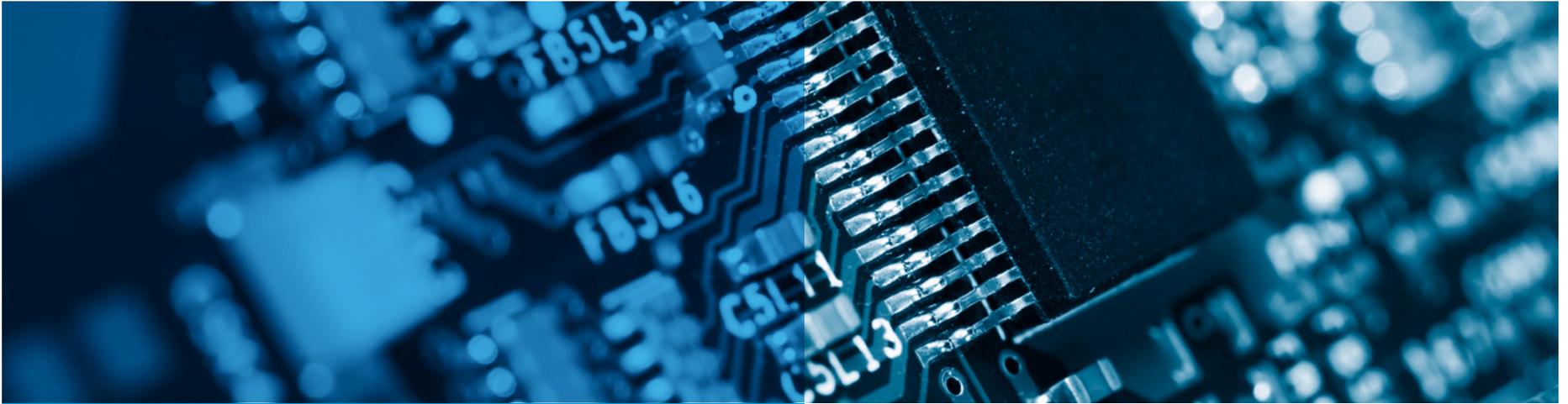


The one-two punch of
Microsoft Azure Synapse
combined with Power BI fast
tracks digital transformation
and powers insights for
middle-market businesses

POWER BI + AZURE SYNAPSE: THE FOUNDATION OF THE DATA-POWERED ORGANIZATION



> The modernization imperative

Improved customer engagement. Nimbleness. Ability to scale. Having easy access to trusted, consistent and accurate data to make informed business decisions.

That wish list is common across the vast majority of middle-market businesses. Turning that wish list into a reality requires that businesses update their existing technologies and processes with scalable, flexible platforms that offer consolidated data views across the organization. There is a strong need to leverage analytics with artificial intelligence (AI) and have access to visualization tools that deliver easy-to-understand data-driven insights.

Unfortunately, the existing infrastructure and overall architecture at most firms relies on siloed databases, Excel spreadsheets and non-integrated systems.

