

CASE STUDY

Empowering Business Intelligence for a Wealth Management Firm

Transforming business insights with a new Power BI self-service cloud environment

THE CLIENT

A Legacy of Excellence in Financial Advisory

Our client boasts a legacy of excellence in financial advisory services, offering a range of solutions including wealth management, tax advisory, and audit. With a commitment to innovation and customer satisfaction, they aimed to harness their data assets for superior client experiences.

"Data-driven decision-making is a critical factor for success. Our client recognised the need to empower their teams with seamless access to real-time insights."

Project Overview

INDUSTRY

Financial Advisory

SERVICES

Wealth & Tax Advisory

FOCUS

Self-Service Analytics

THE CHALLENGE

Barriers to agile, data-driven decision making

Timely Data Insight

The lack of rapid access to up-to-date data hindered their teams' ability to make agile decisions in a fast-moving market.

Data Fragmentation

Data resided in disparate systems, leading to inconsistencies and difficulties in generating comprehensive, reliable reports.

Dependence on IT

Generating meaningful reports required significant involvement from the IT Department, causing bottlenecks and delays.

THE JOURNEY

A human-centered approach to transformation

1

Understand & Empathise

- Conducted meticulous assessment of existing data landscape
- Listened deeply to understand data sources and business processes
- Identified reporting needs with honest, thorough analysis
- Built trust through transparent discovery process

2

Architect & Personalise

- Designed robust cloud environment tailored to their needs
- Set clear expectations for scalability, security and performance
- Created personalised solution addressing specific requirements
- Orchestrated seamless integration of diverse data sources

3

Empower & Deliver

- Developed interactive Power BI dashboards and visualisations
- Enabled self-service reporting reducing IT dependency
- Delivered real-time insights with minimal user effort
- Resolved data access barriers empowering all teams

THE TRANSFORMATION

From IT dependency to empowered self-service

BEFORE

Fragmented data systems with heavy IT dependency, slow report generation, and limited access to timely insights.

AFTER

Unified cloud environment with self-service Power BI, empowering teams to access real-time insights independently.

THE RESULTS

The Transformative Impact of Data-Driven Solutions

Through the creation of a new Power BI self-service cloud environment, our client has revolutionised their data insights, empowering teams, ensuring data consistency, reducing IT dependency, and enabling agile responses to market trends and client demands.