

Management Reporting Replacement

Software Provider - From Foundation to Reporting



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CASE STUDY

Management Reporting Replacement

PROBLEM

This client provides comprehensive software solutions and business automation tools to small business owners.

This client has a customisable solution used internally across the organisation, where management reports are generated on a frequent and ad-hoc basis. These reports ensure client data reconciles across multiple data sources, such as Salesforce and Zuora.

As a public company, the client is audited annually and is bounded by law to provide accurate and secure financial reporting (SOX compliance). This practice was starting to become difficult due to the technological limitations of the management solution. More specifically, some components of the management solution were entering their end-of-life cycle, which could be hard to manage and maintain, if actions were not taken to shift their management and operational reports to a new and more sustainable solution.

SOLUTION

Before business outcomes could be delivered, it was required to create and deploy an entire Enterprise Data Platform (EDP) from the ground up, before the development cycle could finally delve into the reporting layer.

To achieve project goals, exposé created a modern solution and took leadership in the development of a data lake hosted on Snowflake, so that raw data could land from multiple data sources, such as Salesforce, Zuora, and S3 bucket.

The project scope also included developing a Power BI gateway by connecting data hosted on Snowflake to the client's existing Power BI application. This is a key component to providing businesses with relevant data for generating management reports.

By the end of this project, exposé successfully created a high-performing environment that is scalable, secure, and capable of accommodating continuous business requirements and changes.

BUSINESS BENEFITS

Exposé delivered a modern data lake solution using Snowflake technology.

Some of the benefits of this engagement included:

- Development of a Data Ingestion Framework that provides a standard foundation to accommodate future business and technical requirements.
- Implementation of a solution that is connected and compliant with the client's security systems and standards, respectively.
- A secure SOX Compliant solution that has provision for efficient future scalability and enhancement.
- Data Modelling Capability that allows for Business Reporting and self-service Analytics.