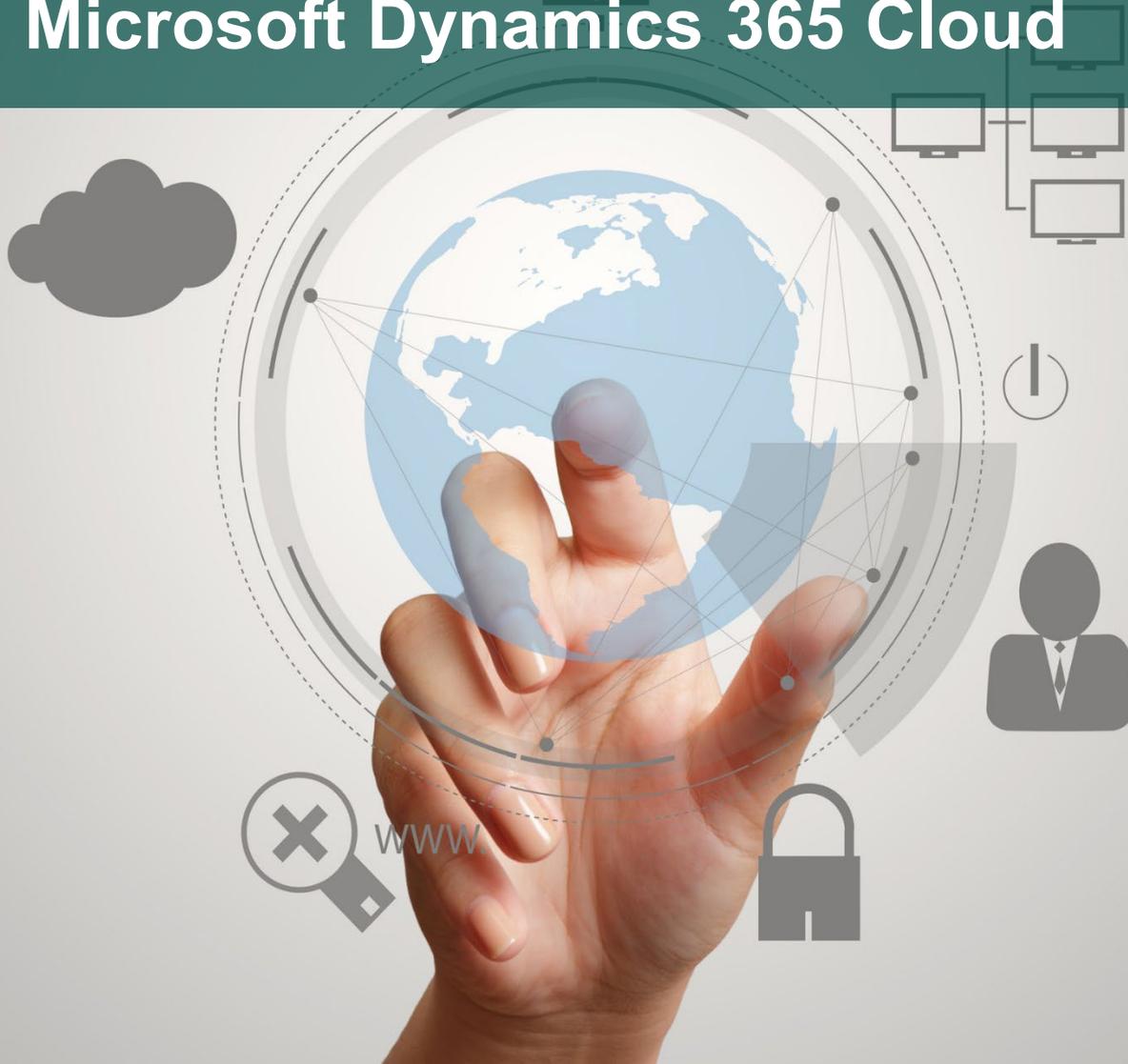


Kreischer Miller Innovation Lab: Management Dashboards with Microsoft Dynamics 365 Cloud



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**Kreischer
Miller**

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Analytics/Management Dashboards

- Dashboards are enablement tools of business performance management in today's modern organizations.
- Dashboards have become popular due to recent advances in cloud and open interface technologies.
- Dashboards are used to report on KPIs in order to enable management to keep everyone focused on achieving tangible results.
- Dashboards, when implemented properly, improve communication and accountability throughout the organization.



