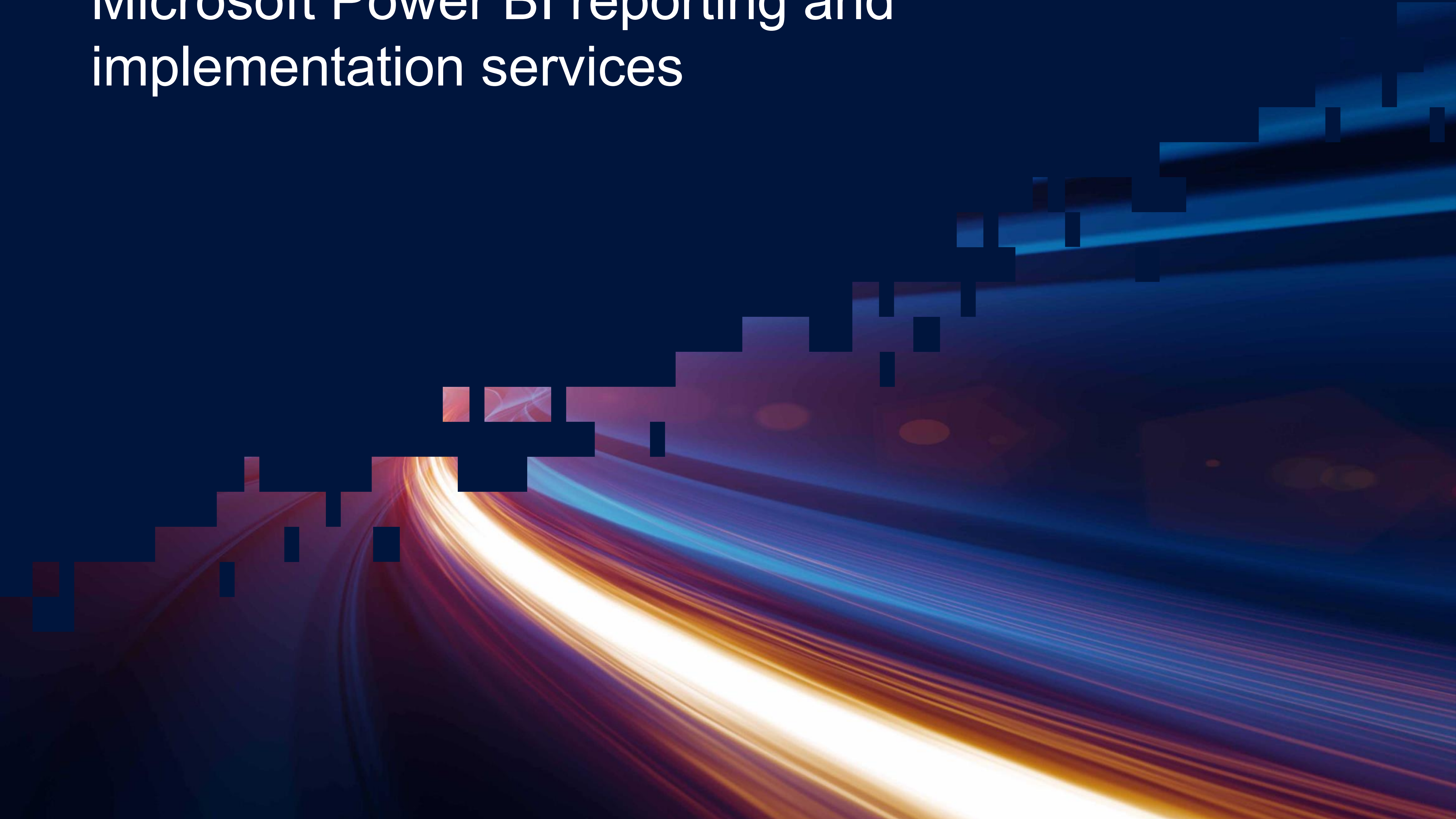
PRIVATE AND CONFIDENTIAL

Microsoft Power BI reporting and implementation services



Our data analytics process

In today's environment, organisations are under increasing pressure to deliver accurate, timely insight from complex and distributed data estates. We help clients unlock the full value of their data by designing, building, and optimising Power BI dashboards and governed data models that support confident decision-making across finance, operations, and strategy.

Our accountant-led analytics team brings together robust financial understanding with modern data platforms, transforming disparate systems into secure, scalable, and reusable semantic models. From day one, our dashboards provide clear, actionable insight while our focus on governance, performance, and enablement ensures your reporting can scale, adapt, and support self-service insight over the long term.

