

Partner Case Study

Empowering a Partner to Deliver Consolidated Power BI Analytics

MICROSOFT FABRIC

POWER BI

PARTNER-LED DELIVERY

01 AT A GLANCE

Softwerx identified an opportunity within their client base for a Microsoft Fabric and Power BI build that went beyond their own delivery capability.

They reached out to Westcoast Cloud to see if there were any specialist support they could benefit from. After listening to their requirements, Westcoast Cloud introduced them to Dogma Group as the right specialist for the job.

Dogma ran the engagement end-to-end — with Softwerx kept informed and brought in at the right moments — and delivered a live analytics platform that has since opened the door to multiple further opportunities.

PARTNER

Microsoft Solutions partner who introduced the engagement but lacked the expertise.

END CLIENT

A growing organisation in a specialist B2B services sector, with multiple data sources following recent acquisitions.



TECHNOLOGY USED

Microsoft Fabric & Power BI

02 THE ENGAGEMENT MODEL

The engagement followed a clean partner-led pattern that protected the Softwerx–client relationship throughout:



Softwerx approached Westcoast Cloud through Cloud Connections, explaining an opportunity and a clear view of what their client needed.



Westcoast Cloud facilitated a meeting between Dogma and Softwerx to align on scope and commercials.



Softwerx introduced Dogma to the client and facilitated the technical discovery sessions.



Softwerx stepped back, Dogma ran it. We reported back regularly and brought Softwerx in when it mattered, but the day-to-day client relationship was led by Dogma.

03 THE CHALLENGE



The client's reporting and analytics could no longer keep pace with the business. Critical data sat across an operational database, a financial system, and a CRM platform, with recent acquisitions adding further sources. Reporting relied on manual spreadsheet processes — slow, error-prone, and unable to scale alongside high transaction volumes and multi-currency billing.

The client had identified Power BI as the right platform but needed specialist Microsoft Fabric expertise to design and deliver it. Softwerx needed a delivery partner who could engage the client professionally and protect the long-standing partner–client relationship throughout.

04 APPROACH AND SOLUTION

Dogma led the engagement end-to-end, keeping Softwerx informed throughout.

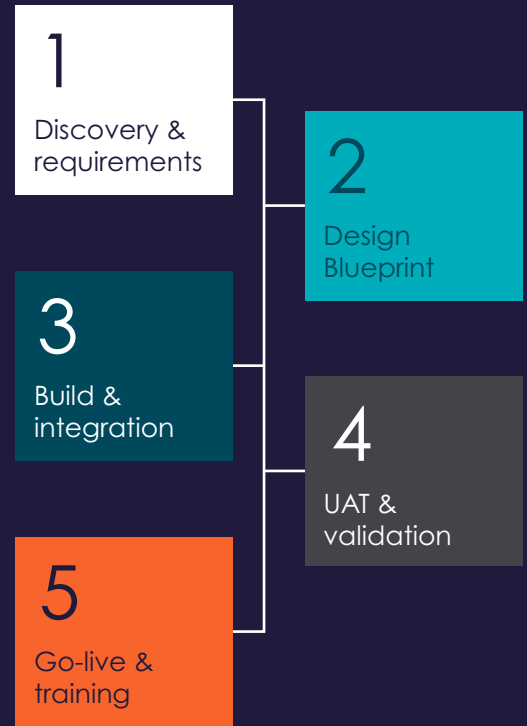
Discovery and requirements capture with the client; a formal Design Blueprint covering metrics, semantic model and integration patterns; build of the Fabric platform, Power BI model, custom connectors and dashboards; UAT covering accuracy, security and refresh validation; and go-live with training for both end users and power users.

Solution architecture

A four-layer analytics platform on Microsoft Fabric:

- **Data sources:** the client's operational database, financial platform, and CRM — connected via secure, monitored pipelines.
- **ETL and integration:** Microsoft Fabric pipelines with incremental extraction, currency conversion, validation, and full audit logging.
- **Data warehouse:** a Microsoft Fabric Lakehouse with full Medallion architecture (Bronze, Silver, Gold) feeding a consumption-ready star schema.
- **Power BI analytics:** a Direct Lake semantic model with optimised dimensional design, DAX measures, and row-level security.

