



— YOUR ROADMAP

# Data Assessment

BY MPOWERUP

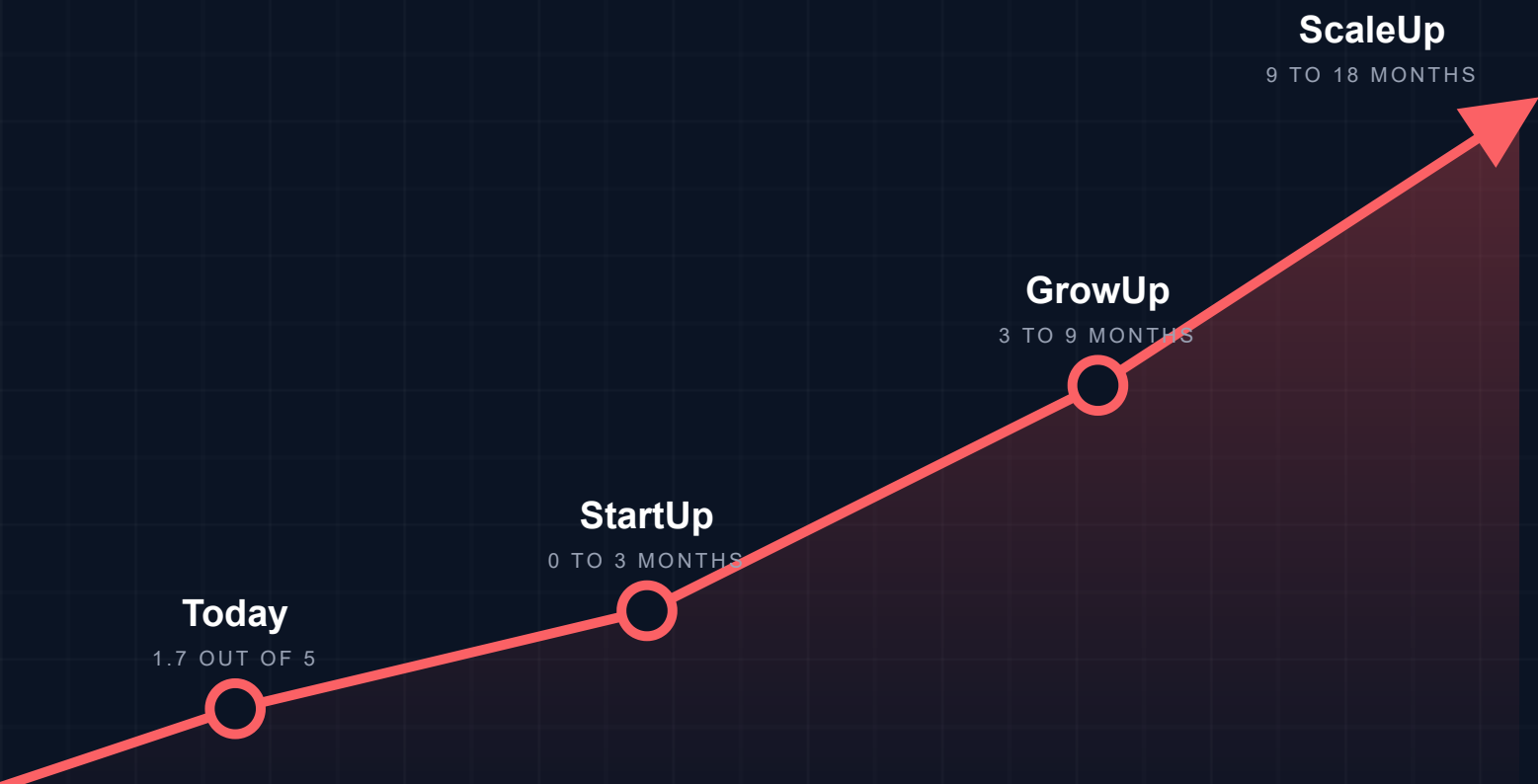
## Where to start, and what it's worth.

Prepared for Westbridge Office Supplies after the assessment call on Wednesday 14 October 2026, with the team who build the reports and look after the systems.

Call 14 Oct 2026

Playback 21 Oct 2026

First step StartUp



## — ONE PAGE FOR THE BOARD

# The short **version.**

**IN SHORT** Westbridge Office Supplies runs on Business Central and a set of spreadsheets that three people rebuild by hand. That costs about 1,476 hours a year. A first step of £8,400 to £9,350 gives about half of it back, and pays back in 7 to 8 months on the cautious case.

**WHERE YOU ARE****1.7** out of 5

Reactive. Answers take days, the numbers are rebuilt each week, and the pipeline sits with one person.

