

Success Story



From Two Weeks To Minutes: HFW Companies Rebuilt Its Financial Package On Microsoft Fabric



Executive KPI

Meaningful Outcomes.

Measurable Impact.



<30 mins

DATA READY
TO REPORT



100 Tabs

PACKAGE TABS
AUTOMATED, FROM 64
IN MAR 2026



2 People

FINANCE CAPACITY
REDIRECTED



1 Model

UNIFIED CHART OF
ACCOUNTS ACROSS 14
FIRMS



“We started with one principle: finance owns the GL mapping and definitions, and then the technology and reporting follows. Extending our Fabric foundation into the Monthly Financial Reporting Package means every number now has one definition, and the leadership team can trust it from day one after close.”

Shreena Fulani,
Director of Business Intelligence, HFW Companies



On day one after month-end close, the Financial Package is already built. The finance team's job shifts from two weeks of manual assembly to reviewing, adjusting, and signing off. The data platform on Microsoft Fabric behind it runs the entire cycle automatically every night. The team's time now goes where it creates the most value: strategic analysis, scenario modelling, and partnership with the business on the decisions that move the company forward.

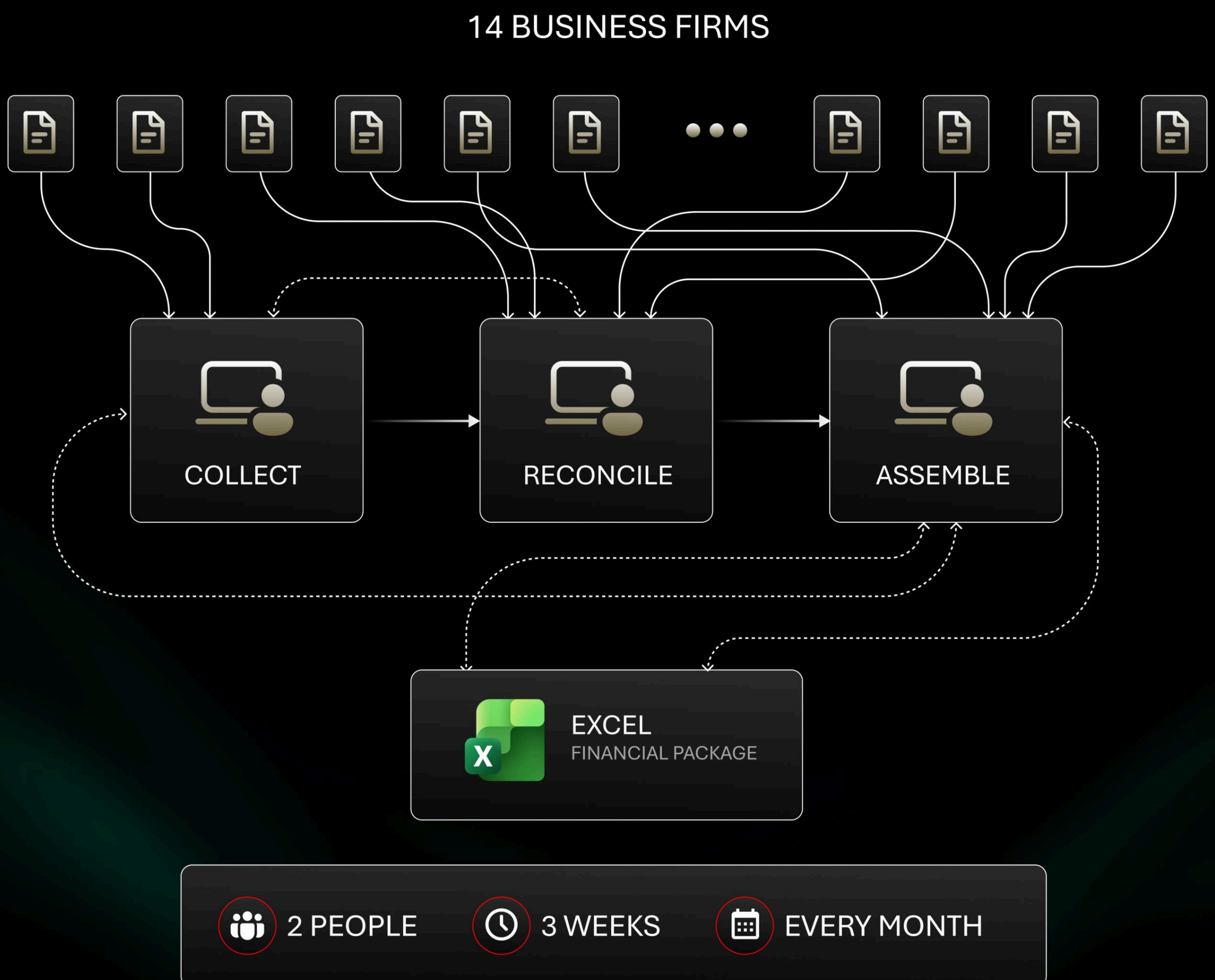
This is the second chapter of HFW's data journey. In the first, the company unified thirteen ERPs into a single analytics foundation on Microsoft Fabric in ninety days. In the second, that foundation was extended into the heart of how HFW runs its finance function. Since then, the group has continued to grow, with one further acquisition bringing HFW to fourteen business units by April 2026.



