

Pragmatic Works **Empowers Business Users** from Nonprofit Medical Research Group to Perform Self-Service BI through On-Demand Training

Client Overview

A large nonprofit medical research group needed a more efficient, all-encompassing, solution to arm business users with in order to effectively analyze data without IT involvement. As there was already a familiarity with Microsoft Excel within the various Business Analyst teams across the organization, Microsoft's Power BI was selected as the solution to perform instantaneous, ad-hoc analysis, significantly reducing reporting requests made to IT. They relied on Pragmatic Works' unique blend of classroom training, and On-Demand Training capabilities to sharpen the skills of it's over 800 users in order to fully leverage the new Self-Service BI platform.

Business Needs

The medical research group is a charitable, not-for-profit corporation with the mission to provide the highest quality, compassionate care at a reasonable cost through a physician-led team of diverse people working together in clinical practice, education and research in a unified multi-campus system. More than 400,000 patients a year come to their outpatient clinics and hospitals for care.

The group decided to adopt the Microsoft Business Intelligence (BI) technologies to meet the organizational data reporting needs currently served by a combination of BI reporting tools. There was an existing effort underway to categorize, prioritize and migrate from those reporting mechanisms as well as implement training on the Microsoft technologies.

The group's management team felt that their current tool was not sufficiently meeting the needs of their users and was not mature enough for their BI strategy. Users needed to be able to do self-service BI to customize reports and pin point specific data that they needed access to. The vast majority of reports that were being sent out were then being put into Excel by the different teams and carved up and combined with other data sources in order for the different departments to gain the information they truly utilized. This substantial waste of time and resources was taking place across multiple teams.

As with many organizations, IT was becoming a bottleneck due to the high demand for custom reports, which individual departments did not currently have the ability to create. IT was spending a lot of time creating these reports rather than being allowed to focus on the actual applications and developing solutions.

The internal team conceived an education plan for the strategic adoption of the new reporting technologies with a specific focus on Power BI. They needed to incorporate the needs of both the business analyst and developer groups, the associated learning curves for the various technologies and long term plans for scaling these education efforts to meet current and anticipated demand for reporting. Previous attempts at group training had suffered some road bumps, including budget restraints, inability to monitor attendance and lack of post-course materials such as class recordings.

Additionally, there were issues with registrant's failing to attend trainings, which in turn lead to wasted funds as the classes were already paid for. The group also saw an issue with quality of trainers and course materials were often dated and did not include the latest technologies and the data used in the class was generic and inapplicable to the attendee's daily efforts.



Solution Deployed

Pragmatic Works came on board to assist the medical research group's internal team with proper training on Microsoft technologies. The primary goal was to facilitate adoption of these tools by the business analyst and developer groups in anticipation of further implementation of Microsoft BI for collaboration and reporting, using the Power BI as the foundation. The immediate need was to provide expert training specifically on Self-Service BI tools within Power BI, SQL Server Reporting Services, Tabular, Power Pivot and SharePoint BI.

Pragmatic Works began the engagement by coming on the ground floor of Microsoft Business Intelligence for them: "One thing we've really seen as a value add, was that Pragmatic Works was in on our initial instructor lead training, they got a lay of the land and have really worked with us to understand our needs," said Jim, BI Analyst of Enterprise Information Management. This allowed Pragmatic Works to observe and hone in on each department's specific reporting and data needs, and ensure that the high level trainings provided to the group were a perfect fit to enable the users to produce exactly what they needed.

The trainers and course materials provided by Pragmatic Works were of the highest quality and covered the latest technologies in depth, something previous attempts at training at the group lacked.

"Brian and Devin Knight have really stood out to us. We do a lot of research and we check the background of companies we work with and Brian literally wrote the book [on several of these technologies] which was huge to us. To have access to Devin and Brian, the top presenters in this area was invaluable," stated Jim. "And the other piece was that Pragmatic Works came highly recommended by Microsoft. They all raved about Pragmatic Works and that stands for a lot."

This sentiment is echoed by Devin Knight, Training Director at Pragmatic Works: "Unlike many other training companies, whose goal is to help you pass a test, the Pragmatic Works' training gives you an in-depth look at how to solve real world problems." The group also took advantage of the virtual mentoring that comes with Pragmatic Works On-Demand Training. This allowed their employees to work with Pragmatic Works experts to apply their training to their day-to-day activities.

Additionally, Pragmatic Works provided a dedicated Sales Representative to partner with the group and ensure that they had all of the tools required to successfully create custom reporting across departments. "Our sales contact at Pragmatic Works, was great to work with and really went out of the way to understand our platform and needs. The responsiveness of Pragmatic Works is something else we're very pleased with. I can call at any time and I know they'll get back to me by the end of the day," said Jim.

"Building the relationship with the group was crucial in ensuring we had the right training program set up for them," said Ryan Dowd, Vice President of Sales at Pragmatic Works. "Working closely with Jim allowed us to determine their needs from both a content and platform perspective to find the right solution. This partnership also built an environment for a successful implementation and ongoing support."

