

Power BI Dashboard Development

VIP SOLUTIONS CASE STUDY

VIP MANAGEMENT CONSULTING

BACKGROUND

Our client in the construction and contracting industry was experiencing great difficulty in combining data from their ERP and operational systems to generate the reports and insight needed to operate and improve their business.

Their revenue recognition and cash management is very complex, and data was being collected through email and excel spreadsheets from the field and department heads.

OBJECTIVES



Design, build, maintain, and train team on a full suite of financial and operational dashboards.



Build KPI summary, various pipeline/backlog sales reports, AR/AP reports, job costing, and operational metrics



Enhance overall financial and operational visibility

SOLUTIONS



Partnered with Executive, IT, and Finance teams to refine existing KPIs and connect to various data sets to publish a simple, actionable set of dashboards



Developed SQL server to collect and organize data



Built prototype to enable partners to provide feedback and input



Delivered practical, sustainable, and meaningful dynamic reporting that could be shared in a secure and cost effective manner



Leveraged Power Automate with distributed forms to collect data from the field without manual intervention

**Construction
INDUSTRY**

**500
EMPLOYEES**

**\$10M
ANNUAL
REVENUE**

**IMPLEMENTED POWER BI
dashboard that is viewed dozens of times daily, providing
analytical transformation to the business**