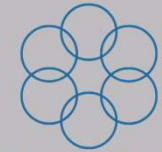


# POWER BI MIGRATION

Peraison Methodology



**PERAISON**

*Insight for success*

30 August 2024

We solve real business challenges by working with the world's leading technology platforms.

Our value is what we bring in experience & accelerated delivery. It's what makes us distinctively different.



## What Makes us Distinctively Different

- ✓ We tackle the business problem with technology, not the other way around
- ✓ Small & agile enough to approach each client uniquely, big enough to bring our vast amount of experience to the table
- ✓ Hands-on experience: Every client has full commercial & technical partner oversight / ownership
- ✓ Data specialists in the best technology stacks without being locked into a single vendor / solution
- ✓ Accelerated delivery through our bespoke assets & ready-made business accelerator solutions
- ✓ Partnership & collaboration: we work as an extension of your team, not a third-party vendor
- ✓ International coverage with cost efficient delivery mechanisms to bring ROI to the table on day 1

1 Partner / Director : 10 Employees



5 Core Business Practices



Specialised teams focused on Data Strategy, Data Analytics, Data Engineering, Data Science, and Data Products.

3 Regions Worldwide



50+ employees covering the UK, Portugal & Australia

True Global Team



Our consulting teams collaborate across regions to support client projects daily - this is the norm - not the exception

Employee Collaboration



Our Global Centre of Excellence in Portugal, partnered with local experts in each local region, fosters a true culture of collaboration

Talent & Retention



With a true path to partnership, we attract and retain the most talented consultants

Reputation Built On Results



Our results speak for themselves; over 80% of our work is referral, recommendation or repeat business

Industry Agnostic



Our teams have experience in your industry and will engineer a solution to match your business process

Client First



Client experience is the 1<sup>st</sup> & most important ethos of our business - Client Experience is everything at Peraison



# International Reach

Peraison supports clients from all around the world through our regional hubs in the UK (for EMEA), Australia (for APAC) and our Global Centre of Excellence based in Portugal


