Modern reporting to support a complex field services project

Business objective
Process Optimization
Sector
Technical Services

Context & objectives

A **technical services provider** took on a new important project in the energy sector that would greatly contribute to their revenue. They wanted to modernize business intelligence (BI) reporting before starting the large, complex project to offer the best services available.

The new project required a more tactical, urgent approach from the technical and organizational perspective regarding data quality, completeness, and usability.

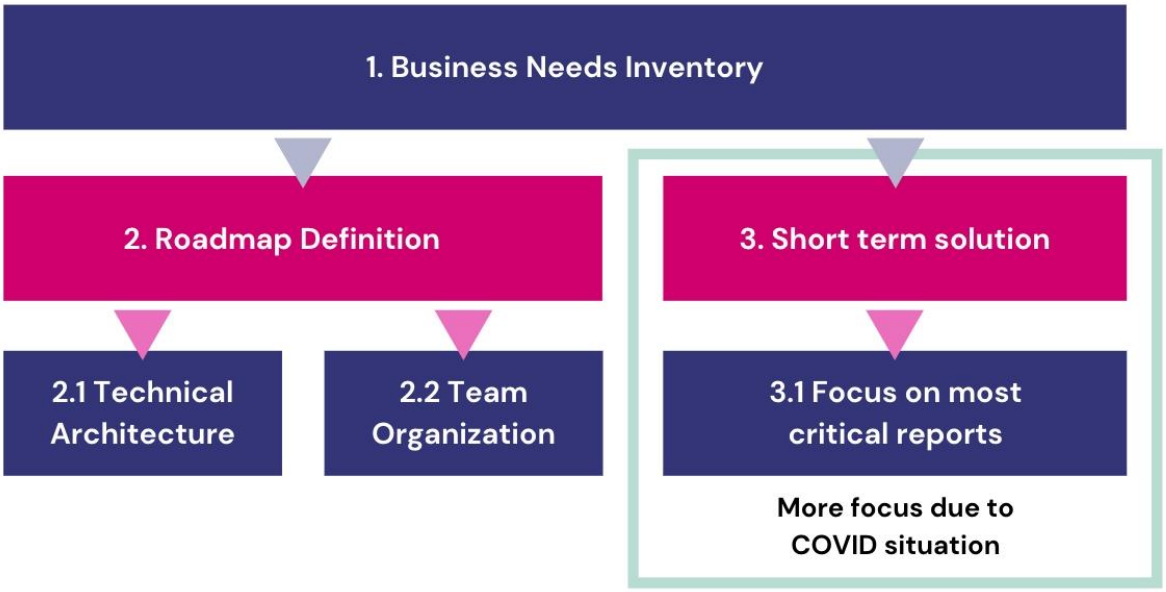
The client requested an all-encompassing reporting tool to track the project's progress and make comparisons between metrics, including forecasts, logistics, finances, technician's productivity, and quality of service.

The main objectives were to:

- Refine and prioritize the business needs
- Make the most critical reports operational
- Define a roadmap towards a more streamlined reporting architecture and a unified reporting solution
- Build a new data model for the BI reporting

Approach

First, we defined a way to organize BI work best and address business needs by the pillars of people, processes, and tools for a more structured approach. We did this to help our client reach a high level of maturity in data reporting from both a technical and an organizational point of view.



We then started to **align with the IT department about data availability.** Next, we met with several business stakeholders across various departments (finance, HR, operations) about the reporting requirements and priorities.

Data was not readily available because the project had not started yet. Therefore, we **created mock data to feed preliminary reports that we created in Power BI**.

Once test data became available, we built a **large data model that would serve as the basis for all reports** required by the different departments (operations, logistics, finances, etc.)

We built several reports in Power BI to track the important KPIs requested by the different departments. Delivered via the BI's cloud version, the developed solution automatically refreshes reports without any human intervention. The cloud capability offers premium features such as more performance, flexibility, and capacity.

Results

Previously, the client's BI reporting was often manual, making it vulnerable to human error and too time-consuming. Employees had little time to analyze data or act based on those figures.

The client now uses an **automated data model and has preliminary BI reporting for the entire commissioned project.**

During the course of the mission, we took on the onboarding of an internal data scientist at the client. We transferred all knowledge to this person regarding the data model and the reporting tool to ensure continuity.

In the future, there are plenty of possibilities for further developments as the project operations scale.

About Agilytic

Since 2015, Agilytic helps innovative leaders solve their biggest challenges through the smarter use of data. With over 150 successful projects to date, we have perfected a pragmatic approach to putting data at the service of business goals, be they commercial, operational, financial, or human. Reach out today for a quick introduction, we'd love to hear from you.