

## CUSTOMER CASE STUDY

# Microsoft Azure Data Lake, Warehouse, and Power BI Radically Improve Analytics for Retail Distributor

## Background

R.S. Hughes, a leading retail distributor specializing in industrial supplies, faced a pivotal challenge. Known as the largest seller of 3M products in North America, the company was burdened by an ageing on-premises reporting system that needed to be improved and sooner than later.



Recognizing this urgency, R.S. Hughes embarked on a transformative journey to revolutionize its reporting infrastructure, in an effort that coincided with the company's ground-to-cloud ERP migration. It required the organization to rethink their approach to reporting and analytics, ensuring that any solution they chose would support the challenges of an upgraded ERP system and lay a foundation for future growth.

## Facing the Challenge

For more than a decade, R.S. Hughes had relied on an on-premises implementation using Hyperion to generate essential business reports. The process was burdened with inefficiency and potential inaccuracy, with employees manually extracting data and processing it in Excel. Although the approach provided basic insights, it was a time-consuming and error-prone process that did not scale with the company's needs.

“We knew our reporting system was outdated,” said the R.S. Hughes IT leader. “We had some robust reporting needs that had been put on the back burner for a long time. And there was nothing native in our new ERP that would give us the reporting that we needed,” he said.

Beyond the technical debt in the current reporting system, R.S. Hughes' small IT team faced significant resource constraints. They lacked in-house expertise in modern data tools like Power BI to design and implement a new reporting system on their own. Additionally, the company needed to standardize their reporting policies and address security concerns as part of the broader cloud modernization effort.

“When I knew I had needs for Microsoft, my mind just immediately went to JourneyTeam. I knew JourneyTeam was adept at Microsoft technologies and had some of the best and brightest people I'd worked with.

– R.S. Hughes IT Leader



## Migrating to a Modern Data Analytics and Reporting Solution

The company made the strategic decision to migrate to Microsoft Azure, adopting Azure Data Lake Storage and SQL resources to centralize data, along with Power BI to automate reporting, and improve decision-making capabilities. JourneyTeam, a trusted Microsoft partner, became R.S. Hughes' critical ally in the multi-faceted engagement.

To replicate and improve the legacy reports generated by Hyperion, JourneyTeam re-engineered the existing logic and calculations in the Power BI framework and leveraged its capabilities to build semantic models so users could access and analyze critical data without technical expertise.

Because Power BI connects directly to the data warehouse, the company is assured that critical business metrics are readily available, and are refreshed throughout the day. Report creators can now use Power BI's tools to develop dynamic visualizations and dashboards that both replicate and drastically improve the legacy Hyperion reports.

## A Transformative Solution

Azure data lake/warehouse storage now serves as a single source of truth: data pipelines that once refreshed daily are now updated multiple times per day, providing near real-time insights. Reports that previously required extensive manual manipulation are now automated, reducing errors and saving valuable time.

By the end of the project, JourneyTeam had developed over 200 reports, beginning with 70 critical ones needed for launch. These reports spanned sales, marketing, and financial metrics, providing a comprehensive view of the company's operations. Employees can access these reports directly through Power BI, eliminating the need to rely on Excel for formatting and analysis.

The migration to Azure and Power BI marked a turning point for R.S. Hughes. Automation saves employees hours each week, while the centralized data warehouse ensures accuracy and consistency across all reports. "The project was a win on every front. We now have a scalable solution that not only meets our current needs but positions us for future growth. And JourneyTeam's support was instrumental in making this vision a reality," he said.



## User Adoption: The Definitive Test

As with any large-scale digital transformation project, the first measure of success is user adoption. With R.S. Hughes, this was a two-fold process: first, to get a select group of team champions onboard and trained, and second, to roll out the new reporting processes to the entire company.

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### GETTING THE CORE TEAM UP TO SPEED

R.S. Hughes took advantage of JourneyTeam’s innovative Power BI Sherpa Program to provide the foundational skills necessary to prepare for the migration and the culture shift. “Sherpa made sense. We had a group of employees—our data teams, our quality and compliance folks. We needed to start establishing a Power BI culture and understanding that could then be expanded to everyone,” he said.

