

COVENANT TECHNOLOGY PARTNERS CASE STUDY

*Enhancing Data Analytics
and Dynamics 365 Support
for a Wholesale Company*

Data and AI



BUSINESS PROBLEM

A wholesale company faced significant challenges in managing and enhancing their data analytics and Dynamics 365 environments. The existing systems were not adequately meeting the demands of the business, leading to inefficiencies and missed opportunities for data-driven decision-making. Specifically, the company needed insights into:

- **User support and satisfaction:** Understanding the needs and issues faced by users to provide better support and improve satisfaction.
- **System performance:** Monitoring the performance of Dynamics 365 and other systems to ensure they are running efficiently and effectively.
- **Issue resolution:** Identifying common issues and their root causes to improve troubleshooting and reduce downtime.
- **Training and adoption:** Evaluating the effectiveness of training programs and user adoption of new systems and features.
- **Service level agreements (SLAs):** Ensuring that support services are meeting the agreed-upon SLAs and identifying areas for improvement.

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OUR OBJECTIVE

The primary objectives of this engagement were to provide comprehensive support for the wholesale company's data analytics, Dynamics 365 Finance & Operations, Dynamics 365 Customer Engagement, and Modern Work environments. Covenant Technology Partners aimed to work as an integrated team with the wholesale company, ensuring effective collaboration and communication. Additionally, the engagement included offering ad-hoc consulting services as requested by the client. The goal was to create a flexible and responsive support system that could adapt to the evolving needs of the wholesale company.

OUR SOLUTION

Covenant Technology Partners provided a comprehensive set of solutions to address the business problem. We implemented end-user logic in the data warehouse and integrated end-users into the Power BI semantic model. The Power BI reports were modified to incorporate design feedback and end-user dimensions. The prototype was reviewed with the sales team, and tasks were identified for the wholesale company's intern. General assistance with Microsoft best practices, product use, and capabilities was provided as appropriate to accomplish the client's business objectives. The solutions were designed to enhance the segment reporting capabilities of the wholesale company, enabling better decision-making and business insights.

THE RESULTS

The flexible and cost-effective support options met the client's needs and budget. The implementation of end-user logic in the data warehouse and integration into the Power BI semantic model allowed for more accurate and timely reporting. The modifications to the Power BI reports based on design feedback and end-user dimensions ensured that the reports were tailored to the specific needs of the wholesale company. The review of the prototype with the sales team and identification of tasks for the intern helped to ensure that the solutions were practical and actionable. The general assistance with Microsoft best practices, product use, and capabilities provided the wholesale company with the knowledge and tools needed to effectively manage their data analytics and Dynamics 365 environments. Overall, the engagement was successful in addressing the business problem and achieving the objectives set forth in the SOW.