EMEA Office Locations  
London – United Kingdom  
Lisbon – Portugal

APAC Office Locations  
Melbourne – Australia  
Sydney – Australia

ROW Office Locations  
Strategic Partner – USA, Canada & Mexico



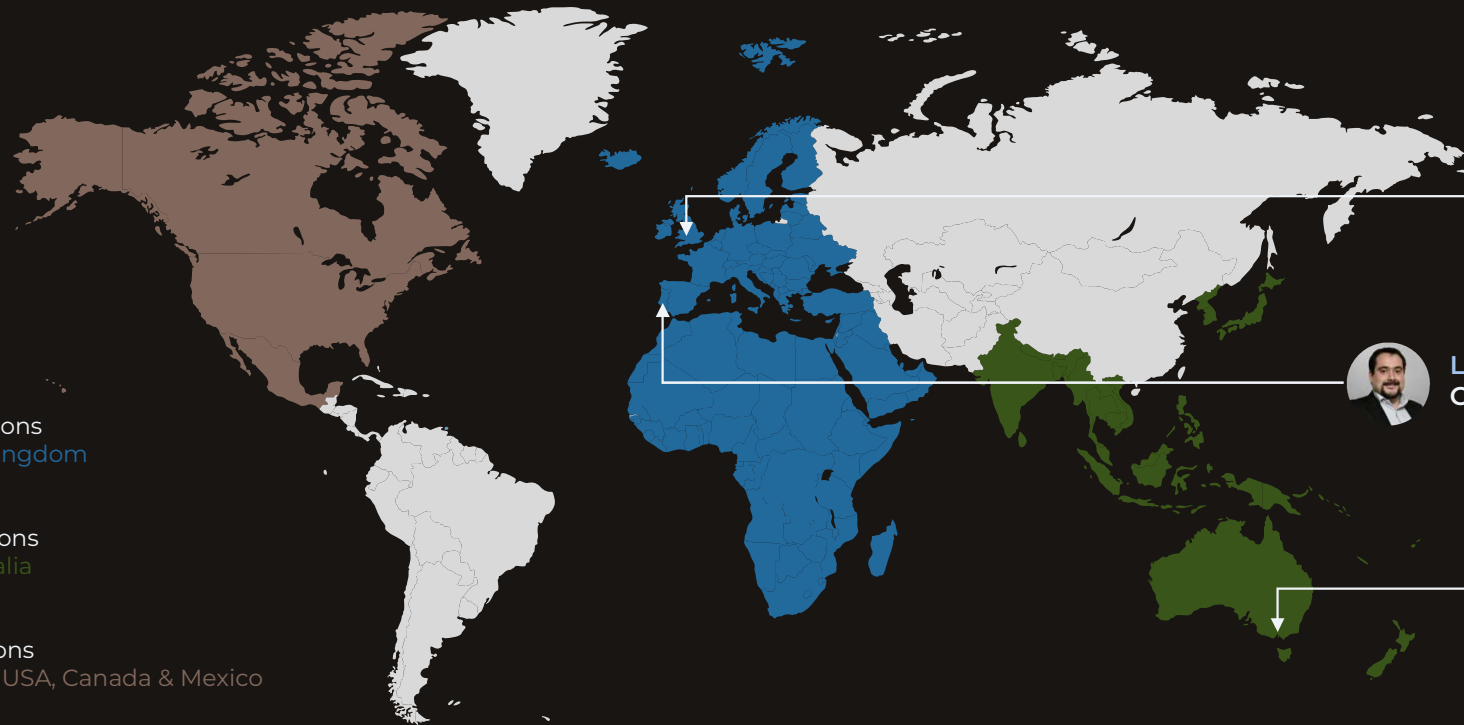
London  
Tim Watson



Lisbon  
Goncalo Pereira



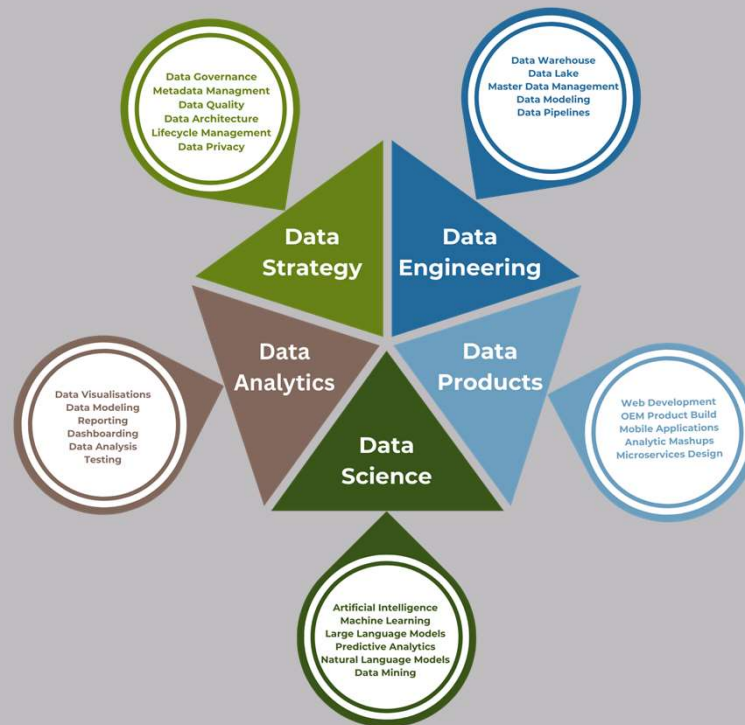
Melbourne  
David Anderson



## Challenges

- Numerous business systems with data that are difficult to access, combine, & analyse together
- Growing demand for access to market information and analytics
- Complex business logic that exists in spreadsheets prone to human error
- Poor data quality is preventing the business from AI / ML adoption
- Constant pressure to deliver more for less
- Scalability or consolidation of technology platforms / cloud providers

## Solutions



Combining deep industry and functional expertise with working knowledge of the supporting technologies

Applying equal weight to getting technology ready for the business, and the business ready for the technology

A vendor-independent view of the technologies and approaches to adopt them

We support our clients in solving their business challenges by building capability with the best-in-class technology platforms

By predicting technological shifts and trends, we design and implement forward-looking solutions

Optimising the delivery of Data Transformation projects, we deliver more, faster, and for less

Using robust frameworks, we are able to deliver business transformation projects consistently and successfully



## Setting Us Apart

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### Generic Data Consultancy Just Isn't Us

We differentiate ourselves by offering more than just a standard multi tool approach, billing by the day or hour...

Our approach is deeply routed to focusing on our 4 key differentiators:

1. Our European Centre of Excellence
2. Ready Built Quick Launch Accelerators
3. Proven Digital Migration Framework
4. Two Dedicated Partners for Every Project





# Market Leading Difference

## What makes us Different



### European Centre of Excellence

Our Lisbon based Centre of Excellence brings cutting edge expertise to our clients in a geographically strategic location, not seen in other traditional near-shore / off-shore providers.