**WHERE YOU COULD BE****3.3** out of 5

Trusted and starting to be proactive within 12 months: one set of numbers, refreshed overnight, with approvals off email.

**THE FIRST STEP · STARTUP**

- ✓ Weekly sales and month-end report from Business Central, through Fabric Express
- ✓ Purchase approvals moved from email to Power Automate

**WHAT IT COSTS****£8,400 to £9,350**

One-off. Year one including licences and support: £15,400 to £16,550.

**WHAT IT GIVES BACK, CAUTIOUS CASE****£14,610 a year**

974 hours a year in full, counted at half.

**PAYBACK****7 to 8 months**

On the one-off cost. 13 to 14 months including a year of licences and support.

## Why it matters

**Without recruiting**

The time released is about 0.9 of a full-time role: the analyst you said you might hire.

**Monday, not Wednesday**

The weekly numbers are there at 9am, so the calls get made on the right figures.

**In stages**

Each stage stands on its own, with a check before the next one starts.

## — IN YOUR TEAM'S OWN WORDS

# What **we** heard.

**IN SHORT** Three themes came up again and again on the call: reports built by hand, numbers that don't agree, and work that waits on one person or one inbox.

1

## Built by hand

The Monday report and the month-end pack are rebuilt from Business Central exports every time.

2

## Two versions of the truth

Sales and finance work from different spreadsheets, so the figures rarely match.

3

## Waiting on people

The pipeline sits with one person and approvals sit in one inbox.

**“By the time the Monday numbers land it's Wednesday, and we've already made the calls.”**

OPERATIONS DIRECTOR

**“Month end is two of us for two days, copying out of Business Central into the pack.”**

FINANCE MANAGER

**“I keep the pipeline in a spreadsheet. If I'm off, nobody knows where we are with anyone.”**

SALES ADMINISTRATOR

**“You've got Business Premium across the board, but nobody's using the automation side of it.”**

IT PARTNER

**“Purchase approvals sit in someone's inbox. We've paid for late deliveries because of it.”**

OPERATIONS DIRECTOR

**“Sales and finance bring different numbers to the same meeting. We spend the first half hour on which is right.”**

FINANCE MANAGER

Quotes are taken from the call transcript with the speaker's role only. Fictional business: names and quotes are illustrative.

## AS-IS

# Where you are today.

**IN SHORT** Business Central is the system everyone trusts. Everything after it, the reports, the pipeline and the approvals, is done by hand in Excel, Outlook and two SharePoint lists.

## YOUR SYSTEMS

**Business Central**

Online. Finance, orders, stock

**Warehouse system**

Picking and despatch

**SharePoint lists**

Supplier contacts, delivery log

**Outlook**

Purchase approvals

EXPORTED AND  
COPIED BY HAND

## WHERE THE WORK HAPPENS

**7 Excel workbooks**

Weekly sales, month end, pipeline, stock checks

**Power BI, 2 reports**

3 Pro licences. Not refreshed since April

**The Monday report**

Ready on Wednesday

**The month-end pack**

Ready on working day 8

## Time spent on manual work

| TASK                                                                | PEOPLE | TIME               | HOURS A YEAR | COST A YEAR    |
|---------------------------------------------------------------------|--------|--------------------|--------------|----------------|
| <b>Monday sales report</b><br>Sales and operations                  | 3      | 3.75 h a week each | 518          | £15,540        |
| <b>Month-end management pack</b><br>Finance                         | 2      | 15 h a month each  | 360          | £10,800        |
| <b>Purchase approvals chased by email</b><br>Operations             | 1      | 6 h a week         | 276          | £8,280         |
| <b>Orders retyped into Business Central</b><br>Sales administration | 1      | 4 h a week         | 184          | £5,520         |
| <b>Pipeline spreadsheet kept up to date</b><br>Sales                | 1      | 3 h a week         | 138          | £4,140         |
| <b>Total</b><br>About 0.9 of a full-time role                       |        |                    | <b>1,476</b> | <b>£44,280</b> |

Hours and headcount as described on the call. Cost at £30 an hour, the loaded cost of a £40,000 role, agreed on the call. 46 working weeks a year.

## SIX AREAS, SCORED 1 TO 5

# Your score, today and in 12 months.

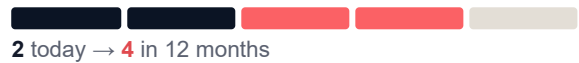
**IN SHORT** We scored six areas from what we heard on the call. Today averages 1.7, mostly reactive. StartUp and GrowUp would take it to about 3.3 within 12 months.

