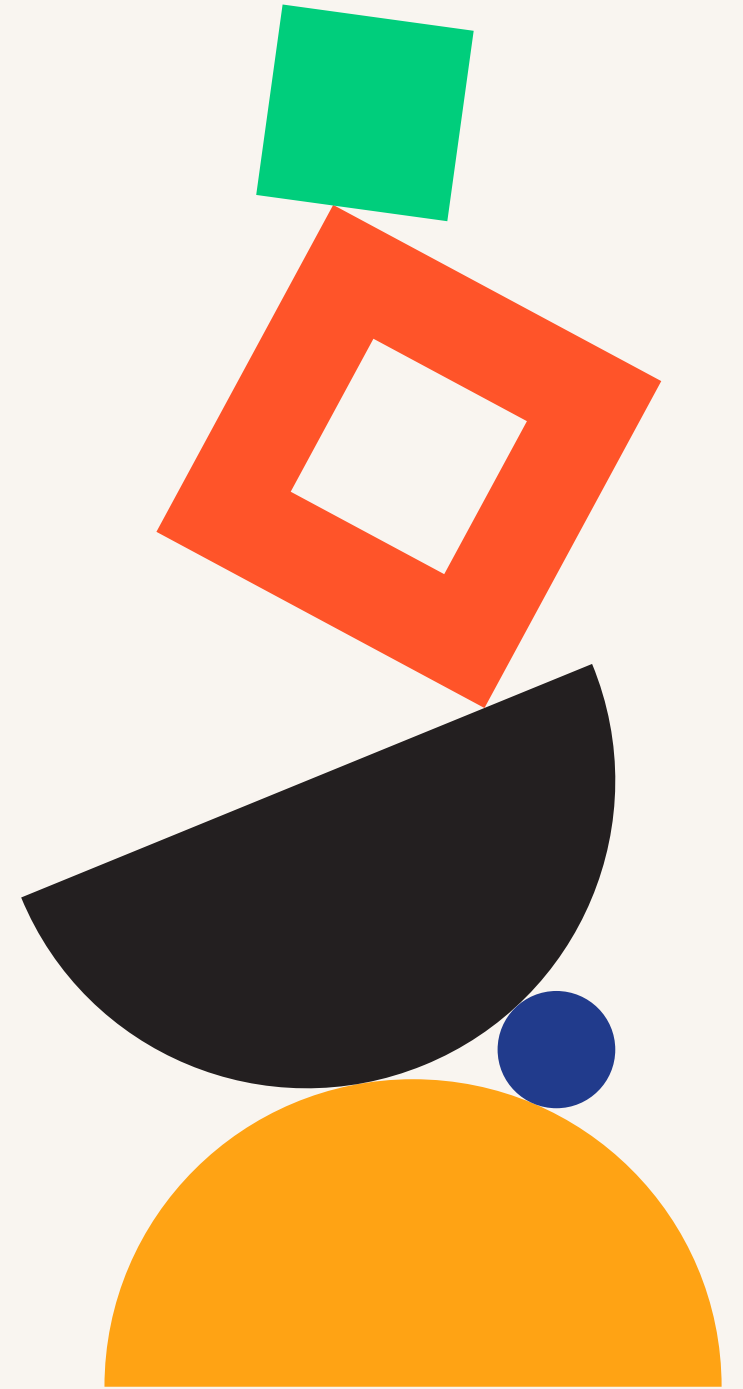


# pomerol

We simplify data to help your business grow.

## Qlik to Power BI Migration



# Introduction to Pomerol Partners

Pomerol is a team of talented consultants specializing in data-driven projects **focused on delivering business value.**

## Pomerol's Model



### 1 Partner : 10 Consultants



### 5 Core Business Practices

We have specialized teams focused on Data Strategy, Data Analytics, Data Engineering, Data Science, and Data Products.



