CASE STUDY: FROM SPREADSHEETS TO A POWER BI REPORTING HUB

ONE PLATFORM.
LIVE NUMBERS.
A TEAM THAT RUNS IT THEMSELVES.

At a glance

A private aviation company running ground operations, a flight school, charter sales, and regulatory reporting tracked each business in its own system and spreadsheets. We built a Power BI reporting hub that pulls directly from its operational systems, refreshes throughout the day, and gives every business line the same comparisons.

KEY METRICS

4 BUSINESS LINES ON ONE PLATFORM

8X DAILY AUTOMATED REFRESHES

3 SYSTEMS CONNECTED VIA API

TrueBlueTechnologies

Sales Operations Redefined
www.truebluetechnologies.com
Indianapolis, IN

CHALLENGES

- **Disconnected systems:** Operations, scheduling, charter sales, and maintenance each ran on a different vendor platform.
- **Spreadsheet dependency:** Weekly dashboards lived in Excel and were rebuilt from manual exports every cycle.
- **Locked-down vendor data:** APIs and restricted database access ruled out off-the-shelf connectors.
- **No consistent comparisons:** Each report calculated MTD, year-over-year, and rolling periods differently.

SOLUTION

- Custom Power Query connectors to vendor APIs with automatic paging
- All-locations operations report first, then flight school, charter sales, and FAA flight reporting
- Shared date model with one comparison selector: MTD, prior year, YTD, and rolling 12
- Refreshes every three hours, with a path to 30 minutes on Premium
- Data warehouse roadmap for systems without direct reporting access

BENEFITS

1. **One source of truth**
   Every business line reads from the same environment and definitions.
2. **Current numbers, all day**
   Eight automated refreshes a day. No waiting on a weekly export.
3. **A team that owns its reporting**
   The client's analyst fixed a live measure on her own, and IT reused our API pattern internally.
4. **Room to grow**
   A new flight-level API feed was delivered within two days of the request.