

## PROJECT BACKGROUND:

Our client partners with government agencies nationwide to help them meet their citizens' needs through restoration, digitization and distilling intelligence of billions of records and documents. This typically involves moving thousands of paper-based records through end-to-end processes consisting of dozens of individual tasks with each workorder covering a period of months.

## THE CHALLENGE

Production jobs & tasks need to be tracked closely in order to manage items such as time, resources, costs, accurately predict and recognize services revenue and to report on progress to their end clients. Our client's system contains data acquired across more than 10-years, however, their legacy system provided very limited insight to data required to manage the business. Lack of business insights restricts the company from performing many essential functions such as:

- Understanding time-to-complete processes across clients, jobs & processes
- Measuring productivity of production resources across processes & job types
- Insight into actual v. estimated costs across clients, jobs & processes
- Accuracy of estimating incoming sales opportunities based upon previous performance
- Measuring WIP, backlog and revenue forecasting for the company

### Key Facts

- Providing Insights to Operational Data for Improved Management
- DW Architecture, Design & Development
- Dashboard & Report Design & Development

## OUR SOLUTION:

Vertisystem designed & developed a cloud-based Enterprise Data Warehouse and Reporting platform which allows power users to build their own adhoc visualization without dependence technical resources. Vertisystem created a complete frontend and backend process based on Microsoft Azure, SQL Server and PowerBI technologies and created data models & views to support insights to data through analytics and visualizations.

In collaboration with our client's leadership, we developed an initial set of dashboards and reports in Microsoft PowerBI based upon their existing spreadsheet-based modelling and reporting processes.



## BUSINESS RESULTS:

Improving the organization's ability to consolidate, analyze and visualize data across platforms provide extensive benefits to our client in areas such as:

- Improved revenue insights and forecasting available in near-real-time without any manual processing
- Replacing and automating WIP reports with a much-enhanced level of detail and cross-organization data insights
- Cleaner, more accurate data from production teams, resulting in greater confidence in data for reporting & forecasting purposes
- Ability to integrate additional data sources such as ERP, CRM, Sales & etc. for more robust 360-view
- Visualization of backlog reporting resulting in better resource planning and forecasting
- Ability to accurately measure estimated v. actual production costs and margins
- Identify opportunities for quality improvement driving out wasteful costs
- Removed extensive manual efforts for their current MS Access based reports