

Customer Success Story

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Data Automation Discovery and Roadmap

About the Client:

An American professional services company headquartered in Chicago.

Background and Challenge:

As a professional services company needing to tie in sales operations with back-office operations and financials, the organization realized it needed to modernize. They knew they wanted to eliminate manual processes for obtaining, preparing, and storing their data, but didn't know where to start. Data came from numerous sources in different formats and was needed to track performance, generate payroll, and generate reporting for BI.

Solution:

Withum worked with the organization's stakeholders and data stewards to identify and detail data sources such as their applicant tracking system, time system, and their GL system. This allowed for specifications on organizing the data to achieve a centralized data model and store to eliminate the manual effort and points of failure. Collaborating directly with organizational stakeholders, a prioritized roadmap to design and develop an enterprise data warehouse, process automation, and implementation of a BI stack using Azure pay-as-you-go services was delivered.

Benefits/Results:

The roadmap detailed cost and savings estimates as well as timelines to achieve milestones. Rather than trying to automate inefficient processes, the organization was able to discover how they could build a scalable foundation that would grow alongside the company in a cost-effective way.

