

Unified Sales & Marketing Visibility with Microsoft Fabric for a Mid-Size IT Company

Discover how we helped the **client fragment sales and marketing data across HubSpot, Excel, and CRM into a unified, real-time analytics platform using Microsoft Fabric.**



• About the Client •

The client is a mid-sized IT services company specializing in digital transformation, cloud solutions, and software development. Operating globally, they serve a diverse set of customers across the healthcare, finance, retail, and manufacturing industries.

• The Need •

Our client faced a fragmented view of their sales and marketing performance data, scattered across multiple tools including HubSpot, Excel spreadsheets, and a CRM system. This led to major challenges in tracking leads, campaign effectiveness, and overall ROI, which is why they needed a centralized, real-time dashboard to unify data, improve visibility, and drive better performance across sales and marketing.



• Our Solution •

Based on our discussion with the client, we helped them achieve the desired results with the help of an advanced tech stack and a strategic approach.

• Tech Stack •



Centralized Data Lakehouse Architecture

We implemented Microsoft Fabric Lakehouse to unify data storage and processing and further structure raw, curated, and gold data zones for scalable, business-ready datasets.

Seamless Data Ingestion & Transformation

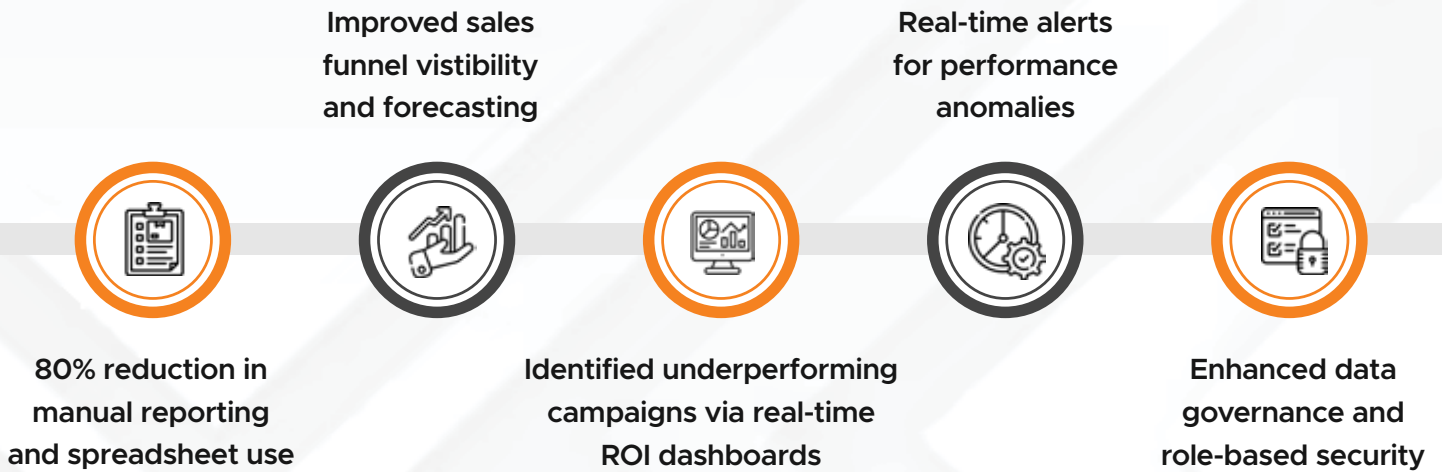
Further, our experts built low-code pipelines using Fabric Data Factory to ingest and transform data from HubSpot, Excel, and Dynamics 365 CRM. We used PySpark notebooks and Dataflows Gen2 for efficient transformation.

Real-Time Insights & Alerts

Lastly, we connected Power BI dashboards to the Lakehouse via DirectLake for real-time analytics. This helped us enable automated alerts and anomaly detection using Data Activator for proactive decision-making.



Results Achieved



Why DataSmartz



Data-first organization focused on actionable intelligence



100+ data engineers, architects & analysts



Expertise across Azure, Snowflake, Power BI, Databricks and many more



Specialized in building scalable data platforms & BI solutions



AI-powered analytics and intelligent automation



About DataSmartz

DataSmartz, our DNA, Turning Data into Intelligence, Period. We believe data is **more than just numbers**—it's the foundation of smarter business decisions. Our mission is to help businesses across North America unlock the full potential & power of their **data using cutting-edge AI-powered data intelligence solutions**. We deliver end-to-end solutions for data modernization, BI & analytics, data engineering, and cloud data platforms. **As a Netsmartz group company, we bring over 25 years of global delivery experience**, certified talent, and deep cloud partnerships to help enterprises drive better decisions with data.

50+

Happy Clients

100+

Certified Expert

200+

AI & BI Solutions
Delivered

10+

Global Locations






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