#FABCONSQLCON2026

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Enterprise Planning in Microsoft Fabric

Planning & Writeback on Top of Semantic Models

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What is Enterprise Planning

Enterprise planning connects sales, finance, and operations around the same data.

Sales Forecasting

Target setting, top-down planning, price × quantity, GP

FP&A Planning

Annual budget, planning models, rolling forecasts

Reporting & Governance

Financial reporting, variance analysis, comments, approvals

AI Integration

AI forecasts with human adjustments and approvals

S&OP

Demand planning, supply planning, inventory optimization

& Many More….

Risks of the Common Approach

Many organizations still rely on legacy EPM planning tools, which create:

Data Silos

When planning is separated from analytics (data platforms)

Complex Integrations

Between data sources and legacy system

Outdated Technologies

Cube-based architectures

Vendor Lock-In

Through proprietary platforms and contracts

! **Result: slow, disconnected planning processes.**

The Opportunity: Planning in Fabric

Unleash the potential of planning directly on top of your data platform.

Reuse Fabric Assets

Semantic models, lakehouses, warehouses

Plan Where the Data Resides

No data duplication, no new ETL/ELT

Familiar Ecosystem

Same environment as Power BI and Fabric

Seamless AI Integration

With Fabric IQ

Usage-Based Model

Aligned with actual consumption

Modern Architecture

Secured data processing with Fabric

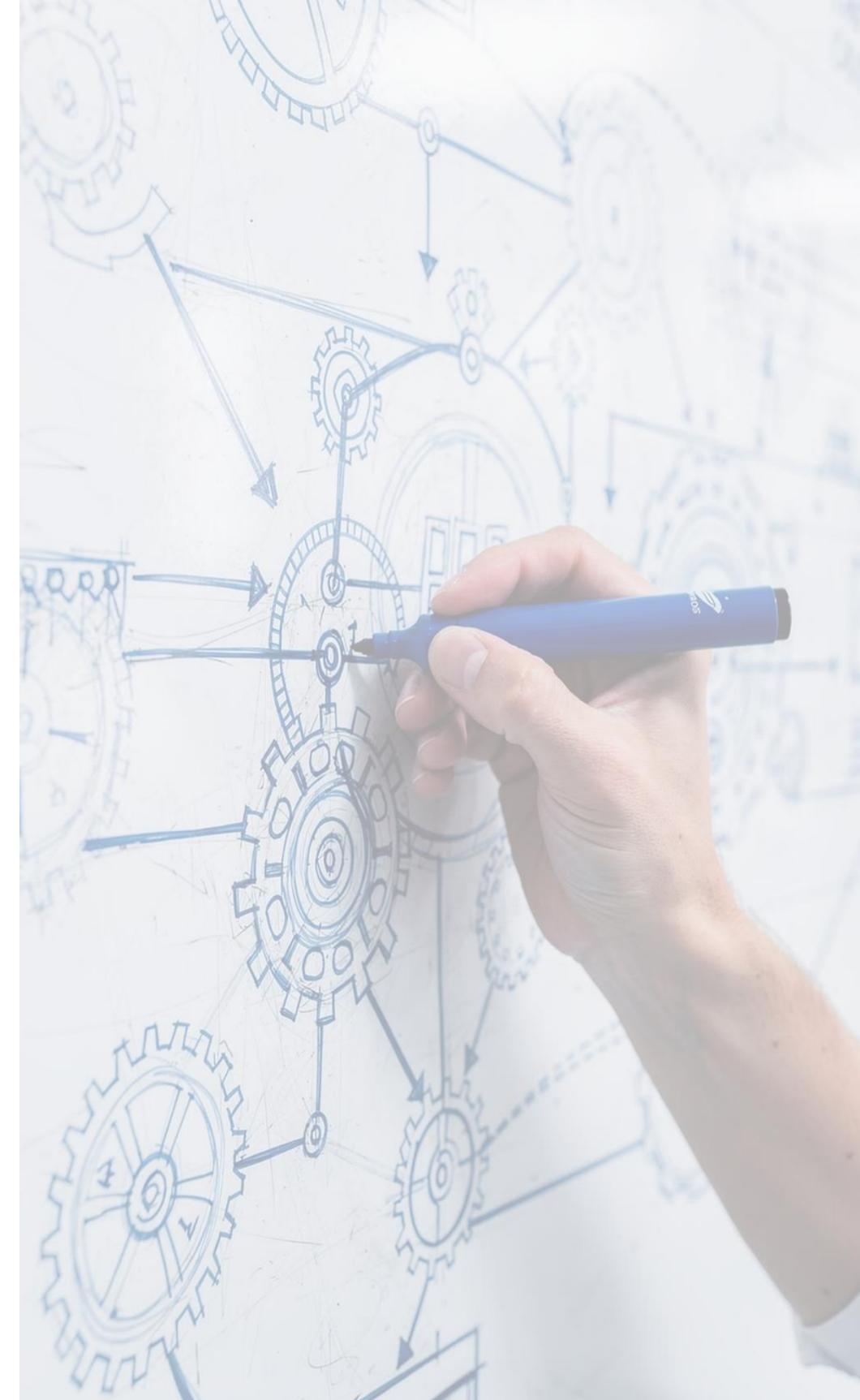**ⓘ Did you know?** There are over 30 million semantic models

