

CASE STUDY: DATA CAPTURE & REPORTING

Retail Distribution Industry

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SITUATION ANALYSIS

A large distribution company had to produce a presentation on sales and store survey data on a **weekly** basis. This data reported on **60+** products across **600+** stores. This presented some problems:



The client's MS Excel workbook was cumbersome due to the amount of data



Time loss due to slow opening, calculating and PC freezes



Data had to be added daily – adding too much at once caused crashes



Manual consolidation was required due to data being received in various formats and layouts



The data processing required was increasing at an unsustainable rate, as a result of new data being added periodically



SOLUTION

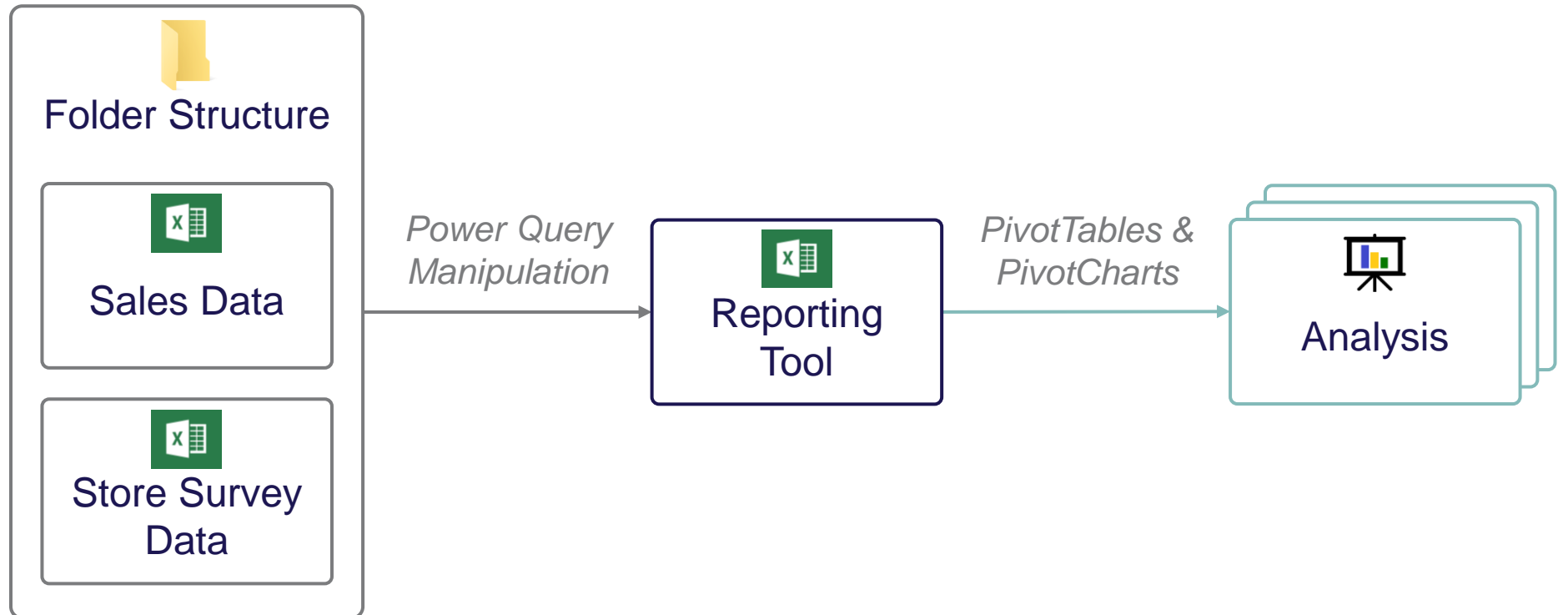
Our solution was to build an MS Excel tool that uses Power Query to handle:

- ✓ Data manipulation;
- ✓ Data cleaning;
- ✓ Data consolidation;
- ✓ Outputting the clean data to the tool for analysis and reporting.

This allows the user to simply save the required data in a specific folder structure and click a button to update the data pulled into the tool.

IMPLEMENTATION

We built the logic to prepare the data for analysis in Power Query into the MS Excel Reporting Tool. The process flow is as follows:



7

hours saved
per report

5x

increase in result
accuracy

95%

decrease in time
taken to open and
calculate
dashboard tool

OUTCOMES

Our solution has the following outcomes:



Time spent importing data significantly reduced due to the heavy lifting of the data preparation being done by Power Query



Reporting Tool much smaller in size as the data is kept externally



Potential for human error vastly reduced



Reliable results every time



Tool updates in a matter of minutes



Reporting inaccuracies reduced due to automated data cleaning and dirty data identification