

# Vertigon helps Fortune 50 company make evolution to data analytics



## VERTIGON CONSULTING

### 'A very manual process' for financial reporting

When a Fortune 50 financial services company resolved to transition their more traditional reporting team into a data analytics team, they sought outside help to exploit advanced technology to make the switch.

### The road to automation and data analytics

Vertigon held the reins of the project along the road to automation, not just by implementing the technology, but also running meetings and procuring requirements.

### A robust solution leads to increased productivity

The successful transition to automated reporting resulted in a roughly 300 percent increase in productivity for the Fortune 50 Company, which continues to work with Vertigon to this day.

Effective financial reporting can be as laborious for a company as it is crucial. Traditional methods of manually tracking and reporting on the financial health of a business—involving potentially hundreds of thousands or millions of data points—in order to make strategic decisions on its future can be tedious and inefficient. New Jersey-based Vertigon Consulting recognized this frustration with manual or semi-automated financial reporting and invested in a future where data analytics could be leveraged for reliable, scalable, and repeatable business insights.

Their flagship SaaS solution, Cloud BI, benefits Vertigon's customers by automating the tiresome accumulation of information and making more time for higher-level functions like analysis and decision making. Vertigon selected Microsoft Azure as the IaaS (upon which they built Cloud BI) leveraging Microsoft's vast capability not only for its best of breed infrastructure offering but also the significant database, tools, and development capability. Vertigon was one of Microsoft's first customers in the cloud with subscriptions dating back to 2013. Soon after, Vertigon transitioned from SharePoint integrated BI to Microsoft's Power tools: Power BI, Power Query, and Power Automate, as well as the suite of O365 applications. The success of Cloud BI has led to its implementation in hundreds of companies nationwide.

"Vertigon Consulting has been an instrumental partner in achieving the Data Analytics Team's vision of automating and enhancing reporting and delivering procurement analytics. Both sides have partnered continuously to take an off-the-shelf offering from Microsoft and customize it to account for the Global Procurement operating environment."

— AVP of Procurement Services for a Fortune 50 Company

## 'A very manual process'

When a Fortune 50 financial services company resolved to transition their more traditional reporting team into a data analytics team, they sought outside help to exploit advanced technology to make the switch. After a successful pitch from Vertigon, work began on assessing the company's current limitations.

"It was a very manual process," said Stuart Sandman, manager of BI Practice at Vertigon Consulting. "They used a team in India, but there was no automation, and it took a long time to generate each of the reports. Because of that, they were almost a quarter behind in their reporting."

Not only was the company trying to coordinate thousands of unique reports into actionable insights, but the elongated nature of the process led to problems with accuracy, leading to duplication of efforts.

"They cried uncle," Sandman said. "They were looking for a solution that would streamline their processes."

## The road to automation

The entire process, from initial meeting to deployment, took only a few months. The Vertigon team developed a solution that included an encrypted portal to receive data, an SSO solution to O365 to deliver results, and its secret sauce: a rules-based engine that allows the client's own analysts to create business rules and

have them ingested just as data is ingested. This represented a considerable cost savings because Vertigon was not required to be engaged for modifications to business rules.

"The Vertigon team challenged us to think more broadly by not just focusing on eliminating manual work but also on creating an environment where the analysis is embedded into the reporting," said the Fortune 50 Company's assistant vice president of Procurement Services.

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"It was not an ad hoc process, and we brought a lot of structure so as to have both parties collaborate," said Phani Gupta, VP of Operations with Vertigon Consulting. "It was a series of regular meetings capped by quarterly summits."

Work progressed so smoothly that the Fortune 50 Company was able to take over the center of project, as automation had been introduced to multiple stages of the reporting process:

- Data collection
- Rules creation
- Rules processing
- Data processing
- Reporting
- Distribution

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“Vertigon Consulting has been an instrumental partner in achieving the Data Analytics Team’s vision of automating and enhancing reporting and delivering procurement analytics,” said the assistant vice president. “Since kickoff of the project, both sides have partnered continuously to take an off-the-shelf offering from Microsoft

and customize it to account for the Global Procurement operating environment. That work continues today, and will into the future, with the Global Procurement Data Analytics team taking the lead and leveraging Vertigon’s technical expertise.”

In fact, Sandman said the stellar work by Vertigon has also led to additional work within different departments in the company, as well as other Fortune 1000 companies.

“We have the appetite, we have a robust solution, we have the team—we are just waiting for more opportunities to open up,” said Gupta.

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