

DATA VISUALIZATION CONSULTING

From static spreadsheets to strategic *finance* intelligence.

How Brewster's data visualization consulting gave Medefy real-time visibility into SaaS financial performance — and freed their finance team to focus on strategy.

CLIENT
Medefy

INDUSTRY
SaaS / Healthcare

TOOL
Power BI

Q1 SERVICE
**Data Visualization
Consulting**

THE CHALLENGE

Medefy, an innovative SaaS company in the healthcare benefits space, was growing fast — but their financial visibility wasn't keeping pace. Static spreadsheets and disconnected tools couldn't handle SaaS-specific metrics or deliver the real-time clarity leadership needed.

THE SOLUTION

Brewster designed and delivered a custom Power BI financial dashboard built specifically for Medefy's SaaS business model — centralizing KPIs, enabling real-time drill-downs, and automating the manual reporting that was consuming dozens of hours per month.

KEY SaaS METRICS TRACKED



THE OUTCOME

- **On-demand financial visibility**
Real-time snapshots replacing week-long waits
- **Dozens of hours saved monthly**
Finance team freed from manual data work
- **Cross-department alignment**
CFO to customer success on the same page

01 — THE CHALLENGE

Static tools for a *dynamic SaaS business.*

Medefy's finance and executive teams faced several recurring challenges due to limited access to centralized, real-time financial insights. Their reporting systems relied on a patchwork of static spreadsheets and basic tools that were not designed to handle the unique demands of SaaS financial reporting — especially in an industry as dynamic and tightly regulated as healthcare benefits. Without modern data visualization consulting infrastructure, the finance team found it increasingly difficult to understand, monitor, and communicate financial performance at the pace the business required.

KEY PAIN POINTS

- ➔ **Difficulty with SaaS-specific financial metrics**
Metrics like MRR, CAC, CLTV, and churn rate — critical to forecasting and performance evaluation — were hard to analyze and report on without purpose-built data visualization.
- ➔ **Static and disconnected reporting tools**
Existing tools lacked the ability to support trend analysis, time-based comparisons, or real-time visibility into financial performance.
- ➔ **Manual workarounds to consolidate data**
Pulling data from multiple systems manually resulted in wasted time, increased risk of human error, and reporting delays that slowed executive decision-making.
- ➔ **Limited drill-down capability**
The finance team could not trace performance fluctuations back to specific drivers, accounts, or segments — blocking root-cause analysis entirely.

These issues weren't just operational hurdles — they were preventing the finance team from playing a more strategic role in the organization. Decision-making was slower, less confident, and often reactive rather than proactive.

02 — THE SOLUTION

A financial dashboard built for SaaS — and designed *to scale.*

To help Medefy address these pain points, Brewster Consulting Group designed and delivered a custom Power BI financial dashboard solution through expert data visualization consulting — built specifically to support the company's SaaS business model and provide executive-level visibility into real-time performance. The dashboard environment was created not just to serve current needs, but also to scale alongside the business.

KEY FEATURES & CAPABILITIES

Centralized Financial KPIs

All metrics in a single interactive environment, eliminating silos and streamlining workflows.

Dynamic Filters & Time Comparisons

Identify performance trends, outliers, and growth opportunities across any time period.

User-Friendly Design

Accessible to finance analysts and executive leadership alike — built for self-service.

SaaS-Specific Metric Tracking

Flexible design built around MRR, CAC, CLTV, churn, and other SaaS growth indicators.

Drill-Down Functionality

Move from high-level summaries to account-level financial data within seconds.

Automated Data Flows

Reduced burden on internal teams by eliminating repetitive manual reporting tasks.

The solution also helped reduce the burden on internal teams by automating data flows and eliminating repetitive manual reporting tasks — freeing the finance team to focus on higher-value analytical work rather than data preparation.

03 — THE RESULTS

Empowered, efficient, *and insight-driven.*

The rollout of the Power BI financial dashboard created a meaningful and immediate shift in how Medefy approached financial management and strategic planning. The impact of expert data visualization consulting was felt across every level of the organization.

WHAT CHANGED

ON-DEMAND VISIBILITY

Leadership and finance teams now have on-demand access to the metrics that matter — real-time snapshots and historical trends — instead of waiting days or weeks for manually compiled reports.

CROSS-DEPARTMENT ALIGNMENT

Improved communication across departments: from the CFO to customer success, everyone has a shared understanding of financial performance, enabling better collaboration around goals, budget reviews, and revenue strategy.

HOURS RECLAIMED MONTHLY

The finance team freed up dozens of hours per month previously spent on data cleaning, reconciliation, and report creation — time now focused on scenario modeling, revenue optimization, and stakeholder engagement.

PROACTIVE DECISION-MAKING

Decision-makers can now track performance daily, identify issues early, and adjust course with confidence — shifting the finance function from reactive to strategic.

04 — CONCLUSION

By partnering with Brewster Consulting Group for data visualization consulting, Medefy was able to move from fragmented, reactive financial reporting to a centralized, data-driven decision-making environment. The tailored Power BI dashboard solution has given the company the structure, scalability, and clarity it needed to operate with precision and confidence in a competitive SaaS landscape.



Today, Medefy is not just tracking financial performance — it's strategically leveraging it to drive growth, improve forecasting, and build long-term value for stakeholders.

READY TO TRANSFORM YOUR FINANCIAL REPORTING?

Data visualization consulting for finance *teams that need clarity.*

Brewster Consulting Group helps finance teams and executives go from disconnected spreadsheets to real-time visual intelligence — building Power BI dashboards and data models that make every KPI actionable.

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HOW WE CAN HELP

STAND UP

Build a BI foundation from scratch — ETL, data modeling, dashboards, and KPI governance.

- ETL & Data Modeling
- KPI Framework Design
- Power BI Dashboard Build
- Governance Setup

SCALE UP

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

- Performance Optimization
- Self-Serve Analytics
- Enterprise Scalability
- Row-Level Security

TUNE UP

Audit and optimize an existing dashboard so it actually drives strategic decisions.

- Dashboard Health Audit
- UX & Usability Review
- Metric Alignment
- Stakeholder Training