As a part of all Pragmatic Works training courses, class recordings, training presentations, instructor demos, and labs are provided to all attendees for further review and to allow them to have an immediate way to refresh themselves on any trainings later on. Prior training efforts at the group did not provide a way for attendees to access materials at course completion. This not only limited users by having to implement the new technologies they learned solely from memory, but it made onboarding new employees across departments very challenging as they had no materials to refer to. With the Pragmatic Works training method, these obstacles were eliminated.

"I've gotten a lot of response on the new Pragmatic Works training platform that it was very easy to access and you go into the class and immediately have access to all this great material. That they can actually print out pieces of the presentations and teach our people on our team and train them on our solutions is something a lot of people rave about," stated Jim.

The class recordings were available on demand for any company employee that management granted access to. This not only enabled attendees to review class resources at will, but it also empowered the management team by putting them in control of who can be granted access to said materials rather than relying on an outside training company for this power.

Benefits Delivered

One of the main benefits to the group by using Pragmatic Works to fulfill their training needs was significant cost savings in multiple aspects. The Pragmatic Works corporate training packages are designed to be a reasonable option for companies needing to train large groups of people while adhering to a budget, "They want their bang for their buck and the training was very affordable," stated Jim. With multiple departments now trained to create advanced self-service solutions, the IT department is now free to spend their time creating applications and code rather than having to stop their regular work to create custom reports for other departments. This affords the group a large cost savings in terms of both man-power and time.

The new training platform also enabled the group to ensure that funding was not being wasted due to several accountability checks they were able to access. "Prior to Pragmatic Works, people would cancel at the last minute and we would waste a lot of money on paying for a training that they didn't attend. With the Pragmatic Works platform, I can monitor attendance much closer and have the ability to add and remove people from classes very easily. This gives us a large cost savings." There are assessments after each module to ensure what students have just watched was retained. Managers can review test results through a reporting portal giving them insight into student performance. Once a course is completed a completion certificate is automatically generated for the student.

More accountability and flexibility within the platform also relieved stress from the management team: "The new training platform is light years better than what we had before. I can add people myself and it has made my life a lot easier. I can assign people to other classes in minutes and they can start their training immediately. Responsiveness is excellent. We would definitely utilize these trainings again and work with Pragmatic Works," said Jim. There is no delay in educational advancement, new employees can be rapidly on-boarded and existing employees can have immediate access to the training they need to improve their efforts.

The high quality of the Pragmatic Works training was another benefit that brought the large nonprofit medical research group a great return on investment, "I've said to our groups that our training has really brought us ROI on our investments, and it's measureable because when you have groups that take a day course and then within a week are making solutions that matters. The work we do is impacting patient lives," added Jim. Prior training efforts yielded limited results, and this in turn was evident in the work produced by attendees post-training. With Pragmatic Works, both attendees and our management could see the impactful results from the training immediately.

On-Demand Training

Pragmatic Works On-Demand Training is taught by industry experts and Microsoft MVPs with real world experience across all industries. The classes are designed to help you master the technology anywhere, anytime and on any device.

Topics include:

- Big Data for Beginners
- Analytics with Power BI
- Power Query for Business
- Pragmatic Workbench Training
- Master SSIS
- SQL Server Performance Tuning
- Tabular and Power Pivot for Developers
- SharePoint for Business Intelligence
- Power BI Desktop and Dashboards
- Introduction to SSIS
- Introduction to SSAS
- Introduction to SSRS
- T-SQL
- Master SSRS
- Introduction to MDX
- Master SSAS

Key Features and Benefits:

- Option for one-on-one virtual mentorship session with one of our experts
- Deep course content (10-12 hour courses)
- Class labs included for training modules
- Assessment modules to test for comprehension
- Administrate your organization's training account

With proper and advanced training, the amount of time saved across departments is monumental and directly effects the success of any new implementation.

“We definitely saved a lot of time using the Pragmatic Works training and dramatically increased the chances of our implementation working. It’s radically improved our migration and ramping people up. If you don’t have training as a forefront, then your chances of a successful implementation are low.”

The group can now feel confident that their team can handle any upcoming implementations with the tools and knowledge gained from the Pragmatic Works training.

Additionally, the research group was looking to support their company image as one that encourages educational growth and development. Management wanted to embolden their employees to take what they’ve learned with Pragmatic Works and build on it, do research and bring back what they’ve learned to the trainings to gain more information and understanding.

“In terms of IT or BI related educations, we’re going to shift because we have very tech savvy people joining our teams and we want to foster that behavior. The Pragmatic Works training really helped us in that they can train us on our own data and answer any questions our team members might have from their own reading and learnings. We get a lot more from a demo on our own data.”



Class attendees not only gained practical real world knowledge built directly from their data, but had access to the top instructors and mentors in the industry to answer any additional questions or problems they might have encountered. These types are resources were invaluable to the group and were one of the main benefits they saw from using Pragmatic Works trainings.

Across the board the medical research group saw immediate value from their investment in Pragmatic Works trainings. Between time and costs savings, they were able to save a significant amount of resources. With budgets being a top concern for the majority of organizations, having an affordable and highly regarded training organization as a viable option is instrumental to both project success and any ramping up or on-boarding initiatives. Pragmatic Works corporate training packages provide the pivotal combination of expert instruction and latest technology, while being backed by Microsoft as a top tier training institute.

***Pragmatic
Works***

sales@pragmaticworks.com | pragmaticworks.com