### US-based

20+ employees and 3 Partners based in the Americas

## Our Consultants



### True Team

Our consulting teams collaborate to support client projects daily – this is the norm – not the exception



### Employee Collaboration

Our employee secondment program leads to closer working relationships across the Americas and provides invaluable experiences for our consultants



### Talent & Retention

With a true path to partnership, we help our consultants grow their individual careers. As a result, we attract and retain the most talented consultants

## Our Clients



### Reputation Built On Results

Our results speak for themselves: over 80% of our work is referral, recommendation or repeat business



### Industry Agnostic

Our consulting teams have experience in your industry and will engineer a solution to match your business process



### Client Experience

Client experience means the world to Pomerol – you will receive personalized and attentive service

## Our Technology Alliances



### Technology Agnostic

Outside our key data analytics technology alliances, we are technology agnostic. Our consulting teams will work with the technology that fits your strategy



### Microsoft Data & AI Solutions Partner:

We have delivered projects across the Microsoft data stack including Power BI, Fabric and more



### Qlik (Elite) Partner

We are an Elite partner of Qlik – we hold a seat on the Global Partner's Advisory Council – and we have completed 400+ Qlik projects

# Rooted in America, Impact on a Global Level.

Our firm is Midwest-based, powered by talent across the Americas.



## Denver

**Scott Duthie**  
Partner

Data Analytics practice lead with deep technical knowledge of CRM and ERP platforms. Specializes in high-impact reporting solutions.



## Chicago

**John Fitzgerald**  
Partner

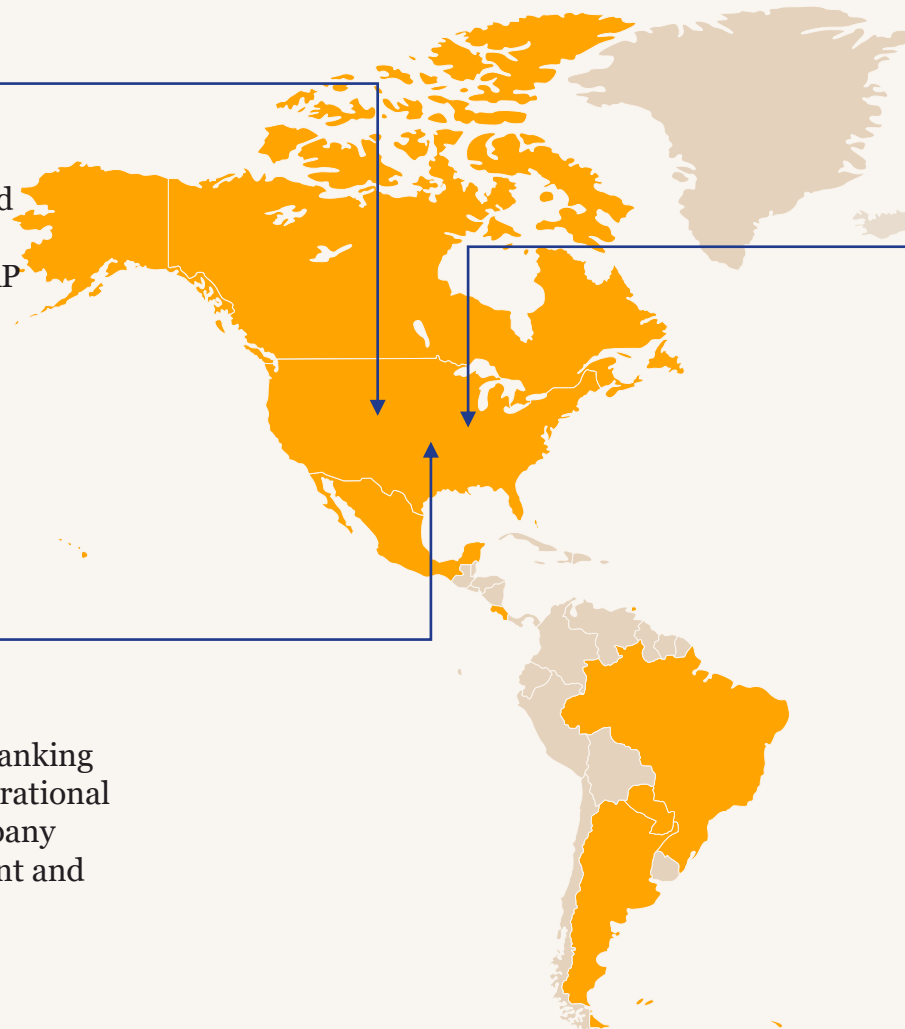
Data Engineering practice lead: Manages technology partner relationships and leads roadmap engagements. Focused on technical sales, lean management and manufacturing consulting.