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Examples

- Opportunity tracking & management
- Sales performance & leaderboard
- Order fulfillment management
- Inventory & supply chain management
- Operational/outcome monitoring
- Project tracking & costing
- Workforce planning & utilization
- Product & customer segmentation analysis
- Financial metrics & forecasting



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Design Considerations

- Every major ERP application offers analytics and dashboard capabilities.
 - Having dashboards built from a variety of tools increases chances of confusion across the organization, resulting in reduced effectiveness levels.
- Establishing a unified approach for performance management benefits the organization as a whole and creates a unified sense of mission.
 - Dashboards represent one view of organizational performance and should be used in conjunction to other more qualitative elements.
- Standardizing on a leading tool and utilizing a pilot-based approach pays dividend in the long run.

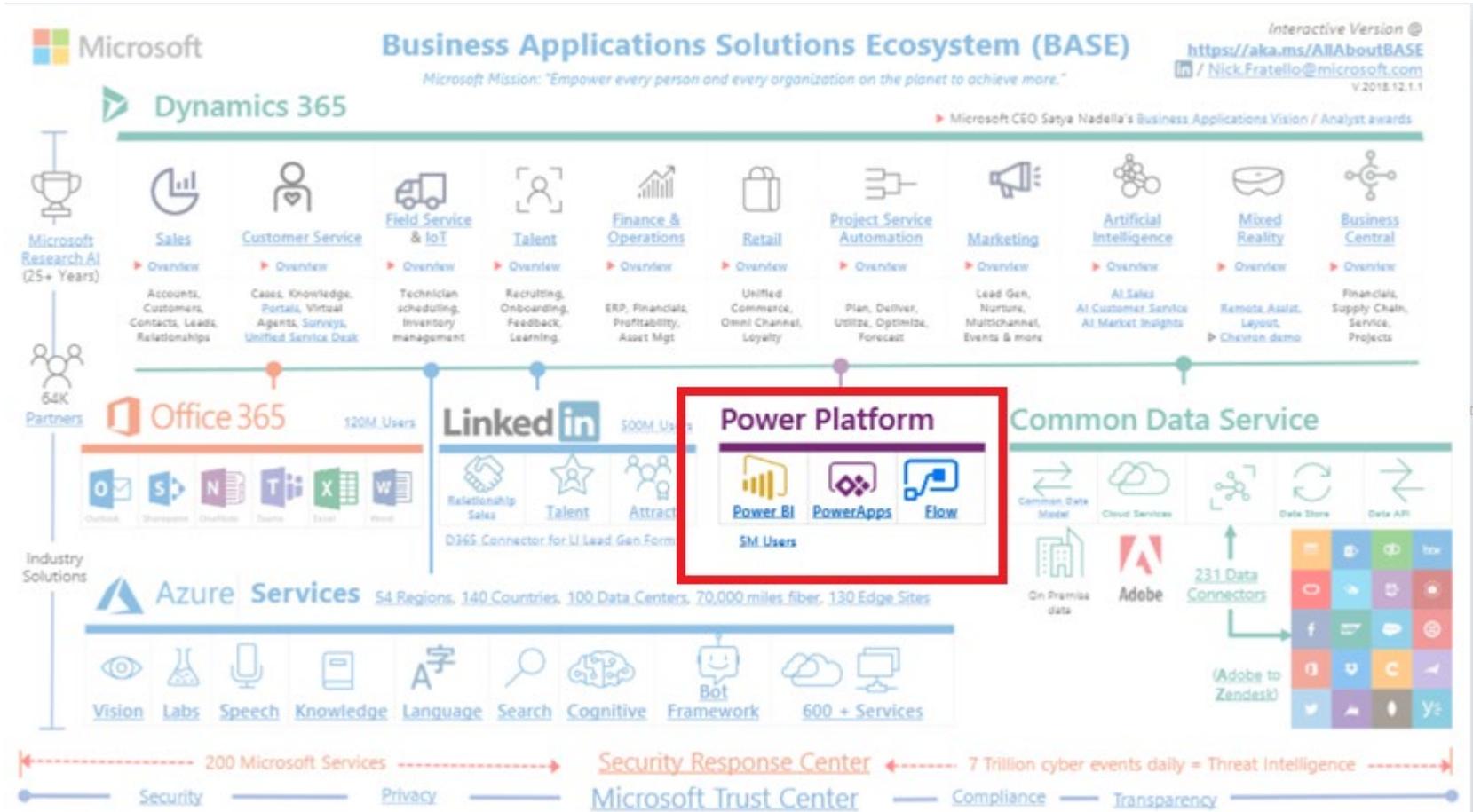


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Microsoft Analytics Toolset Overview