By leveraging the resources and expertise of this offering, clients can drive innovation, achieve superior outcomes, and maintain a competitive edge in the global market.



### Ready Built Quick Launch Accelerators

The Quick Launch Accelerators developed by Peraison allow our clients a far more rapid time to deployment, greater cost efficiency, minimized risk and the ability to scale and deploy the solutions as their needs evolve.

These Quick Launch Accelerators provide a low-risk path to achieving the client's business goals, and staying ahead in a competitive landscape.



### Proven Digital Migration Framework

Peraison's expertise in '4th Wave' digital migrations is unparalleled. We bring deep industry knowledge with a track record of successful transitions from multiple vendor platforms.

Our team leverages our frameworks & tools to ensure each migration is efficient, minimizes disruption, and importantly adds value & ROI through the process.



### Two Dedicated Partners for Every Project

Having two dedicated partners on every project we undertake is a strategic approach that ensures exceptional outcomes & greater continuity.

This methodology brings both a commercial business focused partner as well as a technical partner to every client challenge. This combination of diverse skills & perspectives consistently drives innovation & superior results.

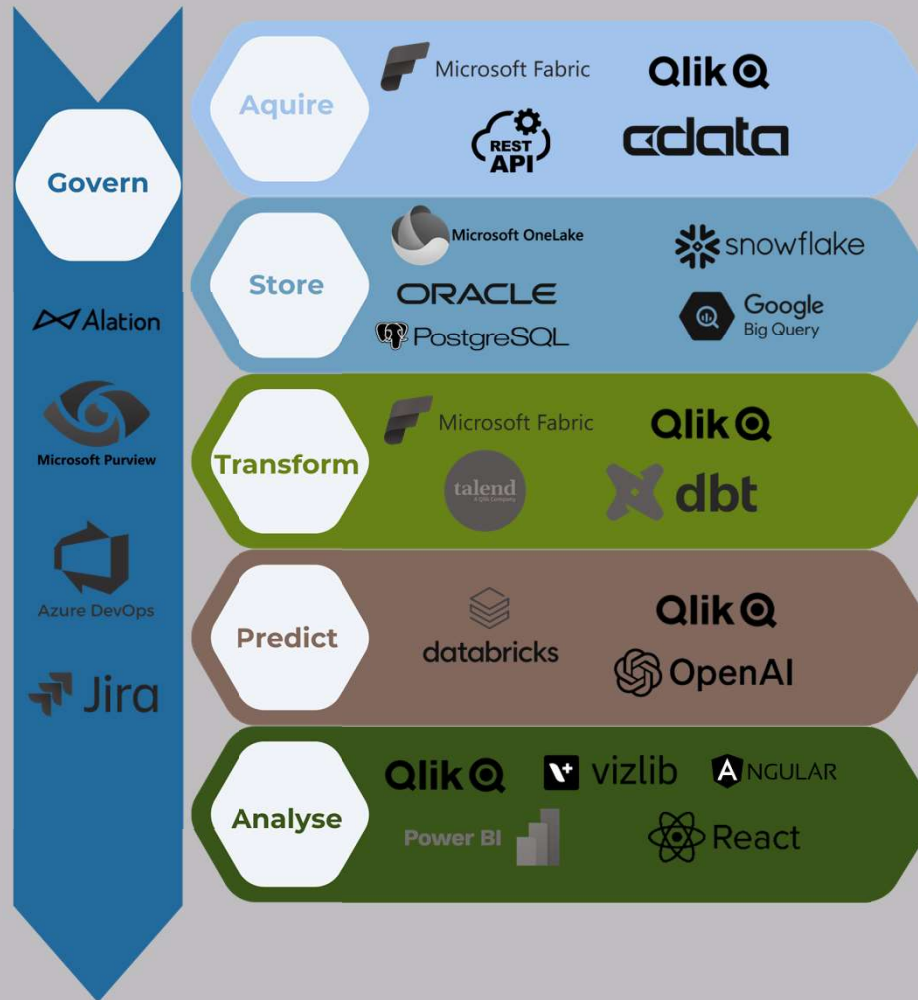




We solve every business challenge with the best technology solution for the task at hand. We will **ALWAYS** take a **vendor agnostic approach**