## Kansas City

**Fred Hefer**  
Managing Partner

Co-founder, ex investment banking finance professional and operational leader. Responsible for company culture, business development and strategic partnerships.



# What We Do At Pomerol Partners

Pomerol builds industry-leading, business-focused data solutions. We are not general technologists; we specialize in data and data-driven projects. We provide business value to our clients through simplifying data and making data actionable.

## Data Strategy

We help drive organization-wide alignment on data and analytics priorities to achieve maximum business value. Analytics TO WIN® is Pomerol's answer to crafting a practical and prescriptive Data and Analytics Strategy quickly and efficiently.

## Data Engineering

We work with you to extract, cleanse, organise, curate, store, and catalog your data throughout its entire lifecycle from creation to the time it's archived using best-in-class tools like Databricks and Snowflake.

## Data Analytics

Dashboards that empower data discovery and channel insights to decision makers. We automate analytic workflows, build scheduled report distribution, and embed operational alerting.

## Data Science

We help you identify future outcomes and trends by layering automated machine learning models over your data landscape. Predictive analytics drives value through better planning and proactive decision making.

## Data Products

We partner with you to build bespoke data driven commercial products leveraging the latest web development tools sets - Subscription based platforms, customer portals, analytic mashups in public facing websites.

Client Success and Managed Services

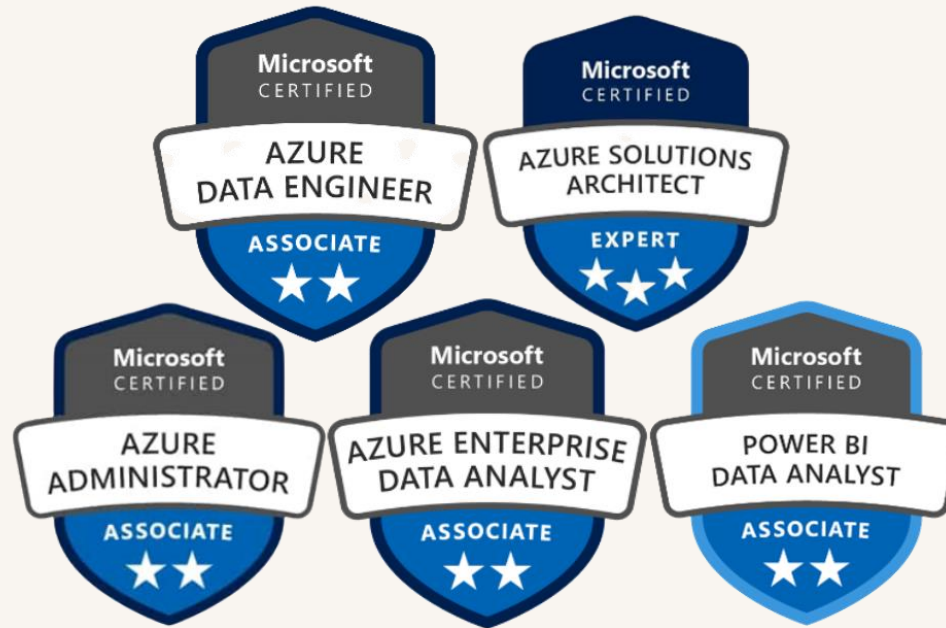
CIO Advisory Services

# Pomerol Partners Credibility

We are a Data & AI Solutions Partner with certifications across the Microsoft stack.



Data & AI  
Azure



# Pomerol Partners Credibility

Our top-tier clients include:

**HOLOGIC**<sup>®</sup>

**LivaNova**

Health innovation that matters

 **swope**  
HEALTH

 **BROWNELLS**<sup>®</sup>

**AH**

Artesia General Hospital

**SMART  
CHICKEN**<sup>®</sup>

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# Why Migrate to Power BI?