**1 Reactive****2 Repeatable****3 Trusted****4 Proactive****5 Predictive**

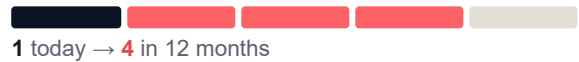
■ Today ■ After StartUp and GrowUp

**Data and trust**

Business Central is trusted; the spreadsheets built from it are not.

**Reporting and insight**

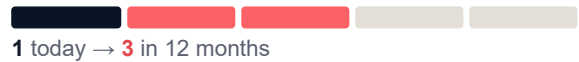
Two Power BI reports, not refreshed since spring. The real report is Excel.

**Process and automation**

Business Premium already includes Power Automate. Nothing uses it yet.

**Customers and sales**

The pipeline lives in one person's spreadsheet.

**Finance and operations**

Business Central online, with month end finished in Excel.

**People and skills**

Reporting is part of three people's jobs. No dedicated role.

**WHAT THE LEVELS MEAN**

**1 Reactive:** answers take days. **2 Repeatable:** the same reports, built by hand. **3 Trusted:** one source, refreshed on a schedule. **4 Proactive:** alerts and self-serve answers. **5 Predictive:** forecasts and AI.

— TO-BE, 12 TO 18 MONTHS

# Where you **could be.**

**IN SHORT** One trusted copy of your data in Microsoft Fabric, refreshed overnight, with reports, an AI agent and simple apps on top. Business Central stays your system of record.



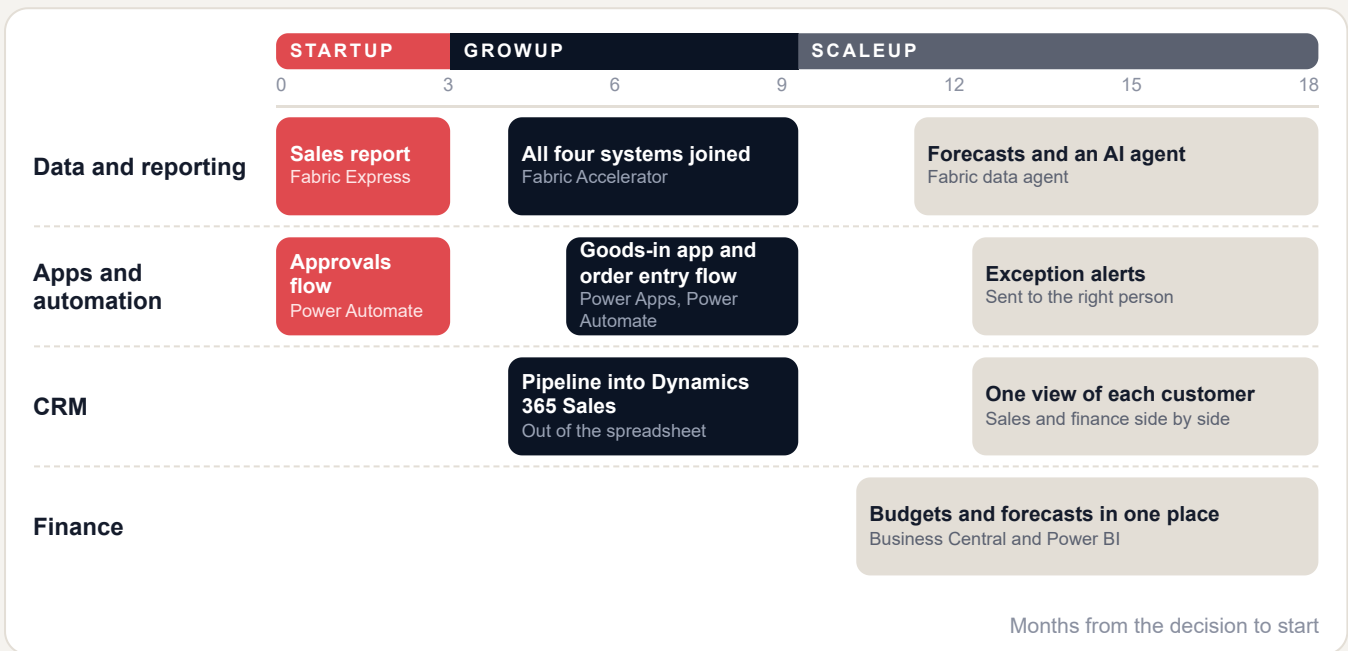
## A normal Monday, before and after

|                         | TODAY                                                | IN 12 TO 18 MONTHS                                               |
|-------------------------|------------------------------------------------------|------------------------------------------------------------------|
| <b>9am Monday</b>       | Three people start rebuilding the sales report       | The report refreshed overnight. The Operations Director opens it |
| <b>A quick question</b> | "Which customers are down this quarter?" takes a day | Asked in plain English, answered in seconds                      |
| <b>Approvals</b>        | Waiting in an inbox                                  | Approved from a Teams notification, logged automatically         |
| <b>The pipeline</b>     | One person's spreadsheet                             | Dynamics 365 Sales, visible to the whole team                    |
| <b>Month end</b>        | Two people for two days                              | Pack ready on working day 3, checked rather than built           |
| <b>Holidays</b>         | Reporting stops                                      | Nothing depends on one person                                    |

