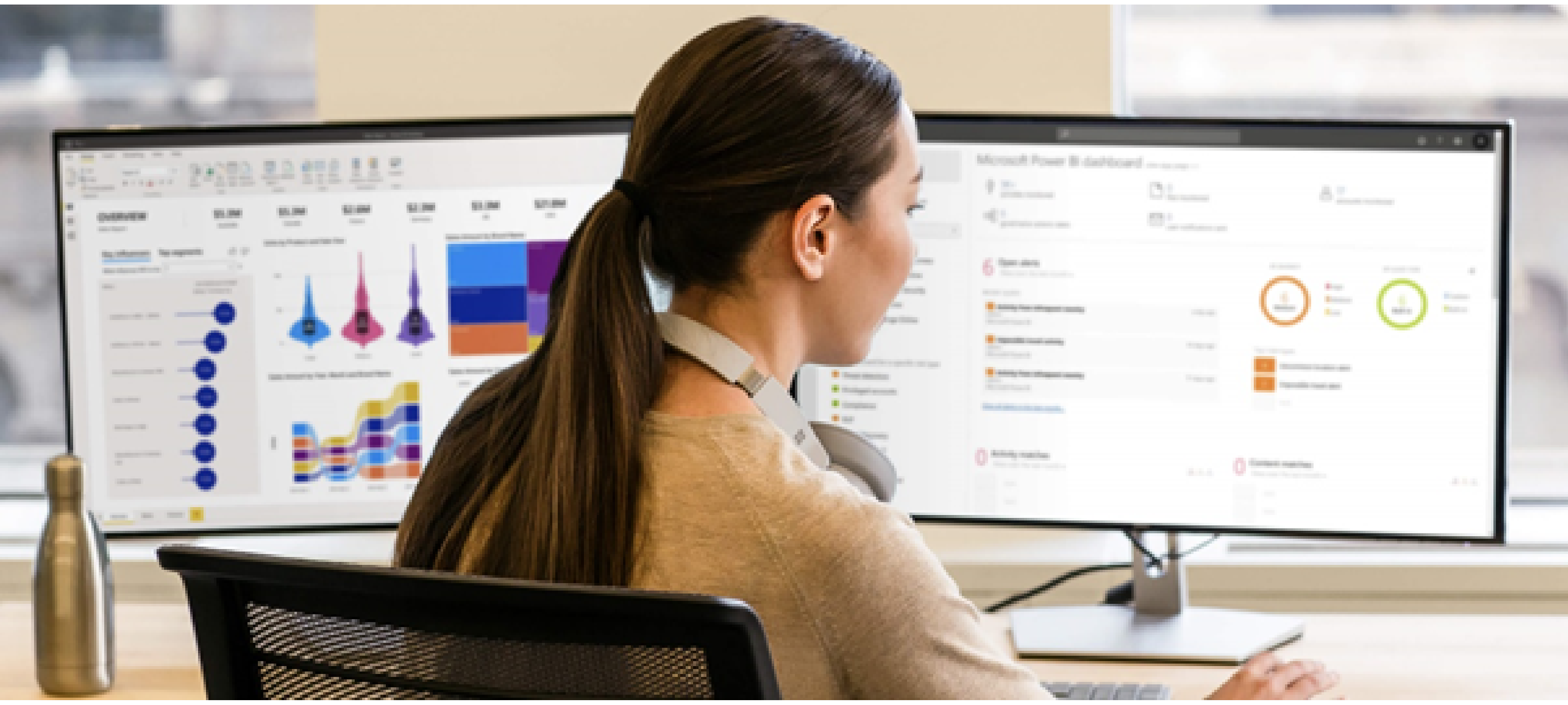
Managed IT experts



Quickly streamlining Group financial reporting at PFI Sign Plus using Microsoft Power Platform

The Customer Challenge

ELIMINATING COSTLY AND RECURRING DATA MANIPULATION AT PFI SIGN PLUS

The Financial team at PFI Sign Plus came to Managed IT Experts to help them improve the efficiency of the reporting process.

As part of the PFI Group, Sign Plus not only need to regularly gather, analyze and report on financial progress internally - but also at a group level - on an ongoing basis. But there were a number of significant issues with the existing process as follows:

- It was **highly time-consuming and manual**, with the team at Sign Plus spending hours and days of time on a regular basis
- They had to **repeatedly work to collate data across a number of internal data sources** that “didn’t speak to one another” including Sage, internal business spreadsheets and their existing Clarity CRM system
- Publishing data in this way effectively gave a **historical view of what was happening to the business** – rather than a real-time assessment
- The transposing and manual input of data, very often multiple times across these different sources **was highly prone to error**
- All of this was a **highly manual and costly process** which had to be repeated weekly and monthly on an ongoing basis and was diverting resources from focusing on higher value financial analysis



Our Solution

USING POWER APPS TO CREATE A SINGLE DASHBOARD VIEW OF ALL DATA

Time - and budget - were both key for PFI Sign Plus. So Managed IT Experts were able to use the highly flexible Microsoft Power platform to quickly create a cost-effective solution that was built on their existing systems.

Which meant that it could **be delivered in weeks – and not months.**

ABOUT PFI SIGN PLUS

PFI Sign Plus is an award-winning sign company which is part of the PFI Group and they specialise in the design, manufacture, installation and maintenance of all types of signs and service Scotland and the rest of the UK.

SOLUTION FOCUS

Eliminating costly and recurring data manipulation from financial processes through the use of the Microsoft Power platform.

