

# Cost Effective Analytics through Domo to Power BI Migration

## Customer Overview

The customer is one of the oldest mutual banks in the United States and one of the largest community banks in Massachusetts. The bank offers comprehensive products and services for personal, business, and commercial banking, financial, and insurance needs.

## The Business Context

The customer had an analytics solution in Domo but wanted to migrate to Power BI to save on licensing costs. They felt the high costs could lead to budget reallocations, potentially diverting funds away from critical areas like R&D, marketing, or personnel, and limiting the scope of operational enhancements.

## Type of Service Provided

Domo to Power BI Migration

## Technologies Used

Domo, Power BI, Power Automate, SQL Server, Python

## The Solution

The team of visualization experts from GS Lab | GAVS took a methodical approach to the migration that involved the following key steps:

**Planning and Analysis** - Existing Domo charts and dashboards were thoroughly analyzed to understand specific requirements, identify critical visualizations, and prioritize migration efforts. An extensive mapping exercise ensured a smooth transition of each visualization.

**Data Migration** - This involved moving data from various applications used for endpoint protection, patch management, and software distribution like Bit9, SCCM, CrowdStrike, Proofpoint, Splunk, Ivanti, Puppet, Commvault, and Imperva into SharePoint as CSV files using Power Automate.

**Data Cleansing** - Techniques were applied to eliminate any inconsistencies or data quality issues and ensure data accuracy. Various data sets were joined and sent through ETL processes to prepare data for the visuals. Python solutions replaced regular expressions used to format data in Domo.

**Data Scheduling** - To store and parse data to build trending datasets per requirements, SSIS was used to perform ETL and move data from SharePoint to SQL DB. SSIS packages were scheduled to automate data movement.

**Visualization Development** - The development phase focused on creating Power BI dashboards and reports based on the redesigned visualizations and data mapping.

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## Challenges

- Integration with external systems demanded careful planning and coordination due to limited connectors in Power BI.
- Since Power BI does not facilitate data storage, data could not be stored and parsed as required.
- In some cases, Power BI offers limited interactivity, for instance clicking on cells does not support further drill down or analysis.
- Effective change management strategies and continuous support were required to ensure user acceptance and adoption of the new platform.

## Solution Highlights

- Due to the lack of connectors to link to different data sources, the GS Lab | GAVS team recommended Power Automate flows to transfer data to SharePoint and SQL Server, necessitating a thorough data movement effort.
- To handle data storage, management, and ETL actions, the team proposed utilizing SQL DB before incorporating the data into Power BI.
- Python solutions were used in cases where Power BI offers limited interactivity.

## Solution Impact

- The user-friendly interface and intuitive features on the new platform empowered technical and non-technical staff to explore and analyze data independently.
- Since the customer was already using various Microsoft products, Power BI's seamless integration with the Microsoft ecosystem helped easier collaboration and data exchange.
- The migration optimized costs while delivering improved analytics capabilities.