatically refresh Power BI on the node, and an automated email will be sent out to the SME to approve the release of the Dashboard.

By using streamlining process, the team was able to **automate what before was a very time-consuming part of their ETL pipeline and reduce refresh times by 73.5%.**

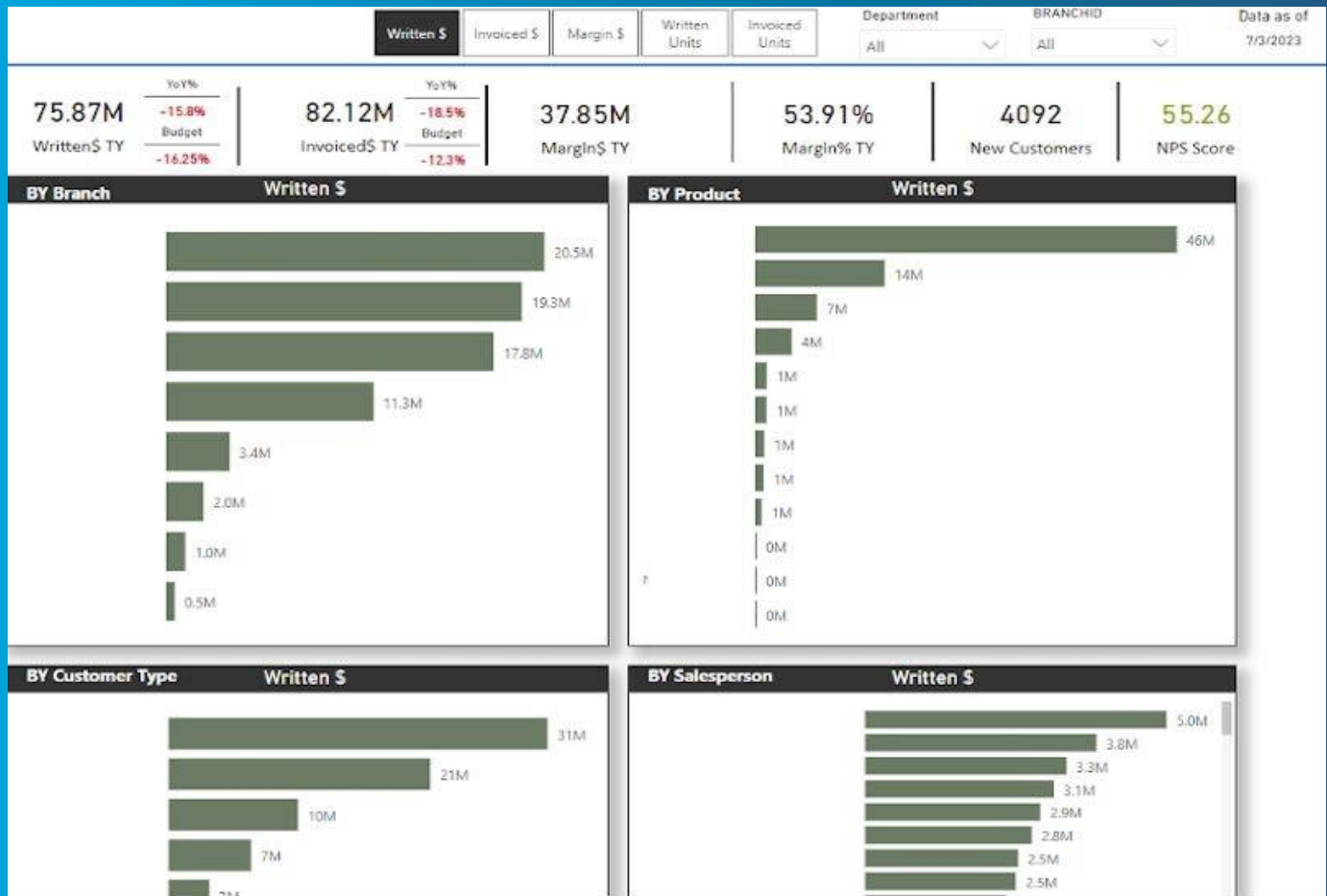
## Final Solution Architecture



## Bringing Real-Time Insights to All Corners of client requirements

With this new data platform and pilot, the team was able to take this solution forward for all complex reporting. Power BI fits organizational needs by handling different data sources, providing increased efficiency, and reducing operational costs.

One of the client's most used dashboards is the Executive Insights dashboard. The dashboard tracks the mix of Brand, Branch, and Margin. Metrics highlight the performance of products, branches, salespeople & Customers. With this Dashboard, the Executive, FP&A, and Planning teams can use these metrics to understand how they are performing in the markets. The products have multiple tabs that enable deep dives and further analysis.



The Executive Insight View provides a general overview of the business on a daily basis with information in real-time.

The ease of use with Power BI visuals has empowered individuals across the enterprise to easily access insights to aid decision-making and help react to the market quicker.

## Building an Insight-Driven Future

The adoption of Power BI for our client involved gradual growth led by a top-down approach. While many individuals were hesitant to learn a new tool, advocacy from leadership and seeing the effectiveness of Power BI convinced users of the value of Power BI and how it could improve their daily workflow. With the influx of Power BI users, the company was able to accelerate Power BI deployment to build products enabling insights across the ecosystem.

**SCHEDULE A CALL WITH ONE OF OUR EXPERTS TODAY!**

**HEAD OFFICE**  
4365 Route 1 S,  
Suite 102  
Princeton, NJ  
08540

**US**  
330 Camp Road  
Charlotte, NC  
28206

**CANADA**  
116 Albert Street,  
Suite 200 & 300,  
Ottawa, Ontario,  
K1P 5G3, Canada

**INDIA**  
Hubtown Solaris,  
Suite 1113,  
N S Phadke Marg,  
Sai Wadi, Andheri  
East, Mumbai  
400069

