

# Transform your business with intelligence



**MS Power BI®**

from HTG

## Business Intelligence

Business Intelligence (BI) describes the tools and methods to access and analyse information to improve and optimise decisions and performance.

Most businesses in NZ have a strong tradition of entering prodigious volumes of data into their database systems (such as their accounting packages, CRM software, Excel spreadsheets, etc). However, the reporting tools within most programs are generally inadequate. To convert the vast amount of data (such as timesheet entries and customer information) into real-time useful information requires a massive amount of effort and technical skill. Most firms have therefore either not bothered to extract the information or have to use external tools such as Microsoft Excel to manually combine and manipulate the information into a useable form.

Enter modern Business Intelligence or BI tools.

BI used to be the domain of large enterprises because of its price tag and extremely technical nature. Therefore, use of BI was restricted to very large firms like Google that had the budget to engage in "big data" analytics.

However, recent entrants of lower-priced BI software such as QlikView® and Tableau® have brought the affordability of this technology down to the level of SMEs. Even so, the licences for these packages are often priced in the \$'000s to \$'0,000s p.a. for many firms.

At the beginning of 2015, Microsoft introduced MS Power BI® and since then this product has taken the market by storm. It is easy to understand why.

MS Power BI® is a very compelling option because:

1. it is very low-cost: only \$180 plus GST pa for a licence.
2. it is very easy to use.
3. it is very economical to set up.
4. it can integrate into a single report or dashboard data from numerous different sources - accounting and CRM packages, Excel, XML, Xero, SQL, ODBC, Facebook, Text, QuickBooks, Exchange, Azure, MailChimp, etc.
5. it can be accessed on any device - Windows, Apple, Android, iOS, desktop, notebook, tablet or mobile appliances.

## EXAMPLES OF DASHBOARDS

Our clients are using MS Power BI® for all manners of BI reports and dashboards. Examples include:

- Rating the performance of the business against KPIs.
- Tracking the fees generated by each author by person, dept, period, branch, etc, against budgets.
- Displaying the P&L of the business in an easy to understand graphical format that allows the users to easily make comparisons against previous periods (last month, last week, last year, last quarter, etc) and budgets.
- Monitoring how often clients have been contacted to ensure no important client feels 'unloved'.



The big differences between using the existing reports from say an accounting (or generating your own reports from a tool like Excel) and using a BI tool are:

- Once the dashboards are created, they run automatically in real time and require no effort to update.
- Users can point and click to set the parameters of the information they wish to see (eg time period, branch, staff, etc) themselves.
- Users are able to drill down into source data.

We invite you to investigate why businesses all over the Waikato/BOP are investigating why MS Power BI® is the tool to help them transform their business performance.



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