



CASE STUDY

ACCELERATED DATA INSIGHTS

THE CHALLENGE

Operating multiple business units, each with its own data systems and practices, the company struggled with fragmented financial reporting. Connecting data for reports or analytics was a manual and time-consuming process. Leadership lacked a clear, real-time view of business performance across units, making it difficult to prepare board materials efficiently or support proactive, data-driven decisions at the strategic level.

KEY PRIORITIES INCLUDED:

- **Enable** timely and clear insights for strategic decision-making.
- **Consolidate** financial reporting across all business units.
- **Support** data-driven decision-making at the holding company level.
- **Streamline** board deck preparation and other executive reports.
- **Ensure** stakeholder alignment via transparent reporting processes.

COMPANY SUMMARY

Founded in the late 1990s, this technology holding company operates through multiple independently run business units and provides integrated software solutions tailored to private clubs, golf courses, fitness centers and more. With a cloud-based infrastructure and a growing client base, the company sought to modernize its financial data and reporting capabilities to support strategic growth.



Industry

Software as a Service (SaaS)



Company Size

300+ employees

THE SOLUTION

To address the challenges of fragmented data and manual reporting, Lunavi first conducted in-depth stakeholder interviews, technical reviews and integration mapping sessions to ensure the proposed solution met the company's operational needs and long-term goals. Then we designed and implemented a centralized analytics platform tailored to the company's business structure. This solution brought together six different salesforce data sources, one Sage Data Source and one Dynamics 365 data source into one unified platform. The solution leverages Microsoft's modern data tools to provide timely, automated insights across all business units, enabling leadership to make data-driven decisions with confidence.



Centralized Reporting

Dashboards and reports unified financial data across all business units.



Automated Daily Refreshes

Replaced manual reporting with real-time, always-current updates.



Scalable Cloud Architecture

Built on Azure DataLake and Microsoft Fabric for long-term flexibility.



Interactive Dashboards

Power BI visualizations support segmentation and dynamic data views.

TECHNICAL SUMMARY

The solution leveraged Microsoft's cloud ecosystem to build a scalable and efficient data analytics platform. By combining Azure tools and modern data practices, the platform delivered real-time financial reporting and business intelligence.

- ✓ Microsoft Fabric and OneLake served as the core platform and centralized data repository.
- ✓ Azure Data Factory (ADF) orchestrated data pipelines and automate data integration tasks.
- ✓ Power BI and Power BI Report Builder provided interactive dashboards and financial reports.
- ✓ The system architecture supported secure, scalable analytics while allowing cross-BU data segmentation and access controls.



ACTIONABLE DATA DRIVEN DECISIONING

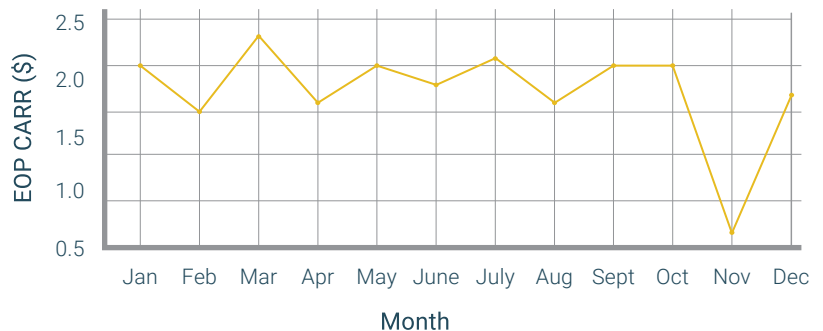
Net Retention in January

+208%

EOP CARR Peak in March

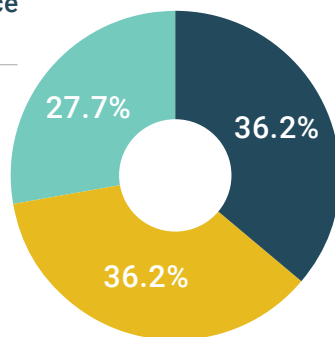
\$24M

End-of-Period (EOP) CARR by Month - 2023

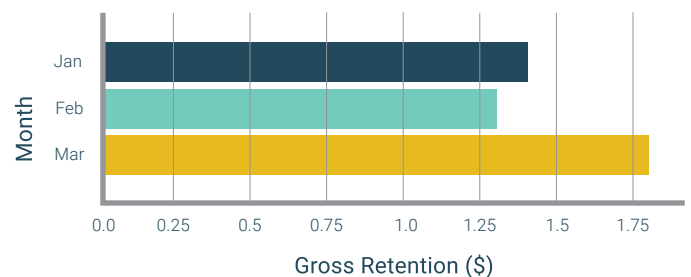


Revenue Contribution by Source (2023 Estimated)

- Upsell
- New Logo
- Existing Customer Activity



Gross Retention by Month (Jan - Mar 2023)



CONCLUSION

In just three months, Lunavi implemented a centralized analytics platform that unified financial reporting across business units. The solution replaced manual processes with automated, real-time insights used by leadership and key stakeholders. It now serves as a scalable foundation for smarter, faster decision-making across the organization.

ABOUT LUNAVI

Lunavi empowers organizations to navigate what's next in their digital transformation journey. Our solutions include custom AI development, data analytics, app modernization, and managed Microsoft Azure cloud solutions - helping organizations embrace the technologies of today and transform their ambitions into reality. Across multiple industries, Lunavi has led full scale IT transformations and supported teams with everything from datacenter infrastructure solutions to cutting edge predictive AI. With Lunavi by your side, next is now, and the future is yours to innovate.