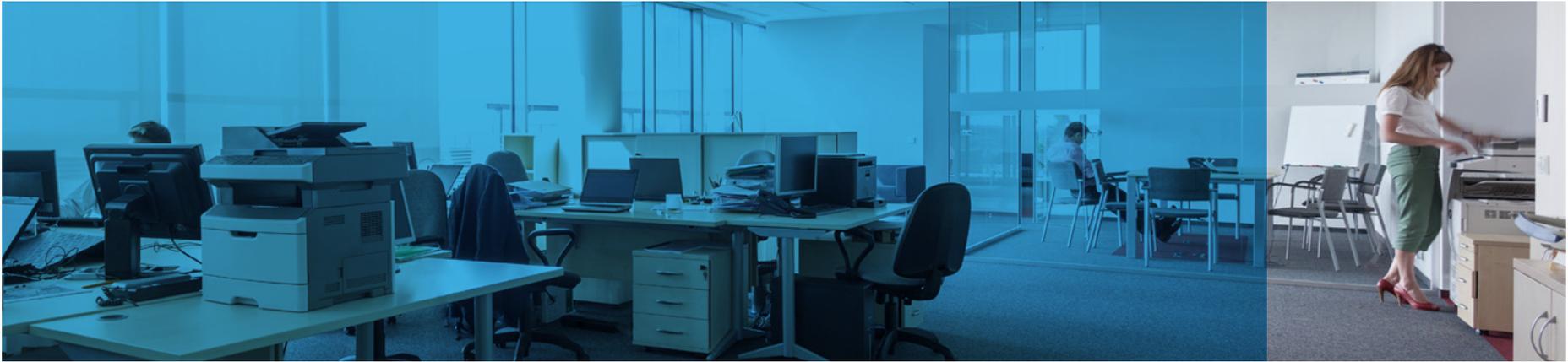
1

2

3

4

5



1

HERE ARE THREE EXAMPLES OF THE TECHNOLOGY-CENTRIC CHALLENGES FACED BY MIDDLE-MARKET BUSINESSES:



A leading North American producer of salads and healthy fresh foods with production facilities throughout North America was unable to compare its operations across various regions. As a result, the producer struggled to standardize and optimize its operations.



A leading provider of life insurance, retirement and investment solutions serving millions of customers lacked standardized financial reporting, making it difficult to understand capital requirements as well as achieve a single version of the truth.

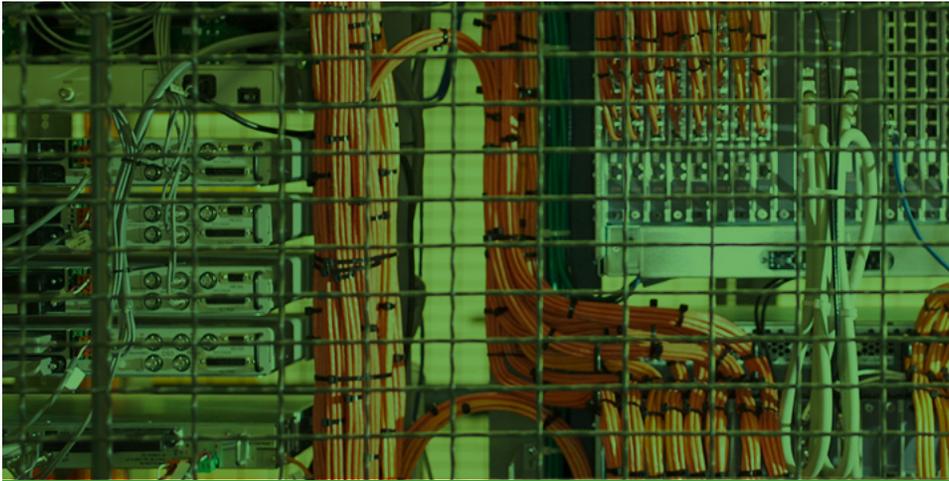


An association with 40,000 members from 90 countries lacked the insights it needed to support its members. The association wasn't even able to determine exactly how many members it had.

Each of these businesses was looking to accelerate the modernization of its overall architecture and digital transformation to achieve the following:

- Use data as an asset that would help gain a competitive advantage
- Improve operational efficiency
- Empower business users to make smarter, more informed decisions based on data rather than gut feelings
- Leverage data analytics to identify patterns and predict behaviors not visible to humans
- Reduce IT costs and reliance on IT staff
- Improve governance and controls
- Grow the business and improve the bottom line

Each of these businesses achieved its goals with the combination of Microsoft's Azure Synapse and Power BI.



➤ Building a foundation for modernization with Azure Synapse

Middle-market businesses have invested in solutions such as data warehouses and data lakes in an effort to provide the business with a single source of truth. For instance, rather than continue to allow marketing to make business decisions based on the data stored in its data mart and Excel spreadsheets while finance relied on its own data mart and spreadsheets, businesses decided to bring all these disparate data sources together into a single data warehouse. This allowed for proper cleansing and normalization of the data and the ability to deliver standardized data insights across the organization.

Unfortunately, the centralized data warehouse didn't deliver the expected results. The process of importing data into the data warehouse was arduous and costly, and in the end, business users were wary of data accuracy. Users were not willing to leave behind their rogue Excel spreadsheets, and data analysis occurred in the shadows.