Our constantly evolving technology stack ensures our clients are serviced with the best in breed tools with the **highest return on investment** possible

**Certified & accredited** to ensure our clients are guaranteed a quality solution no matter what technology we use

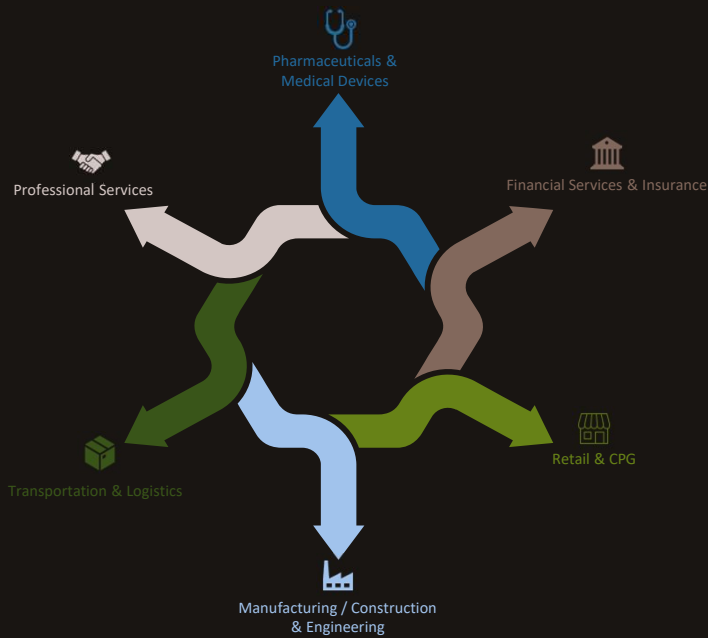


## Technology we Deliver in





# Your Industry Your Department



Our expertise spans every industry & department. Whether you're in technology, healthcare, finance, or any other sector, our tailored solutions bridge gaps, streamline operations, and drive success across the board

# Our Capabilities







# Client Success

We pride ourselves on delivering exceptional results that not only satisfy but delight our clients, turning them into our greatest advocates. When you achieve your goals with us, you're not just a client—you're a partner.



## Referrals

Over 80% of our work is referral, recommendation or repeat business

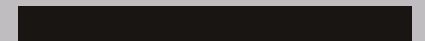


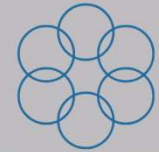
## Client Experience

Years of experience across diverse industries and projects, our team brings a wealth of knowledge and a deep understanding of what drives success



# What We Bring





**PERAISON**

*Insight for success*

# OUR MIGRATION PROCESS

30 August 2024

# Why Migrate to Power BI?

## The top reasons our clients have given for migrating to Power BI

### Lower Costs

Power BI licensing is significantly cheaper than competitors

Flexible license packages allow adaptation to your business needs

### Self-Service BI

Empower users to design and deploy their own reports

Cultivate Data-Driven Culture that encourages actionable knowledge sharing

### Reduce Complexity

Most enterprises use an average of 3+ different BI platforms

This leads to report overload, duplication, errors, and lack of control

Rationalizing BI delivery to a single platform (Microsoft) addresses these issues

### Fabric

With Fabric, Power BI, Synapse, and Data Factory are unified on a single SaaS platform

Data teams can collaborate in a single workspace, on the same copy of data, with centralized administration, governance, and compliance tools

### AI Ready Platform

Bring your data into the era of AI

Reshape how everyone accesses, manages, and acts on data with a single, AI-powered platform

Adopt a data platform that's infused with AI at every layer to help you get more done, faster

### Power Platform

Suite of low-code tools that empowers organizations to streamline processes and automate tasks

Integration with Power BI enables businesses to automatically drive actions based upon insights detected in their data

