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Case study

THE WESTMORLAND FAMILY

Sector Professional Services
Service Data & Analytics

Jun 2021

Petrol, Pies and Power BI: Self Service Reporting at Westmorland Family Services

Needing a haven on the road? We've just the place for you. Rolling hills behind picture-windows, set with cosy chairs, inviting you to settle in with your fresh brew and homemade cake. Come, appreciate this slice of serenity on your weary journey. Here you'll find shops full of little luxuries, ready for your purchase for that friend you're on your way to. Or even for yourself. This is the award-winning Westmorland Family motorway services, always ready to welcome you with hearty home cooked food and locally sourced products.

Results at a glance

- Timely and accurate information to improve decision making
- High level view of the world with the ability to drill into the detail
- Easy management of securing and sharing information

Westmorland is a progressive business and we have worked closely with them since 2002. A few years ago their reporting was largely Excel-based, and they were heavily reliant on IT to create and maintain reports. The business needed automated and accessible reporting for all. They needed great operational and commercial reports to make excellent data driven decisions, reporting from overall site performance right down to transactions by the hour; high-level supplier analysis to detailed information on top selling products.

> **We really value the long term relationship we have with Waterstons. Their people feel like a natural extension of our own team and they understand our challenges and what makes us tick as a business.**
>
> Jon Lees
> Head of IT

We built a Tabular Model based on data from the Data Warehouse we'd created. We used Power BI for reporting. It's a versatile tool, meaning we could meet the many varied reporting requirements. We even wowed them with some new, unexpected visuals.

From a user perspective, Power BI is intuitive. Forget traditional, slightly budget-looking reports. Power BI reports are smart – they'll get anyone excited about data, we promise! Not only do they look great, they function great too. You can drill down to find the root cause of an issue. You can drill-through to more detail on a specific reporting area.

We often run projects with a view to the customer's team taking on reporting themselves. We trained Westmorland staff to manage and trouble shoot the reports we'd built and to build their own reports from scratch. We love it when someone excitedly shows us their work – the sense of achievement is a joy to observe.

> **The agile approach really worked well for us as we could feedback on report development throughout the process. The reports have given us huge insight. Crucially, our business report went live as the country entered lockdown, but the reports gave us information and confidence from which we could rapidly make decisions.**
>
> Jon Lees
> Head of IT

Of course, no project is undertaken without clear business benefits. The benefits for Westmorland are:

- Raising quality and lowering cost – from Excel-based reports with limited functionality and a heavy reliance on IT for maintaining reports to a new world of self-service and automated refresh reporting. Power BI gives both a high-level view of the world and the ability to drill down to detail. Many of our customers say it's 'scary', the amount of data surfaced through reporting projects.
- Reducing risk and increasing security – with Workspaces, Apps and Row Level Security, it's easy to manage who sees what. Gone are the days of sharing reports via email.
- Teamwork and collaboration – the Commercial and Operational teams now have their own reports from which they make real decisions (both strategic and tactical) on the running of the business.
- Timely and accurate information – we're all about the right information at the right time. The new reports proved crucial to rapid decisions early in the pandemic.

So... next time you're on the road, be sure to visit a Westmorland Family Services (it's even a destination for some!).