A Financial Package That Leadership Depends On

HFW Companies is a national group of architecture and engineering firms that has expanded rapidly through acquisition. Every month, the finance organisation produces a Financial Package for the board and investors. It is one of the most visible documents the company produces, and the standard for accuracy is absolute.

The process that produced this package had evolved alongside the business. Two full-time members of the finance team spent two weeks every month collecting data, reconciling it manually across fourteen business units, and stitching it together in Excel. The team delivered what leadership needed each month, though the work consumed significant capacity that the executive team saw could create more value elsewhere.



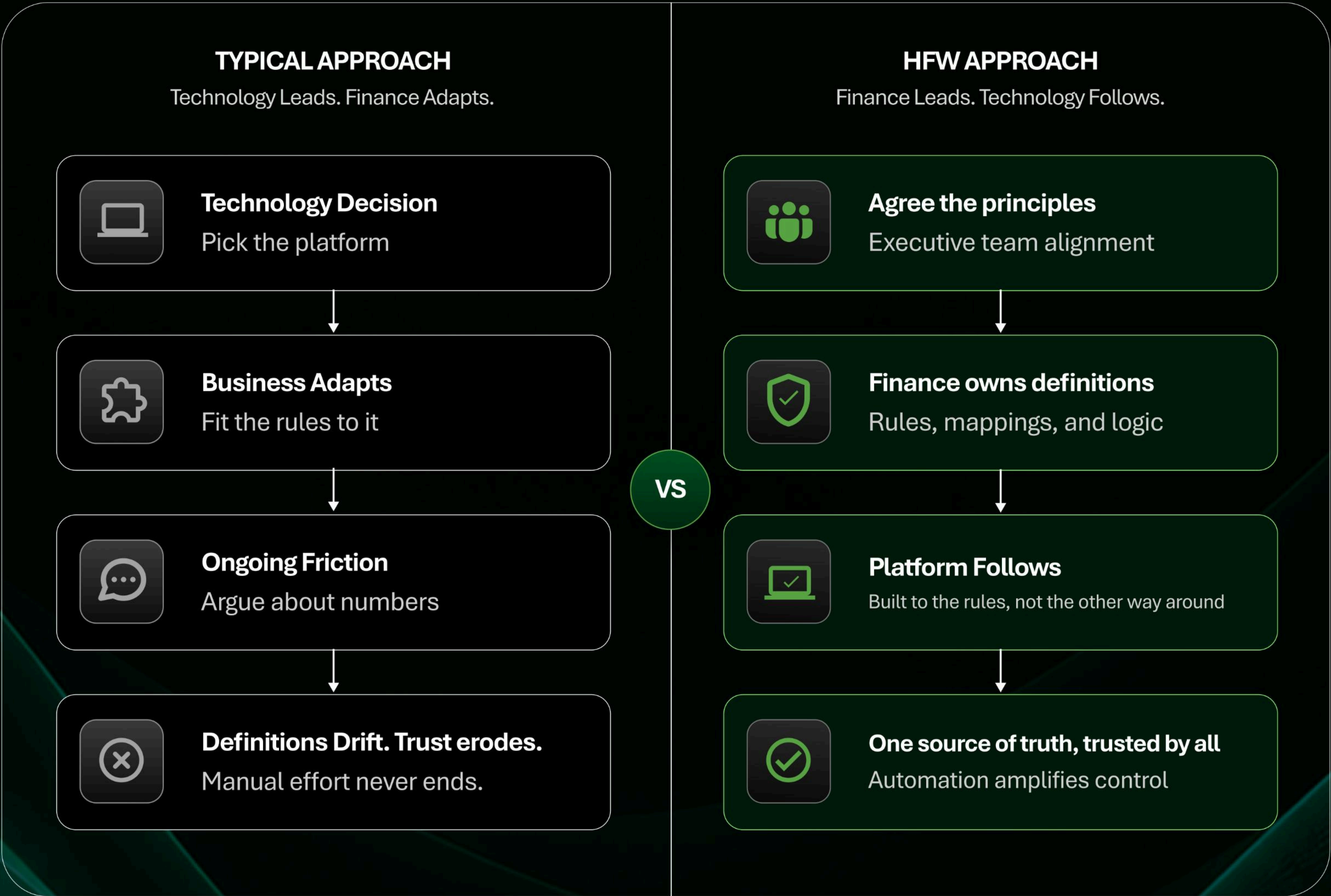
Leadership Set the Bar Before the Technology

