

Project Context

Client: Zentra Dynamics

Industry: Technology & Operations

Project: Budget Performance Audit

Tools used: Excel (Power Pivot & Pivot Tables)

Zentra Dynamics is a mid-sized technology firm operating across four major Canadian cities: Calgary, Toronto, Montreal, and Vancouver. The company has experienced rapid growth but lacks a clear, automated process to track actual vs. budgeted expenses.

Until now, all financial data was siloed and manually reviewed by business unit managers, making it nearly impossible to spot overspending or underutilized resources in real-time. This project aims to centralize, structure, and visualize the budget vs. actual performance across departments, regions, and categories to improve financial decision-making.

Problem Statement

Zentra Dynamics was facing a lack of visibility into how different departments and regions were performing against their allocated budgets. Without dynamic reports, leadership couldn't easily identify cost overruns or areas of efficiency. The need was clear: build a dynamic, interactive dashboard to:

- Track actual spending vs. budget by category and department.
- Highlight top areas with budget variance.
- Allow filtering by month, department, and region.
- Provide quick, visual insights for decision-makers.