

Power BI for Steel Manufacturer

Reporting against a complex, on premises highly-customized JD Edwards environment.

Modernizing inefficient Excel reporting.

OVERVIEW

Organization was experiencing significant pain around sales reporting. Most of the reporting was being done in Excel and was very manual, inefficient, not actionable insights and the reports were always behind.

CHALLENGE

Executive and operational need for more robust, up-to-date, timely and actionable decision based reporting, for sales, opportunity reporting, sales metrics and closed to quota reporting.

Reporting against a complex, on premises JD Edwards environment that had been highly customized.

SOLUTION

The Oakwood Data and Analytics team delivered value to this important strategic client in a variety of ways:

- Conducted strategic stakeholder discussions and analysis to understand strategic and tactical BI objectives to develop deeper understanding of client current state.
- Conducted interviews and whiteboarding sessions, as well as envisioning exercises to develop a future state architectural design and strategic roadmap for a future state modern BI and analytics environment.
- Designed, created and published various reports around their sales processes, opportunity tracking, closed win ratios etc.
- Configured a Microsoft Power BI reporting environment to support multiple users.

PROFILE

Founded in 1962, a steel manufacturer that boasts more than a half-century of steadfast commitment to serving customers requiring steel pipe and tube. The fastest growing competitor in the market, producing tubular steel.

VALUE

The organization derived immediate value from the Power BI portion of the engagement through enhanced operational and executive sales reporting.

TECHNOLOGIES

Azure SQL Managed Instance, SSIS, Power BI, and Oakwood proprietary frameworks and methodologies.