MIGRATION

BusinessThinking

How finance moved to a new system and kept its trust in the numbers

Large utility infrastructure contractor, United States.

Migrate Systems
Finance planning and reporting modernized

5 reports
Rebuilt, tested and signed off by finance

1
Agreed way to count profit, revenue and hours

THE CHALLENGE

- Years of calculations and rules lived inside the reports themselves
- Each report worked out profit, revenue and hours in its own way
- Some data had no clear home in the new system. This included job completion, invoice aging, and revenue timing
- No single guide showed where old data would land in the new system

WHAT WE DID

- Mapped each key piece of old data to its new home and listed data that didn't match
- Agreed one way to count each key figure. Each data set got one agreed source
- Rebuilt the main finance reports one by one in Power BI, testing with finance along the way
- Coordinated finance, both IT teams, the data team and outside consultants as the central point

THE RESULT

- Reports rebuilt, tested and signed off, with no loss of business logic
- Mapping and migration documentation used by every team involved
- One trusted, standardized way to calculate key financial measures
- Gaps identified early and resolved before they could disrupt the business

ENGAGEMENT

Migration: finance report move and rebuild

TIMELINE

2 months

STAKEHOLDERS

Finance and the IT teams for both systems

TECHNOLOGY

PeopleSoft | Oracle Fusion | Power BI

Moving your finance reports to a new system?

We rebuild and test your reports with finance, so the numbers hold up after go-live. Book an introductory call, and we'll show you how we'd approach your move.

Book an introductory call

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