Delivery in five stages



05 WHAT WAS DELIVERED

Phase 1 is complete and live, refreshing daily for Finance, Operations, Sales and Management teams.

Live dashboards cover

Validated at go-live: revenue reconciliation within a tight variance threshold, sub-30-minute daily refresh, sub-3-second dashboard load, high refresh reliability, and a platform designed to serve 150+ users across Finance, Operations, Sales and Management.

06 WHAT SOFTWERX GOT OUT OF IT

FAST

Specialist services delivered through the partner introduction

PULLED THROUGH

Additional Power BI licences sold via Softwerx

MULTI-PHASE

Pipeline of follow-on opportunities generated

- **Referral income** from approximately 50 days of professional services they would not have delivered themselves.
- **Power BI licences pulled through Softwerx**, generating direct licensing revenue alongside the services.
- **Strengthened standing with the client.** The client thanked Softwerx for the introduction — reinforcing Softwerx's role as a strategic advisor, not a transactional supplier.
- **Dogma as an on-call specialist capability** that Softwerx can confidently bring to other clients in future, without building it in-house.

07 WHAT THE CLIENT GOT OUT OF IT



Daily automated reporting across portfolios, revenue, and operations — replacing the previous manual spreadsheet processes.



Multi-currency, constant-currency reporting for consistent period-over-period comparison across entities.



Self-service drill-down for finance, operations, sales and management teams, without dependency on a central reporting function.



A scalable, AI-ready foundation on Microsoft Fabric that supports future growth and unlocks Copilot-driven analytics.

08 WHAT CAME NEXT

A single Power BI introduction grew into a multi-stream strategic relationship — exactly the outcome a referral engagement is designed to produce.

- **Phase 2 Power BI** extending the platform onto the same Fabric architecture for a newly acquired business, with a planned Phase 3 consolidating reporting across the group.
- **Dynamics 365 Finance** now in proposal stage. Once live, it is expected to replace the client's current finance platform and feed directly into the Power BI environment.
- **Strategic CRM migration conversation** around moving from the client's existing CRM to Dynamics 365 — building on the trust established through the Power BI engagement.

WHY THIS MATTERS

Because Dogma built the original platform, they are uniquely positioned to deliver the next phases of work — with Softwerx continuing to share in the commercial upside.

09 ABOUT THE PARTNER

DOGMA GROUP

www.dogmagroup.co.uk

Delivering end-to-end CRM, ERP solutions with D365, Salesforce & Power Platform - in collaboration with our partners.

SOLUTIONS OFFERED

CONSTRUCTION

MANUFACTURING

DYNAMIC 365



WE SPECIALISE IN

Information Technology, Enterprise, Industrial, Business Services, Healthcare & Medical, Manufacturing, Academic, Charity and Government organisations.

WHAT MAKES US DIFFERENT

We deliver outcome-focused solutions through transparent engagement with users and partners, leveraging a configure first methodology and impartial, product-agnostic guidance. Our fairness-first approach includes fixed-cost guarantees and a commitment to rigorous quality assurance at every stage.



HOW CAN WE HELP

We deliver:

1. CRM & ERP Consulting

- Health- checks & Discovery assessments
- Fully managed project delivery: scoping, documentation, development, testing, data migration
- 24/7 comprehensive support services
- Flexible training programs tailored to client needs
- Licensing guidance (procurement managed via the partner)

2. Partner Engagement & Development |

- Dedicated Westcoast partner team
- Attractive referral programs

3. Delivery Methodology

- Configure-first, product-agnostic approach to maximise platform value
- Fixed-cost delivery guarantees with robust quality assurance at every stage

This case study reflects a partnership in action — each company bringing its specialist strength to the table, the engagement designed around the client's success and the partner relationship protected throughout.



LOOKING FOR A SPECIALIST PARTNER LIKE DOGMA GROUP?

At Westcoast Cloud, we can help you get in touch with your perfect specialist partner. Just head over to our Cloud Connections webpage by clicking the link below.

[FIND YOUR MATCH](#)