

Case Study

Scaling Data Platforms & AI Solutions for a Global Consulting Firm



A leading global consulting firm engaged Distillery to accelerate its data transformation initiatives. This firm works with Fortune 500 companies across multiple sectors, helping them solve complex business challenges. They sought new ways to leverage advanced data architectures and AI to deliver greater value to clients, modernize internal processes, and empower consulting teams with timely, actionable insights.

Strategic Intelligence & Agentic AI

Challenge: The Global Consulting Firm sought a way to go beyond traditional data analysis and proactively identify new business opportunities for their clients. The goal was to build a scalable platform that could process diverse, semi-structured data from a network of partners and, using advanced AI, recommend specific, actionable strategies for their end customers.

Solution: Distillery engineered a cutting-edge **Strategic Intelligence Platform** hosted on **Azure**. This project involved the development of a complex and interconnected data ecosystem:

- **Cross-Company Lakehouse:** We built a multi-tenant data lakehouse designed to securely store and process semi-structured information contributed by various firm partners. This central repository served as the foundation for all subsequent analysis.
- **Advanced AI & Custom Logic:** Our team developed a sophisticated Agentic AI solution, driven by extensive custom code. This AI was designed to work in synergy with business-specific rule engines and was trained on internally curated data to understand market dynamics and client needs.
- **Actionable Recommendations:** The platform was built to analyze the data, identify potential business opportunities, and recommend a clear course of action for end customers. Recommendations were supported by quantifiable metrics, such as benchmark percentages and KPIs, to illustrate potential improvements in areas like operational efficiency.

Results: This advanced platform has transformed how the Global Consulting Firm provides value to its clients. By leveraging a unified data lakehouse and a powerful AI engine, the firm can now offer proactive, data-driven recommendations that go beyond traditional consulting. The solution not only highlights potential areas for improvement but also provides a clear roadmap for achieving them, solidifying the Global Consulting Firm's role as a strategic partner in driving business growth and operational excellence.



Working Capital

Challenge: The Global Consulting Firm's consultants needed to quickly analyze vast amounts of financial data from new clients to identify "quick wins." However, they faced a significant bottleneck: the time-consuming and repetitive process of performing ETL (Extract, Transform, Load) for accounts receivable and payable data, which was unique to each customer's ERP system. This manual effort delayed initial insights and took hours away from more strategic analysis.

Solution: Distillery developed a robust **Working Capital** solution using **Palantir** as the core data backbone. Our key contributions included:

- **Data Pipelines in Palantir:** We designed and implemented secure ingestion pipelines to bring raw, heterogeneous data from customer systems into Palantir. Our team applied ETL/ELT best practices to clean, transform, and curate these datasets, ensuring high data quality, lineage, and traceability for downstream analytics.
- **Canonical Model Development:** We mapped diverse customer datasets into a standardized canonical model within Palantir. Our work involved defining a clear schema governance framework, aligning reference data, and establishing transformation rules to support scalability. This standardized approach allows new customers and data sources to be onboarded efficiently, significantly reducing setup time.
- **Data Integrations & Connections:** We built and maintained seamless integrations between Palantir and Power BI for enhanced reporting and visualization. By ensuring semantic consistency, key performance indicators (KPIs) and metrics remained aligned across both platforms. We also managed external connections (APIs, databases, and cloud storage) to enrich the canonical model and feed curated data back into analytical tools.
- **Data Architecture & Governance:** Our team defined and implemented enterprise-grade standards for environment separation (development, testing, production) to guarantee data reliability and integrity. We established rigorous access controls and role-based permissions to meet compliance requirements and documented data flows, dependencies, and integration patterns for long-term maintainability.



- **Results:** By providing a structured and automated data solution, Distillery helped the Global Consulting Firm achieve significant business impact. The solution now provides consulting teams with clean, standardized, and timely data for their working capital analyses. Curated datasets feed directly into Power BI dashboards for executive reporting, and the automation of data transformations and integrations has reduced manual effort, freeing up consultants to focus on high-value, strategic work.

Consumer Insights

Challenge: A Global Consulting Firm needed to centralize and streamline their consumer data to accelerate the generation of market insights. However, the data from several third-party sources, such as Numerator and 7Puentes, was often unreliable, leading to delays and inconsistent results. This made it difficult for various teams, especially those in Business Development, to quickly access actionable data and create compelling client-facing materials.

Solution: Distillery deployed a team of data experts to build and manage a Consumer Insights Platform (CIP) on Databricks. This long-term engagement focused on several key areas:

- **Data Consolidation:** We designed and built the CIP to serve as a single, unified repository for data from the Global Consulting Firm's primary sources.
- **Data Visualization & Accessibility:** Our team developed and refined dashboards in both Tableau and Power BI. We paid special attention to critical sectors like Apparel, Beauty, and Home, making survey data more understandable and accessible to different teams.
- **Actionable Insights:** By centralizing data and improving visualization, we empowered the Global Consulting Firm's teams with the ability to generate actionable data that was directly used to create client-facing decks. These materials were instrumental in establishing new commercial relationships.



Results: The new platform and the ongoing support from the Distillery team have significantly improved the Global Consulting Firm's ability to leverage their consumer data. They now have a robust, scalable system for generating insights, which has directly supported their Business Development efforts and enhanced their value proposition to clients.

FP&A and Software Capitalization

Challenge: The Global Consulting Firm's Finance, Planning & Analysis (FP&A) department relied on a manual, Excel-based reporting pipeline. This process was inefficient and lacked standardization, making it difficult to manage and expand information related to employee software capitalization and cost recovery for intangible assets.

Solution: Distillery's team provided expert support to modernize and streamline these financial processes in **Phase 1** of the project. Our contributions focused on automating and optimizing the technical aspects of the existing pipeline:

- **Migration to Power BI:** We successfully migrated several key Excel reports to Power BI. This move not only improved reporting efficiency but also created a more flexible foundation for future expansion.
- **FTE Capitalization Tracking:** We developed a system within Power BI to accurately track and check the full-time equivalent (FTE) hours for each employee, distinguishing between capitalizable and non-capitalizable work on platform development.
- **Process Standardization:** Our team worked to eliminate and standardize the entire cost recovery process for the capitalization of intangible assets, creating a more efficient and reliable workflow.



Results: By transitioning from manual spreadsheets to an automated Power BI environment, Distillery helped the Global Consulting Firm achieve greater accuracy, efficiency, and transparency in their financial reporting. This initial phase has established a robust technical foundation. In later iterations, the project will move towards advanced data modeling and productization of the solution, ensuring long-term scalability and organic growth for the firm.



About Distillery

Distillery is a premier nearshore software development firm. At our core, we embed elite AI-enabled senior engineers and agile experts directly into our client's projects, accelerating velocity by at least 40-60%, ultimately helping our clients get digital products to market faster and driving more revenue.

We support essential applications, mobile apps, websites, and eCommerce platforms through the placement of senior, strategic technical leaders and by deploying fully managed technology teams that work intimately alongside our client's in-house development teams.

At Distillery, we're not here to reinvent nearshore software development, we're on a mission to perfect it.

Awards



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