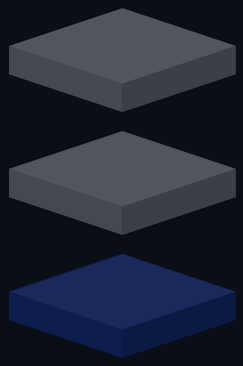
Ariavor



Manual Excel, replaced by governed models, one engagement at a time

A series of smaller BI engagements across finance, HR and production, run alongside larger projects. Each one replaced manual Excel reporting with a governed Power BI model on the same pattern.

SECTOR
Several, mid-size

PERIOD
18 months

COMPANY
50—250 people

AREAS
Finance, HR, production

OCTOBER 2026

AT A GLANCE

Different departments, the same pattern

Finance, HR and production teams each had reporting kept in Excel by hand. Every engagement in the series replaced it the same way: automated loading, one governed model and training for the team.

4
kinds of engagement in the series

3
teams trained: finance, HR, operations

18
months, alongside the main projects

No outcome figures are published for this engagement: nothing exists that would let you check them, so what was built is described in full instead. Anonymised by sector and size, because the confidentiality that protects this client would protect you too. Sector and outcomes are real; identifying detail is not.

CLIENTS

Several organisations of 50 to 250 people, each with a contained reporting problem in one department.

MANDATE

Replace a manual Excel report with a governed Power BI model, automate how it is fed, and leave the team able to use it.

The recurring pattern

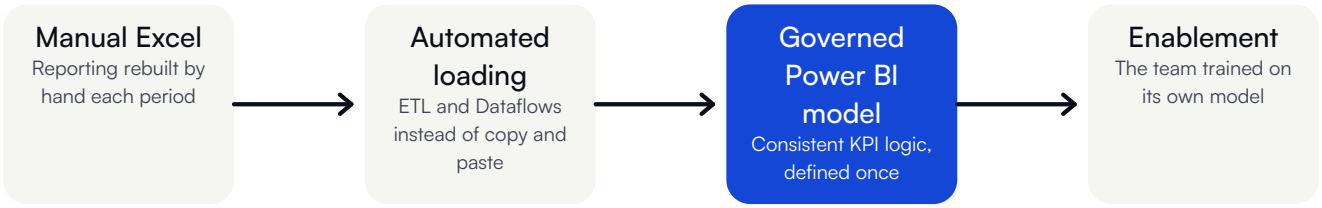


Figure 1 · Every engagement in the series followed the same 4 steps, whatever the department.

What each engagement replaced

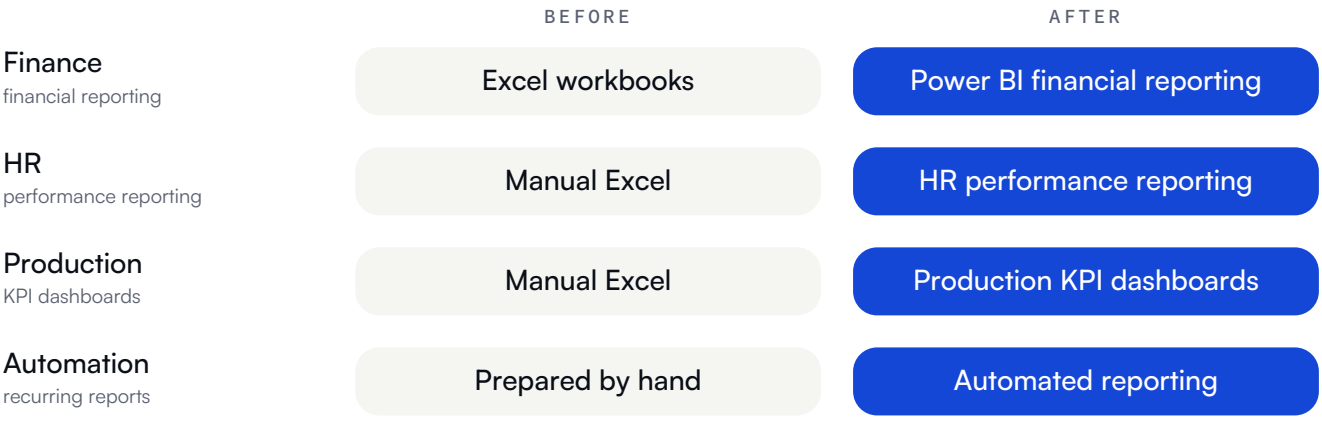


Figure 2 • The 4 kinds of engagement in the series, each moving from manual Excel to a governed model.

Performance underneath the reports

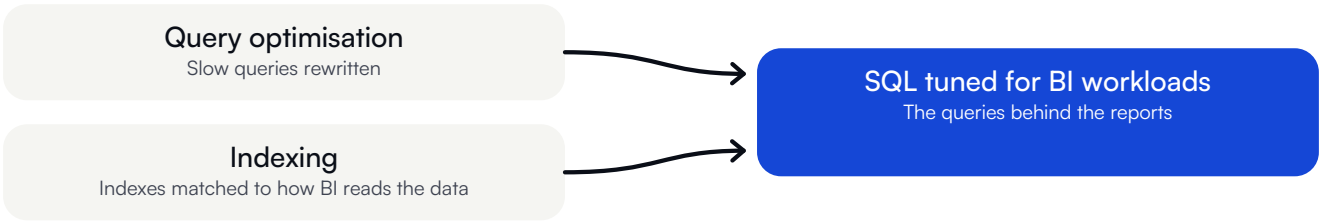


Figure 3 • SQL performance tuning for BI workloads: query optimisation and indexing on the sources the models read.

Architecture decisions

DECISION	REJECTED ALTERNATIVE	WHY
One pattern for every engagement	A new approach per department	Each engagement started from something already proven.
Automated loading through ETL and Dataflows	Copying data into Excel each period	The report stops depending on someone doing the copy.

Architecture decisions (cont.)

DECISION	REJECTED ALTERNATIVE	WHY
KPI logic defined in the model	Formulas spread across workbooks	A figure is calculated the same way every time it appears.
Training as part of delivery	A handover document only	The team uses and extends the model rather than going back to Excel.

What the clients have today

- ✓ Governed Power BI models in place of manual Excel for financial, HR and production reporting.
- ✓ Automated ETL and Dataflows feeding the models, with consistent KPI logic inside them.
- ✓ SQL tuned for the BI workloads that read it, through query optimisation and indexing.
- ✓ Finance, HR and operations teams trained to use and extend their own reporting.

WHERE IT LEFT THEM

Smaller engagements, each closed with a governed model and a team that can use it, built on a pattern the larger projects use as well.

STACK

Power BI · DAX · SQL · Azure Synapse · Azure Data Factory · Dataflows

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