Platform Case Study

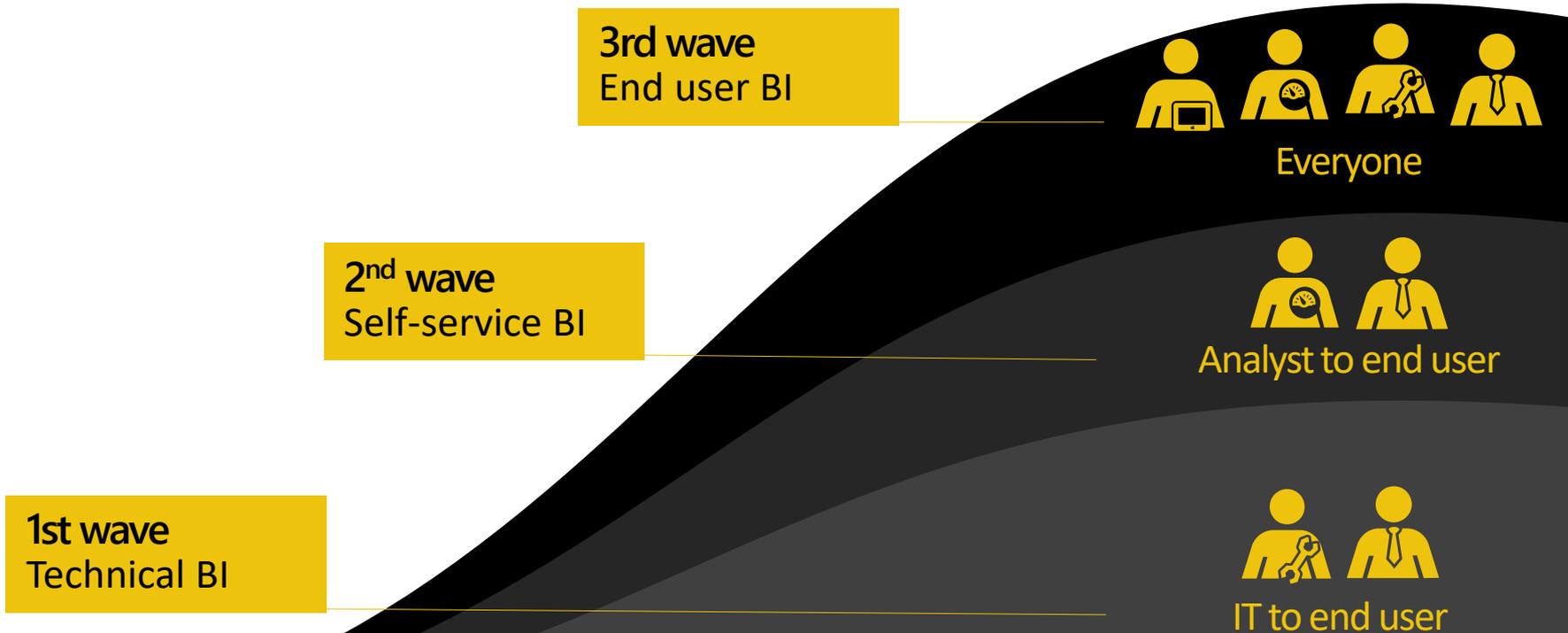


Going All in with the Cloud



Evolution of Business Intelligence

- Today, BI extends to everyone



A New Generation of Business Intelligence

- Turning data into business insights is challenging
- Common BI challenges include...



End-to-end view

Data often resides in disparate locations, making it difficult to see a complete picture of your business



Multiple data sources

Data residing in SaaS solutions, and other external locations, is difficult to access and refresh securely

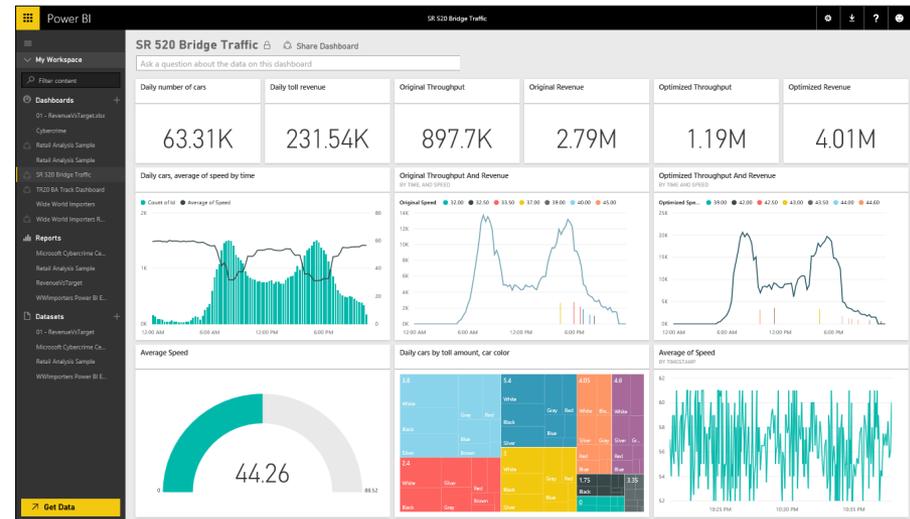


Right data for the right users at the right time

Different roles have different needs, and business users need the latest operational data

What is Microsoft Power BI?