The top reasons our clients have given for migrating to Power BI

## Lower Costs

Power BI licensing is significantly cheaper than competitors

Flexible license packages allow adaptation to your business needs

## Reduce Complexity

Most enterprises use an average of 3+ different BI platforms

This leads to report overload, duplication, errors, and lack of control

Rationalizing BI delivery to a single platform (Microsoft) addresses these issues

## AI Ready Platform

Bring your data into the era of AI

Reshape how everyone accesses, manages, and acts on data with a single, AI-powered platform

Adopt a data platform that's infused with AI at every layer to help you get more done, faster

## Self-Service BI

Empower users to design and deploy their own reports

Cultivate Data-Driven Culture that encourages actionable knowledge sharing

## Fabric

With Fabric, Power BI, Synapse, and Data Factory are unified on a single SaaS platform

Data teams can collaborate in a single workspace, on the same copy of data, with centralized administration, governance, and compliance tools

## Power Platform

Suite of low-code tools that empowers organizations to streamline processes and automate tasks

Integration with Power BI enables businesses to automatically drive actions based upon insights detected in their data

# Our Migration Process





# Overview

## Phased Migration Approach

### Phase 1 - Planning

- Rationalize scope of migration
- Produce roadmap for migration delivery

### Phase 2 - Delivery

- Accelerated migration using automation tool
- Optimise architect for Power BI

### Objectives

**Maximize ROI** - focus scope of migration to only where value is added

**Automate** - minimize time and costs by automating wherever possible

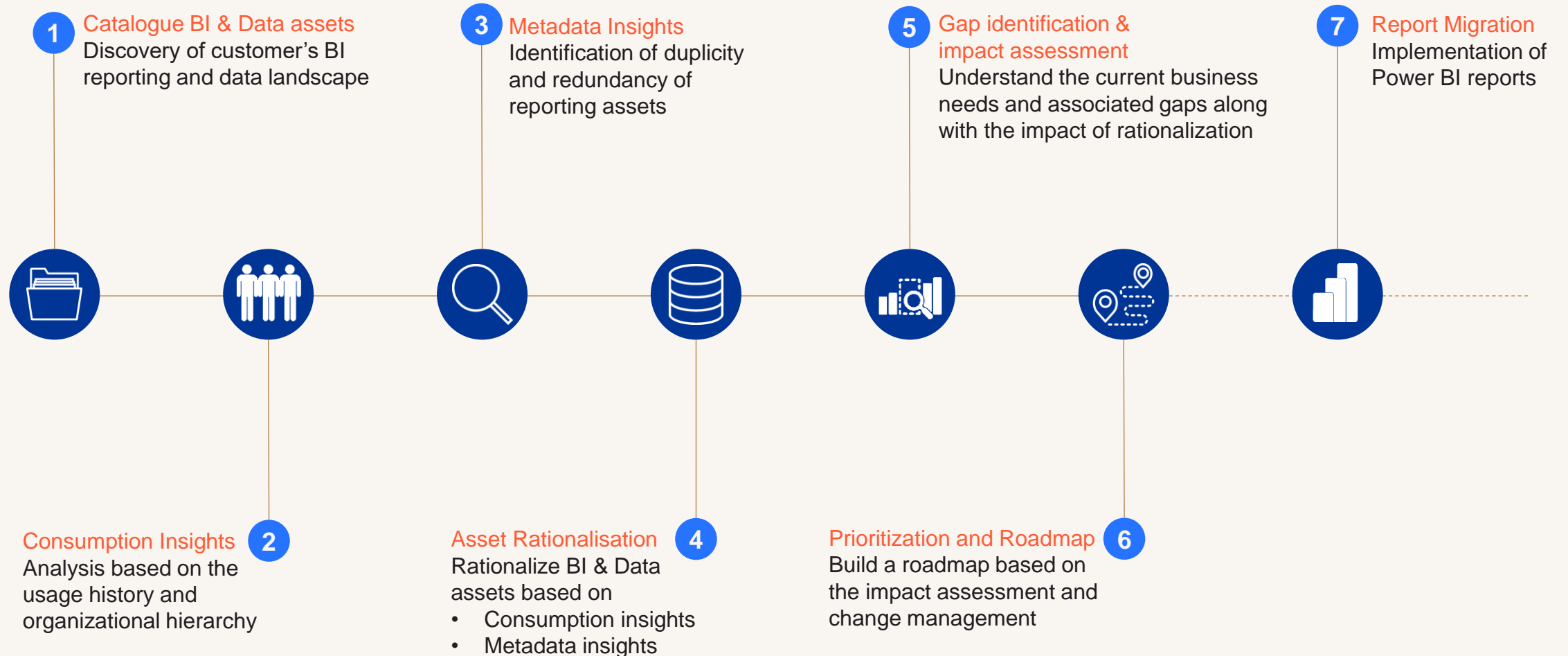
**Optimize for Power BI** - tailor the solution to leverage Power BI strengths

