



## CASE STUDY

Leading private equity firm  
automates analytics in the cloud  
to save analysts days of work

Avanade helps build a secure, Microsoft Azure-based data ecosystem

## CASE STUDY

Leading private equity firm automates analytics in the cloud to save analysts days of work

### Business situation

#### Reducing manual work to increase efficiency

When a leading private equity firm wanted to leverage the cloud to optimize its business operations, it partnered with Avanade to define a Microsoft-based digital transformation. During a design-led advisory phase to build out its transformation roadmap, the firm identified a need to move its manual data analytics processes into the cloud to increase efficiency and insights through automation. By leveraging the power, pricing and security of Microsoft Azure, its employees could spend significantly less time inputting, organizing and analyzing portfolio data and more time providing quality service to their clients.

### Solution

#### A custom move into the cloud

Creating a new Azure data ecosystem required a complex migration of data that was previously stored on thousands of spreadsheets, as well as custom application development to meet the firm's specific needs. Avanade delivered this solution in multiple phases:

1. Mapped key metrics and reports to their source files
2. Migrated all data – including all metadata – from existing spreadsheets onto the new platform
3. Created an end-to-end process for spreadsheet intake, curation, transformation and publication to the Azure platform
4. Developed a custom suite of reporting and analysis tools using Microsoft Power BI

While the firm wanted to upgrade its existing process for analyzing and manipulating data, it was important that it could still use its legacy spreadsheet application. Avanade built a custom tool that can read this information, extract it and feed it into Power BI, which enables insight and analysis. Importantly, the secure cloud ecosystem ensures full control over who accesses data and how it's distributed.

### Results

#### Unlocking automated insights

The power of Azure has allowed this leading private equity firm to build an integrated data ecosystem that has modernized the way it does business. The solution has significantly increased efficiency and productivity for the firm's analysts and has delivered several key results, including:

- Huge amounts of data have been imported, transformed and centrally stored for automated testing and analysis, making thousands of manual spreadsheets obsolete.
- Employees can now process financial data and generate key business reports from any number of portfolios and dates in just 20 minutes rather than the hours or days it previously required.
- There is now fully automated data extraction and upload for new portfolios, and automated reporting on portfolio performance.
- A 24/7 interactive dashboard in Power BI, which includes customized charts and tables for different personas, gives clear visualization of insights and analytics.
- The move to the cloud has made a large, on-premises database unnecessary, saving the firm huge costs annually.

With this solution, the firm now has a secure, trusted data and analytics platform to help its analysts better serve their clients.



#### **About Avanade**

Avanade is the leading provider of innovative digital and cloud services, business solutions and design-led experiences on the Microsoft ecosystem. Our professionals bring bold, fresh thinking combined with technology, business and industry expertise to help make a human impact on our clients, their customers and their employees. We are the power behind the Accenture Microsoft Business Group, helping companies to engage customers, empower employees, optimize operations and transform products, leveraging the Microsoft platform. Avanade has 38,000 professionals in 25 countries, bringing clients our best thinking through a collaborative culture that honors diversity and reflects the communities in which we operate. Majority owned by Accenture, Avanade was founded in 2000 by Accenture LLP and Microsoft Corporation. Learn more at [www.avanade.com](http://www.avanade.com)

©2020 Avanade Inc. All rights reserved. The Avanade name and logo are registered trademarks in the U.S. and other countries. Other brand and product names are trademarks of their respective owners.

#### **North America**

Seattle  
Phone +1 206 239 5600  
[America@avanade.com](mailto:America@avanade.com)

#### **South America**

Sao Paulo  
[AvanadeBrasil@avanade.com](mailto:AvanadeBrasil@avanade.com)

#### **Africa**

Pretoria  
Phone +27 12 622 4400  
[SouthAfrica@avanade.com](mailto:SouthAfrica@avanade.com)

#### **Asia-Pacific**

Australia  
Phone +61 2 9005 5900  
[AsiaPac@avanade.com](mailto:AsiaPac@avanade.com)

#### **Europe**

London  
Phone +44 0 20 7025 1000  
[Europe@avanade.com](mailto:Europe@avanade.com)