1

Extraction

Our analytics tools let us work with data sets that are too large or complex for traditional tools such as Excel.

2

Transformation

We efficiently consolidate and cleanse disparate data sets to create a robust data cube.

3

Enrichment

We can layer your data with financial and non-financial data sets to help understand what is driving key metrics and trends.

4

Insights

Using data analytics tools allows us to rapidly surface richer, more meaningful insights.

5

Visualisation

Interactive, user-friendly outputs allow for more impactful presentation of your data.

Solutions offered

At its core, we transform, analyse and present data in dynamic and interactive ways. Our typical use cases span the following categories:

- **Extraction -** We work with vast quantities of data across a variety of sources always utilising the most granular level of data available.
- **Transformation -** By utilising machine learning techniques, we can tackle even the most severe data quality issues ensuring our data cubes are complete and robust.
  - **Data transformation** - We consolidate and cleanse data from multiple sources, including MS Fabric and Azure, to create a data cube that is invaluable in driving efficient analytics or creating a reporting tool to ensure timely decision making.
- **Enrichment -** Benchmarking data or additional non-financial data is key to understanding KPIs and trends, we can use this to enrich your data to unlock value.
- Visualisation.

Dynamically presenting your data in engaging outputs unlocks value and brings your business’s story and associated key selling messages to life.

- **Insights -** Faster, richer and higher quality insights enable us to rapidly challenge key hypotheses to focus our work and your decision making into critical areas.
  - **Dashboards and databooks** - We can create dynamic outputs from your data to:
    - Aid the management decision making process.
    - Provide fast and thorough answers to your questions.
    - Reduce reporting burden through performance-optimised data models and DAX.
    - Have secure, governed access with row level security and workspace controls.

Analytics strategy

RSM empowers organisations to become data-driven by delivering a targeted analytic strategy. Our approach offers a robust framework for defining your strategy and immediately mobilising efforts through a curated backlog of executable use cases and clear business requirements developed through clear processes and people structures supporting data literacy and adoption.

Current state and readiness analysis:

- Engage key stakeholders to document insights, pain points, challenges, opportunities, and initial analytics requirements and use cases.
- Understand current architecture, processes, data landscape, analytical tools, and readiness within the organisation – i.e., capabilities and data literacy.

Strategy and use case prioritisation:

- Conduct workshops with leadership to define the analytics vision and identify key use cases and metrics.
- Translate initial use cases into a clear plan, outlining key questions, source data, and required calculations to create a backlog of impactful "game changer" metrics.
- Prioritisation of defined use cases based on value, feasibility, and effort.

Future state recommendations:

