

UBI assisted a top-tier **Software & Computer manufacturer** to automate their monthly P&L report

Situation & Objective

- Our client, a multinational corporation with worldwide operations, encountered difficulties in consolidating data points with the required granularity. This hindered their ability to generate timely profit and loss (P&L) reports, as rate calculations and data validation processes often caused delays. The primary objective was to establish a streamlined pipeline that would incorporate management's rate parameter inputs for final calculations and provide users with timely and accurate P&L reports.

Business Benefits Achieved

- **Increased Efficiency:** By automating the data consolidation process, the client experienced a 30% increase in efficiency.
- **Streamlined Data Validation and Audit:** The Power BI solution facilitated a streamlined data validation and audit process. By providing transparent and traceable calculations, it enhanced data accuracy and compliance with regulatory requirements.
- **Timely Reporting:** With the new Power BI-based reporting system in place, the client achieved timely generation of P&L reports. This enabled faster decision-making, improved financial planning, and better business performance monitoring

Solution Approach

- UsefulBI partnered with the client's in-house management and data engineering teams to develop an internal tool that would gather input parameters from stakeholders. To achieve this, Azure Databricks, a powerful data transformation platform, was utilized. The client's raw data tables were transformed into the required views using Azure Databricks, ensuring data integrity and consistency. These transformed tables were then imported into Power BI, a leading business intelligence tool.
- The Power BI implementation involved developing a comprehensive data model tailored to the client's needs. UsefulBI's data experts collaborated closely with the client to understand their reporting requirements, ensuring that the data model captured all relevant aspects. Alongside the P&L report, three additional reports were created to enable users to drill down into detailed data, verify rate calculations, and review user inputs

