

Helping our clients address today's challenges

**For FP&A teams tasked with processing large quantities of data disparate sources, Excel is often the primary tool. We leverage multiple additional tools to help our clients augment their Business Intelligence capabilities.**

## Today's challenges

### Disparate Data Sources



- Companies routinely pull data from a multitude of sources when compiling reports / running analyses
- Manually aggregating data is time-consuming and error-prone
- Modern tools offer automated data integration capabilities for seamless aggregation

### Explosion in Data Volume



- The volume of data has exploded in the digital age, surpassing Excel's capacity
- Large datasets can lead to performance issues and limited analysis possibilities
- Advanced tools handle big data with ease and enable complex analyses

### Messy Data



- Data is almost always messy (duplicate values, different units of measure, etc.) which can lead to misinterpreted outputs
- Manually cleaning in Excel is inefficient and doesn't leave an audit trail
- New tools allow for the automation of data cleansing and transformation

## Example of data processing at many companies we work with



**The above process is resource intensive and very prone to error!**

### Tools that support unique client needs, and when to use them

#### Python / SQL

- **Aggregation:** SQL can quickly aggregate large datasets with data scattered across multiple datasets (e.g., sales, customers, products).
- **Data Cleansing:** Before doing any analysis, data often needs to be cleaned and transformed. Both SQL and Python excel at this.
- **Automation:** Monthly data dumps often need to be cleaned, transformed, and analyzed on a repeated basis. Instead of doing this manually, the entire process can be scripted in Python or SQL .

#### PowerBI

- **ERP Connectivity / Data Aggregation:** PBI can connect to various data sources directly for access to real-time information.
- **Data volume:** PBI can handle datasets that exceed Excel's capacity limitations.
- **Visualization and Reporting:** PBI allows easy creation of visually appealing and interactive reports (e.g. quarterly earnings dashboard) that allow for access to live information.
- **User-friendliness:** PBI allows users to analyze and visualize large amounts of data in a user-friendly way with little technical expertise needed.

## In practice

#### Data aggregation at beverage company using Python / SQL

- Used Python to fetch data from multiple sources, clean the data, and transform it for easy and accurate analysis.
- Resulted in **more accurate forecasting and informed decision-making** by allowing Company to see insights down to the SKU-level, which they had not been able to do before.

#### Dashboard creation at CPG distributor using PowerBI

- Developed a PowerBI dashboard integrating sales, financial, and operational data.
- Enabled real-time monitoring of Key Performance Indicators.
- **Insights allowed Company to prioritize certain customer accounts, achieving 25% reduction in total past due A/R.**

Read more about MERU's Data Insights Practice [here](#)