Demo

Getting Started with Native Data Entry & Writeback

The Art of Planning

Proper enterprise planning requires more than data entry -
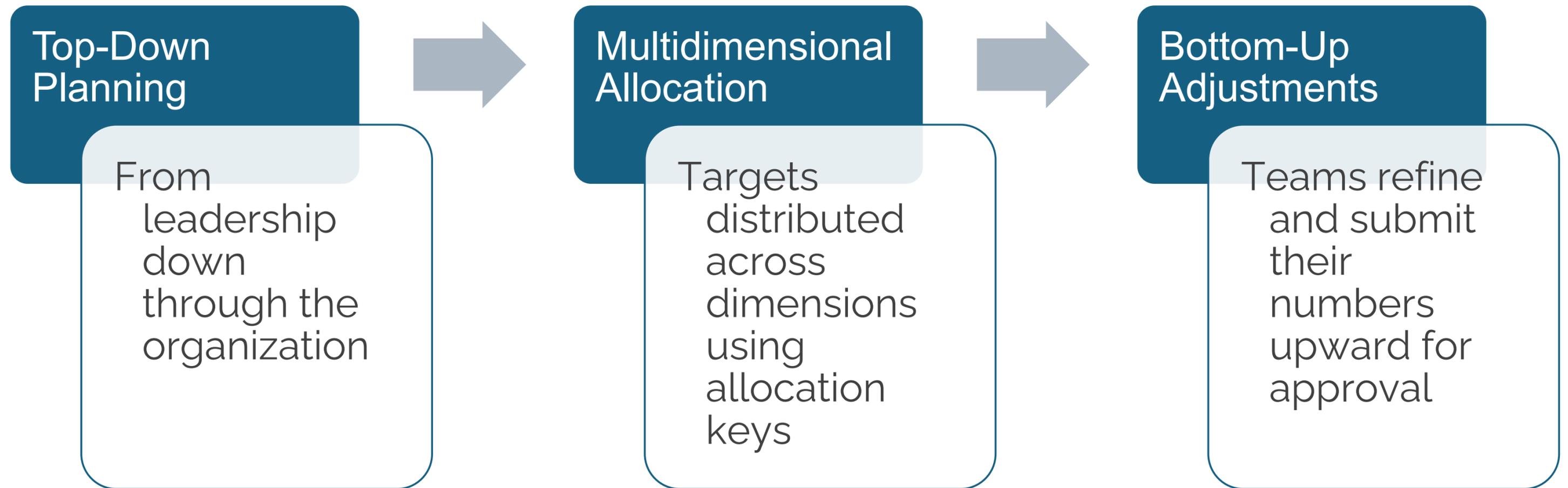It requires a combination of dedicated functions and process-oriented features.