The transformation started with a conversation about expectations, not about tools. The executive team agreed on three principles that would shape every decision that followed:

- Every number in the Financial Package would have one unified definition.
- Accuracy would be held without compromise.
- Finance would own the definitions, with technology following the business rules rather than the other way around.

Shreena Fulani, Director of Business Intelligence, led the transformation on the HFW side, working with Landon Bradford, Business Intelligence Analyst, to extend the Medallion architecture established in the first phase of HFW's data journey into a finance-grade data platform on Microsoft Fabric.

Michelle Huber, Senior Vice President of Finance, and Becky Garner, Accounting Manager, drove the accounting and finance side of the transformation, working hand in hand with the BI team. The depth of financial knowledge they brought shaped how every definition, mapping, and reconciliation rule was designed, and turned a technical platform into a finance-grade one.



A Finance-Grade Data Platform on Microsoft Fabric

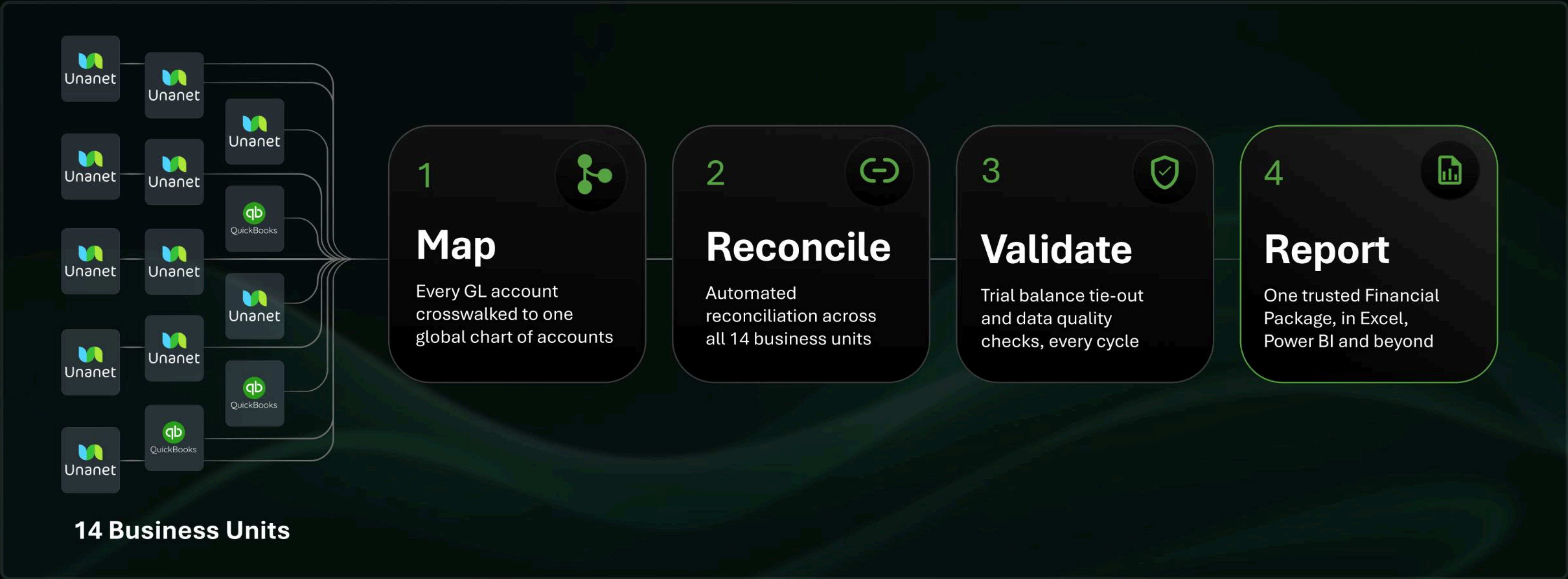
Data flows directly from every ERP into Microsoft Fabric. Every chart of account mapping and every manual adjustment lives in one governed place, where finance maintains the logic behind every consolidated number. From that single source of truth, the platform runs:

- Automated reconciliation across all fourteen business units, and every new acquisition onboards into the same framework
- Validation rules at every stage of the pipeline
- Trial balance checks every month
- A completeness and accuracy check before any number reaches a report

Finance-Grade Controls.

Governed, automated, trusted

Controls built in at every step so the numbers you report are the numbers **leadership can trust.**

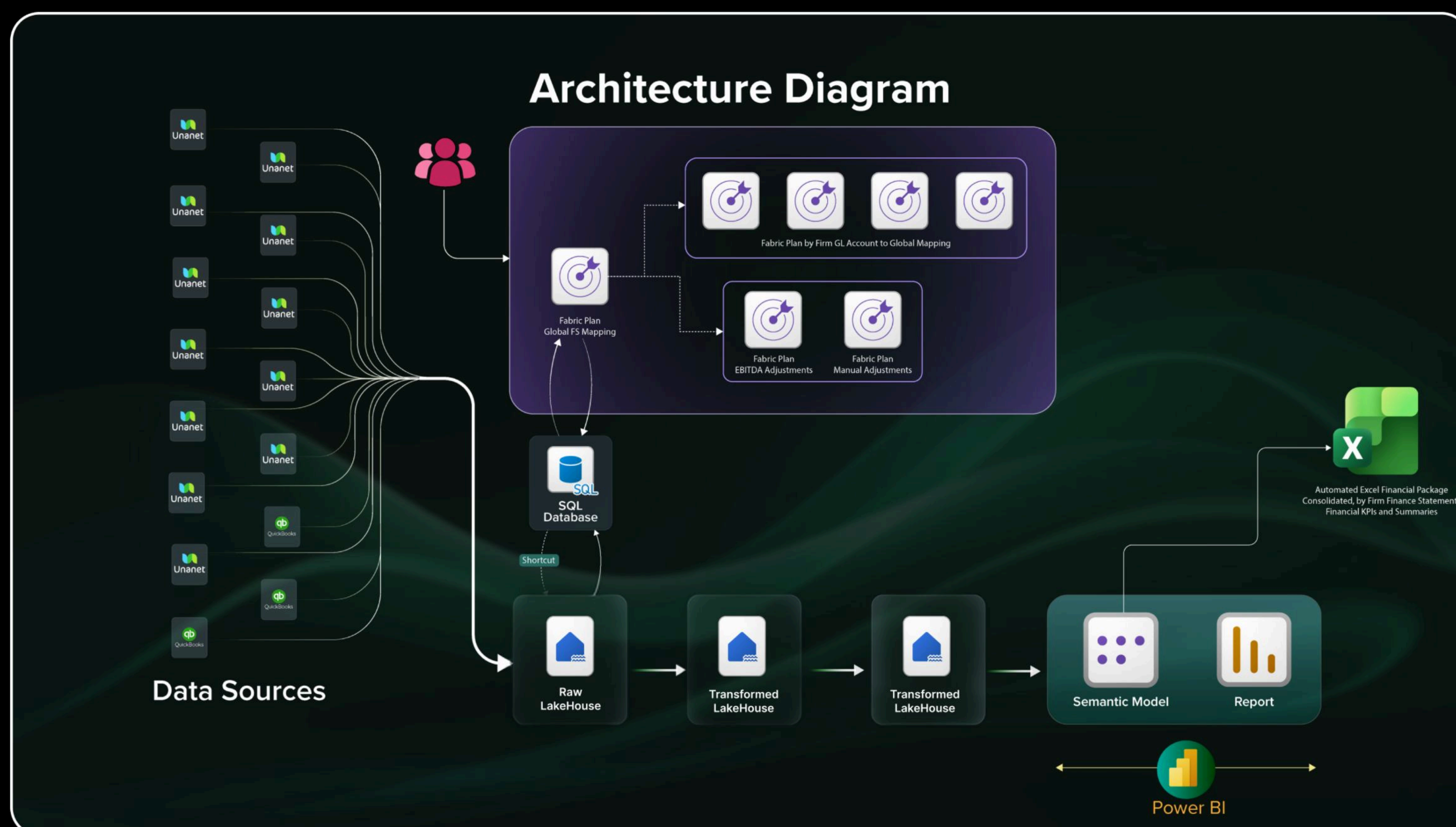


**Governed**
One source of truth

**Owned by Finance**
Rules, logic, & definitions

**Traceable**
End-to-end lineage

**Secure.**
Role-based access.



The platform follows the Medallion architecture from HFW's first data foundation. Raw data lands first, then a unified business layer governs how revenue, cost, account, entity, and period are interpreted across the group, and the semantic model that drives the Financial Package sits on top. Inside that unified layer, **Fabric Planning with its Data Management** capability (formerly PowerTable) holds every chart of account mapping and every manual adjustment under an approval-based policy. Changes are proposed, reviewed, recorded, and traceable. The metadata that defines how the Financial Package comes together is owned by finance and ready for audit at any time.

A validation framework sits above the foundation. External trial balances are kept apart from the transactional systems, and the platform reconciles its own trial balance against them every month. A dashboard tracks the process, and the moment a GL account breaks tolerance, it is flagged at the account level with full lineage back to source. The finance team sees the issue, traces it, and resolves it well before it reaches a report.

