FABRIC PLANNING ASSESSMENT · FOR FINANCE & CONTROLLING

Enterprise planning in Microsoft Fabric. **Does it work for your finance team?**

Budgets, forecasts and scenarios natively in Microsoft Fabric: in the Fabric Planning Assessment we check together whether Fabric Planning fits your enterprise planning – and show you the next steps.

3
Phases

1
Proof of concept

1
Decision paper

AT A GLANCE

The Fabric Planning Assessment for Finance & Controlling by Obungi checks whether planning in Microsoft Fabric is suitable for a company's enterprise planning. In three phases – kick-off and requirements, technical evaluation with a guided demo and a hands-on proof of concept, results and recommendation – Obungi looks at planning requirements, data architecture and organisation. The result is a decision paper with a recommendation, risks, next steps and a rough adoption path.

SERVICE	Suitability check of planning in Microsoft Fabric for budgeting, forecasting and scenarios in finance and controlling
PROVIDER	Obungi GmbH, Hamburg – Microsoft Solutions Partner and Microsoft Fabric Featured Partner
FORMAT	Focused workshops, a guided demo and a hands-on proof of concept on one prioritised planning process
PARTICIPANTS	CFO, head of controlling and IT
PROCESS	Kick-off & requirements → Technical evaluation → Results & recommendation
PERSPECTIVES	Planning requirements, Data & architecture, Organisation & change
RESULT	Decision paper with a recommendation, risks and next steps, a gap analysis and a rough adoption path
GETTING STARTED	Free initial call
CONTACT	Tim Kirchner, BI Consultant

STARTING POINT

Where classic planning **reaches its limits.**

Finance and controlling teams face a structural dilemma: analytical systems based on Microsoft Fabric, Power BI or the Azure Data Platform deliver precise insights into the past – while planning takes place alongside them in isolated tools, Excel workbooks or dedicated CPM systems.

01

Manual reconciliation

Plans and actuals are regularly reconciled by hand.

02

Rounds of alignment

Changes to assumptions trigger time-consuming rounds of alignment.

03

Many versions

Different planning versions circulate without clear data ownership.

04

No basis for AI

AI-supported planning cannot be implemented – the data foundation is missing.

Today: planning in an isolated platform

Source systems
ERP, CRM, HR and master data

↓ ETL 1: replicate transaction data into the planning platform

Isolated planning platform
Budget, forecast and scenarios in proprietary storage

↓ ETL 2: feed budgets and forecasts back for variance analysis

Enterprise BI
Plan/actual reporting in Power BI, insights with Copilot

DATA DUPLICATION, REDUNDANCY AND LATENCY

With Fabric Planning: one platform

Source systems
ERP, CRM, HR and master data

↓

Microsoft Fabric
Actuals, budgets, forecasts and scenarios on the same data – with reporting in Power BI and Copilot

PLAN AND ACTUALS IN ONE PLACE

Based on the presentation “Redefining Enterprise Planning in Microsoft Fabric”, Borkar / Krishnamurthy, FabCon Atlanta 2026.

PLANNING IN FABRIC IQ

What can **Planning in Fabric IQ do?**

Planning in Fabric IQ is a native enterprise planning capability within Microsoft Fabric – an extension of the analytics platform, not a separate system. Budgeting, forecasts and scenarios are created directly on your Fabric data: no export, no second system, no loss of time. The analytics platform becomes a decision platform.

Planning sheet with governance

Capture budgets, inputs and formulas in a structured way – rule-based instead of in loose spreadsheets.

Forecast & rolling forecast

Revenue projections directly on the semantic model – continuously updated.

Scenario & what-if analysis

Play through assumptions as scenarios without changing the base data.

Live simulation

Reports update in real time while values in the plan are adjusted.

Microsoft currently offers Planning in Fabric as a preview (source: Microsoft Learn, “Planning in Fabric”). The assessment takes the current feature set into account.

Request the Fabric Planning Assessment →

THE APPROACH

The foundation for **your planning strategy.**

In focused workshops and a proof of concept we look at requirements, data architecture and the organisational setting. Focused workshops instead of long projects – fast, compact and ready to act on.