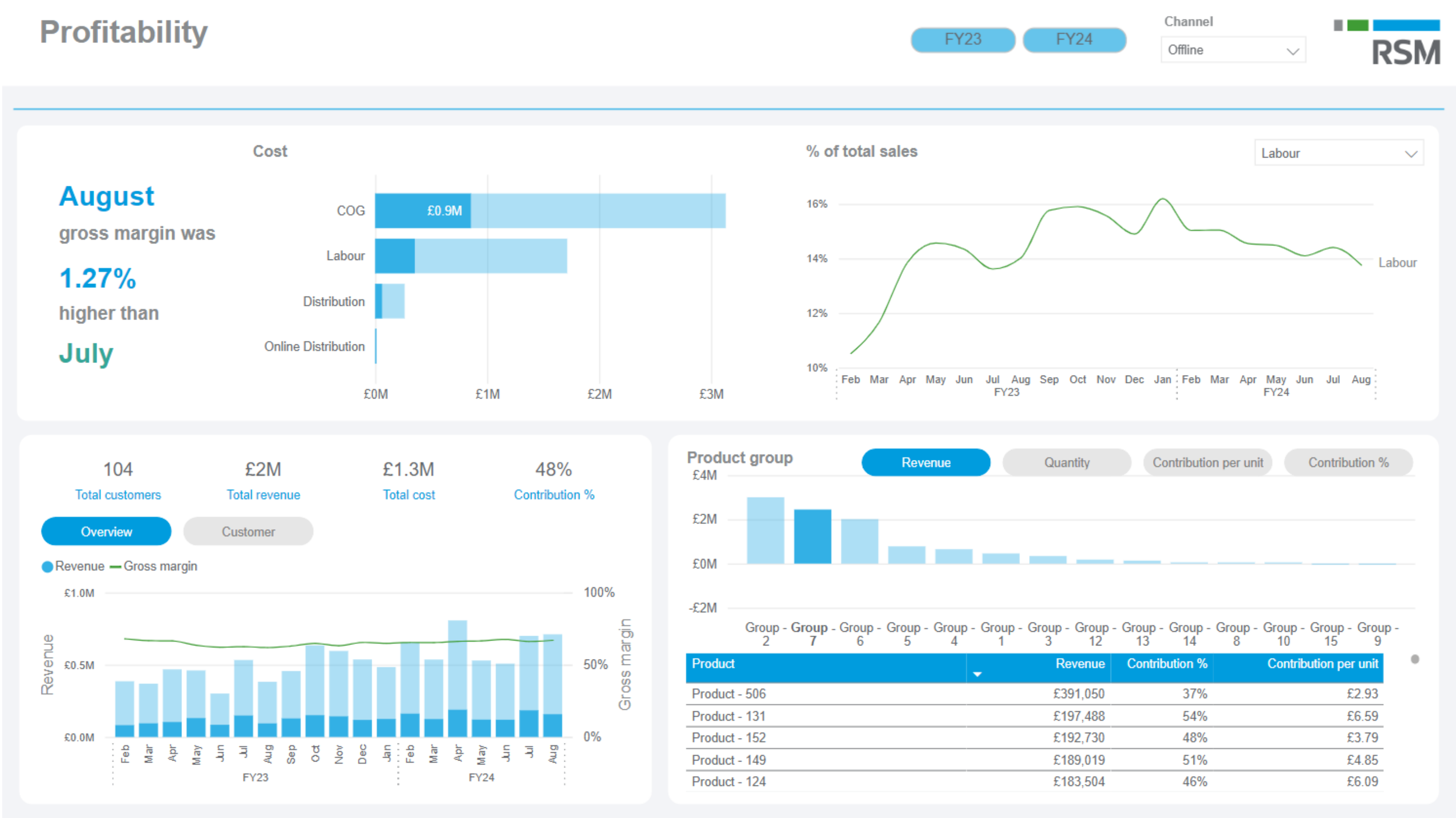
- Define the proposed future state data and analytics architecture inclusive of proposed tools and technologies.
- Design a Centre of Excellence (COE) to support analytics, promote data literacy, and adoption within the organisation.
- Develop a detailed plan of next steps and a strategic roadmap for prioritised analytical releases inclusive of governance and organisational capabilities.

Business outcomes

- Strengthened Data Culture and Literacy Across the Organisation.
- Optimised Resource Allocation and Investment.
- Enhanced Data-Driven Decision Making.

Example profitability

As the dashboard is fully dynamic, decision makers can assess the overall picture, but then also drill down into the detail. As shown here, the user can drill into a specific product group to assess cost trends.



Product	Revenue	Contribution %	Contribution per unit
Product - 506	£391,050	37%	£2.93
Product - 131	£197,488	54%	£6.59
Product - 152	£192,730	48%	£3.79
Product - 149	£189,019	51%	£4.85
Product - 124	£183,504	46%	£6.09

Case studies

"RSM produced an automated analytics suite that gave us and the management team timely insights that enabled data driven decision making.

The design of the analytics workflows meant that the tools could easily be handed over to management to maintain and use as part of BAU. By analysing historic customer behaviour, they were able to develop an early warning customer churn flag, enabling preventative action to be taken.

The work also acted as a data readiness exercise, supporting an efficient transaction process when the time came. The RSM team were able to add significant value to the business, both operationally and during the exit process."

Operating partner
LDC

Exit readiness
GRESB

We built an automated reporting tool for GRESB, a leading global provider of sustainability standards and benchmarks for real assets, and a portfolio business of Summit Partners.

GRESB now have timely access to a full picture of the business, empowering them to make data driven decisions

The reporting tool was a critical part of exit readiness ahead of General Atlantic's majority investment in April 2024.

Reporting enhancement
Western global

"We engaged RSM to customise and enhance our management reporting in power BI and are delighted by the results. They took the time to understand our needs, combining technical expertise with commercial understanding. The RSM team were professional and enjoyable to work with, delivering premium, intuitive dashboards that met all our requirements. I highly recommend RSM for any organisation looking to enhance their reporting capabilities."
Richard Adams, CFO

Operational dashboards
Cakesmiths

We supported Cakesmiths, a portfolio business of LDC, by building an automated operational dashboard.

We performed a customer cleansing exercise to give more accurate KPIs and helped reduced churn by identifying at risk customers. We also utilised publicly available data to perform a whitespace targeting analysis. This solution also gave LDC access to key data ahead of their exit to Onoré food group.

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