EXCELLENCE

SUCCESS

SATISFACTION

PASSION

COMPETENCE

INNOVATION

MOTIVATION

Driving Employee Productivity and Financial Excellence with Data-Driven Insights

+1-302-498-8332

www.corientbs.com

Introduction

A company approached Corient Business Solutions seeking an advanced solution to analyze employee productivity in relation to their cost to company (CTC), track critical financial metrics, and gain insights into client acquisitions and service categories. The company aimed to enhance decision-making, optimize financial performance, and support strategic planning for service offerings.

The Problem?

- Lack of visibility into employee productivity relative to their CTC, hindering performance evaluations.
- Challenges in tracking financial metrics such as fee recovery and patterns in write-offs.
- Limited insights into new client acquisitions and the distribution of service categories like Accounts, Payroll, and Audit Services.

Corient Solution

1. **Employee Productivity Analysis:**
- **T**racked individual employee productivity metrics in relation to their CTC.
- Visualized trends using Pareto and waterfall charts for actionable insights.
2. **Financial Metrics Monitoring:**
- Monitored fee recovery from each client to identify and address patterns in write-offs.
3. **Client Insights:**
- Tracked new client acquisitions and categorized them by service type, such as Accounts, Payroll, and Audit Services.

> **The best accountants are the architects of financial legacies.**
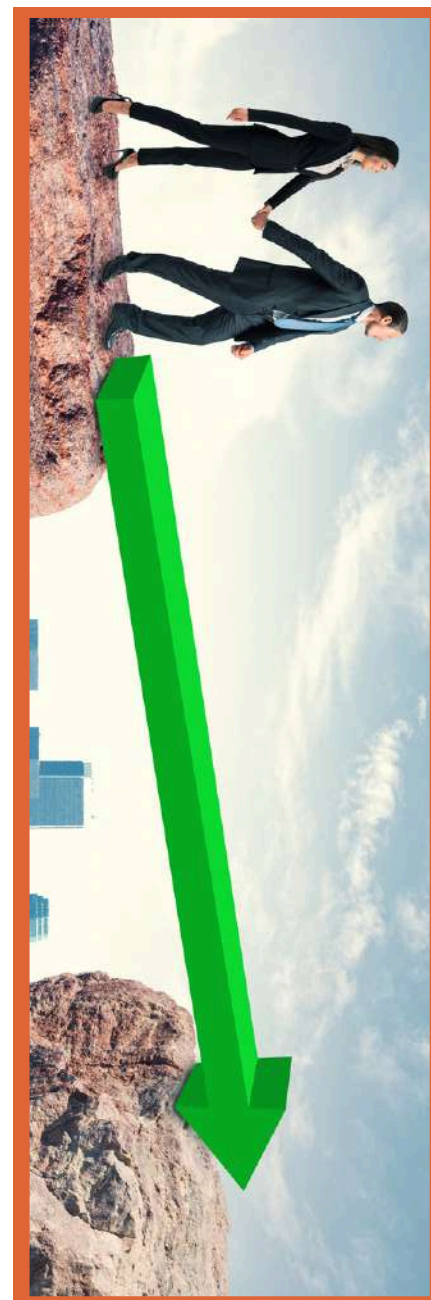>
> **– Laura Anderson**

Challenges Faced

Data Consolidation:
- Integrating data from HR, financial systems, and client records into a unified framework.
- Complex Visualizations:
- Designing advanced visualizations like Pareto and waterfall charts to effectively represent data.

Overcoming the Challenges

- Utilized Power BI's Power Query to build a unified data model consolidating HR, financial, and client data.
- Collaborated with stakeholders to define key performance metrics and ensure data accuracy across datasets.
- Leveraged advanced Power BI features to design Pareto and waterfall charts, ensuring clarity and usability of insights.

> **Behind every good business is a great accountant.**
>
> **– Anonymous**

Result Achieved

- Analyzed employee productivity relative to their CTC, identifying high-performing employees.
- Monitored fee recovery trends, enabling effective management and reduction of write-offs.
- Provided clear insights into new client acquisitions and service category distribution for strategic planning.

Conclusion

Corient's tailored Power BI solution enabled the company to achieve enhanced decision-making, improved financial management, and better visibility into client growth and service diversification. The integration of advanced visualizations and actionable insights reaffirmed Corient's expertise in delivering impactful business intelligence solutions.

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The road to success and the road to failure are almost exactly the same.
– Colin R. Davis