SUCCESS STORY

HFW

Architectural Engineering Group Unifies 13 ERPs in 3 Months Using Microsoft Fabric

DataCrafters

Microsoft
Solutions partner

HFW COMPANIES UNIFIES 13 ERPS IN 3 MONTHS USING MICROSOFT FABRIC

In just three months, HFW Companies consolidated multiple distinct ERP systems across 13 business units into one centralized data platform.

What others estimated would take two to three years, HFW achieved in under 90 days, thanks to the vision of Chief Financial Officer Daniel Forguson, execution leadership from Director of Business Intelligence Shreena Fulani, and the power of Microsoft Fabric.

HFW Companies is a national group of architecture and engineering firms that has expanded rapidly through acquisition that is building a preeminent network of Architecture and Engineering (A-E) legacy partners, providing a gateway to accelerated growth and leverages their partners' collaborative expertise.

With each new firm came a new ERP system, creating data silos and inconsistencies that made unified reporting almost impossible. While unifying their ERP footprint in Unanet, HFW also wanted modern analytics at their fingertips. They needed something that could replace manual reporting, empower leadership, and bring immediate value to every member company.

Daniel Forguson, Chief Financial Officer of HFW, had a clear vision: bring all business data together. But he was told it would take over a year. He couldn't wait that long, and thanks to Microsoft Fabric, he didn't have to.

> *"Given our rapid expansion and the complexity of our house of brands model, achieving timely and precise financial reporting without a BI tool was challenging. The integration of our BI platform with our ERP system is set to offer limitless opportunities for data-driven decision-making."*
>
> *Daniel Forguson*
> Chief Financial Officer, HFW Companies

This transformation gave the company real-time sales and operational visibility and laid the groundwork for scalable, repeatable growth.

Shreena Fulani led a close collaboration with trusted partners, bringing in **Technik Solutions** and **ResultSet** for their deep Unanet and architecture expertise, while **Data Crafters** drove the implementation of the Microsoft Fabric platform.

"This engagement demonstrates how the right blend of technical expertise can drastically accelerate delivery and accuracy."

John McPherson
Co-Founder, Principal Consultant, ResultSet

"A unified ERP and BI-enabled platform creates a scalable foundation for long-term growth and performance."

Lawrence Potts
CEO,
Technik Solutions Group

Driving toward a single source of truth also required detailed data mapping, one of the most essential but often invisible parts of any data project. **Michelle Huber and the Finance team, along with Brenda Jimenez from Project Controls, played a key role in this effort, ensuring the foundation was accurate and aligned across entities.**

THE ARCHITECTURE AND ENGINEERING INDUSTRY FACES A DATA PROBLEM

Every business unit at HFW was operating independently, each with its own ERP system, reporting logic, and business definitions. Many of them used Unanet as ERP with some implementations of Deltek Ajera and QuickBooks. Invariably they had to depend on manual inefficient processes to get the data into Excel to give business visibility to the leaders.

Despite investments in newer systems, data across the portfolio remained fragmented. There was no easy way to compare metrics, answer questions quickly, or align leadership around a shared source of truth.

MAKING IT HAPPEN: A UNIFIED PLATFORM IN JUST THREE MONTHS

Driven by the strategy and execution led by Shreena Fulani, and supported by CFO Daniel Forguson, HFW assembled the right expertise to move fast. Their ERP partners, Technik Solutions and ResultSet, brought deep Unanet knowledge, while Data Crafters implemented the Microsoft Fabric foundation. In just 90 days, the teams delivered a modern data platform that:

- Integrated 12 distinct ERP systems + a newly introduced unified enterprise platform.
- Enabled daily refreshed dashboards, ensuring data is always up to date.
- And completed deployment in a fraction of the time others predicted.

"For the first time ever, we have a single source of truth for our data. HFW now has the capability to analyze and gain data insights from all our partner firms in Power BI - an effort which previously took weeks to manually consolidate from various ERPs."

**Shreena Fulani**
Director of Business Intelligence,
HFW Companies

INTEGRATION HAPPENED DURING MIGRATION, NOT AFTER

HFW's approach didn't wait for every system to be standardized. Instead, they built a centralized data model that could accommodate any ERP structure while delivering meaningful analytics during the onboarding process.

