






Reporting Assessment

Gain insights
Optimize reporting
Drive data-driven success



Unlock smarter reporting & insights from Dynamics 365 Finance & SCM

Our tailored assessment, part of a broader journey, helps you to align your reporting needs with the right tools and strategy. From awareness to implementation, we guide you in making the most of Power BI and Dynamics 365's standard reporting capabilities.

-  **Demo: reporting awareness**
Explore the built-in reporting and BI capabilities of Dynamics 365.
-  **Assessment: Reporting requirements and strategy**
Define your reporting needs and future BI roadmap with expert guidance.
-  **Training: Building Power BI and other Dynamics 365 standard reports**
Learn to build self-service reports using Power BI and other D365 tools.
-  **Consultancy: Querying the D365 data model**
Get expert advice on extracting and combining D365 data effectively.
-  **Project: Custom BI project or starting from Cegeka BI product CBI**
Leverage our BI expertise to build tailored solutions or fast-track with our CBI (Cegeka Business Insight) solution.

What's included in the assessment?

Kick-off & Discovery

Initial alignment on scope, goals, deliverables, resources, and roadmap & review of your current data and reporting landscape, tools, data flows, and reporting usage.

Discovery Review

Presentation of initial findings and agreement on key focus areas for deeper analysis.







In-Depth Analysis

Formulation of recommendations on data architecture, scalability, quick wins, and future-readiness.

Closing & Reporting

Presentation of final conclusions, action list, and responsibilities & Formal summary of findings and recommendations discussed during the closing meeting.

How does the assessment help you move forward?

-  Build a scalable foundation for growth
-  Enable data-driven decision-making
-  Align reporting with your business strategy
-  Maximize ROI of your ERP system
-  Uncover hidden opportunities and risks
-  Strengthen competitive advantage

What can you expect from the assessment?

-  Optimization opportunities related to your current data landscape, reporting setup, and tools
-  A phased strategic roadmap with prioritized initiatives and clear next steps
-  A future-state vision for next-gen data architecture, modern BI tools, and advanced analytics

Ready to explore the possibilities?

A workload estimation will be provided based on your specific needs, whether you're interested in one part of the journey or the full trajectory, and whether your focus is on execution, consultancy, or a combination of both.

For more information on what this could look like for your organization, simply reach out to your account manager.