

# COVENANT TECHNOLOGY PARTNERS CASE STUDY

## Enhancing Profitability Reporting for a Manufacturing Company

Data and AI



### BUSINESS PROBLEM

A manufacturing company faced significant challenges in refining their profitability reporting. The existing approach was not adequately meeting the demands of the business, leading to inefficiencies and missed opportunities for data-driven decision-making.

The company needed insights into:

- **Customer profitability:** Understanding which customers are most profitable and identifying opportunities to improve customer relationships and increase profitability.
- **Product line profitability:** Analyzing the profitability of different product lines to determine which products are driving revenue and which may need to be reevaluated or discontinued.
- **Sales team performance:** Evaluating the performance of the sales team to identify top performers, areas for improvement, and strategies to enhance sales effectiveness.
- **Cost management:** Identifying areas where costs can be reduced or better managed to improve overall profitability.
- **Revenue optimization:** Developing strategies to maximize revenue through pricing, promotions, and other initiatives.

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### OUR OBJECTIVE

The primary objective of this engagement was to develop a prototype for refinements to the manufacturing company's current approach to profitability reporting. Covenant Technology Partners aimed to work as an integrated team with the manufacturing 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 manufacturing company.

### OUR SOLUTION

Covenant Technology Partners provided a comprehensive set of solutions to address the business problem. They 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 manufacturing 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 profitability reporting capabilities of the manufacturing company, enabling better decision-making and business insights.

### THE RESULTS

The engagement led to several positive outcomes. The manufacturing company experienced enhanced profitability reporting capabilities, which enabled better decision-making and business insights. The collaboration between Covenant Technology Partners and the manufacturing company improved, fostering a strong partnership. The flexible and cost-effective support options met the client's needs and budget. Overall, the engagement was successful in addressing the business problem and achieving the objectives set forth in the SOW.