Azure Synapse addresses these challenges by removing the complexity of data migration, reducing the burden on IT and lowering costs. By aggregating and rationalizing both structured and unstructured data from disparate sources, Azure Synapse streamlines and improves data migration efficiency. The precision and speed around the ETL gives IT confidence in the solution, which translates down to the confidence end users have in the data.

Azure Synapse's cloud-based architecture is scalable and cost effective since it allows middle-market businesses to reduce their technology debt of on-premises servers and data warehouses. Synapse accelerates advanced decision-making with integrated AI and cognitive services.

1

2

3

4

5

Here's how Azure Synapse transformed the underlying technology architecture at three middle-market businesses and set the foundation for further transformation:



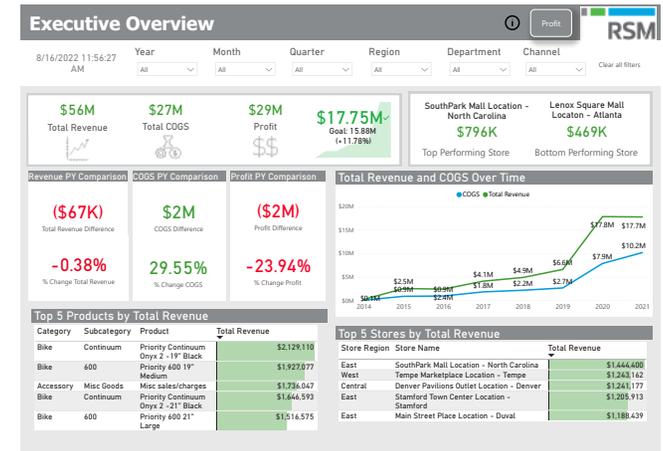
Instead of building yet another data warehouse with limited scalability, the North American food producer implemented a technology platform based on Azure Synapse that served as a foundation for multiple solutions designed to ingest, aggregate, monitor and analyze data from a wide variety of sources. This created a consolidated view across the business with consistent metrics and reporting standards. The platform is scalable and will support new data sources from mergers and acquisitions as they become available.



The life insurance, retirement and investment solutions provider replaced its on-premises data warehouse with cloud-based Azure Synapse. Synapse delivered a scalable platform and supports full data analytics. Data governance and security improved significantly. By eliminating manual reporting processes, the business has reduced costs and put data and reports in the hands of business users much faster.



The global association had attempted to centrally manage data in the past, but because the tool was not effective, it was largely unused. With Azure Synapse, the association now has a scalable and flexible architecture for data ingestion, storage, consumption, management and governance. They can collect data from additional sources as needed and aggregate and analyze this data with low code/no code analytics.



- 1
- 2
- 3
- 4
- 5



➤ Seeing is believing: Powering insights with Power BI

Power BI is a business intelligence tool designed to turn data into insights that businesses can act on. Rather than sitting behind the walls of the technology department, Power BI employs easy-to-use data visualizations that put actionable data in the hands of non-technical business users.

Statistical methods, predictive models, machine learning and AI elevate analytical data insights from historical to predictive. Power BI can identify patterns in data that humans simply cannot, such as irregularities that could identify fraud or the likelihood of a customer leaving.

Visualization tools and dashboards make insights easy to consume and understand. Employees at all organizational levels have access to up-to-the-minute analysis by simply typing a question against a dataset and receiving visual answers, trend identification and highlighted key takeaways.

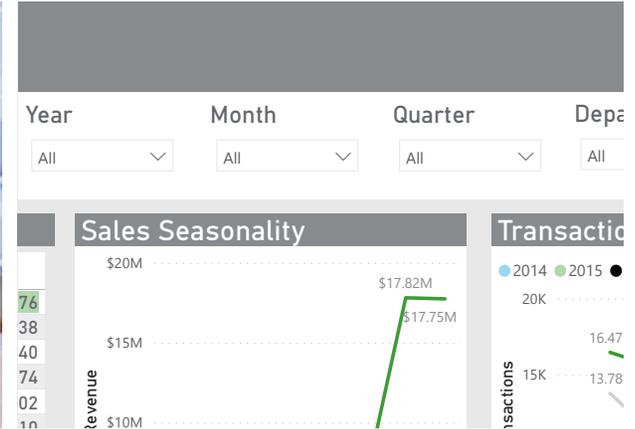
1

2

3

4

5



Here's how our three middle-market businesses use Power BI to drive data-driven insights:



The North American food producer had been using file extracts from its on-premises SQL database to populate reports. Today, it uses APIs to aggregate disparate data quickly and load it into Power BI. Once in Power BI, business users can slice and dice data by individual facilities, by region and enterprise-wide values and can easily compare facilities and regions with consistent metrics. The company has reduced operations costs and can share best practices across the organization.



Financial report creation at the life insurance, retirement and investment solutions provider included lots of manual steps to consolidate data from disparate legacy systems. IT had estimated that modernizing financial reporting for such a complex organization would be a five-year endeavor. Instead, the organization implemented a data warehouse to consolidate data and feed it into Power BI. It now has a clear understanding of its capital requirements and end users are actively using their reports.



The global association had used on-premises SQL servers, rogue Excel spreadsheets and manual workarounds for data manipulation and management. Siloed data and non-standard data definitions added to its challenges of getting a 360-degree view of its members. Power BI not only aggregates and analyzes data for association headquarters staff, but staff can share data with its chapters to use for member campaigns and outreach. Power BI has improved the lines of communication between chapters and members.

- 1
- 2
- 3
- 4
- 5



> A new approach to data analytics: Power BI + Azure Synapse

Using the analogy of building a house, Azure Synapse provides the foundational elements such as framing, plumbing and electrical and brings these elements together into a single environment. Power BI is analogous to the windows that provide access from within the home to the outside world.

For middle-market businesses, Azure Synapse consolidates and aggregates data from disparate systems into a single platform that makes it easier to access and query data regardless of the system the data originated from. Azure Synapse is a one-stop shop for data warehousing, data preparation and data management, removing much of the complexity of data migration.

As a data visualization tool, Power BI allows business users to view data from Azure Synapse in a way that's easy to understand and consume.

Azure Synapse, combined with Power BI, puts data insights into the hands of business users. The benefits of Azure Synapse plus Power BI include:

- Support a more data-driven organizational culture in which data is trusted by business users
- Create an environment that supports predictive analytics using AI and machine learning to provide actionable insights
- Provide a scalable platform that can easily ingest additional data sets
- Improve data governance and controls

Payment Type



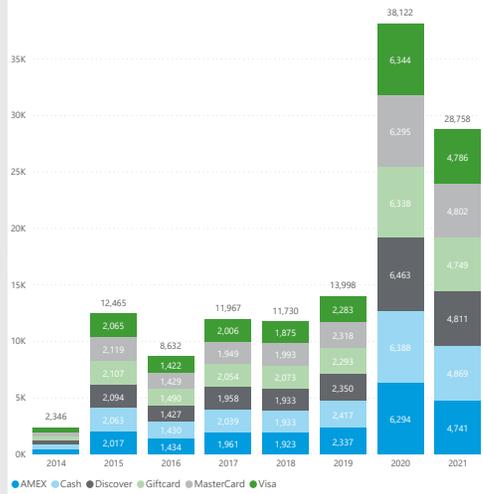
8/16/2022 11:56:27 AM

Year: All | Month: All | Quarter: All | Store Region: All | Department: All | Channel: All | Clear all filters

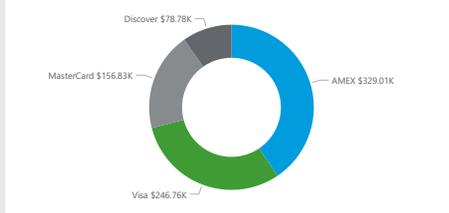
Transaction Amount by Payment Type



Transaction Quantity by Payment Type



Credit Card Fees



- 1
- 2
- 3
- 4
- 5



With the combination of Microsoft Azure Synapse and Power BI, the three middle-market businesses achieved the following:



The North American food producer that struggled to standardize and optimize its operations across the U.S., Canada and Mexico achieved a consolidated view of its manufacturing operations. The technology modernization sets the stage for additional transformation beyond operations and throughout the entire organization. For example, the business is looking at adding data sets such as IoT or drone footage to support even more advanced use cases.



