

SCORPION

Scorpion Scales Their Business with Virtualized Data

Scalability combats growing pains

CData Connect Cloud provides flexible, simple connectivity to help Scorpion evolve their tech stack and improve reporting processes.

Data virtualization saves hours of manual work

Virtualizing live Sage data into Power BI reports saves Scorpion's FP&A team from spending hours every week manually extracting and manipulating data.

Native deployment in the cloud

Connect Cloud connects to live data in the cloud, meaning Scorpion's sensitive data stays at the source, and reports always have the latest data without the risk of failures.



Company

Scorpion

Industry

Advertising

Product

CData Connect Cloud

Snapshot

Scorpion leverages CData Connect Cloud for always-on access to live data from Sage Intacct, combining general ledger data with FP&A metrics to slice and dice financial reports in Power BI.

Scorpion swaps hours of laborious data handling for live data connectivity with CData Connect Cloud and sets itself up for healthy, robust growth.

Scorpion is the leading provider of digital marketing technology for local services businesses. It helps business owners understand their local market and optimize their marketing efforts to drive more revenue. Through award-winning AI, technology, and marketing experts, Scorpion helps businesses run their best business.

Leveraging Google Sheets to manage reporting processes sufficiently met their needs when Scorpion was in its infancy, but as the workforce expanded from a few hundred to over a thousand employees in the span of just a few years, they faced major challenges scaling data operations. Manually manipulating data in CSV files every week wasn't feasible or effective anymore, so Scorpion VP of Financial Planning and Analysis Nathan Thompson sought a different kind of data connectivity solution to uplevel their reporting processes.

"We experienced what's pretty typical for companies that are growing rapidly: Your growth outpaces the technologies that you're using in your processes," said Thompson. "I was downloading data into spreadsheets, and I'm just thinking, 'What am I doing? This is not efficient.' It certainly wasn't a good use of anyone's time. The data was a mess, and we lacked integrations between our systems."

Thompson adopted the [CData Google Sheets Power BI Connector](#), saving hours of manual work with a direct, out-of-the-box connector that allowed him to simply hit 'refresh' on reporting dashboards for up-to-date data. Thompson was so pleased with the tool that when Scorpion ditched the spreadsheets for more sophisticated sales and financial systems, he turned once again to CData.

Today, [CData Connect Cloud](#) helps Scorpion efficiently integrate live Sage Intacct and ADP data into Power BI. This allows Thompson to seamlessly blend and analyze financial data from Vena and Intacct for in-depth PNL insights and responsibly handle sensitive payroll information from ADP. By providing a holistic view of financial and employee data in a secure manner, Connect Cloud streamlines Scorpion's budgeting and payroll processes while maintaining data privacy.

"I had this vision of having something where I could look at high-level PNL, and if I wanted to look at a particular account, I could filter to that and just right-click to drill through to the details. [Connect Cloud] allowed me to basically save a report, set it up to automatically refresh, and give us visibility into that transaction level data."

– Nathan Thompson, Scorpion VP,
Financial Planning and Analysis

The challenge: Meeting ever-evolving reporting needs

As Scorpion evolved in both size and sophistication, Thompson and his team experienced growing pains within their financial reporting processes. The first issue arose when trying to 'slice and dice' PNL statements at the transactional level to present monthly reports to leadership. Scorpion's FP&A software Vena stores data at the account level, but Thompson needed to drill down further to uncover insights into vendor activity, budget vs. actuals, changes in performance, and more.

The transaction-level data could be found in Sage Intacct, but Sage doesn't offer native integration to Power BI. Thompson turned to CData again to automatically connect Sage data in Power BI, combining Sage and Vena metrics for a fuller financial picture of the organization.

Thompson first downloaded the [CData Sage Intacct Power BI ODBC Driver](#) on his laptop to create a live connection. This worked brilliantly, sending the refresh command automatically at the time he chose. Over time, he realized that the reliance on local hardware could be a potential blocker in the event of hardware failure. To remove the element of dependence on his laptop, he decided to upgrade to the flexibility of cloud deployment.

Enter: CData Connect Cloud.

“Connect Cloud solved the bottleneck that was my laptop. My machine doesn’t have to be powered on to refresh the report. Power BI is talking to a cloud connector that’s always on, so I could schedule the refresh to run at 5:00 in the morning and I’d know that the report was going to be up to date.”

– Nathan Thompson, Scorpion VP,
Financial Planning and Analysis

The solution: Flexible, controlled access in the cloud

CData Connect Cloud provides the scalability and flexibility Scorpion needed, as well as the hands-off automation Thompson was looking for. Connect Cloud enables virtualized connectivity to hundreds of data sources directly in Power BI – without the limitations of local hardware.

The shift to Connect Cloud saved Thompson hours of manual integration work every week, made data refreshes hands-off and worry-free, and provided leadership with secure access to live dashboards for financial analysis. Scorpion had a robust, scalable cloud solution that could keep pace with their growth.

Thompson couldn’t help but think that Scorpion could benefit from further expanding his use case with Connect Cloud to surface ADP data in Power BI, as well.

“To me, the last thing you want to do is constantly be downloading files to your computer that are sensitive in nature. That data should be protected. What I love about Connect Cloud is that none of the data is stored in your systems. It enabled me to use SQL to directly access ADP data when we need it without compromising data privacy.”

– Nathan Thompson, Scorpion VP,
Financial Planning and Analysis

He needed to surface sensitive payroll data from ADP in an easily consumable format for HR, enabling them to view average salary ranges and make informed budget and hiring decisions. Scorpion was already using the CData ODBC Connector to access ADP data in Power BI, so why not move that to the cloud, too?

This move would support a larger strategy to streamline reporting in the cloud – all while protecting sensitive data. Connect Cloud’s access controls allow Thompson to share data with only the people who need to access it, ensuring that PII (personally identifiable information) stays safe.

The outcome: A future-proof framework

Connecting to live financial and payroll data in the cloud allowed Scorpion to transform its approach to data management and analysis, a change that Thompson describes as “hugely successful.”

This pivotal shift from manual, time-consuming processes to a streamlined, automated system enables Scorpion to create a more flexible and resilient data management framework capable of supporting the company’s evolving needs.

Connect Cloud allowed Scorpion to reach a new level of operational efficiency, enabling real-time insights that drive strategic decisions. It will also play a crucial role in Scorpion’s expansion, providing the flexibility to integrate additional data sources as the company moves forward.

“CData can connect to anything, really. I’m not limited to using it in just one reporting tool, or connecting to one system. I know we have versatility if we experience change, which is really important to me because we’re not tied to some proprietary system of using that data in certain ways.”

– Nathan Thompson, Scorpion VP,
Financial Planning and Analysis

Flexible, secure data connectivity in the cloud from CData ensures that Scorpion’s data infrastructure keeps pace with current and future needs, efficiently scaling as data volumes increase and new tools are added.

Handle your organization’s growing data connectivity needs with CData

CData Connect Cloud provides virtualized, real-time connectivity to hundreds of cloud databases, warehouses, and applications. The tool is built to scale with your connectivity needs, allowing you to connect to as many sources as you need to evolve your data strategy as your business grows.

Ready to get started? [Download a 30-day free trial.](#)



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