PHASE 1

Kick-off & requirements

- Kick-off workshop (half a day) with CFO, head of controlling and IT
- Requirements: top 3 planning processes, cycles, stakeholders
- Review of the Fabric architecture and semantic models
- Identifying a pilot use case for phase 2

PHASE 2

Technical evaluation

- Guided demo of Fabric Planning, tailored to your use case
- Hands-on proof of concept: one prioritised planning process in Fabric Planning
- Assessment of semantic model maturity and data availability
- Gap analysis: requirements and the current platform situation

PHASE 3

Results & recommendation

- Presentation of results with the stakeholders (half a day)
- Decision paper: recommendation, risks, next steps
- Rough adoption path and optional follow-up phases

ASSESSMENT DIMENSIONS

A holistic understanding of **your planning landscape.**

The assessment looks at your planning from three perspectives – business, technical and organisational. The result is a complete basis for evaluation: it shows where you stand today and what Fabric can do for you.

BUSINESS

Planning requirements

- Budgeting
- Forecast & rolling forecast
- Scenario & simulation

TECHNICAL

Data & architecture

- Semantic model maturity
- Fabric integration
- Governance & access

ORGANISATIONAL

Organisation & change

- Operating model
- Roles & processes
- Skills & enablement

YOUR EXPERT

Your contact for the **Fabric Planning Assessment.**



Tim Kirchner
BI Consultant

Tim Kirchner is a BI Consultant at Obungi and guides you through the Fabric Planning Assessment.

As a Microsoft Solutions Partner, Obungi supports finance and controlling teams in implementing planning, forecasting and scenarios in Microsoft Fabric – on a governed data foundation, with a clear architecture and measurable value. Obungi is also a Microsoft Fabric Featured Partner.

Microsoft Fabric at Obungi →

Blog (in German): planning without data silos →

FAQ

Frequently asked questions about **Fabric Planning.**

What is the Fabric Planning Assessment for Finance & Controlling?

The Fabric Planning Assessment for Finance & Controlling by Obungi checks whether planning in Microsoft Fabric is suitable for a company's enterprise planning. In three phases – kick-off and requirements, technical evaluation with a guided demo and a hands-on proof of concept, results and recommendation – Obungi looks at planning requirements, data architecture and organisation. The result is a decision paper with a recommendation, risks, next steps and a rough adoption path.

What is Microsoft Fabric Planning?

A planning capability directly in Microsoft Fabric: budgets, forecasts and scenarios are created on the same data you use for analysis – without exporting to a separate tool.

What does Fabric Planning actually give us?

Plan data and actuals are in one place: no manual reconciliation, faster forecasts, scenarios at the push of a button and a foundation that AI and Copilot can build on.

How does the assessment work?

In three phases: Phase 1 „Kick-off & requirements“ (Kick-off workshop (half a day) with CFO, head of controlling and IT; Requirements: top 3 planning processes, cycles, stakeholders; Review of the Fabric architecture and semantic models; Identifying a pilot use case for phase 2), Phase 2 „Technical evaluation“ (Guided demo of Fabric Planning, tailored to your use case; Hands-on proof of concept: one prioritised planning process in Fabric Planning; Assessment of semantic model maturity and data availability; Gap analysis: requirements and the current platform situation), Phase 3 „Results & recommendation“ (Presentation of results with the stakeholders (half a day); Decision paper: recommendation, risks, next steps; Rough adoption path and optional follow-up phases).

What do we receive at the end of the assessment?

A presentation of the results with your stakeholders and a decision paper with a recommendation, risks and next steps. You also receive the gap analysis between your requirements and the current platform situation, and a rough adoption path with optional follow-up phases.

Is it worthwhile if our data landscape is not yet mature?

Especially then: the assessment shows where you stand today and what it takes to get to productive planning.

Do we need Fabric or planning skills of our own in the team?

No. We guide you through the demo and the proof of concept; enabling your team is part of the approach.

Where does the data for planning come from?

From your existing systems: ERP, CRM, operational data, files, or your lakehouse or warehouse in Fabric. A separate data import is not needed.

What happens to our existing Excel budgets?

The familiar logic stays – but in a governed platform where plan and actuals are in one place instead of in scattered spreadsheets.

Is the Fabric Planning Assessment the former Finance & Controlling Assessment?

Yes. The offer used to be called “Finance & Controlling Assessment” and is now called “Fabric Planning Assessment for Finance & Controlling”. Content and approach are the same.

THE OFFER

Book your **free initial call** now.

In the initial call we clarify your planning processes and your starting point in Fabric, and agree what the assessment looks like for you.

½ day

Kick-off workshop with CFO, head of controlling and IT

1 PoC

One prioritised planning process in Fabric Planning

Would you like to ask a question first?

Write to us directly

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