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Improving Enterprise Finance Through Power BI

Governed analytics for enterprise decisions

A financial data consulting company needed to replace its outdated reporting system with a Power BI setup that supports real-time data, secure access, and clearer visuals. We helped them update their reporting model, improve decision speed, and make data easier to use for thousands of finance brokers.

CLIENT BACKGROUND

The client is an Australian consulting company that specializes in financial data and advisory services. They are investing in smarter processes that turn complex data into simple actions for teams across the business. They needed a faster, flexible, and simple analytics based system that could support growing data needs in the finance sector.

BUSINESS VALUES

- **Expansion of Data Mining App:** Enabled the successful expansion of the App with the Bank of New Zealand.

- **Scalable Collaboration:** Supported collaboration for 17,000+ finance brokers using a secured license framework.

- **Better Usability with Dynamic Modeling:** Improved usability and visualization through dynamic data modeling in Power BI.

PROBLEMS

- **Limited Interaction:** The SSRS reports that were available had few interactive features and few possibilities for visualization.

- **Fixed KPIs and Rigid Filters:** Users were unable to explore business metrics from different angles since KPIs, and filters were fixed and not dynamic.

- **Outdated Layout:** Real-time data updates were not supported by the report's design and layout.

TECHNOLOGIES

SOLUTIONS

- **Real-Time Insights:** Built Power BI dashboards with live SQL Server connections for real-time insights.

- **Built-In Benchmarking:** Added industry benchmarks and top-performer views to improve comparisons.

- **Secure Collaboration and Access Control:** Established secure collaboration with license management and guest access controls.

FUTURE SCOPE

We built a modern Power BI reporting system that improved data understanding and made data access secure for the client and their users. The next phase moves toward an intelligent analytics setup. This includes forecasting, automated data refresh with Power BI Service and Azure, and role-based dashboards for leaders and analysts. Over time, the client will adopt Azure Machine Learning for better insights and Power Automate to remove manual work.