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# Bond Brand Loyalty Engages CRGroup for Data Centralization and Power BI Reporting

Bond Brand Loyalty integrates data from disparate sources in a data warehouse and uses Microsoft Power BI to increase pipeline & project delivery efficiency and effectiveness.

**“The solution offered by CRGroup helps Bond scale its business in a significantly more efficient and effective way. The timeliness and reliability of the data in Power BI powers us to be more agile as an organization and drive competitive advantage, both for ourselves and for our clients.”**

*Brian Kim, Chief Financial Officer - Bond Brand Loyalty*

## The Organization

### Bond is a Marketing & Customer Experience Business.

Bond is an integrated marketing services agency that provides solutions in customer experience design, brand loyalty consulting and management, CRM and digital marketing, channel and employee engagement.

Bond has been recognized by Forrester, Gartner and Loyalty 360 as a market leader in Professional Services.



## Overview

Bond Brand Loyalty, a marketing agency, wanted an Integrated Decision-Making Platform (IDMP) to get continuous insights across its entire client project journey, from bidding and project delivery to billing. Due to tremendous demand on its own resources, Bond asked CRGroup to assist in this journey. **The new platform designed, developed, and implemented by CRGroup now provides Bond with a 360° view of its business.** The solution includes an automated SQL data warehouse and [Power BI](#) to unify different business systems used for operational, financial, and project management.

**Using SQL for data management and Power BI for strategic analysis, Bond can now drive actions through insights, increase the speed and quality of client projects, save costs and improve margins.**

## The Challenge: Decentralized Data & Inefficient Workflows Pose Risks to Client Delivery

Serving clients that represent some of the world’s most influential and valuable brands, Bond was experiencing rapid business growth. Its nearly 500 employees dispersed across offices in Toronto, Detroit, New York, Atlanta, and Denver, had grown more dependent on each other to deliver increasingly complex solutions to its customers. However, their reliance on ad hoc communications and anecdotal decisions risked their ability to deliver.

Bond’s internal Data and Analytics Team had to work across three different business systems to support client solutions: **Oracle NetSuite for CRM and financial management; Compass for preparing proposals and quotes; and Easy Projects software for project management.** Compiling data manually across decentralized sources created costly inefficiencies and delays. Brian Kim, CFO of Bond Loyalty Group, said:

**“Not having access to the right data and metrics on a timely basis, to measure the success of each project and report on their progress, was a significant hindrance to our ability to scale our rapidly growing business.”**

### The Search for a Better Solution

Overseeing Bond’s financial, legal, and administrative functions, Kim is responsible for developing the people, the processes and the tools required to facilitate growth, while increasing margins and project delivery. For Kim, pressure on these three areas of the organization adversely affected project delivery.

- **People** – The organization was unable to implement a data-driven performance management program for project team employees
- **Processes** – Inefficient business processes were established to compensate for siloed systems
- **Systems** – Inability to combine data from different systems into a single truth resulted in untimely, reactive, and error-prone decisions

It was imperative to centralize the data available from different systems to drive each of these areas' strategic actions. In their annual planning session for Fiscal Year 2020, Bond executives agreed to adopt an Integrated Decision-Making Platform, as 1 of 8 Balanced Scorecard Objectives.

## The Brief for an Integrated Decision-Making Platform

Given the pressures and resource constraints faced by its client-facing analytics team to help develop and implement a fully automated data platform, Kim contacted CRGroup. CRGroup had proven to be a reliable and strategic partner for Bond to help get its internal data systems in order. Having implemented solutions built on Power BI before, Bond trusted the technology to power its own solution.

Bond asked CRGroup to build a BI solution to address its users' unique needs and business requirements:

- A **centralized data warehouse** with data flows from NetSuite™, Easy Projects™, and Compass™
- A **360° view of the business**, serving the right data to the right people at the right time to enable timely and informative decisions
- A system that **combines operational and financial metrics** from each of the source systems to be able to track budgeted and actual resources and utilization, project milestones, and performance
- **Authorized access to users**, customized by audience and role, to improve customer onboarding, transitions, and resource management
- A **BI tool with dashboards and interactive reporting** capabilities that required minimal user training

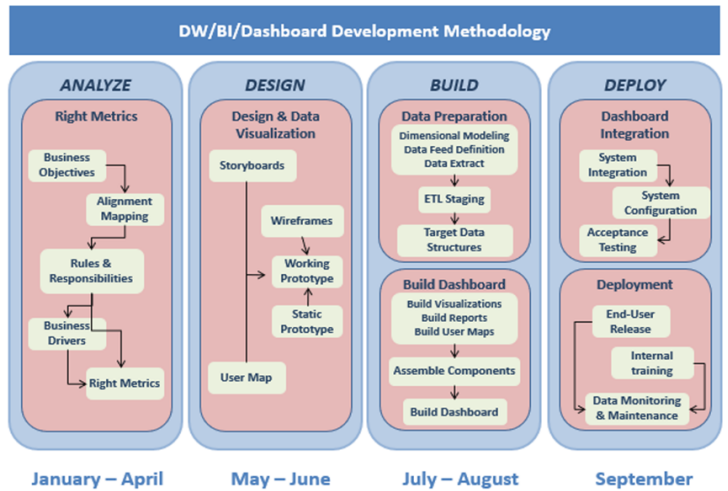
## A Consultative Process to Deliver a Winning Solution