We will cover:

Target setting & cascading

Approvals

Forecasting

Evaluating scenarios

Business logics and drivers

Integrated planning

Target Setting

A 'CFO Dream' – Instant cascading of business targets

Top-Down Planning

From leadership down through the organization

Multidimensional Allocation

Targets distributed across dimensions using allocation keys

Bottom-Up Adjustments

Teams refine and submit their numbers upward for approval

Demo

Target Setting & Approval

Rolling Forecast
Simplifying most common planning need

2025												2026											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

Actual

Budget

Forecast March

Forecast April
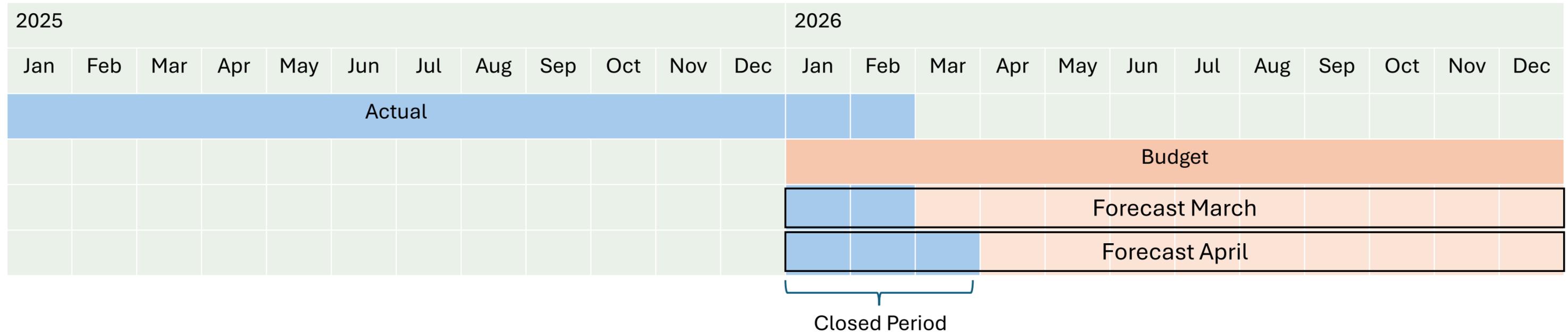
Closed Period

Out of the box:

| Short (Current Year) and Long Range | Closed Period (Month) | Hybrid (Blended) Version

And…

| What-if scenarios (for each forecast version)

Demo

Rolling Forecast & Scenarios

Modelling with Business Logic

Zero-Based

Start from scratch with every budget cycle

Simple Business Drivers

Driver-based formulas – P x Q, GP%

Time Intelligence & Rolling

Renewal, inventory, cashflow, etc.

Value Driver Tree

Visual, comprehensive strategic models

Demo

Business Logic – Drivers, Rules, Tree

The Power of Integrated Planning

Integrated planning is a holistic, process-oriented approach for data and planning:

Connecting business planning models*

Advanced interactive reporting
Fin. reports, dashboards, KPIs

Data applications
Projects, timesheets, contracts

Master Data management
Dimensions, members, hierarchies

*A few examples:

Salary Planning → Relevant P&L accounts	Target Setting → Customer Planning	Demand Planning→ Supply Planning

Demo

Integrated Planning & Data Management with PowerTable

Key Takeaways

- **Planning on Semantic Layers:**
  - ✓ One Platform
  - ✓ One Dataset
  - ✓ One Planning Experience

- **Built on Microsoft Fabric, Enterprise AI-ready**

- **From simple input to enterprise-wide planning**

- **Bonus: Data Applications**
  - ✓ Reference Data Management
  - ✓ Interactive Reporting

Ready to start?
Visit the *Lumel* Planning Booth

www.Lumel.com

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