

BUSINESS INTELLIGENCE CONSULTING SERVICES

# From *fragmented spreadsheets* to a real-time SaaS finance command center.

How **Brewster Consulting Group** delivered end-to-end **Business Intelligence Consulting** — modeling SaaS financial metrics and shipping a purpose-built Power BI dashboard — so a healthcare-benefits SaaS could track MRR, CAC, CLTV, and churn in one place.

CLIENT	ENGAGEMENT	FOCUS	PRACTICE
Medefy — Healthcare SaaS	Power BI Financial Dashboard Build	SaaS KPIs: MRR, CAC, CLTV & churn	Business Intelligence Consulting Services

## 01 – THE CHALLENGE

# Static tools for a *dynamic SaaS business* — until Business Intelligence Consulting brought the numbers to life.

**Medefy**, an innovative SaaS company in the healthcare benefits space, had access to the financial data it needed — but its reporting stack was a patchwork of static spreadsheets that could not handle the demands of SaaS finance. Without modern **Business Intelligence Consulting Services** in place, the finance team struggled to monitor and communicate performance at the pace the business required.

## WHERE REPORTING WAS BREAKING DOWN

## 01 SaaS metrics buried in spreadsheets

MRR, CAC, CLTV, and churn — the metrics that define a SaaS business — couldn't be analyzed or forecasted with the existing tools.

## 02 Static, disconnected reporting

No trend analysis, no time-based comparisons, no real-time visibility — just snapshots that were already stale by the time they shipped.

## 03 Manual consolidation across systems

Pulling data from multiple sources by hand burned hours, introduced human error, and delayed every reporting cycle.

## 04 Limited drill-down capability

When a number moved, the finance team couldn't trace it back to the account, segment, or driver responsible.

## 05 Finance stuck in reactive mode

Without reliable, accessible data, decisions were slower and less confident — and finance couldn't take on the strategic role the business needed.

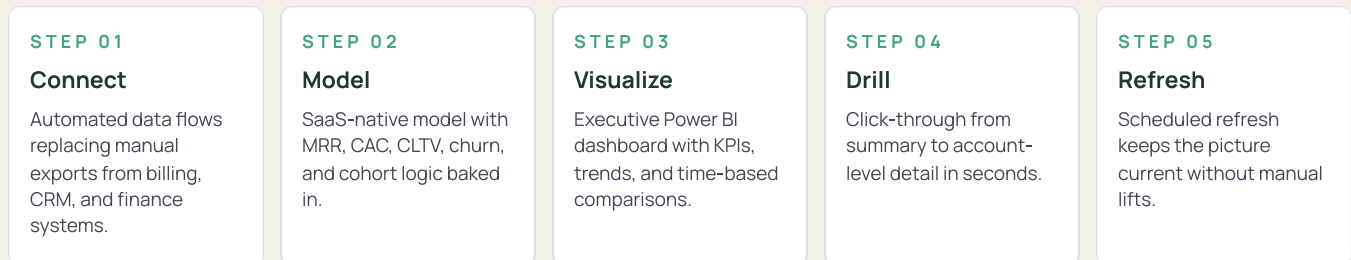
"Medefy needed a Business Intelligence Consulting partner who could turn a patchwork of static reports into a real-time, drill-downable view of SaaS performance."

## 02 – OUR APPROACH

# A Power BI financial dashboard purpose-built for SaaS – and built to scale with the business.

Brewster’s Business Intelligence Consulting team designed and delivered a custom Power BI financial dashboard, engineered around Medefy’s SaaS model and the questions leadership was already asking. Every layer – data flow, model, visualization, refresh – was built to serve real decisions.

## THE PIPELINE WE BUILT



## WHAT THE ENGAGEMENT INCLUDED

- **Centralized SaaS KPIs**  
One interactive reporting environment for the financial KPIs that matter, eliminating silos across teams.
- **Drill-down to the account level**  
Move from a high-level summary to specific accounts and drivers in seconds – no SQL required.
- **Flexible metric tracking**  
Metrics built around SaaS-specific needs – so the dashboard stays relevant as Medefy evolves and expands.
- **Executive & analyst friendly**  
A user-friendly design that supports both finance analysts and executive leadership for self-service exploration.
- **Dynamic filters & time comparisons**  
Surface trends, outliers, and growth opportunities across periods, segments, and cohorts.
- **Automated data flows**  
Repetitive manual reporting tasks eliminated, freeing the finance team for higher-value work.

POWER BI

SAAS ANALYTICS

FINANCIAL MODELING

DASHBOARD DESIGN

BI STRATEGY

MRR · CAC · CLTV · CHURN

## 03 – RESULTS &amp; IMPACT

# Empowered, efficient, and insight-driven – finance moved from reactive reporting to strategic enablement.

With Brewster's Business Intelligence Consulting Services in place, Medefy went from fragmented, reactive financial reporting to a centralized, data-driven decision environment. Leadership now has on-demand visibility into the metrics that move the business.

**Daily**PERFORMANCE TRACKING  
INSTEAD OF WEEKLY**Dozens**OF FINANCE HOURS  
RECLAIMED EACH MONTH**1**SHARED VIEW ACROSS  
CFO, REVOPS & CS

## WHAT CHANGED FOR MEDEFY

- ✓ **On-demand access to the metrics that matter**  
Real-time snapshots and historical trends – no more waiting days or weeks for manually compiled reports.
- ✓ **Earlier issue detection**  
Decision-makers track performance daily, identify issues early, and adjust course with confidence.
- ✓ **Better cross-department alignment**  
From the CFO to customer success, everyone shares the same view of how the company is performing.
- ✓ **Finance hours redirected to strategy**  
Dozens of hours per month freed from cleaning, reconciliation, and reporting – redirected to modeling and revenue optimization.


LET'S BUILD YOUR BI ENGINE

# Looking for Business Intelligence Consulting Services that turn data into decisions?

Brewster Consulting Group empowers organizations through comprehensive data management, process improvement, and project management. Whether you're starting with a spreadsheet or sitting on millions of rows, our Business Intelligence Consulting team helps you unlock the value of your data with tailored, end-to-end solutions.

## Will Oyarzabal

OPERATIONS &amp; DATA ADVISOR

 [will.oyarzabal@brewsterconsulting.io](mailto:will.oyarzabal@brewsterconsulting.io) [www.brewsterconsulting.io](http://www.brewsterconsulting.io)

## Three ways our Business Intelligence Consulting Services help

### STAND UP

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

### SCALE UP

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

### TUNE UP

Audit, optimize, and harden an existing Power BI or Tableau deployment so it actually drives decisions.