- Experience your data. Any data, any way, anywhere.
- Power BI is a cloud-based business analytics service that enables:
 - Fast and easy access to data
 - A live 360° view of the business
 - Data discovery and exploration
 - Insights from any device
 - Collaboration across the organization
 - Anyone to visualize and analyze data



Microsoft Power BI Value Proposition

- Key benefits and differentiators

	Pre-built content packs, consisting of dashboards and reports, for popular SaaS solutions
	Real-time dashboard updates
	Secure, live connection to your data sources, on-premises and in the cloud
	Intuitive data exploration by using natural language query
	Integration with familiar Microsoft products, and commitment for scale and availability in Azure
	Fast deployment, hybrid configuration, secure, and integrated with existing IT systems



Power BI Architecture

Data sources



Power BI service

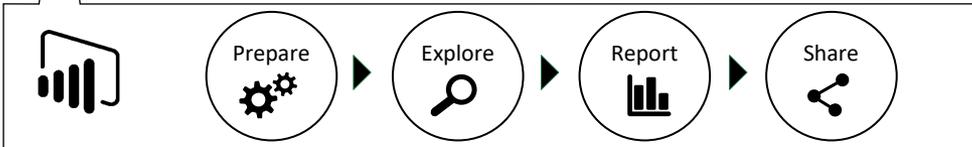
- Content packs
- Live dashboards
- Visualizations
- Reports
- Datasets
- Data refresh

