

A leading Cybersecurity company migrates Tableau reports to Power BI, achieving a 20% reduction in BI-related expenses



About the Client

An American cyber security software and services company that provides protection to enterprise data and application software. The company is headquartered in San Mateo, California.

Business Challenge

After a strategic merger, the client faced major difficulties combining different data systems and improving their BI tools for better performance. They used Tableau extensively for their complicated reporting and dashboard needs but needed a more powerful solution that could work well with their current data management platform, Snowflake. They decided to move from Tableau to Power BI to make data visualization and decision-making processes easier.

Key challenges:

- Managing over 80 distinct Tableau workbooks and 300 worksheets, with some dashboards containing over 200 intricate calculations.
- Ensuring a smooth transition without disrupting ongoing business operations.
- Training their analytics team on Power BI to leverage its advanced reporting and ad-hoc analysis capabilities.

Business Solution

WinWire was approached to facilitate a smooth transition to Power BI.

Highlights of the Solution include:

- **Assessment and Planning:** A thorough documentation of the current Tableau report inventory and data sources, followed by a detailed migration plan prioritizing critical reports.
- **Architecture Design:** Defining the Power BI solution architecture to ensure compatibility with Snowflake data views and setting up BI gateways for secure data access.
- **Migration Execution:** Conducted in sprints, the migration process included:
 - Rebuilding Tableau reports in Power BI while adhering to design standards.
 - Performing quality assurance to reconcile Power BI outputs with original Tableau reports.
 - Regular in-progress demos and feedback sessions with the client to refine the BI reports.
- **Knowledge Transition and Support:** Post-migration, comprehensive training sessions were held for the client's team to maximize their proficiency in utilizing Power BI. Ongoing support was provided to ensure smooth operation and immediate resolution of any emergent issues.

Business Value

- **Faster report generation:** Reports were generated **30% faster**, improving efficiency and decision-making.
- **Lower operational costs:** The migration saved **20% of the BI-related expenses** in the first year due to the more efficient BI tools.
- **Higher report quality and reliability:** Report errors from manual processes dropped by 40%, increasing data reliability.