



ANALYTIC
VIZION

Stabilizing Executive Reporting During a Business Transition

A national precast concrete manufacturer stabilized executive reporting during a business transition by fixing broken period logic, rebuilding key Sigma dashboards on Snowflake and dbt, and cutting recurring manual reporting work so leaders could rely on the numbers in front of them.

“ One of the biggest wins was helping the team move away from manual Excel reporting. By automating the data pipeline and reporting process, we reduced repetitive work and gave the business faster, more reliable access to the data they needed.

ANGEL LAZO-GONZALEZ
Lead Analyst

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THE CHALLENGE

A national precast concrete manufacturer needed reliable executive reporting during a business transition, but the reporting environment was difficult to trust. Year-to-date and trailing-12-month figures did not always reconcile, fiscal and calendar definitions were implemented differently across dashboards, and acquisition cutoffs were applied unevenly.

Product classification and backlog logic excluded or miscategorized parts of the business, while legacy dashboards and scheduled exports still required manual cleanup in Excel. These issues slowed updates and forced leaders to question the numbers before they could act on them.

TOOLS & TECHNOLOGY



OUR APPROACH

Analytic Vizion partnered with the manufacturer on a combined visual analytics, data engineering, and reporting stabilization engagement, aligning stakeholders through a simple weekly rhythm and moving work from ad hoc fixes into a structured backlog. The team focused on rebuilding trust in executive reporting while making future changes safer, clearer, and easier to manage.

Key elements of the approach included:

- Correcting fiscal, calendar, acquisition, product, backlog, prospect, and premium reporting logic so core views told a consistent story.
- Stabilizing and releasing a new Sales Dashboard (V2) in Sigma, retiring the legacy dashboard, and beginning work on a Production Dashboard.
- Building and refining Snowflake and dbt models, including backlog snapshots and a Sigma-ready summary layer, to support customer, geographic, backlog, and production analytics.
- Restoring reliable production data flow by resolving a pipeline synchronization issue and documenting restart paths so the organization could resume work without losing context.

THE RESULTS

By the end of the engagement, executive reporting was more stable, trustworthy, and easier to manage. Leaders could compare fiscal, calendar, and post-transition views with greater confidence because key logic issues had been corrected, while the new Sales Dashboard replaced a legacy view with a more reliable reporting experience.

Operational friction was reduced behind the scenes. Manual reporting work decreased, production data flow was restored, and the reporting issue list was narrowed to a small set of clearly defined next steps, giving the team a stronger foundation for ongoing dashboard and data model improvements.