



# Power BI Dashboard Development

## Case Study

### 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**