**Drive User Adoption** - ensure the success of the migration effort by encouraging user adoption

**Be Agile** - continuously improve delivery process and adapt to evolving business requirements

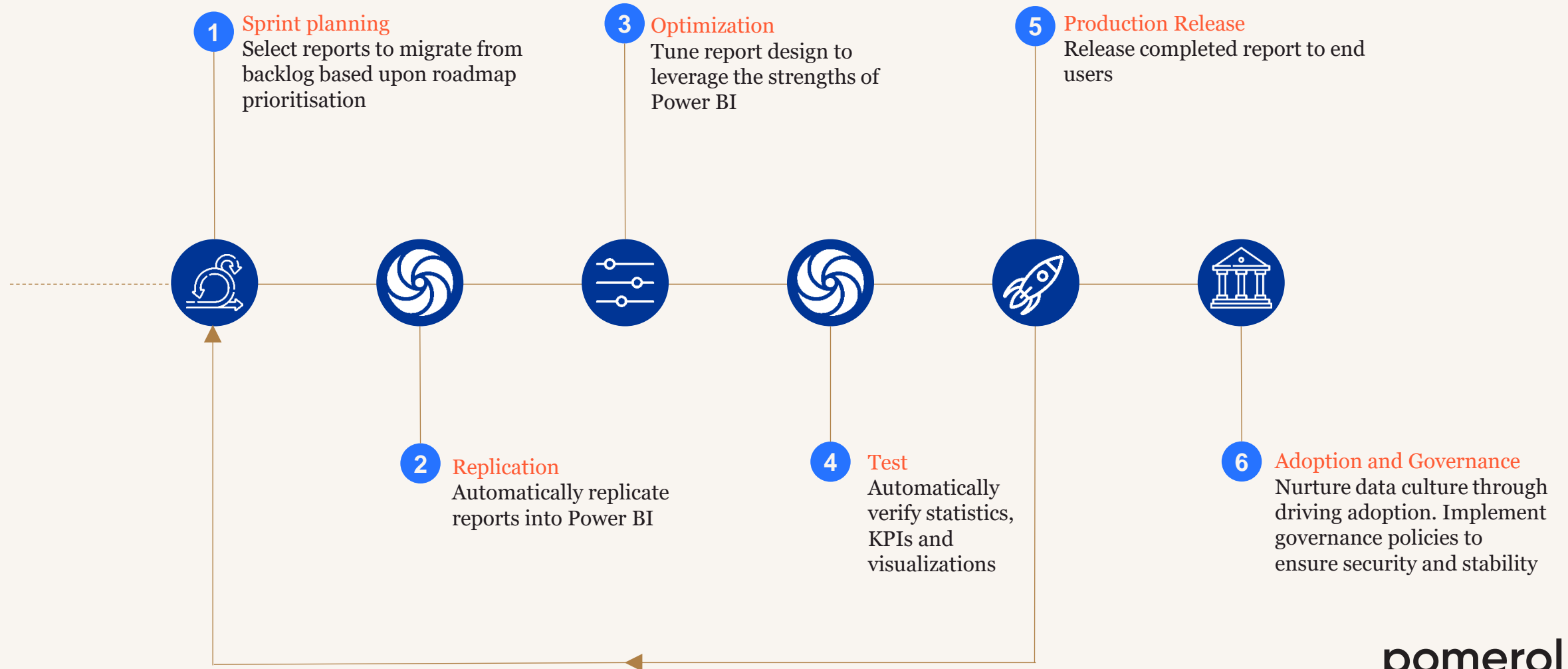
# Building a Migration Roadmap

Our process for planning a migration to Power BI



# Migration Delivery Process

Our process for an accelerated agile migration

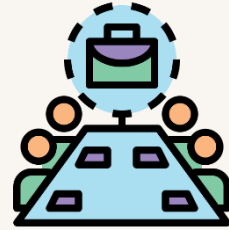


# How We Achieve Power BI Migration Success

Every migration is slightly different. It can depend on the organizational structure, data strategies, data management maturity, and organizational objectives. We have consistently achieved Power BI migration success with our clients.

## Executive sponsorship

Identify an executive sponsor early in the process.



## Training, support, and communication

Recognize that it's more than just a technology initiative. Any BI or analytics project is also a people initiative, so consider investing early in user training and support.