On top sits the Power BI semantic model that drives the Financial Package. Excel connects to it live, so the P&L, balance sheet, and cash flow all draw from one governed source. The pipeline refreshes every night, which turns the financial close from a monthly event into any-day visibility. Leadership can open the package on any day of the month and see where the business stands, confident that the numbers have already been reconciled, validated, and signed off by the platform.



“Most people will point to the speed, but for me the biggest change is confidence. Every account is reconciled and validated before it reaches me, so I’m no longer wondering whether the numbers are right. I’m deciding what they mean.”

Rebecca Garner,
Accounting Manager, HFW Companies



Excel Is Still Where the Last Mile of Finance Happens

Excel remains the place where ad hoc analysis gets done and where the last mile of finance work lives at HFW, and that was never going to change. What changed is what Excel is now connected to. Anyone who has produced a monthly Financial Package in Excel alone knows the risks that come with it: manual stitching across multiple files, broken links, reconciliations done by hand, and updates redone every time a number moves. With a governed foundation underneath, those risks stay out of the process. Every number in the file flows live from the semantic model, every calculation refreshes from a single trusted source, and what needs to land in Excel now lands in minutes.

Excel: Same Experience, New Foundation.

Same Excel. Different Foundation.

Excel stays where finance works. The **risk is removed** from underneath.