## THREE STAGES, FOUR LANES

# Start small, then build.

**IN SHORT** StartUp proves the approach on one system in the first three months. GrowUp joins the rest of the business. ScaleUp moves you from reporting what happened to seeing what's coming.



## STARTUP · 0 TO 3 MONTHS

### Prove it on Business Central

One trusted source and the report that hurts most, plus the approvals flow. Uses licences you already own for the flow.

**Check before GrowUp:** report used every Monday for four weeks, at least 8 hours a week confirmed back.

## GROWUP · 3 TO 9 MONTHS

### Join the business up

The Fabric Accelerator joins Business Central, the warehouse system, SharePoint lists and Dynamics 365 Sales.

**Check before ScaleUp:** month-end pack by working day 3, pipeline fully in Dynamics 365.

## SCALEUP · 9 TO 18 MONTHS

### From hindsight to foresight

Forecasts, an AI agent your team can question in plain English, and alerts when something needs attention.

**Reviewed** at the end of GrowUp, with costs firmed up then.

## PRODUCTS, LICENCES AND BUILD

# What it costs.

**IN SHORT** Costs are ranges, based on what we learned in one call. StartUp is at fixed MPowerUp prices. GrowUp and ScaleUp firm up when each stage is scoped, before you commit.

| STAGE AND ITEM                                                                                                      | TYPE    | ONE-OFF                   | EACH YEAR                 |
|---------------------------------------------------------------------------------------------------------------------|---------|---------------------------|---------------------------|
| <b>STARTUP · 0 TO 3 MONTHS</b>                                                                                      |         |                           |                           |
| <b>Fabric Express, reporting route</b><br>Business Central into Fabric, one Power BI report                         | Product | £5,000                    |                           |
| <b>Fabric capacity, F2</b><br>One-year reservation through MPowerUp                                                 | Licence | £1,500                    |                           |
| <b>Purchase approvals flow</b><br>Power Automate, 2 to 3 days. Uses your Business Premium licences                  | Build   | £1,900 to £2,850          | £0 licences               |
| <b>Power BI Pro, 7 more users</b><br>Everyone who views the report needs one. Indicative                            | Licence |                           | £1,000 to £1,200          |
| <b>Fabric Express support</b><br>Half a day a month, bug fixes, quarterly updates. Recommended                      | Support |                           | £6,000                    |
| <b>StartUp total</b>                                                                                                |         | <b>£8,400 to £9,350</b>   | <b>£7,000 to £7,200</b>   |
| <b>GROWUP · 3 TO 9 MONTHS</b>                                                                                       |         |                           |                           |
| <b>Fabric Accelerator deployment</b><br>From £20,000, less the £5,000 Fabric Express credit                         | Product | from £15,000              |                           |
| <b>Dynamics 365 Sales</b><br>Set-up and pipeline migration, 15 to 25 days                                           | Build   | £14,250 to £23,750        |                           |
| <b>Goods-in app and order entry flow</b><br>Power Apps on SharePoint lists, Power Automate. 12 to 18 days           | Build   | £11,400 to £17,100        |                           |
| <b>Managed service, Essentials</b><br>Up to 4 sources. Replaces Fabric Express support                              | Support |                           | £12,000                   |
| <b>Dynamics 365 Sales licences, 6 users</b><br>Indicative                                                           | Licence |                           | £3,700 to £4,500          |
| <b>GrowUp total</b>                                                                                                 |         | <b>£40,650 to £55,850</b> | <b>£15,700 to £16,500</b> |
| <b>SCALEUP · 9 TO 18 MONTHS</b>                                                                                     |         |                           |                           |
| <b>Forecasts, AI agent, alerts, budgets</b><br>Scoped at the end of GrowUp. Capacity and service tier reviewed then | Build   | £22,000 to £43,000        | At review                 |

**Licences.** Microsoft licence figures are indicative and confirmed at list price when each stage is quoted. All MPowerUp prices in GBP, excluding VAT. Day work at £950 a day.

