

From Budget Spreadsheet to **Rolling Forecast**

Canlak Coatings, a North American wood coatings manufacturer, took Microsoft Fabric Plan into production in under four weeks, building the forecast directly on the governed data platform it already trusted

Under
4 weeks
Kickoff To Production

Rolling forecast
Refreshed Monthly, Not
Annually

1 Model
Plan And Actuals,
No Reconciliation

Reporting And
Planning On The
Same Capacity

The Challenge

Sales forecasting lived in spreadsheets. That worked at the rep and customer level, but every step toward product-level detail meant more tabs, more manual reconciliation, and version-named files standing in for a single source of truth.

The Approach

With two years of governed reporting already running on Microsoft Fabric, Canlak added Fabric Plan directly on top of its existing OneLake data and Power BI semantic model, keeping the same definitions and the same security with no new system to maintain

What Canlak Gained

- ✓ Rolling sales forecast in production, live ahead of Fabric Plan's general availability
- ✓ Plan and actuals on one governed semantic model, with zero cross-system reconciliation
- ✓ Full-year forecast horizon, kept current with a rolling monthly refresh
- ✓ Forecast detail down to the product level, cascading segment → rep → customer → product
- ✓ Reporting security inherited automatically by the planning layer, with no duplicate rules to maintain
- ✓ Working planning model in under 4 weeks, with no noticeable increase in capacity cost

"Moving from Excel spreadsheets to Fabric Plan transformed our forecasting process. What used to take three to four weeks of spreadsheets, emails, meetings and reconciliations can now be completed in about a week. By bringing planning and reporting into a single platform, we've simplified the process into a rolling forecast, improved visibility and given our team more time to focus on analysis rather than administration."



Rich Zielinski

Director of Finance and Treasury, Canlak Coatings



Built On



Ready to bring planning onto your data platform?

Data Crafters designed and implemented Canlak's planning model, extending an analytics foundation that has run the business in production for close to two years.

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