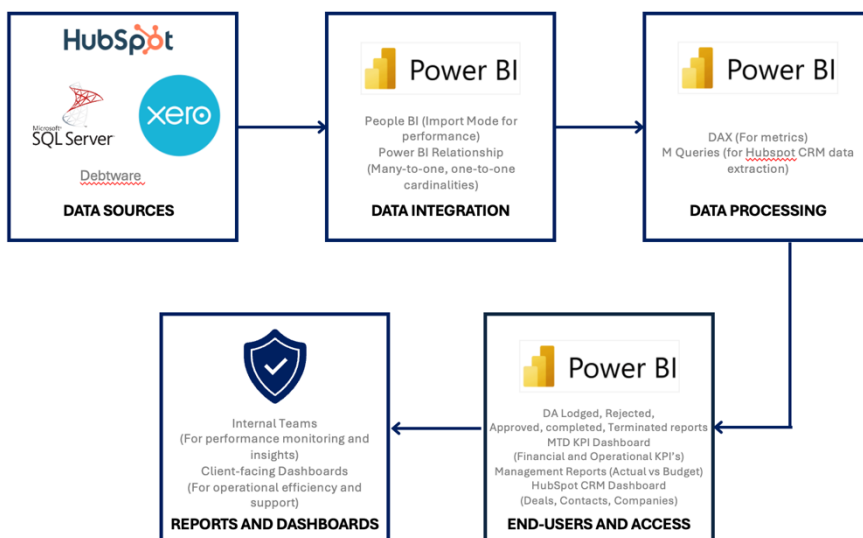# Case study:
Revive Financial Foundation Project

The Opportunity

Revive Financial relied on inefficient, manual Excel-based reporting, leading to time-consuming processes and a higher risk of errors. As data complexity increased, the company required a more scalable, automated solution to streamline reporting and support advanced analytics.

4impact's Approach

4impact addressed Revive Financial's challenges by implementing Power BI to automate data integration and improve reporting efficiency.
The team integrated data from Debtware, Xero, HubSpot CRM, and Excel into Power BI, creating a streamlined data model and user-friendly dashboards. 4impact ensured a smooth transition, configured Power BI workspaces, and set up automated data refreshes. Additionally, the team provided ongoing support and documentation, empowering Revive Financial to leverage advanced analytics for improved decision-making and operational performance.

DATA SOURCES (HubSpot, SQL Server, xero, Debtware) → **DATA INTEGRATION** Power BI — People BI (Import Mode for performance) Power BI Relationship (Many-to-one, one-to-one cardinalities) → **DATA PROCESSING** Power BI — DAX (For metrics) M Queries (for Hubspot CRM data extraction) → **END-USERS AND ACCESS** Power BI — DA Lodged, Rejected, Approved, completed, Terminated reports MTD KPI Dashboard (Financial and Operational KPI's) Management Reports (Actual vs Budget) HubSpot CRM Dashboard (Deals, Contacts, Companies) → **REPORTS AND DASHBOARDS** Internal Teams (For performance monitoring and insights) Client-facing Dashboards (For operational efficiency and support)

Key Services utilised

- Implementing BI
- Data Modeling/Dashboard Development
- Deployment and Configuration

Key Toolkit

- Power BI
- Microsoft Excel
- HubSpot CRM
- Xero
- Debtware

Key Outcomes and deliverables:

The project provided Revive Financial with enhanced reporting capabilities, enabling more efficient data analysis and decision-making. The Power BI dashboards offered insights that improved business intelligence and operational efficiency, ultimately adding significant value to Revive Financial's reporting processes and overall business performance.

Deliverables included a fully integrated Power BI model, an initial dashboard/report, documentation of the ETL process, and a scalable platform for future analytics.

Key project statistics and success insights.

OPTIMISED

AUTOMATED MULTI-SOURCE DATA

AUTOMATED

ELIMINATION OF MANUAL AND LEGACY DATA PROCESSES.

Power BI

The 4impact Advantage.

4impact is a consulting and technology services business with a primary focus on the delivery and implementation of complex technology projects. We value relationships - with our consultants, with our clients, and with our suppliers and partners.

4impact Head Office
Brisbane QLD 4000 Australia

P: 1300 112 100 Int: +617 3177 1400
connect@4impact.com.au
Brisbane | Manila

4impact.com