# Phased Migration Approach

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## Phase 1 - Planning

- Rationalise scope of migration
- Produce roadmap for migration delivery

## Phase 2 - Delivery

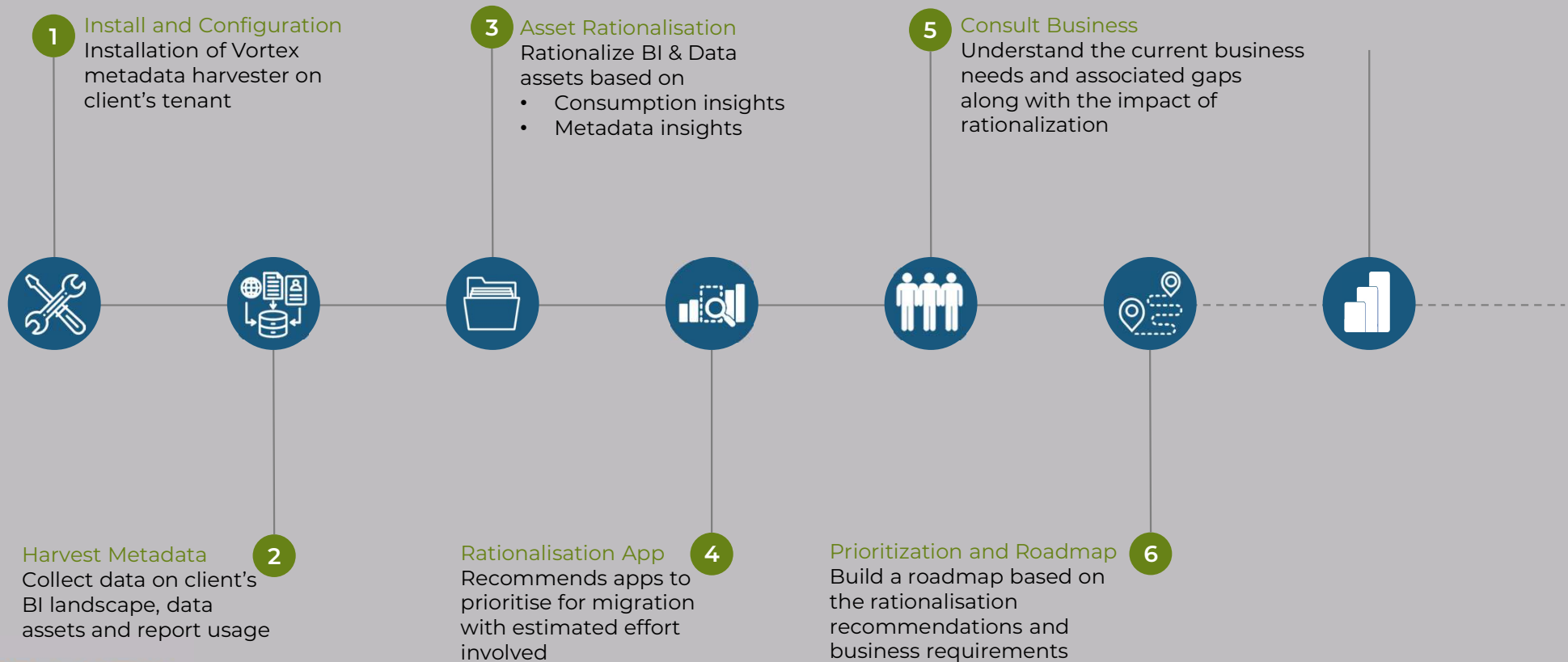
- Accelerated migration using automation tool
- Optimise architect for Power BI

## Objectives

- **Maximise ROI** - focus scope of migration to only where value is added
- **Automate** - minimize time and costs by automating wherever possible
- **Optimise for Power BI** - tailor the solution to leverage Power BI strengths
- **Drive User Adoption** - ensure the success of the migration effort by encouraging user adoption
- **Be Agile** - continuously improve delivery process and adapt to evolving business requirements

