



REACH YOUR GOALS

Business Intelligence — Project-based Implementation

OUR APPROACH

Eide Bailly utilizes a six-phase methodology for embedding business intelligence and data analytics into your business. The approach is proven to successfully identify your business' needs and challenges and design the solution with your future business goals in mind.

DISCOVER VALUE IN YOUR DATA.

To develop Business Intelligence solutions and uncover purpose-driven data analytics within your organization, a series of interviews are conducted with your key data resources. We begin by speaking to your functional users of the data such as salespeople, operations team members and executive leadership to identify specific areas of opportunity. We conduct an interview to understand the data sources we will connect to, for example, QuickBooks (on-premises and online), Excel spreadsheets, NetSuite, Google AdWords, Salesforce or your Microsoft Dynamics products. A final interview will surround the technical integration needs for the project to best understand technical resource requirements.

After we complete our interviews, we document how the connection will be set-up and draft initial reports for you to review and confirm before we move on to next steps.

CONNECT AND INTEGRATE DISPARATE DATA SOURCES

In the second phase, our team provides the technical set-up and user provisioning for the Business Intelligence tool. We connect to the identified data sources and conduct data manipulation/transformation to streamline the data consumption process. An automatic data refresh cadence is set-up to ensure your Business Intelligence tool has the most up-to-date information on an on-going basis.

At this point in the project you will have a fully functioning Business Intelligence tool, data uploaded, with auto-refresh occurring at your preference, and a canvas for your reports to be developed.

CONSTRUCT YOUR DATA STORY

Having set up and connected the Business Intelligence tool, we start crafting your data story by developing reports specifically for your lines of business. We create reports with the widest scope of data available, then configure security layers for the users you intend to share the data. In this phase of the project we also test each report created to ensure the data is trusted, reliable, and high quality. We share reports with the end-user in mind for their optimized experience by equipping them with the data they need to feel empowered to fulfill their role and show them how the tool works so they can use it on a consistent basis. Creating a robust self-service environment is an important output of the overall project.

By the end of the Construct phase, your team has fully functioning reports and dashboards for your organization to start utilizing and begin collaborating on from a training perspective.

ITERATE AND CONTINUOUSLY IMPROVE

The team will walk through the Business Intelligence tool and subsequent reports developed to review our work thus far in the project. It is handed over to you to test, critique and provide feedback on. Once the testing period is over, we review the feedback together to understand and talk through any adjustments that are necessary. We will perform the suggested updates or modifications, then we fully roll out the Business Intelligence experience to the whole organization.

DEPLOY DATA INSIGHTS THROUGHOUT YOUR ORGANIZATION

We create tailored training content for each client and accommodate various level of technical competency. Educating the organization is done through two main roles, the first is serving as the organizations Business Intelligence administrator who needs to see the operational side of the Business Intelligence tool. The second role is the developer, which is the user who would be functioning largely in the database or data sources component of the application. The last role is functional user, who we intend this tool to be used daily to improve the organizations performance.

Once we perform the training for these different roles, we provide those training tools to the team. It is important to note that Business Intelligence is a fast-changing sector of technology and we pride ourselves on staying engaged after the project is complete to keep you up-to-date as the tool you utilize evolves.

NURTURE YOUR JOURNEY TO A DATA DRIVEN ORGANIZATION

The last phase of the project is our plan to take our project past the date we hand you the keys to your Business Intelligence instance. We stay connected to the group or the individual championing your Business Intelligence utilization with meetings that take place two weeks, one month and three months after the project is completed. The final phase of our Business Intelligence methodology is to ensure that the reports developed are functional, relevant and become adopted seamlessly across the overall organization.

OUR EXPERTISE

At Eide Bailly Technology Consulting, we believe in a better way of doing business. We think of ourselves as business advisors first and solution providers second. It's a small change that can make all the difference. Wherever you are in your technology journey, we can help.

After 100 years of business and more than 30 years in the technology industry, our team has curated a diverse portfolio of client successes, spanning industries and verticals.

See below for the featured consultants that support our business intelligence projects:



JON AULT
Project Lead and Data Strategist

Transforms your business by leveraging your data to answer operational questions and understand challenges.



ADAM HANEL
Project Lead and Data Architect

Aggregates the plethora of data organizations use and manipulates the information into business changing reports & dashboards.



MICHAEL FELCH
Data Architect

Aggregates diverse data sets and transforms the information into business changing reports & dashboards.



ELOY YNDIGOYEN
Data Analyst

Transforms data from various data sources into one common language for concise output.



KIRSTEN HENAGIN
Data Analyst

Develops engaging visuals & reports to help key decision-makers stay actionable and informed.



DEBBIE FANTASKI

Data Analyst

Consumes and interprets an organizations financial data to help business leaders make informed and proactive decisions.



JOE TILLMAN

Project Manager

Manages project plans and navigates risk, challenges and changes to ensure successful project completion.