



Case Study: Global Accounting Firm hires DecisivEdge to Build a Power BI Dashboard

CHALLENGE

A U.S.-headquartered accounting firm with a strong international presence relied on Wolters Kluwer's Commerce Clearing House (CCH) platform to manage a wide array of operational tasks: from employee time tracking and billing, to productivity analysis and financial performance reporting. While the CCH suite offered the ability to run reports to review raw data, it lacked visual clarity of the data. As a result, leadership was eager for a cleaner reporting dashboard to help display key performance metrics.

Despite CCH's comprehensive capabilities, the accounting firm found its standard reporting tools lacked the visual clarity and flexibility needed to make data-driven decisions.

Key business questions like "Which employees are underperforming relative to their billing targets?" or "How are we trending year over year on profitability?" required manual manipulation of unwieldy tables. The default dashboards were visually unappealing and limited in customization, making it difficult to:

- Analyze employee productivity and profitability at the invoice level
- Track work in progress (WIP) and time against targets
- Monitor revenue trends and compare YoY billing performance
- Identify underperforming team members relative to billing rates
- Tailor reports for leadership-level decision-making

The firm needed an overlay dashboard solution, one that allowed for elegant visualizations, easier data slicing, and deeper, faster insights. And it had to work with their existing CCH data while remaining flexible and owned in-house.

SOLUTION

The DecisivEdge team built a custom data architecture by reverse-engineering the backend of CCH, creating structured tables in a SQL Server database. This enabled the raw CCH data (previously aggregated and difficult to interpret) to become accessible and meaningful.

On top of this foundation, DecisivEdge implemented a robust, permissions-based Power BI dashboard suite. This modern reporting layer allowed the firm to:

- Slice and dice performance metrics with ease
- Visualize trends over time and drill into specific contributors
- Compare actuals to targets across departments, geographies, or individual employees
- Identify billing deficiencies and adjust resource targets proactively

RESULTS

The new business intelligence solution that DecisivEdge built, has transformed how the accounting firm engages with its data:

- **Faster insights:** Time-to-decision decreased significantly thanks to automated data pulls and visual dashboards.
- **Improved clarity:** Leaders could now easily see billing gaps, productivity issues, and growth opportunities without needing to interpret dense, raw tables.

- **Ownership and scalability:** The firm now owns the full BI layer, allowing for customization and expansion as business needs evolve.
- **Smarter planning:** Year-over-year billing trends, employee-level profitability, and target tracking became core components of strategic discussions.

Today, DecisivEdge continues to maintain and support the firm's dashboard ecosystem, helping them turn raw operational data into business intelligence that drives growth. bureau while granting users the ability to sign multiple lease documents and record separate payments.

ABOUT DECISIVEDGE

DecisivEdge leads organizations through their transformation journey. We believe that the right mix of people, processes, and technology will drive modernization, business optimization and automation. To learn more, please visit our website at www.decisivedge.com, email us at getresults@decisivedge.com or contact us at 302.299.1570.