



Case Study

## **Building Power BI Visualisations for Customer Insights**

Enabling a local council to enhance their  
service offering by keeping track of customer  
request patterns

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**Problem.**

This council faced a problem with a key resource risk on an outdated dashboard, which was unable to be updated and maintained but was used to make decisions regarding service offerings. Data was stale and aggregated; the underlying data was not able to be explored and interrogated.

The original dashboard contained a subset of operational data and was thus supplemented with other reporting methods. Key metrics were not easily interpreted by the intended audience.

The council required a refresh of their reporting to better suit the intended audience and allow them the ability to answer current business questions. They also had a desire to improve KPIs by monitoring how they were tracking as a council more frequently.

**Solved.**

Exposé began by understanding and assessing information needs, identifying areas for insights and analyses. Reporting was then consolidated and brought into Power BI with all required data.

An executive dashboard was created whereby key KPIs were visualized in more meaningful and understandable ways, adding business context for the audience. Interactivity allowed for exploration of metrics to answer simple questions.

An operational report for the customer service team was created, exploring patterns and trends in CRM data, and drill-downs to detailed records.

**Business Benefits.**

The transformation to a Power BI dashboard provided instant benefits for the council.

Improved visibility and ability to interrogate data enabled the council to quickly and easily identify business process errors and correct data quality issues.

Enhanced capability to observe overdue and aging requests will drive improvement on SLAs and operational performance. The identification of seasonal patterns within and amongst CRM request types and trends in customer behaviours allows for enhanced resource planning and informs areas of focus.

All the while increasing efficiency and reducing administrative effort in report creation and distribution.

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**Do you have any additional questions, or  
want to know more?**

We would love to hear from you.

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