Natural language query

Sharing & collaboration



Power BI Desktop



Power BI REST API

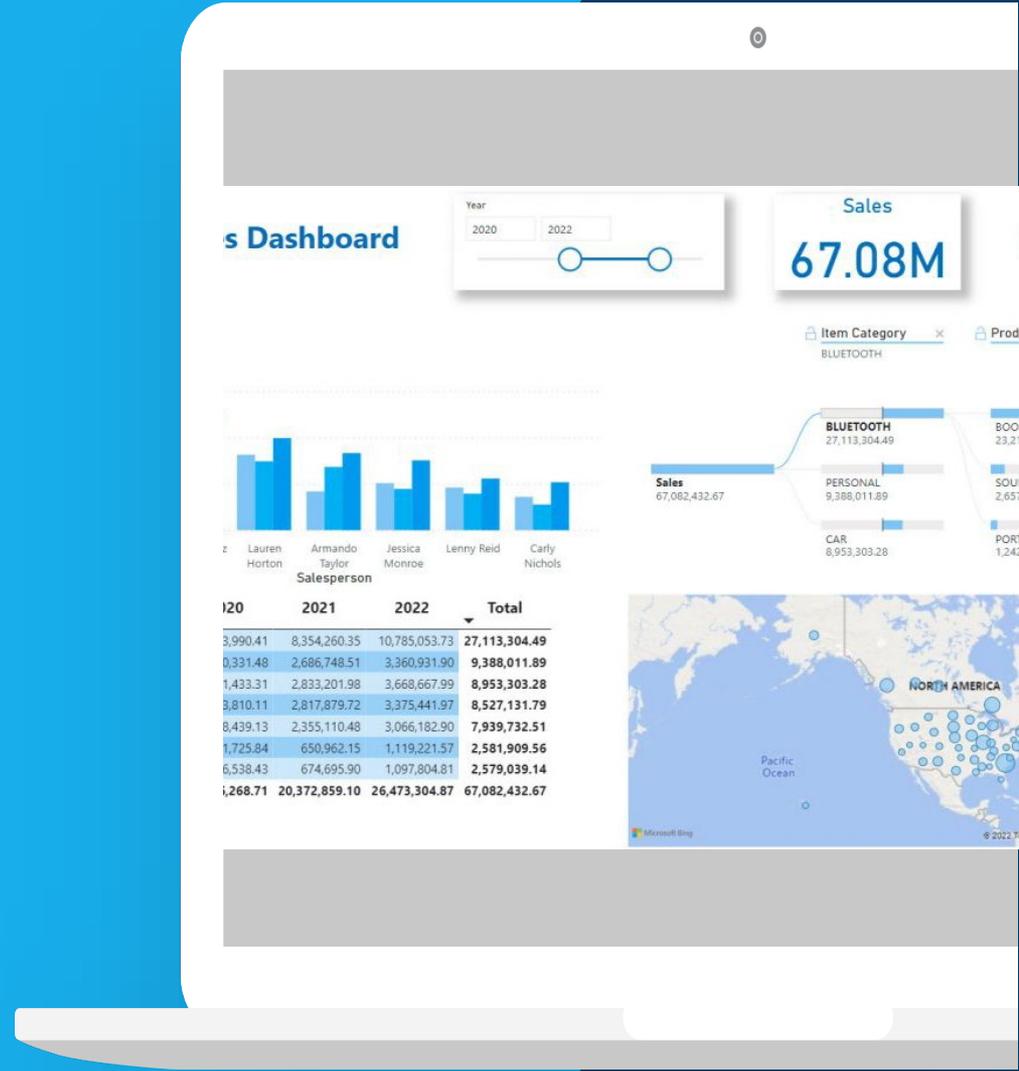


Power BI User Roles

- *No matter what industry, or what role, Power BI is relevant*
- Business user
 - Import data from SaaS sources, and work with dashboards and reports
- Business analyst
 - Import, reshape, integrate and model data
 - Create compelling reports and visualizations
 - Create content packs to share insights
- BI professional
 - Connect to live Azure data services
 - Connect to on-premises Analysis Services databases
 - Empower colleagues to create their own reports
- Developer
 - Integrate applications with Power BI
 - Create real-time dashboards
 - Develop custom visuals

DASHBOARDS & ANALYTICS

- Power BI is now integrated with Cosmos!
- Leverage your Cosmos Data from within Power BI to quickly create robust dashboards
- Incorporate powerful charts, graphs, and more to paint a picture of your business performance
- Publish your Power BI dashboards to your Cosmos Portal with the push of a button
- Spot opportunities to increase revenue, reduce costs, and mitigate risk



COSMOS

DATA ENGINE

- Manage your Business Central data in a modern, user-friendly interface
- Built for business users as opposed to technical users
- Powered by Microsoft's Azure Data Factory
- Easy to import and clean data with just a few clicks
- No coding required
- Comes with a prebuilt model for Business Central



Case Study I:

- **Background:** Client utilizes Dynamics GP for finance, inventory and order management needs in conjunction with Salesforce for CRM.
- **Client Need:** Ability to view and drill down on business critical data integrated from both systems.
- **Solution Approach:** PowerBI was utilized to build the needed dashboards in an iterative manner, starting with a proof of concept and adding more dashboards shortly thereafter.
- **Business Impact:** Management team has an integrated view of key information from sales to operations in a real-time and unified format.



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Case Study II:

- **Background:** Client utilizes an outdated ERP system, is hesitant to upgrade the solution due to perceived risks with such a project.
- **Client Need:** Management would like to present status of activities to shop floor employees using modern and easy to understand dashboards.
- **Solution Approach:** Develop data extracts from the legacy application onto an intermediary data repository, leverage PowerBI to build the needed dashboards and tweak the presentation formats to maximize impact.
- **Business Impact:** Operations team has visibility to process status, bottlenecks and priorities on a near real time basis.



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Case Study III:

- **Background:** Client utilizes Dynamics BC for finance and projects in addition to applications for expense management.
- **Client Need:** Ability to view and drill down on project status on a real time basis and make adjustments as needed.
- **Solution Approach:** Given PowerBI's native integration with Dynamics BC, a series of project management dashboards were developed quickly to provide an aggregated view of relevant data in an actionable manner for project managers.
- **Business Impact:** Project managers have the tools at their fingertips for real time visibility to project activities and budgets so they could manage their portfolio in a pro-active manner resulting in increased client satisfaction and profitably!



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Lessons Learned

- Develop the big picture – understanding some of the critical insights to best manage the business.
- Identify a champion – need an enthusiastic executive participant in support of the process.
- Outline data sources – making sure we have a baseline understanding of nature and quality of needed data.
- Execute via experimentation – crawl, walk, run; select a well defined, smaller, yet a high impact use case for an initial pilot.



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Management Dashboard Deployment Roadmap

- Conduct a discovery meeting/discussion of business management challenges and applicable dashboard needs.
 - Hold a management roundtable.
- Review current data sources and underlying system architecture to identify/validate potential Power BI enabled solution opportunities.
 - Identify other solution approaches if Power BI is not a best fit.
- Initiate a “pilot” project to build a management dashboard that could demonstrate tangible results quickly.
 - Learn from experience and develop a path forward strategy.



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Thank You for Attending!



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