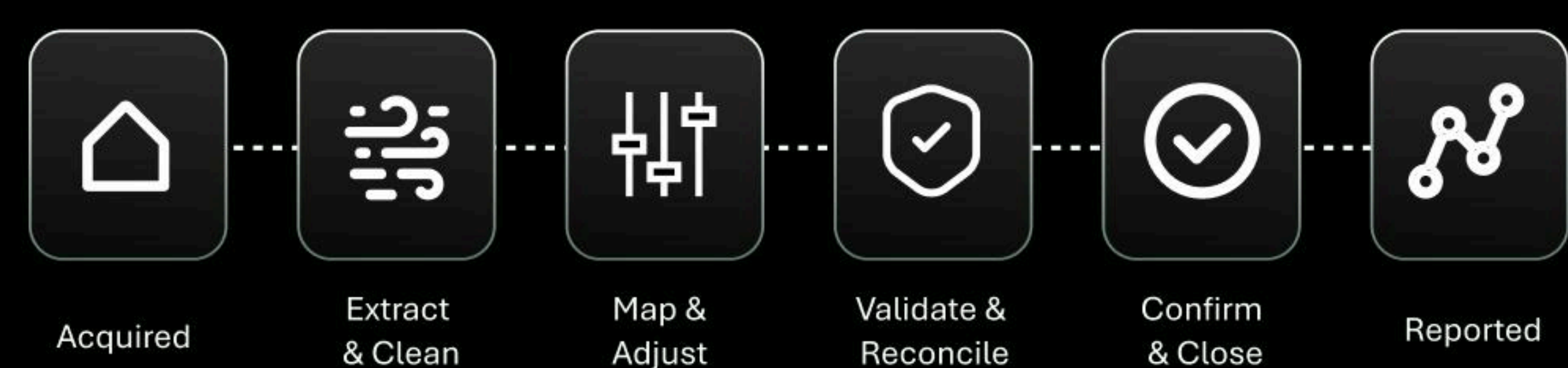


New Acquisitions, Reporting-Ready From the Start

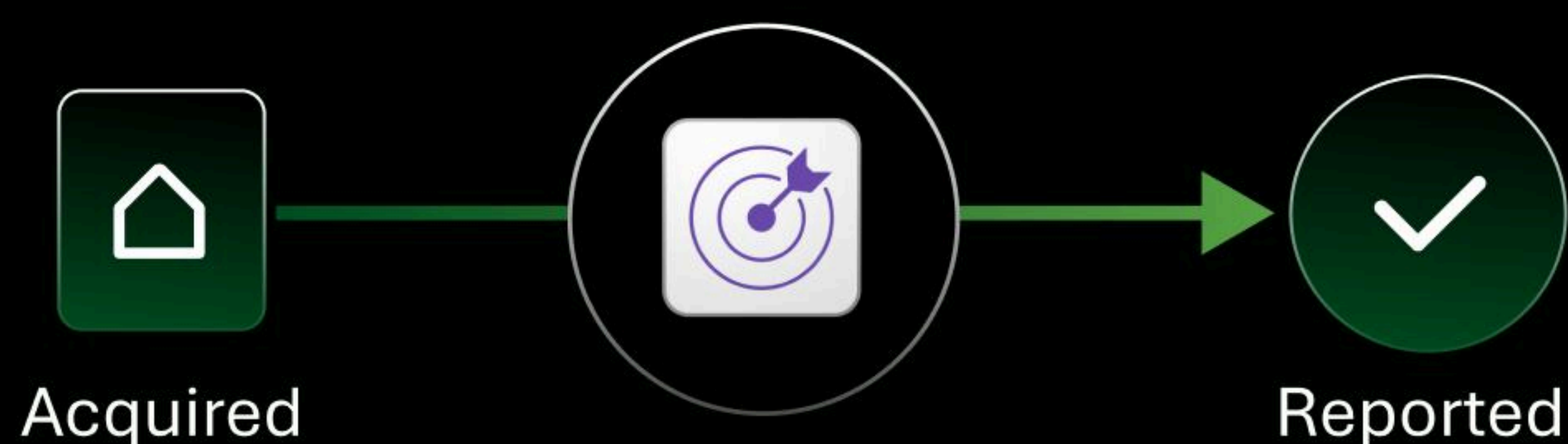
HFW grows through acquisition. The same foundation that powers the Financial Package now absorbs new companies directly into the reporting cycle. The company acquired in April 2026 was included in the Financial Package the same month, as acquisitions have been in the past. What changed is the work behind it: each new company’s accounts are now mapped to the HFW global chart of accounts and run through the same automated reconciliation and validation, rather than reconciled manually.

One Onboarding Step, Not Manual Rework

The reporting timeline did not change. What changed is the work that sits behind it, and how much of it repeats with every new company.



Before
Repeated In Full For Every Acquisition



Now
One Onboarding Step, Run On The Framework That Already Exists



Each new company’s accounts are mapped to the HFW global chart of accounts, then run through the same reconciliation and validation as every other business unit.