## Quick wins

We prioritize high-value items that have tangible business value and demonstrate the value of the migration immediately.



## Modernization and improvements

Be willing to rethink how things have always been done. A migration can provide an opportunity to deliver improvements.



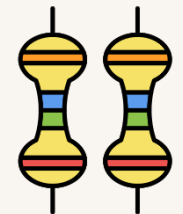
## Continual learning

Be prepared to use a phased approach while continually learning and adapting. Work in short, iterative cycles to bring value quickly.



## Overcoming resistance to change

Understand there may be varying levels of resistance to change; some users will resist learning a new tool. We are well versed on overcoming these challenges to make your migration successful.





We simplify data to help businesses grow.

# Case Studies

Power BI Migration Customer Success Stories



# Customer Insight & Marketing Effectiveness



## Qlik Sense to Power BI Migration

The client wished to migrate an existing Qlik Sense dashboard into Power BI as part of a larger firmwide move into Azure Cloud Services. The Qlik Sense dashboard had functionality native to the Qlik Sense tool that needed to be replicated in Power BI. Additionally, the data modelling had to be recreated using Power BI's Query Editor as the two tools handled the data differently.

### Problem

The principal challenges were to replicate visualisations and analytics built using native Qlik Sense functionality, and to recreate the Qlik data model in Power Query M. These included:

- Loading data from multiple data sources in one data model so business users could access and do analysis on data in one place
- Maintaining the Self-Service functionality that Pomerol had built into the Qlik Sense report
- Restricting user's access to only data from their business unit
- Distributing the report to over 100 business users across different business units
- Alternate dimensions and measures (user ability to configure dimensions and measures in a chart)
- Comparing results across different time periods
- The ability to view the data in different currencies

### Solution

Pomerol created a new report in Power BI tracking marketing spend and ROI against internal targets.

A new data model was designed to align with Power BI's functionality and best practices. Using the new data model Pomerol were able to replicate the dimension switching functionality of Qlik Sense.

A series of nested measures were created that allowed the business users to view the data by their chosen currency as well as other business defined metrics based on slicer selection in data islands. Another series of nested measures allowed the user to select which measure was reflected in charts based on filter selections in data islands.

### Result

Up to 100 users now have access to Marketing KPIs so they can report on these figures and take decisions faster. Significantly improved KPI tracking and report delivery time.

# Energy Industry Success

## Qlik View to Power BI Migration



Our client in this success story is a firm that used QlikView for reporting, wanted to migrate to Power BI and Azure, the strategic data platforms that offer market leading data tools. Pomerol supported the migration by rebuilding the ETL, replacing nPrinting with Power BI Paginated Reports, and using Power Automate workflows to create buttons in the reports.

### Problem

This well-known energy company used QlikView for reporting across the firm including uses cases as diverse as operational reporting on their reservoirs and credit risk reporting for finance. They wished to migrate all their QlikView apps to Power BI. QlikView has gone end-of-life and is no longer supported by Qlik. The Power Platform and Azure are the strategic data platforms for our client. They provide market leading data tools and the capability to cater for any future use case they may face.

Some of the QlikView apps had additional complexities, this prompted this Energy company to ask for Pomerol's support with the migration:

- Complex ETL processes with multiple stages of transformations apps and QVD storage.
- nPrinting used extensively to generate PDF reports to email to stakeholders.
- Buttons embedded in the QlikView apps allow users to manually trigger the nPrinting emails and refresh of the data.

<https://pomerolpartners.com/qlik-to-power-bi-migration-success-story/>

### Solution

The ETL was rebuilt using Power BI dataflows and SQL stored procedures. The dataflows provide modular multi-stage ETL and the SQL database replaces the QVD storage.

Power BI Paginated Reports replaced nPrinting recreating all PDF reports. Paginated Reports ability to independently create visuals and charts means this company has a more flexible solution going forward that is simpler to maintain.

Power Automate workflows were used to create buttons in the Power BI reports to trigger data refreshes and Paginated Reports. The Power Platform suite of tools enables adding other capabilities to Power BI reports.

The solutions Pomerol delivered set our client up to apply best practice throughout their Power BI and Power Platform environments.

### Result

Pomerol successfully completed the migration enabling our client to decommission their QlikView servers, substantially reducing their reporting license costs.

# Thank you



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