The life insurance, retirement and investment solutions provider that struggled to understand its capital requirements now has standardized reporting that empowers the financial team. The organization is migrating to a new general ledger, and because they modernized their technology foundation, they can easily integrate the new system into the new platform.



The global association that desperately needed to understand and support its members reports considerable business value from analyzing member insights and significantly reducing its administrative and IT burden. The modernization efforts eliminated manual processes and improved the lines of communications between business units, chapters and members.



5 > The RSM consulting advantage for the middle market

Middle-market businesses face many of the same challenges as Fortune 500 firms, but unlike larger firms that tend to have more resources available—both in terms of budgets and talent—middle-market businesses need to achieve their goals with more modest means.

However, that doesn't mean that middle-market firms should be satisfied with inferior technologies or processes.

RSM focuses on middle-market businesses, bringing a team of industry professionals to every engagement who can personalize their approach to transformation based on an organization's current state, budget and business priorities. RSM addresses not just the technology, but the people and processes that are critical to successful transformation.

Instead of a “big bang” approach to technology modernization, RSM seeks to start small and build momentum throughout the transformation journey. As a result, middle-market businesses begin realizing positive results and returns on investment quickly.

For example, here's how RSM modified its approach for three middle-market businesses:



RSM began with an in-depth assessment of the North American food producer's needs and current technology architecture. RSM then implemented a platform that supports multiple solutions. During the transformation, the organization sunsetted redundant and antiquated systems, reducing both cost and complexity.



The life insurance, retirement and investment solutions provider's IT department had projected a five-year transformation project. Instead, RSM used agile methodology to significantly reduce project timelines. The approach was adaptable and flexible, allowing the organization to make changes as the project progressed.



As a non-profit, the global association had a limited budget and a small IT team. RSM worked within budgetary constraints and focused on helping the association become self-sufficient by training its internal staff and automating many of its processes.

Individually, Microsoft Azure Synapse and Power BI are powerful tools that can support a wide variety of use cases. Brought together by a team of RSM professionals, these tools enable middle-market businesses to tackle their biggest data challenges: bringing together data from disparate sources and transforming that data into a visual representation that is easy to turn into actionable insights.



- 1
- 2
- 3
- 4
- 5

"In a world where information evolves second by second, the ability to merge unique data marts into a single warehouse where it is available for on-demand mining is an unparalleled benefit for the business. This access and flexibility is crucial for day-to-day operations while enhancing our ability to model for the future. RSM created a comprehensive plan transitioning us from a system that required constant IT support to one that empowers staff to generate the information they need on demand. RSM assembled a team of experts who remained invested in the success of our project which allows for a seamless and collaborative environment that kept the project moving forward on time and on budget."

—CIO, Global Association

Ready to start your data transformation?
Take our data assessment to learn more.

TAKE THE ASSESSMENT



+1800 274 3978
rsmus.com

This document contains general information, may be based on authorities that are subject to change, and is not a substitute for professional advice or services. This document does not constitute audit, tax, consulting, business, financial, investment, legal or other professional advice, and you should consult a qualified professional advisor before taking any action based on the information herein. RSM US LLP, its affiliates and related entities are not responsible for any loss resulting from or relating to reliance on this document by any person. Internal Revenue Service rules require us to inform you that this communication may be deemed a solicitation to provide tax services. This communication is being sent to individuals who have subscribed to receive it or who we believe would have an interest in the topics discussed. RSM US LLP is a limited liability partnership and the U.S. member firm of RSM International, a global network of independent audit, tax and consulting firms. The member firms of RSM International collaborate to provide services to global clients, but are separate and distinct legal entities that cannot obligate each other. Each member firm is responsible only for its own acts and omissions, and not those of any other party. Visit rsmus.com/aboutus for more information regarding RSM US LLP and RSM International. RSM, the RSM logo and the power of being understood are registered trademarks of RSM International Association.