The architecture normalized key business concepts such as invoices, project status, and revenue recognition across all companies. Each unit was able to validate its own data and see where it fit within the broader portfolio. Executives finally had a consistent, up-to-date view of how the business was performing.

Processes that previously took two weeks each quarter are now automated and refreshed daily. Today, HFW primarily leverages the platform for monthly reporting, but the daily refresh positions them to shift into near-real-time reporting whenever the business is ready.

The architecture below illustrates how HFW integrated multiple systems into a centralized Microsoft Fabric platform, enabling scalable reporting without waiting for full system standardization.

Architecture Diagram
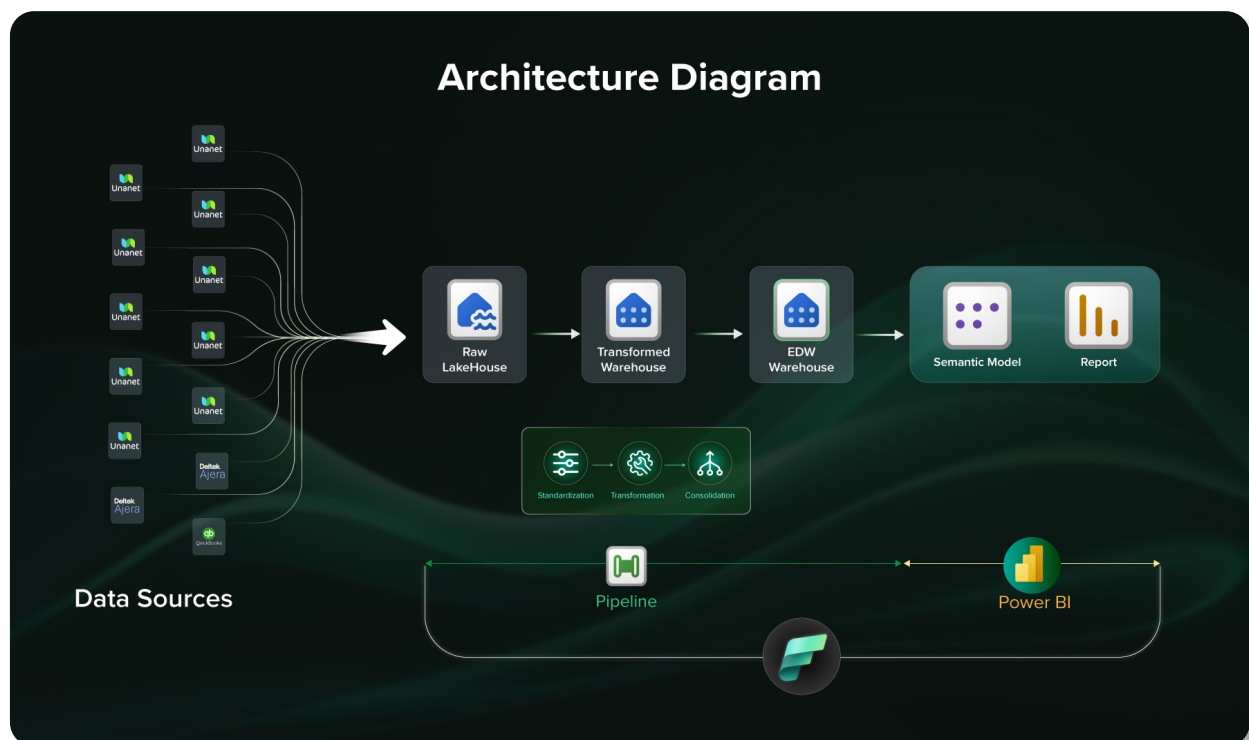
THE SOLUTION: BUILT TO SCALE WITH THE BUSINESS

Key features of HFW's architecture:

- **Centralized Medallion architecture**, built once, used across entities
- **Normalized data views**, so all firms report using shared logic
- **Daily refreshes**, replacing manual Excel aggregation
- **Security by design**, enabling both group-wide oversight and local access
- **Onboarding-ready**, so new acquisitions can plug in fast

With Fabric as the foundation, HFW didn't just solve today's reporting needs, they created an engine for scalable growth.

