A NEW ERA

How three top SMEs are transforming their enterprise planning using **Microsoft Power BI**

- **Businesses implementing Microsoft Power BI and using it well are the ones that are not only surviving, but getting ahead, as data continues to grow in complexity and importance.**

- **Power BI is an essential tool that allows organisations to analyse all aspects of their business and make substantial improvements across multiple areas.**

- **Businesses must do their groundwork, plan well and work with a trusted partner to implement Power BI successfully and reap its benefits.**

In this era of information overload, actual knowledge is power. How well do you know your business? Your customers? How much real insight do you have into what impacts your sales? How well does your own team know what drives your business and the role they play in its success?

How do you drive your business forward? By having clear, precise and real-time insights into your organisation across all financials and KPIs, understanding what you mean to your employees, customers and competitors. This is what allows you to create a solid business strategy for success.

If you haven't had the time or resources to take business intelligence seriously – now is the time. And Power BI, part of the Microsoft Power Platform is well worth your consideration.

Read on to see how this platform has made real transformational change for the likes of TravelEdge Group, Fullerton Health and St George's Foodservices and how it could do the same for you.

Data challenges are increasing for all businesses

Data and using it smartly is becoming the key challenge. Business goals have shifted from using data to improve productivity, reduce cost and save time (although these are still important) to needing more from the data, and with good reason.

They want more access, faster access, and specifically, access to data providing information and insights that can be used to transform the business and generate real benefits for customers.
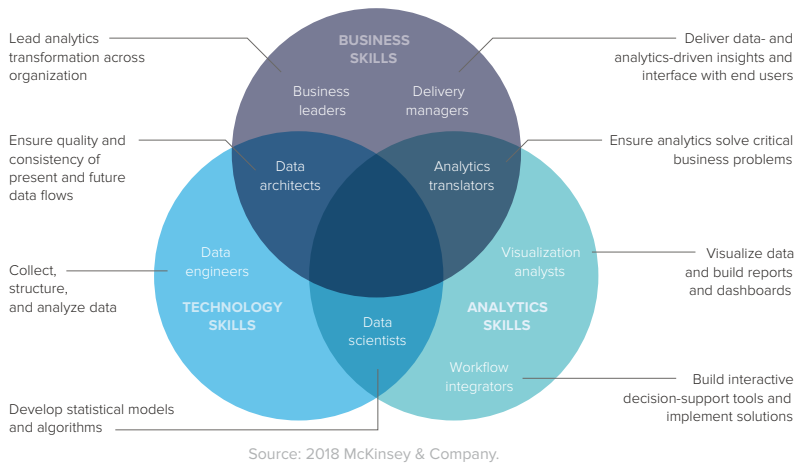
However, navigating large amounts of data, sorting it into usable information and then analysing it to provide valuable business insights is no easy feat.

A huge challenge in this regard is having personnel with the right skill-sets. Jobs that barely existed ten years ago are becoming paramount. Global management consulting firm McKinsey & Company identify a number of key analytics roles including:

- Data architects
- Data engineers
- Data scientists
- Analytics translators
- Visualization analysts
- Workflow integrators

McKinsey notes that one of the key areas in which businesses fall short when implementing data and analytics initiatives, is failing to understand analytics roles properly and not having the right people with the right expertise in key roles. And of these roles, translators are often most overlooked.

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Analytics roles and responsibilities

Lead analytics transformation across organization

Ensure quality and consistency of present and future data flows

Collect, structure, and analyze data

Develop statistical models and algorithms

Deliver data- and analytics-driven insights and interface with end users

Ensure analytics solve critical business problems

Visualize data and build reports and dashboards

Build interactive decision-support tools and implement solutions

BUSINESS SKILLS
Business leaders
Delivery managers
Data architects
Analytics translators

TECHNOLOGY SKILLS
Data engineers
Data scientists

ANALYTICS SKILLS
Visualization analysts
Workflow integrators

Source: 2018 McKinsey & Company.

What is Power BI?

- Part of the Microsoft Power Platform
- A powerful reporting and dashboarding solution to display your data
- Can draw data from multiple sources
- Data display is specific to the user profile within a business
- Product is coming out best in class in comparison to competing products

What is the Microsoft Power Platform?

The Microsoft Power Platform allows organisations to analyse, act and automate through three service offerings –Power BI, Power Apps and Flow. The simplicity of these systems once implemented means that employees, regardless of technical ability can access information and make strategic business decisions based on real time data.

Whilst all three services are considered best in class products on their own, it is their ability to work with one another that is a real game changer for organisations with empowered and highly engaged employees steering the ship.

Key roles required to implement Power BI

- Business leaders within an organisation
- Technical experts with intersecting business knowledge
- Implementation team
- Training team to impart crucial training within an organisation
- Delivery managers and team
- Analytics translators and experts

Who is benefitting most from Power BI

So, who is already forging ahead and reaping the benefits of Power BI? The first thing to understand is that there is no 'one way' to implement or use Power BI. Businesses and organisations are using it in different ways depending on their core business values and goals, whether that be primarily profit-driven, people-driven or process-driven.

Businesses that require external client access (e.g. customer reporting) and those for whom scalability is important also benefit from Power BI.

Forbes research from 2018 indicated that most BI implementation to date has been driven by Executive Management, Operations and Sales. Of particular value at a high level is the Power BI Business Scorecard – a unique tool that gives a powerful snapshot of the health of the business.