“Because the Medallion foundation was already in place, bringing a new company into finance reporting is now a mapping exercise, not a rebuild. This gives us an efficient and repeatable way to scale reporting as HFW grows.”

Landon Bradford,
Business Intelligence Analyst, HFW Companies

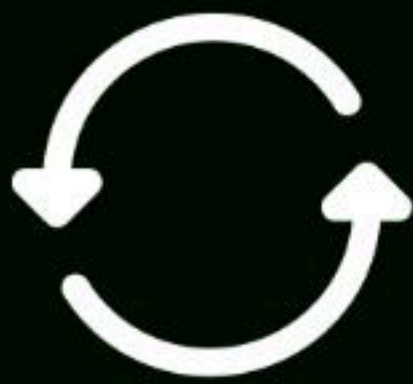
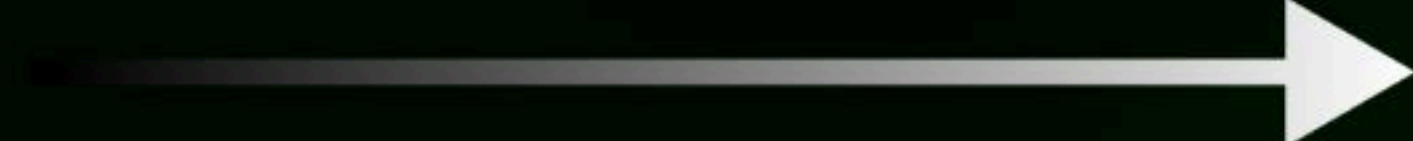
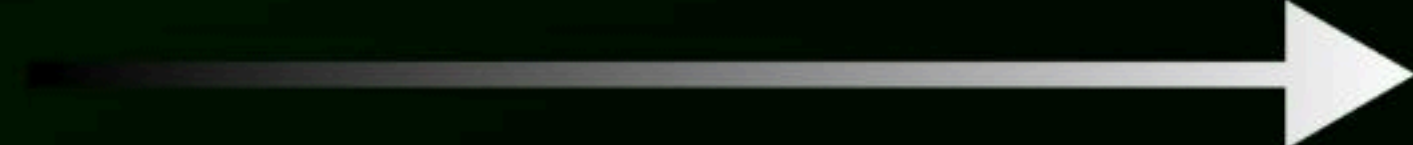
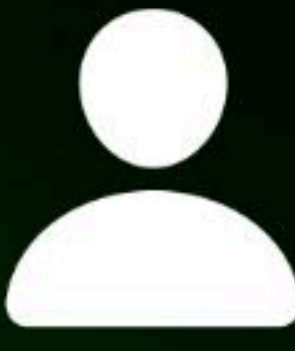


Why It Worked

Transformation Area	Before Microsoft Fabric Plan	After Microsoft Fabric Plan
Financial Package production	2 finance team members, 2 weeks per month, manual stitching across 14 ERPs	Nightly automated refresh, under 30 minutes on day one
Data ownership	Finance capacity spent assembling numbers	Finance owns definitions, reconciliation rules, and analysis
Reporting cycle	Numbers reached leadership up to two months after the period	Numbers available on day one after close
Accuracy assurance	Manual reconciliation, dependent on individual care	Automated reconciliation and validation every night, with trial balance checks every month
Acquisition integration	Manual account mapping and reconciliation for every new company	Included in the Financial Package from the month of acquisition, through one onboarding step
Role of finance	Assembling and reporting	Analysing, modelling, and partnering with the business

Proof In Results. Clarity In Impact.

Before vs. after across key areas that matter most.

	Before		After
 Data Availability	3 Weeks		<30 Mins
 Reporting Cycle	Up To 2 Months		4 Weeks (Reducing)
 Accuracy Assurance	Manual		Automated
 Acquisition Integration	Manual Rework		One Onboarding Step
 Role Of Finance	Assembling & Reporting		Analysis And Partnership