WHY IT WORKED

Transformation Area	Before Fabric	After Fabric
Data Access	Quarterly, manual Excel exports	Daily automated refresh now enables up-to-date access, currently used for monthly reports with capacity for more frequent insights
Existing Companies Integration	Estimated 12–18 months	Any new acquisition will take less than a month to get into the centralized data model
Ad Hoc Requests	Manual, time-consuming	Answered on-demand with live dashboards
Executive Visibility	Fragmented, delayed	Unified reporting with cross-company KPIs
Scalability	Each acquisition added complexity	Designed for rapid onboarding and growth

WHAT'S NEXT: FROM FOUNDATION TO ACCELERATION

With all core data unified and board-level visibility established, HFW is now moving toward:

- Finance transformation: enhancing financial reporting, creating real-time visibility, and reducing manual processes that currently take weeks.

- Operational analytics expansion: extending the unified architecture to additional departments for broader efficiency gains.
- Future AI initiatives: exploring automation and intelligence opportunities now made possible by a strong data foundation.

What began as a visibility and reporting challenge became a strategic shift. HFW now has the infrastructure to scale without chaos, and the clarity to lead with confidence.

"The collaborative efforts of Data Crafters, ResultSet, and Technik Solutions completely transformed data analytics at HFW - and we're just getting started!"

Shreena Fulani
Director of Business Intelligence,
HFW Companies

FOR ARCHITECTURE AND ENGINEERING FIRMS READY TO MOVE BEYOND REPORTING

HFW's success is a clear example of what's possible for architecture and engineering firms, whether they use Unanet, Ajera, or any other ERP platform.

Even organizations with just one system can begin the journey toward a modern analytics environment powered by Microsoft Fabric and Power BI. In today's AI-driven landscape, standardization is no longer a requirement to gain real-time insights.

For financial controllers and operations teams, time savings are tangible. What once took two weeks of manual effort can now be automated and refreshed daily, laying the groundwork for near real-time insight, currently leveraged for monthly reporting with the flexibility to scale.

Instead of just visualizing data, firms can now act on it with clarity, speed, and alignment across teams.

LAYING THE FOUNDATION FOR WHAT COMES NEXT

The success of this project has energized the entire organization. Leadership and board members now have daily access to accurate, consistent insights, enabling better decisions, faster reactions, and more strategic planning.

With a strong foundation in place, HFW is scaling its platform to support broader goals, from operational visibility to AI-enabled forecasting, intercompany financial unification, and deeper automation.

> *"As we advance, we will continue to incorporate data from additional sources such as HR, CRM, and Treasury, while also leveraging AI-based analytical reporting capabilities."*
>
> *Daniel Forguson*
> Chief Financial Officer, HFW Companies

FROM CLARITY TO CAPABILITY: DISCOVER HOW YOUR TEAM CAN SCALE SMARTER

HFW Companies proved that strategic leadership paired with the right technology can deliver transformative results fast. In 90 days, they unified 13 ERP systems and equipped every business unit with real-time insight.

What makes this story remarkable is the shift in what leadership can now accomplish. Financial controllers no longer rely on manual reports. Executives no longer wait for alignment. Every business unit sees where it stands and where it's going.

If your organization is facing disconnected systems, complex reporting cycles, or slow post-acquisition integration, this story proves that transformation doesn't have to take years. Just the right tools, the right timing, and the right partners.

KEY INSIGHTS

13 ERPs Unified

Disconnected systems brought into one central platform.

Manual Reporting Automated

Manual processes that took weeks are now refreshed daily.

1 Source of Truth

Consistent, validated data across all business units.

3 Months to Go Live

Deployment completed in under 90 days.

Ready for AI & Forecasting

Architecture designed to support future automation and analytics.

Enterprise-wide Dashboards

Leadership accesses insights daily through Power BI.

READY TO BUILD YOUR OWN UNIFIED PLATFORM?

Let's talk about how Microsoft Fabric
can help you scale with clarity.

CONTACT US

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