

POWER BI CONSULTING SERVICES

# From static *spreadsheets* to real-time SaaS financial intelligence.

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How Brewster Consulting Group delivered a custom Power BI Consulting Services solution — centralised SaaS KPIs, drill-down analytics, and automated reporting — to give Medefy's finance team the clarity to lead with confidence.

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**01 — THE CHALLENGE**

# Static tools in a dynamic SaaS *business — a visibility problem.*

Medefy, an innovative SaaS company operating in the healthcare benefits space, was experiencing growing pains when it came to financial visibility. As the company scaled, so did the complexity of its data and reporting needs. While Medefy had access to the financial data it needed, their existing tools lacked the agility, clarity, and depth to turn that information into meaningful insights. Their reporting relied on a patchwork of static spreadsheets that weren't designed to handle the unique demands of Power BI Consulting Services for SaaS financial reporting.

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**WHERE THE REPORTING WAS FAILING**

## **01** No SaaS-specific financial metrics

MRR, CAC, CLTV, and churn rate were impossible to track consistently — the very KPIs critical to forecasting and performance evaluation in a SaaS model.

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## **02** Static, disconnected reporting tools

The team had no ability to run trend analysis, time-based comparisons, or real-time visibility into financial performance across the business.

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## **03** Manual data consolidation from multiple systems

Wasted hours, increased error risk, and reporting delays resulted from stitching together exports by hand every reporting cycle.

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## **04** No drill-down capability

When performance fluctuated, the finance team had no way to trace the issue back to specific drivers, accounts, or customer segments.

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## **05** Finance team stuck in reactive mode

Without reliable, accessible data, decision-making was slower, less confident, and driven by gut feel rather than Power BI Consulting Services-enabled insight.

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*"Medefy needed Power BI Consulting Services that could turn SaaS complexity into financial clarity — not another static report to maintain."*

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**02 — OUR APPROACH**

# A Power BI Consulting Services solution built for SaaS — *and built to scale.*

Brewster Consulting Group designed and delivered a custom Power BI Consulting Services financial dashboard solution built specifically to support Medefy's SaaS business model. The engagement was structured to eliminate manual reporting, surface the right KPIs at every level, and give both the finance team and executive leadership on-demand access to the metrics that drive decisions.

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**KEY FEATURES & DELIVERABLES**

- **Centralised SaaS financial KPIs**  
MRR, CAC, CLTV, and churn rate unified in a single interactive Power BI environment — eliminating data silos and streamlining reporting across teams.
- **Full drill-down functionality**  
Move from high-level executive summaries to account-level financial data in seconds — giving the finance team instant root-cause capability.
- **Self-service design for all users**  
Dashboard built for both finance analysts and C-suite — accessible, intuitive, and designed for self-service exploration without technical support.
- **Dynamic filters & time-based comparisons**  
Users can identify performance trends, outliers, and growth opportunities over any time horizon with Power BI Consulting Services-built filter logic.
- **Automated data flows**  
Manual reporting tasks eliminated through Power BI Consulting Services automation, freeing dozens of hours per month for higher-value financial analysis.
- **Scalable architecture**  
The Power BI Consulting Services solution was designed not just for current needs but to grow alongside Medefy as the business expands its product and customer base.

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SAAS ANALYTICS

FINANCIAL DASHBOARD

MRR / CAC / CLTV

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**03 — RESULTS & IMPACT**

# From manual reporting to *strategic finance enablement.*

The rollout of the Power BI Consulting Services financial dashboard created an immediate and meaningful shift in how Medefy approached financial management and strategic planning. The finance team gained on-demand access to the metrics that matter — and the hours they were spending on manual work were redirected to the analysis that actually drives growth.

## On-demand

REAL-TIME ACCESS  
TO ALL KPIs

## Dozens

HOURS FREED  
PER MONTH



DRILL-DOWN PATHS  
TO ROOT CAUSE

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**WHAT CHANGED FOR MEDEFY**

- ✓ **On-demand financial visibility, company-wide**  
Leadership and finance now access real-time snapshots and historical trends instantly — no more waiting days for manually compiled reports.
- ✓ **Dozens of hours freed per month**  
Time previously spent on data cleaning, reconciliation, and report creation is now focused on scenario modelling, revenue optimisation, and stakeholder engagement.
- ✓ **Cross-department alignment on financial performance**  
From the CFO to customer success, the entire organisation shares a consistent view of how the company is performing — built on a single Power BI Consulting Services platform.
- ✓ **Faster, more confident decision-making**  
Decision-makers track performance daily, identify issues early, and adjust course with confidence — powered by Power BI Consulting Services and real data.
- ✓ **A scalable financial foundation**  
The dashboard was built to grow alongside Medefy, supporting future SaaS metrics, new product lines, and expanding reporting needs without rebuilding from scratch.

*"Medefy moved from fragmented, reactive reporting to a centralised, data-driven environment — built by Brewster's Power BI Consulting Services team."*



LET'S BUILD YOUR POWER BI ENGINE

# Looking for Power BI Consulting Services that turns financial data *into decisions?*

Brewster Consulting Group empowers organizations through comprehensive data management, process improvement, and project management. Whether you're a SaaS startup or an enterprise scaling fast, our Power BI Consulting Services team builds tailored, end-to-end financial dashboard solutions that give your team the clarity to act with confidence.

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### THREE WAYS OUR POWER BI CONSULTING SERVICES HELP

#### STAND UP

Build a Power BI foundation from scratch — data modelling, KPI dashboards, and governance.

#### SCALE UP

Take an existing Power BI environment from fragile to enterprise-grade and fully self-serve.

#### TUNE UP

Audit, optimise, and harden an existing Power BI deployment so it actually drives decisions.