After receiving the project brief, CRGroup consultants led by Dr. Vijay Jog, CRGroup's founder, reviewed all existing process flows and documents for the business systems to be integrated. They conducted interviews and storyboarding sessions with key stakeholders to capture all the criteria required for different use cases and challenge the status quo. **They ensured that the architected solution would provide quantifiable ROI.**

The teams collaborated on weekly status meetings to review prototypes, subsequent design refinements, and progress. **CRGroup made recommendations to simplify functionality and to reduce potential complexity in the final solution to control costs.**

## Methodology & Implementation

CRGroup clearly defined each phase of the engagement with specific deliverables. **The final implementation was completed on budget and on time.**



## A Power BI Solution that Delivers for Bond and for its Customers

### The Solution

The solution that CRGroup implemented for Bond connects data from multiple sources on the Azure cloud. Through [Power BI](#), users can access and interact with data in real-time on a single dashboard. They can effortlessly create and share reports for insightful analysis and strategic actions, all within a secure system.

### The Results

Using centralized data, Power BI provides an integrated view of a customer project's entire life cycle, from bidding to completion. **The Data and Analytics Team can quickly drill down on granular data**, such as the number and dollar value of hours that are budgeted, spent, billed at the client, project, contract, and project manager level. Users can identify potential risk factors and respond quickly and decisively to mitigate against them. Brian Kim, the CFO, says:

**“We are learning from data to bid better and to deliver better - to the satisfaction of our customers.”**

Internally, managers can analyze projects along the Cost – Quality- cycle Time (CQT) dimensions to link incentives to project delivery team members' performance.



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**Power BI** is being integrated into all internal reporting across the organization. The solution empowers the executive team with proactive capacity planning for improved results. Executives can track key metrics, such as revenue and margin percentage per employee and service lines, based on fixed price vs fee-based projects.

## The Benefits: Empowered Decisions for Strategic Outcomes

According to Kim, the Power BI solution overlay with well designed fully automated data warehouse drives remarkable ROI. **Automated reporting reduced manual hours, proactive project management and issue resolution led to significant cost savings, and executive insights led to increased margins through resource prioritization and re-allocation.**

Users are motivated by how the solution automates time-consuming manual processes and how it identifies clear actions. They can see how the solution helps them make effective decisions to save costs and increase productivity. For example, users can now forecast if a project is trending in the wrong direction and take mitigating actions before it is too late. Before Power BI, weeks or months would pass before a user noticed any risk to the project, with significant resources spent at irreversible cost.

Kim also noticed that collaboration among teams and departments have **evolved into strategic conversations driven by insights, leading to decisive actions.** Before Power BI, client teams relied on anecdotal discussions, lacking confidence in their ability to take required actions.

**“The timeliness and reliability of the data powers us to be more agile as an organization and drive competitive advantage, both for ourselves and for our clients,”** said Kim.

## What is Power BI?

Power BI is an easy to use cloud-based analytics solution offered by Microsoft where users can **quickly create dashboards and share reports while directly connecting data from a variety of sources.**

- Implement Power BI quickly and easily
- Create dashboards and reports in minutes
- Visualize and analyze everything in one place
- Control who accesses your data with robust security
- Connect securely to your data on-premise or in the cloud

**Get self-service analytics at enterprise scale.** With Power BI, you reduce the added cost, complexity, and security risks of multiple solutions with an analytics platform that scales from individuals to the organization as a whole.

**Use smart tools for strong results.** Find and share meaningful insights with hundreds of data visualizations, built-in AI capabilities, tight Excel integration, and prebuilt and custom data connectors.

## Getting Started with Power BI and Data Warehouse

Power BI connects to over 50 data sources your business already uses and pulls data into a centralized, easy-to-digest environment. Get started enabling your team and business today. Contact CRGroup to learn more.

[www.crgroup.com/powerbi](http://www.crgroup.com/powerbi)

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## About Corporate Renaissance Group

**Your partner for end-to-end business transformation and growth.** Since 1989, **CRGroup** has been delivering expert guidance and leading solutions to help improve business management and performance. We are a group of dedicated business, financial, and technology experts helping organizations transform how they work. With over 4,500 customers worldwide, CRGroup has established itself with expertise in business management, financial management, enterprise resource planning, corporate performance management, business intelligence, cloud migration, and enterprise collaboration.

We are neither a consulting company nor are we a pure IT company. We are a professional services company that employs thorough analysis and leading technology solutions like Microsoft, Board, Workday, IDU, and BI4Dynamics to solve business challenges for our clients. **We've established a strong track record of delivering impactful business solutions that drive transformation for our clients.** We offer a variety of services & solutions that can be implemented individually or layered to create unique solutions that meet our clients' unique needs. Visit our [website](http://www.crgroup.com) to learn more.

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