JourneyTeam’s Sherpa program is a unique readiness program, and a cost-effective and quick way to drive immediate impact. The approach included discovery sessions, hands-on training, and coaching to equip a select group of users with the knowledge and tools they needed to begin using the Power BI toolset and drive a successful adoption.

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### ROLLING IT OUT: TURNING POTENTIAL RESISTANCE INTO READINESS

R.S. Hughes’ team didn’t get quite the time they wanted to crawl and walk with Power BI before they had to run. As part of the ERP migration, they were tasked with rolling out the reporting system within a condensed, two-week window.

However, doing it so quickly required a broad and nuanced approach, which was addressed successfully by JourneyTeam’s Adoption and Change Management (ACM) program. ACM was a perfect fit for R.S. Hughes and provided the connective tissue, so employees understood the “why” behind the migration while giving them the skills to adopt the new system with confidence.

JourneyTeam’s ACM program used readiness assessments, targeted communication strategies and customized training plans to ensure success. The program was tailored to R.S. Hughes’ needs, including their multilingual workforce, and included:

- Daily meetings to identify key user groups and their unique needs.
- Partnering with power users to deliver training for Spanish-speaking employees.
- Designing tiered training for managers, super users, and end-users to ensure adoption at all levels.
- Providing continuous learning opportunities through office hours, knowledge base articles, and recorded training sessions.

As part of the ACM effort, JourneyTeam closely monitored adoption metrics, identifying areas where additional support was needed. For example, when lower adoption rates among Spanish-speaking employees were identified as an issue, the team adjusted its approach to address the gaps—fine-tuning the training program with interpreters to ensure adoption.

## MEASURING SUCCESS

R.S. Hughes' cost savings has been nothing short of eye-opening. The company estimates they are saving 85 managerial hours per week, for a first-year financial savings of \$257,111, and a three-year savings estimate of nearly \$600,000.

Other intangible benefits that have set up R.S. Hughes for future success:

- Improved data accessibility through semantic models.
- Automated report generation driving accuracy and efficiency.
- A scalable Azure Data Lake storage solution seamlessly integrating ERP data.
- A modern architecture laying the foundation for advanced analytics and further innovation.

## Expanding the Solution



Following the success of the initial migration, R.S. Hughes identified a new opportunity to enhance their data capabilities: using the data lake to mine marketing data for deeper insights. JourneyTeam played a critical role, expanding the data warehouse to include marketing data pipelines from R.S. Hughes' customer engagement platform

The team leveraged Azure to store and process and analyze the data, and Power BI provides data semantics, marketing dashboards and reports for near real-time insights.

By centralizing marketing data, R.S. Hughes empowered the marketing team to make more informed decisions and drive targeted campaigns with measurable results. It also demonstrated the scalability of the Azure Data Lake to support evolving business needs.

## Looking Ahead



The journey doesn't end here. R.S. Hughes is continuing to look for opportunities to expand its data capabilities. Now that they have a strong foothold in the Azure and Power BI world, they are considering the potential value of migrating and mining data from additional workloads.

Because the transition also involved expanding their Microsoft 365 and Power Platform licensing, they are planning to take further advantage of Azure's endpoint management and security functionalities. "We wanted to modernize and as luck would have it, it all played cohesively into our plan of expanding our licensing level with Microsoft," the IT leader said. And JourneyTeam will be part of those initiatives as well.



## Key Outcomes

- A cloud-based data lake and real-time Power BI reporting driving accuracy, efficiency and transparent reporting.
- 4,420 hours saved annually by 85 managers using the new cloud-based reporting solution.
- Projected three-year financial savings of \$594,734 from improved efficiency across reporting tasks and processes.

## LET'S TALK!

R.S. Hughes' transition from an outdated reporting system to a modern, cloud-based Azure data architecture underscores the transformative power of Microsoft technologies. The company not only overcame its reporting challenges but also set a new standard for operational efficiency and data-driven decision-making. And with JourneyTeam as a trusted partner, the company had a clear plan for navigating the change and achieving long-lasting adoption.

If you are considering a cloud migration or looking for assistance with change management and adoption, reach out to JourneyTeam today. We'd love to discuss how we can help ensure your success!

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