

FROM SPREADSHEETS TO STRATEGY

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3–5

Systems with your data

4–8hrs

Hrs/wk rebuilding reports

\$5M+

Documented savings from better BI

\$7.2K

Annual cost of one manual WIP report

\$0

Power BI Desktop license cost

WHY YOUR BRAIN HATES SPREADSHEETS

- **Cognitive Overload:** Working memory holds ~7 items. Your 12-project job cost report has 900+ data points. You're not struggling because you're not smart — you handed your brain a task it wasn't built for.
- **Pattern Blindness:** We spot a predator in the grass in milliseconds. We never evolved to find a \$10K leak in row 97. In a spreadsheet you search for the problem. In a dashboard, it finds you.
- **Wrong Tool:** Excel was built for calculations, not communication. When you send a spreadsheet, you ask your boss to do the analysis. A dashboard hands them the answer.
- **Invisible Leak:** The \$5K cost creep buried in row 112 on Tuesday is \$50K by month-end. You had the data. It just wasn't visible.

WHAT POWER BI DOES

- **Updates Automatically:** Connect once. Set a refresh schedule. Current numbers every morning — no export, no copy-paste.
- **Interactive:** Click a project name. Every chart and KPI filters instantly. No pivot tables. One click.
- **One Source of Truth:** No more "my spreadsheet vs. yours." Everyone sees the same number from the same place.
- **Works With What You Have:** Connects to Sage, Viewpoint, Foundation, Procore, QuickBooks, and plain Excel. If it exports, Power BI reads it.

THE THREE DASHBOARDS THAT CHANGE EVERYTHING

Job Cost Tracker

Budget vs. actual by cost code. Click a project — everything filters instantly. Red means over budget. No digging required.

Cash Flow Monitor

Two lines: cash in vs. cash out. When they converge, you have a problem. 30-day forward look so you see it coming.

WIP Report

Standard format your auditors recognize. Underbilled/overbilled by project. Auto-updates. Zero hours to produce after initial build.

THE ROI MATH

Manual WIP report (8 hrs/mo)	96 hrs/yr
Loaded cost @ \$75/hr	\$7,200/yr
Power BI Pro (1 user)	\$120/yr
Net savings — first year	\$7,080+

Tool pays for itself before you finish Q1.

GETTING STARTED

- **Cost:** Desktop is free. Pro is \$10/user/mo. Check if your M365 E5 already includes it.
- **Time:** First dashboard: 20–40 hrs. Second: 10–15. Third: 5–8. It compounds.
- **Data Prep:** Standardized job codes. Consistent naming. One owner. Most BI projects fail here, not in the tool.
- **First Step:** Pick the one report your controller spends the most time on. Build that one first.

WHAT POWER BI DOES NOT DO

✗ Fix Bad Data

Garbage in, garbage out — just in beautiful charts. Clean your job codes first.

✗ Replace Your Software

Sits on top of Sage, Viewpoint, Foundation. Reads a copy. Does not write back.

✗ Build Itself

Someone has to build the first dashboards. If they write VLOOKUPS today, they have 80% of the skills.

Four Things to Remember

1. You already have the data.
2. Start with one report.
3. Clean your data first.
4. The cost is minimal. The return is your life back.

Want the How-To Guide?

Email Zack for a step-by-step guide to building your first Power BI dashboard — data model, DAX formulas, and the job cost template from today's demo.

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