Technologies Used



Fabric



Fabric Planning



Power BI



Microsoft Excel



Data pipelines



Dataflows Gen2



Lakehouse



Fabric SQL Database

A Partnership That Went Beyond Technology

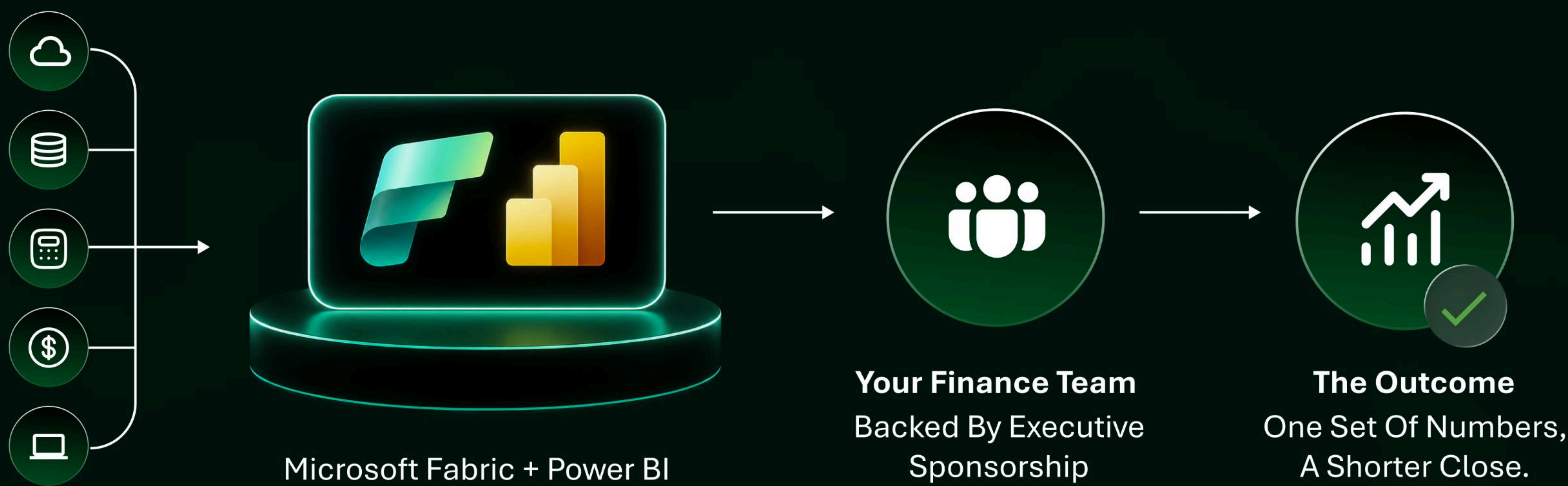
HFW's finance team partnered with Data Crafters throughout the build. Alongside the Fabric implementation, Data Crafters supported Michelle and her team on the process and finance side: designing the monthly workflow, translating accounting standards into reconciliation rules, and bringing finance-industry experience into the definitions themselves. The platform and the finance logic were built together, which is why the result reflects how HFW's finance function actually works.

What's Next

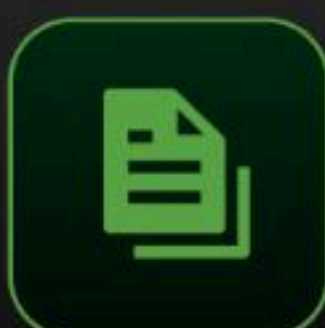
With the Financial Package running on a nightly cycle, HFW is preparing the next wave of work: Data Agents that answer finance questions conversationally. Deeper scenario modelling for acquisitions. Extension of the same foundation into additional finance and operational domains.

Modern Finance Starts With Data You Can Trust

Shared definitions, governed data and AI working from numbers, finance can stand behind.



Shared revenue
definitions



Reports reconcile
before sign-off



Less manual work
every close.



Audit ready
governance

We do not wait to standardize every source system first. We build the model to work with what you already have.

The Lesson for Finance Leaders

AI is only as good as your data, and in finance the bar for data is absolute. The value of a modern finance platform comes from unified definitions, clean reconciliation, clear ownership, and the steady removal of manual steps from the reporting cycle.

Microsoft Fabric and Power BI make the build possible. A finance team backed by an executive team that holds the standard makes it real.

Whether an organization runs fourteen ERPs or one, the path is the same.

Ready For A Finance-Grade Data Platform?

Let's talk about how Microsoft Fabric can
transform how your finance team works.



CONTACT US