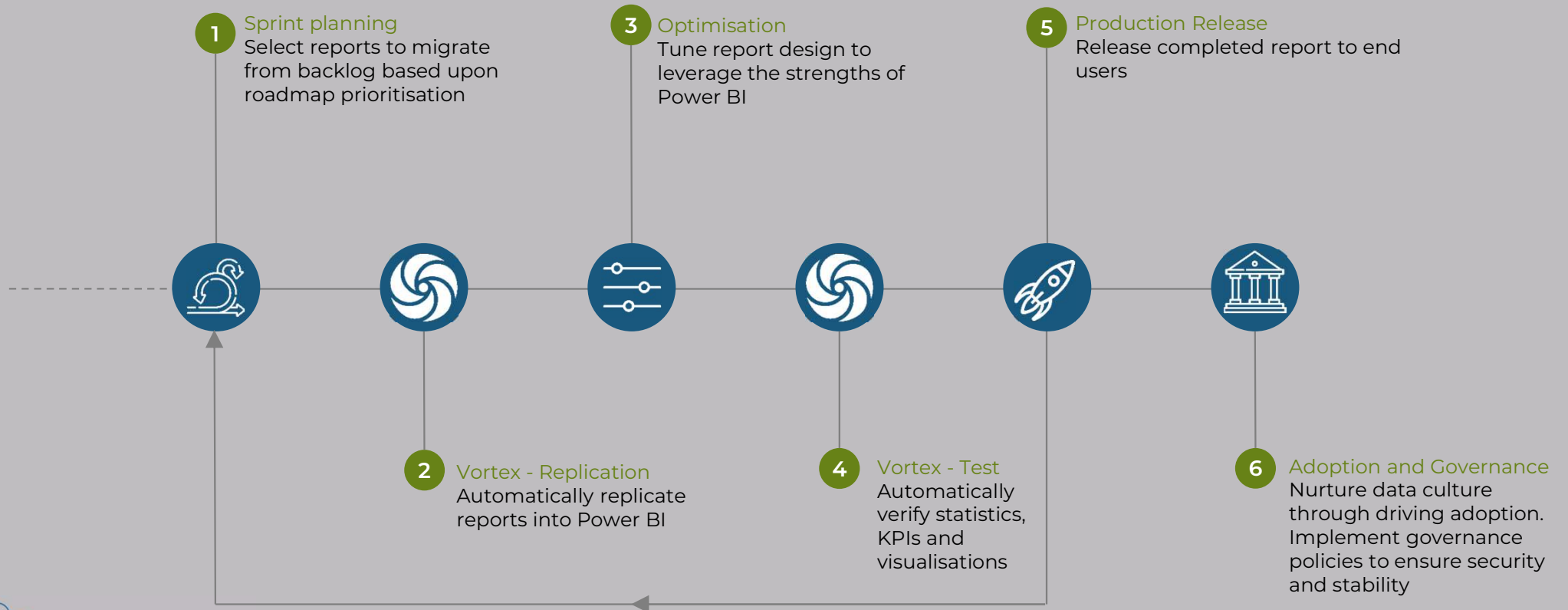
# Building a Migration Roadmap

## Our process for planning a migration to Power BI



# Migration Delivery Process

Our process for an accelerated agile migration



# Project Delivery Framework

## How Pomerol and Axis Group work together to deliver your migration

	Axis Group	Pomerol
<b>Phase 1: Planning</b>		
Vortex Install and Configuration		Hands on installation of harvester
Run Vortex Metadata Harvester		Run harvester and send outputs securely to Axis
Metadata Processing	Process harvested outputs. Configure rationalization app	
Consultation		Liaise with business to understand their needs Assess impact of rationalization
Migration Plan		Create roadmap for migration to Power BI
<b>Phase 2: Delivery</b>		
Vortex Auto-Convert: Power BI	Convert UI apps based on migration plan	
Vortex Auto-Convert: ETL Script	Convert ETL script apps based on migration plan	
Optimisation		Complete build of Power BI reports Tune design to leverage the strengths of Power BI
Testing		Leverage Vortex to verify accuracy of data
Adoption & Governance		Training and sharing best practice



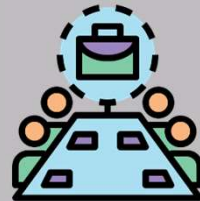


# How we Achieve Power BI Migration Success

Every migration is slightly different. It can depend on the organizational structure, data strategies, data management maturity, and organizational objectives. We have consistently achieved Power BI migration success with our clients.

## Executive sponsorship

Identify an executive sponsor early in the process.



## Training, support, and communication

Recognize that it's more than just a technology initiative. Any BI or analytics project is also a people initiative, so consider investing early in user training and support.



## Quick wins

We prioritise high-value items that have tangible business value and demonstrate the value of the migration immediately.



## Modernization and improvements

Be willing to rethink how things have always been done. A migration can provide an opportunity to deliver improvements.



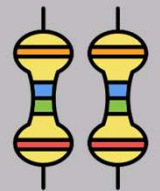
## Continual learning

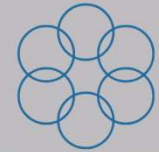
Be prepared to use a phased approach while continually learning and adapting. Work in short, iterative cycles to bring value quickly.



## Overcoming resistance to change

Understand there may be varying levels of resistance to change; some users will resist learning a new tool. We are well versed on overcoming these challenges to make your migration successful.





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**THANK YOU**

WE APPRECIATE YOUR TIME