

BAR EXAM PREPARATION

BAR EXAM PREPARATION COMPANY TRANSITIONS STATIC DATA USING MICROSOFT POWER BI

EXECUTIVE SUMMARY

Withum's Digital Advisory group worked to transition existing exports from a single Excel workbook to the Power BI platform to support the customer's data and improve the capabilities of the organization. By providing support and an innovative solution, this company was able to explore, share, and secure their data more efficiently.

THE CLIENT

The client is a medium-sized educational services company, with offices in locations throughout the United States and around the world. Offering a bar exam preparation course, the company has helped more than one million U.S. lawyers pass the exam. The company also provides specialized ongoing skills training and certifications in areas such as financial crime, eDiscovery, and cyber awareness, security and protection.

THE CHALLENGE

The client is no stranger to utilizing data to inform their operations and decision making but found themselves encumbered by static Excel-based reporting. In their existing workflow, large exports from their databases and systems were collected into a single Excel workbook. The amount of data in these reports combined with the complexity of their analysis led to slow, unresponsive reports which were prone to crashing and difficult to change.

Security was a constant concern due to the reports containing full exports from the client's systems. And sharing reports was often limited to screenshots and print outs of metrics and visualizations to avoid distributing the accompanying raw data.



CASE BRIEF

CLIENT: Medium sized educational services company with U.S. offices

STRENGTH: Strong utilization of data for decision making

CHALLENGE: Overwhelmed by static, Excel-based reporting

OPPORTUNITY: Get out of spreadsheets

OUTCOME: All data was connected allowing for control access to reports and source data





As a Microsoft Office 365 customer, the client was aware of the benefits and capabilities of Power BI but lacked the internal resources to develop their own solution.

THE APPROACH AND SOLUTION



Withum worked with the client to not only transition their existing reports to the Power BI platform, but to improve their analysis capabilities. Data sources were moved from local files to cloud storage for improved access and security. A data model was developed to connect previously separated data allowing for new and efficient ways to approach their data. Analysis and data transformations were developed using PowerQuery and DAX to move processing to the cloud. Dynamic visualizations and interactive filters allow the client to quickly and easily adjust their reports and explore their data.

By taking advantage of the cloud-based Power BI service and its integration with Office 365, the client is able to control access to reports and source data.

THE RESULTS, ROI

By moving from static, Excel-based reports to dynamic, up-to-date reports in Power BI, the client is able to improve their ability to explore, share, and secure their data. Access to key metrics is no longer limited by access to Excel or PDFs but is available anywhere through the Power BI web application or mobile app.