## COSTS SET AGAINST THE UPSIDE

# The value case, **in your own numbers.**

**IN SHORT** On your own figures, manual work costs £44,280 a year. We count half of it, £22,140, as the cautious case, and work out payback on that alone.

## 1 Only your figures

From the call, not industry averages

## 2 Shown, then halved

Full figure, then half counted

## 3 Hard value only

Payback on time, hires and licences

## 4 Cash kept apart

Counted once, never as savings

| TIME FREED                           | STAGE              | HOURS A YEAR | IN FULL        | CAUTIOUS       |
|--------------------------------------|--------------------|--------------|----------------|----------------|
| Monday sales report                  | StartUp            | 518          | £15,540        | £7,770         |
| Month-end management pack            | StartUp and GrowUp | 360          | £10,800        | £5,400         |
| Purchase approvals chased by email   | StartUp            | 276          | £8,280         | £4,140         |
| Orders retyped into Business Central | GrowUp             | 184          | £5,520         | £2,760         |
| Pipeline spreadsheet kept up to date | GrowUp             | 138          | £4,140         | £2,070         |
| <b>Total</b>                         |                    | <b>1,476</b> | <b>£44,280</b> | <b>£22,140</b> |

### STARTUP PAYBACK, CAUTIOUS CASE

## 7 to 8 months

£14,610 a year back against £8,400 to £9,350 one-off. 13 to 14 months including a year of licences and support.

### LICENCES YOU ALREADY OWN

## £0 extra

The approvals flow and goods-in app run on the Power Automate and SharePoint rights in Business Premium.

### Listed as upside, not counted in payback

#### A hire you may not need

The analyst you said you might recruit. Counted only if you confirm the plan.

#### Fewer late-delivery charges

Approvals no longer wait in an inbox. Cash, counted once.

#### Better days at work

Three people doing the jobs they were hired for, and holidays that don't stop the reporting.

## RECOMMENDED FIRST STEP

# Your first step: StartUp.

**IN SHORT** Start with the report that hurts most. Fabric Express connects Business Central and delivers the weekly sales and month-end report, and a Power Automate flow takes purchase approvals off email.

**WHAT YOU GET**

- ✓ Business Central in a trusted Fabric data layer, refreshed every night with full history
- ✓ One Power BI report: weekly sales and the month-end pages
- ✓ Purchase approvals in Power Automate, approved from Teams or Outlook
- ✓ A monitoring report and an email if a nightly run fails

**PRICE**

## £8,400 to £9,350

One-off, fixed. Plus Power BI Pro for 7 more users and, recommended, support at £500 a month.

**TIME**

Live in 5 working days from the day the prerequisites are in place. The approvals flow follows in week two.

## How we'll know it worked

**Used every Monday**

The report opened by the Operations Director for four weeks running.

**8 hours a week back**

Confirmed by the three people who build the report today.

**Approvals in a day**

Purchase approvals turned round within one working day.

## Next steps

**01****Playback**

Wednesday 21 October 2026, 10am, 45 minutes. Booked on the call.

**02****Decision**

Your board meets on 4 November. We'll send a one-page order form to take to it.

**03****Prerequisites**

A short checklist: Business Central access and Fabric capacity.

**04****Live**

Five working days later, with the approvals flow in week two.

## — ASSUMPTIONS AND WHAT WE DIDN'T LOOK AT

# What it's based on.

**IN SHORT** This roadmap is built from a questionnaire and one two-hour call. It's a starting point, not a specification. Each stage is scoped properly before you commit to it.

**WE ASSUMED**

- ✓ Hours and headcount as described on the call
- ✓ £30 an hour loaded cost, agreed on the call
- ✓ Business Central online, with API access available
- ✓ Business Premium for all staff, and 3 Power BI Pro licences today
- ✓ Microsoft licence figures are indicative until each stage is quoted

**WE DIDN'T LOOK AT**

- The quality of the data inside Business Central
- The warehouse system's integration options
- Security and access rules beyond what was discussed
- HR, payroll and other systems not raised on the call

## How the stages map to MPowerUp products

**01 · STARTUP****Fabric Express**

1 SOURCE · 5 DAYS · FROM  
£5,000

Prove reporting, AI or both on one source, plus a first app or flow.

**02 · GROWUP****Fabric Accelerator**

UP TO 12 SOURCES · 4 WEEKS

Join your systems in one trusted layer, with CRM and app work alongside.

**03 · SCALEUP****Enterprise data platform**

12+ SOURCES · MANAGED  
SERVICE

Reporting, forecasts and AI across the whole business.

## Ready when you are.

Questions before the playback? Get in touch and we'll answer them plainly.

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