

# A Data Modernization Journey



*After successfully partnering with Hitachi Solutions for a Microsoft Dynamics CRM overhaul in 2022 — an initial collaboration further strengthened by ongoing support from the Hitachi Solutions Managed Services team — Schneider Downs sought to build upon that trusted foundation to explore their future state for data and analytics modernization and unification, beginning with a data management proof of concept. Thus began a transformation journey.*

## SPECIFICATIONS

### [Company Website](#)

#### Industry

- Financial Services

#### Organization Size

- 600+ employees

#### Products

- Dynamics 365
- Managed Services
- Data Estate Modernization Pilot Project
- Microsoft Fabric
- Microsoft Purview

## Big Thinking. Personal Focus.

Schneider Downs is a leading regional certified public accounting (CPA) and business advisory firm based in Pittsburgh, PA with offices in Columbus, OH and McClean, VA. Founded in 1956 with a mission of making personal and lasting connections with their clients, Schneider Downs has grown to provide a full suite of 140 services including: auditing, consulting, tax, digital modernization, wealth management, retirement planning, tax advisory and cyber security.

With their long-time commitment to “**Big Thinking. Personal Focus,**” today the company aims to develop a robust data strategy to harness business intelligence and leverage analytics from their entire data estate. This will enable them to make more informed, timely business decisions — all rooted in unified, real-time analytics.

## The Genesis of a Trusted Partnership

Schneider Downs began working with Hitachi Solutions in 2022 when they sought a new partner to solve for a challenging Dynamics 365 implementation. Hitachi Solutions helped the company change course and make their Dynamics 365 CRM investment a success. Offering recommendations for improvements and changes with continued managed services support, Hitachi Solutions helped Schneider Downs unpack even greater returns from their investment.

This proved to be the foundation of a trusted partnership. Hitachi Solutions was able solve a critical business process chokepoint that required technical innovation and careful collaboration and communication with key stakeholders to remedy, adapt to the overall change and adopt the new process. This extra care and consideration for improvement solidified the partnership. Hitachi Solutions continues to iterate with the Schneider Downs team to innovate and make improvements on the Dynamics side as the company scales into the cloud.

## On Becoming Data-driven

As the company continued to grow and expand their services, so did their data estate. But the analytics weren't unified, making it cumbersome for business intelligence gains. Governance and management are always a focus, but the company sought more from the data they collected. They wanted to put it to work to drive more efficient and accurate insight for everyone. With organic company growth and a desire to take care of their clients, CIO Jack Wolford sought to scale their data to make the best business decisions possible in a timely manner all the time.

Wolford recognized the challenges this created for the company, and calls the company's future analytics estate "data nirvana," aiming for a time when all the enterprise analytics are governed, secure, accessible and instantly analyzable.

Schneider Downs has a legacy data warehouse on site, but their data management processes are challenged due to the company's continued growth. To be secured, unified and data-driven, the company once again turned to a powerful partner to help them explore how best to modernize their legacy systems while continuing to govern and maintain their security posture.

## The Road to Data Nirvana

Wolford explains his vision, **"We will have all the data from all the systems at any time from any place to make the best decisions we can in a timely fashion; all driven from analytics. To do that, we need a powerful partner."**

To reach "data nirvana," they knew they wanted to work with Hitachi Solutions. Schneider Downs started their journey with a deep dive into their infrastructure and workloads to deliver a proof of concept for data modernization — beginning with an emphasis on data management and governance with an overall assessment utilizing **Microsoft Purview**. Their future state has their sights on adoption of **Power BI** and **Azure Data Factory**.

**It's been a real benefit to have the Hitachi Solutions team be a part of the environment of our team, and it's really unique. Throughout my technological career, I've never had the privilege to work with such a team like this.**

Dustin Metz, Schneider Downs  
Power Platform Administrator



## First Comes Governance

**Today, compliance, security, and data protection prioritization** all came into play when considering modernization. To address these “always on” concerns with a proven provider, Schneider Downs initiated their multi-stage modernization journey with a governance model to eventually build a cloud-driven or hybrid data strategy with Hitachi Solutions.

To do that, Hitachi Solutions delivered a proof of concept, proving the ability to better leverage their data and analytics to accelerate the business processes, drastically improve their insights on demand, and provide their customers with real-time analytics to support their needs.

### Along with speed to value, Hitachi Solutions delivered:



Better understanding of data estate deployments in the cloud



Insight as to how to securely ingest on-prem SQL Server and Dataverse sourced analytics into Microsoft Azure



A configured environment to establish governance framework as part of the deployment

With proof of execution in hand, Schneider Downs can now explore the viability of modernizing their data estate with Microsoft Azure, opening the door for new functionality and performance, increasing their capabilities to deliver robust personalized insights and service on-demand for their customers as their needs evolve and change.

## A Smooth Transition to Data Modernization

Looking ahead, **Schneider Downs aims to build a data-driven strategy and roadmap** that will support their people and processes with continuous advancements that will result in always improving the personalized delivery and experience for their customer engagement.

In the near term, Schneider Downs can rely on Hitachi Solutions for in-depth insight of their business goals and understanding of their challenges and additional managed services to assist them there to their desired future state of “data nirvana.”

Schneider Downs desires to enhance its data strategy to enable predictive analytics and business intelligence to better understand and forecast business outcomes. To help start this data-driven culture journey, Hitachi Solutions conducted an assessment on the six areas of focus below:

- 1 **Data Warehouse Environment & Architecture Review**
- 2 **Data Source Inventory**
- 3 **Data Quality Management**
- 4 **Business User Interviews**
- 5 **Security and Governance Review**
- 6 **Reporting and Analytics Review**

From the assessment findings, Schneider Downs' leadership expressed the importance of **data governance**, **data democratization**, and **operational efficiency** as the pillars to drive the organization towards advanced data capabilities, ensuring data-driven decision-making becomes a core part of the organizational culture.

**“We need a data-driven culture where it’s as soon as you get something that’s useful that people can trust...As soon as you get something in front of them that they love it and they want more, they want deeper insights...like those next levels of predictive and prescriptive [analytics].**

Eric Surma, Senior Manager of FP&L

### Forward Focus

With data-driven predictive analytics as a core priority, Schneider Downs looks forward to the next phase in their partnership with Hitachi Solutions, including:

- ✓ Phase 1 roadmap for data-driven reporting and analytics
- ✓ Data Estate Modernization scope of work
- ✓ Enterprise-wide knowledge
- ✓ Wisdom rooted in analytics



**“We’re going to be attached at the hip for many years, so we want to be successful together. That’s why this is a partnership, not a vendor-client relationship.**

Jack Wolford, CIO, Schneider Downs

**Contact us to learn how we can help you!**



 **Hitachi Solutions**

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