

CASE STUDY: FROM MANUAL EXCEL REPORTS TO AUTOMATED TABLEAU DASHBOARDS

**FASTER INSIGHTS.
SMARTER DECISIONS.
CLEANER DATA.**

At a glance

A finance team relied heavily on static Excel workbooks that were time-consuming to update and prone to errors. By moving reporting into Tableau, True Blue Technologies delivered automated, interactive dashboards that provide leadership with real-time insights, reduce manual effort, and improve data confidence across the organization.

KEY METRICS

**80% REDUCTION IN
MANUAL EFFORT**

**45% REDUCTION IN
AD-HOC REPORT
REQUESTS**

**70% FASTER MONTH-
END CLOSE**

TrueBlueTechnologies



Sales Operations Redefined



www.truebluetechologies.com



Indianapolis, IN

CHALLENGES

- Manual updates: Finance staff spent hours each week exporting, cleaning, and refreshing Excel sheets.
- Error risk: Copy-paste processes and complex formulas led to inconsistent results.
- Slow decision-making: Executives waited days for updated numbers, limiting agility.
- Limited visibility: Reports were static; no ability to slice, drill down, or self-serve data.

SOLUTION

True Blue migrated the client's core financial reports into Tableau dashboards:

- Automated data refreshes directly from source systems
- Consolidated multiple Excel workbooks into a single source of truth
- Interactive dashboards for executives, managers, and analysts
- Visualizations designed for quick interpretation and drill-down analysis

MONTHLY INCOME STATEMENT				
	CM	CM%	BUD	BUD%
P&L DETAIL CURRENT MONTH VS SAME MONTH LAST YEAR				
GROSS SALES	\$2,682.2K	101.5%	\$2,691.3K	101.9%
CREDITS / RETURNS	(\$34.1K)	-1.3%	(\$34.1K)	-1.3%
FREIGHT OUT	(\$14.8K)	-0.6%	(\$14.8K)	-0.6%
REBATES/DISCOUNTS	(\$1.7K)	-0.1%	(\$1.7K)	-0.1%
	\$2,631.7K	100.0%	\$2,640.8K	100.0%
STD COST SALES OVDH	\$286.4K	10.9%	\$286.4K	10.8%
STD COST SALES LABOR	\$123.7K	4.7%	\$123.7K	4.7%
STD COST SALES MATERIAL	\$1,384.9K	52.6%	\$1,384.9K	52.4%
	\$1,795.0K	68.2%	\$1,795.0K	68.0%
	CM	CM%	BUD	BUD%
INV ADJUSTMENTS CC	\$98.5K	3.7%	\$98.5K	3.7%
FREIGHT IN	\$75.0K	2.8%	\$75.0K	2.8%
COS ADJUSTMENTS	\$25.0K	0.9%	\$25.0K	0.9%
WARRANTY	\$15.6K	0.6%	\$15.6K	0.6%
SCAP	\$15.0K	0.6%	\$15.0K	0.6%
PPV TARIFF	\$12.1K	0.5%	\$12.1K	0.5%
MATERIAL - SUPS	\$1.4K	0.1%	\$1.4K	0.1%

BENEFITS

1

Time saved:

Finance analysts no longer spend hours manually exporting and formatting spreadsheets. That time is redirected toward analyzing trends, spotting risks, and advising leadership.

2

Faster decision-making:

Executives and managers have immediate access to live dashboards whenever they need them. Real-time insights speed up approvals, course corrections, and strategic planning.

3

Transparency:

Every stakeholder sees the same up-to-date numbers in one centralized dashboard. This creates a single source of truth that builds trust across departments.

4

Scalability:

Tableau dashboards can quickly incorporate new KPIs, cost centers, or data sources as the business grows. Expansion no longer requires building a new set of spreadsheets from scratch.