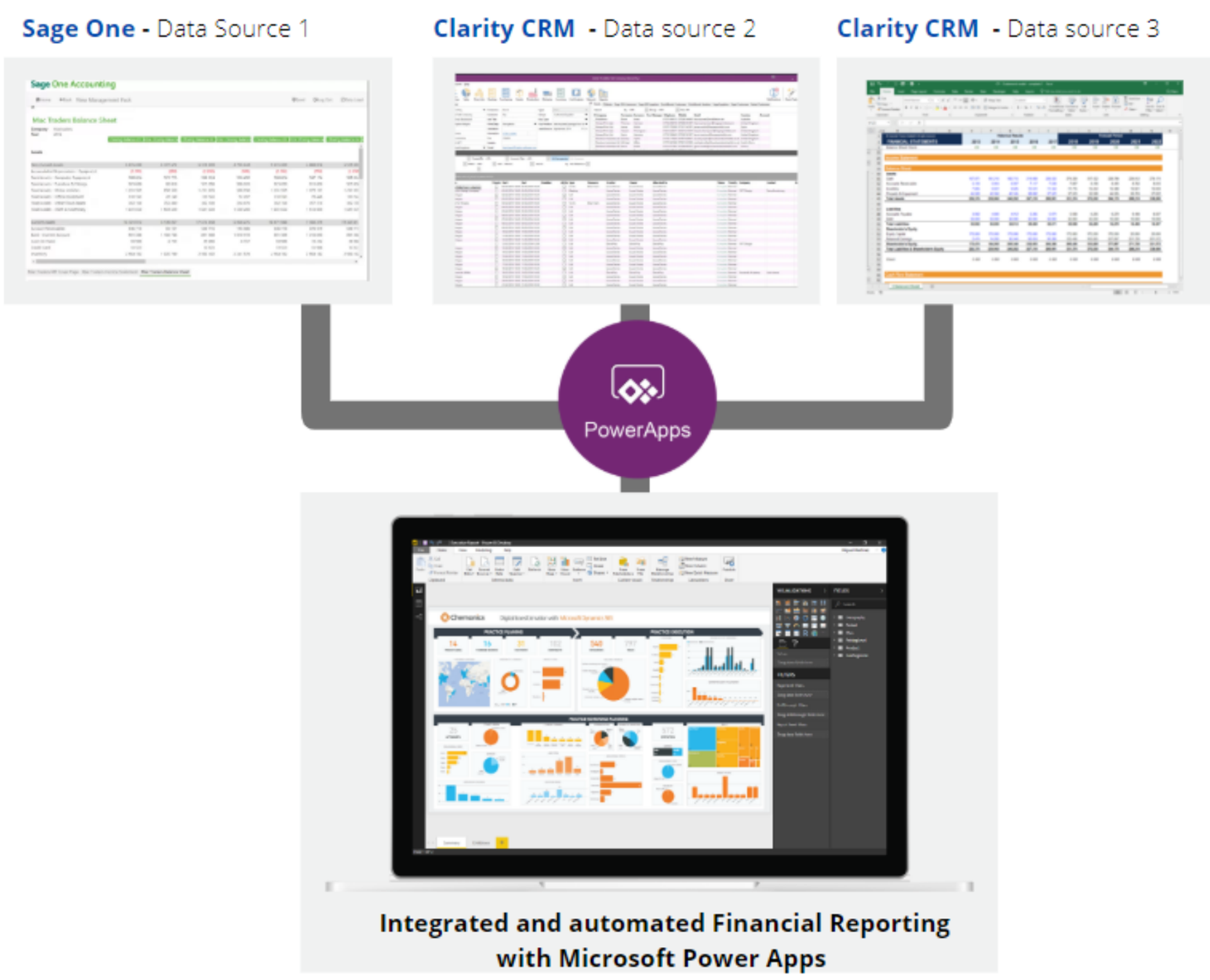
QUICK FACTS

- PFI Sign Plus had time consuming and repetitive manual processes for financial reporting
- This included legacy data systems like Sage, Clarity etc not “talking to each other”
- We used the Power Apps platform to quickly build a new, automated solution on top of the legacy platform
- We delivered this in weeks – automating the entire process and providing a single view of data in real-time

Our Solution

By using **Power Apps to connect the three existing data sources** it was possible to fully automate the process of sourcing, collating and publishing data both within PFI Sign Plus and at a Group level. Providing a centralized data dashboard that gave a single view of all data in real-time.

As shown below.



What PFI Sign Plus said:

"Managed IT Experts were able to quickly streamline our financial reporting by pulling together data from disparate legacy systems – proving higher quality insight".

James Barbour, Director
PFI Sign Plus

This solution had a **number of valuable benefits** for PFI Sign Plus including:

- **Reclaiming valuable time in the data management process** by automating the entire workflow and freeing up internal resources
- Surfacing and enriching the data in a more meaningful way, revealing trends and **providing much better-quality insight** that drives smarter decisions for the business
- Making the right metrics and KPIs **available in real-time**, so PFI SignPlus can move from insight to action more quickly
- Providing a **greatly improved reporting capability** with the ability to publish data anywhere, at any time and on any device
- Ensuring that the data can be rapidly published and is **more accurate and less prone to error**
- All in an environment which is **familiar to Microsoft Office users**

Do you need to take the regular pain out of managing your Financial Reporting data?

- **Talk to us** about a quick and cost-effective way to get to the real business data you need quickly
- **No need to change existing systems** – Microsoft Power Platform can work on top of your legacy applications – and deliver real business value quickly
- A **highly cost-effective approach** that enables you to do more with less

CONTACT US NOW on 01383 722 225 for a no-obligation 30-minute consultation around your needs. Or email consultation@manageditexperts.co.uk

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