

TetonCloud

Microsoft INDUSTRY CASE STUDY | MAP Build the Business Case | CLIMB Modernize Platform & Data | SUMMIT Enable AI & Innovation | Frontier Firm™

Case Study: A Privately Held U.S. Bank

Power BI Security & Governance Assessment — A Trusted Path to Secure, AI-Ready Analytics

Executive Summary

As demand for data and reporting grew, a privately held U.S. bank partnered with Teton Cloud to make sure its Microsoft Power BI platform was secure, well governed and ready for production. In just three weeks, Teton Cloud reviewed the bank's entire analytics environment, caught 29 high-risk issues before launch and delivered a clear 12-week roadmap forward. The bank can now grow its use of data with confidence, protect its customers and build an AI-ready foundation for Microsoft Fabric and Copilot.

79
Controls Reviewed Across 7 Key Areas

29
High-Risk Issues Caught Before Launch

9
Quick Wins Ready to Act On Immediately

12-WEEK
Roadmap to Production Clear & Prioritized

How it Protected the Bank

- **Customer Data Secured:** Safeguards so sensitive customer and financial data is seen only by the right people.
- **Access Locked Down:** Always-on administrator rights replaced with access granted only when needed.
- **Regulatory Confidence:** 29 high-risk issues caught before production, not by auditors or examiners.
- **Reliable Reporting:** A plan to keep the reports the business relies on every day up and running.

How it Helped the Business

- **Faster Path to Production:** A clear 12-week roadmap to launch Power BI with confidence.
- **Fast, Low-Cost Wins:** Nine quick fixes reduce risk in the first month, with no new investment.
- **Smarter Investment:** A clear licensing and Microsoft Fabric recommendation to right-size spend.
- **AI-Ready Foundation:** A governance framework built to support Microsoft Copilot and future AI initiatives.

Strategic Drivers

- ☑ Scale analytics safely as a regulated institution
- ☑ Protect customer and financial data
- ☑ Reduce security and compliance risk before launch
- ☑ Replace ad-hoc growth with a governed, repeatable model
- ☑ Make a confident Microsoft Fabric investment decision
- ☑ Enable Microsoft Copilot and future AI innovation

> *Teton Cloud served as a trusted security and governance partner, combining Microsoft Power BI, data protection and compliance expertise to give the bank a clear path to production while reducing risk, protecting customers and accelerating its journey to AI.*