Clear signs your business is ready for Power BI

Any one of these practices or realities is an indicator that your current data and BI processes are outdated and not serving you as they should:

- Using Excel spreadsheets – unwieldy and difficult to export data
- Manual data entry – takes too much time and leaves too much room for error
- Numerous legacy systems that don't talk to each other
- Data gathering and processing taking days out of every month
- Inability to really know if data is accurate
- Reliance on Human Intelligence to decipher insights and trends

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Case Study Snapshot: Fullerton Health

When Fullerton Health (an Asia-Pacific health network) acquired Healthscope in Australia, the systems of nearly 50 medical centres and clinics needed to be integrated and a practice of manual data collection upgraded. Extraction from systems and data was taking a long time. Data was unclean and unreliable. After a successful Power BI implementation project with Clade, one click of a button now shows 18 KPIs in one report. This report shows everything from total billings across all practices, the number of consultations, billings per hour, treatment types and payroll information – sufficient information for the GM to run the business.

> "We needed to get so much done in a short time frame. That can be very frustrating but Clade were prepared to be very flexible. I learned very quickly that I could trust them to do what they promised and often Microsoft Power BI quite a bit more."
>
> **Fullerton Health**

Key Challenges in Power BI Implementation

- Not using an implementation partner may seem like a good way to save on costs but if not executed properly a great BI tool will end up costing you more in the long run.
- Complex legacy systems in place require time to decipher and untangle.
- Many organisations do not realise that Power BI is a fully cloud based solution and therefore this needs to be implemented prior.
- Good quality data is required for Power BI to be effective but can be time consuming to clean at the beginning.
- The data modelling of Power BI may be different to what some users are comfortable with.
  Training and knowledge sharing is imperative in the early stages of roll out.

Real transformation and impact with Power BI

It is definitely a challenging landscape for business. But the flipside of challenge is potential. And those businesses that harness the power of data and analytics to gain true visibility and insights will reap the benefits. Implementing Power BI can play a fundamental role in fulfilling this potential.

How to implement Power BI successfully

- Engage your full team from the outset, including architecture, data security and infrastructure.
- Establish a solid strategy and define organisation metrics.
- Ensure regular updates with all key stakeholders.
- Plan for future growth, not just todays requirements.
- Create on-brand reports, this is often forgotten but necessary for fast effective reporting templates.

Snapshot of transformational benefits

- Improved data accuracy
- Time saved in data entry and processing
- Efficiency improved across all areas
- Better visibility and real time visibility across all areas
- Increased business cohesion
- Better business performance
- Improved staff and user satisfaction

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Case Study Snapshot: TravelEdge

TravelEdge group was on a steady growth trajectory but internal reporting mechanisms were inefficient, unwieldy and error-prone. Add to this a complex systems landscape that required data to be sourced and analysed from multiple sources including: travel management software, online booking tools, finance, payroll, HR, contact centre management software, Microsoft Dynamics 365, and SharePoint. They needed to make better use of their large data sets and marry this with their people-focussed approach to business – to benefit both staff and customers.

A significant challenge was that there was no data dictionary within this complex system, no way for the structures and relationships of these disparate data sources to be consistent.

How to integrate an initial requirement of 73 reports? The process was iterative and consultative, and by going through discovery with each department, the real needs of everything from reporting to dashboarding was clarified.

Power BI simplified, automated and vastly improved reporting processes and outputs. This has included improved accuracy of financial reports, rapid creation of board reports, increased operational efficiency and has led to real time insights that management can see and respond to swiftly.

The swathe of BI benefits

Leading enterprise software industry analyst BARC recently surveyed 2,600 businesses about the levels of benefit they had found when implementing BI.

64%
Stated they enjoyed faster reporting, analysis or planning;

49%
Reported being able to make better business decisions,

56%
Responded with 'more accurate reporting analysis or planning';

43%
Reported improved data quality and improved employee satisfaction.

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Case Study Snapshot: St George Foodservice

St George Foodservice is one of Sydney's leading distributors. A family business founded in 1980, it was built on anticipating and meeting customers 'needs. However, fast forward to 2018 and manual reporting was limiting their responsiveness. Their ERP was due for an upgrade, and as it also ran on Microsoft, Power BI was a logical fit.

For St George Foodservice, it was a game changer. Rather than manual information extracts being inserted into Excel, they now had online access to sales information 24/7 via desktop and mobile devices. Suddenly they could see customers' spending patterns over eight week and 12 months, and access customer data going back three years. The unexpected effeciences gave the team more time to focus on productive work, allowing them to be nimble and reactive again – exactly how you need to operate in their industry to thrive.

Project and implementation essentials

Every business will be different. Some will implement one specific change while others will be looking at a longer-term and major overhaul. Either way, planning and timelining are crucial.

The iterative approach described in the TravelEdge Case Study Snapshot is an important aspect of BI implementation success if the latter is the case. You cannot take a roughshod approach to a project like this.

Harking back to the McKinsey analytics personnel list, BI implementation may well be a process for which you don't have sufficient in-house expertise. Working with an expert provider, and one who has experience with complexity, and with applying Power BI across different industries, is highly recommended.

The future of your business and Power BI

There is no question that Business Intelligence is going to increase in importance as data gets more complex and sophisticated. Being across BI and having a scalable solution in place will be the difference between long-term business failure and success.

Clade has had skin in the game for a long time when it comes to assisting businesses with effective Power BI solutions. Our knowledge is deep and our expertise broad – across a range of sectors and industries. Please get in touch if you want more information or to get started on this crucial aspect of business transformation.

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