



UBTI Modernizes Retail with Microsoft Fabric, Reducing Costs, Eliminating Manual Effort, and Increasing Sales Growth by 30%



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WHO WE ARE

“UB Technology Innovations is a Microsoft Power Platform delivery partner offering no/lowcode solutions, virtual bots, RPA, and data insights. We help clients on their digitalization journey by automating tasks, optimizing workflows, and providing a competitive edge through quick app deployment”

WHAT WE DO

- Compliance and Security
- Enhance Productivity
- Improve Time to Market
- Reduce Operational Costs
- Maximize Profits
- Customer Experience



THE CLIENT

The client is a fast-growing retail brand specializing in curated gifting solutions across personal, occasion-based, and business segments. They operate across both e-commerce and physical stores, with a diverse portfolio spanning return gifts, home décor, utility items, and customized offerings. The brand caters to both individual buyers and bulk corporate requirements and continues to serve a dynamic customer base with solutions tailored for celebrations, events, and everyday gifting needs.



CHALLENGES

Across both store operations and online channels, the client's retail teams were managing high volumes of transactions, customer interactions, and inventory movements daily. Despite the client's strong market presence in E-commerce and physical stores, their teams encountered these operational and technological challenges:

- **Data silos:** Sales were managed through Shopify (online store) and Odoo (ERP/retail POS). However, the systems operated in isolation without a unified customer view. While Shopify provides analytics, Odoo's reporting setup was not sufficient for advanced customer behavior and churn analysis.
- **Incomplete customer insights:** There was no centralized platform to consolidate customer interactions (purchases, returns, and support tickets) across both channels. This fragmentation made it challenging to identify at-risk customers and build targeted retention strategies.
- **Manual reporting and inefficiency:** Teams spent significant time exporting reports from Shopify and Odoo, manually consolidating and unifying the data before it could be used for decision-making, leading to delays and increased risk of errors.



- Limited market visibility: The client lacked clear data on market trends, competitors, or pricing, so decisions were made without reliable insights.



SOLUTION

- Understanding the client’s situation, UBTI architected and delivered a scalable, modern data platform using Microsoft Fabric. The solution brought together data ingestion, transformation, reporting, and governance with:
 - Unified data foundation and integration: Shopify and Odoo data were consolidated and connected via APIs into Microsoft Fabric OneLake, with automated ingestion and transformation using Data Pipelines and Notebooks.
 - Customer 360° view: Customer data from all channels, like purchases, returns, and interactions across channels, was combined into a single view, enabling better segmentation and churn prediction:
 - o A Power BI dashboard within Fabric provides a unified view of customers across both e-commerce and retail channels.
 - o Key metrics such as Customer Lifetime Value (CLV), purchase history, engagement trends, return patterns, and support interactions are visualized.
 - Data Science use cases: Predictive analytics models were introduced, namely:
 - o Customer Churn Prediction and Segmentation to improve retention strategies.
 - o Inventory Demand Forecasting to optimize procurement and stocking.
 - o Slow-Moving Inventory Analytics to reduce carrying costs and improve cash flow.
 - Business-focused analytical reporting: Targeted reports were developed in Power BI to address key operational and strategic areas across inventory, competition, and logistics:
 - o 45-day rolling inventory: Uses the last 30 days of sales to forecast the next 15 days' demand and compares it with the current stock to guide restocking decisions.
 - o Competitor analytics: Tracks pricing, product availability, assortment mix, and new launches to support market positioning.
 - o Shipping Analytics: Compares e-commerce shipping data with courier partner data to identify cost/weight discrepancies and optimize courier selection.
 - Data Syncing and automation: A centralized data lake was established in Fabric OneLake, with scheduled daily refreshes enabling near real-time insights across business functions.
 - Daily Mail Triggers: Automated reporting mechanisms were set up to keep stakeholders informed on a daily basis for:
 - o Daily sales summary: Automated daily email reports that highlights total net sales across all business units and stores, along with Month-to-Date (MTD) target vs actual comparison to track performance.
 - o Inventory snapshot: A closing inventory stock availability across all stores, enabling better visibility and timely replenishment decisions.
 - Unified Semantic Model: A standardized KPI and metrics layer was defined across sales, customer, and inventory analytics, ensuring consistent reporting across e-commerce, retail, and corporate gifting business lines.



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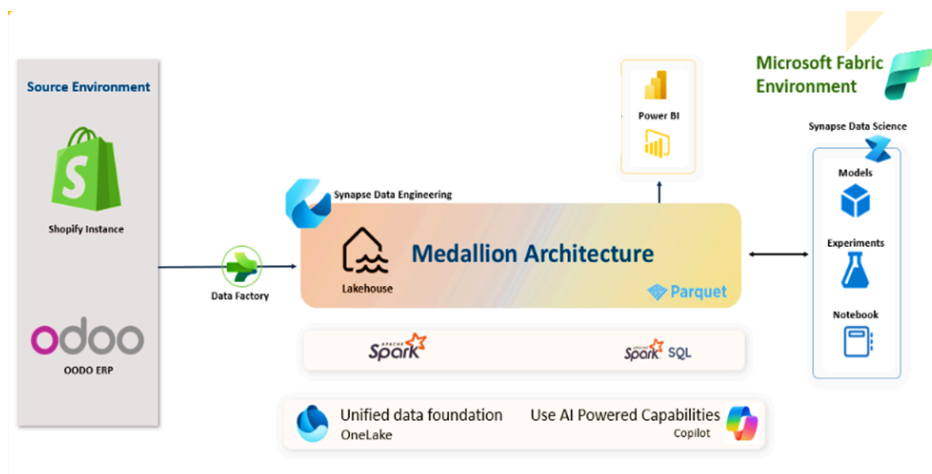
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- Role-Based Access Control (RBAC): Secure, role-based permissions were implemented to control access for business users, operations teams, and management, protecting sensitive customer and financial data.
- Scalable, future-ready Architecture: A modular and extensible architecture was established to support additional data sources, AI/ML capabilities, and advanced analytics use cases without requiring major redesign.



OUTCOME

- By unifying Shopify and Odoo data into a Microsoft Fabric, UBTI helped the client eliminate manual consolidation efforts, leading to:
- Better cost optimization: Our solution reduced campaign management costs by \approx \$5,000 annually, as it eliminated the dependency on cloud-based marketing automation tools.
- Data-driven growth: With unified customer insights and targeted campaigns, Microsoft Fabric helped the client increase sales by 30%.
- Centralized reporting: As a single source of truth, we consolidated customer, sales, and inventory data into one unified analytics platform, replacing fragmented tools and manual reporting.
- Reduced stock imbalances: With 45-day rolling inventory insights and demand forecasting in place, the client can now align stock levels with expected demand, reducing both stockouts and excess inventory across stores.
- Cross-business unit visibility: The client can now analyze e-commerce and retail data channels, with deeper insights into customer behavior and product segments. This supported more targeted marketing campaigns, stronger cross-selling, and improved customer engagement.
- More rapid operations: By automating sales-to-inventory analysis, shipping reconciliation, daily performance reporting, and customer segmentation, our implementation reduced manual data consolidation and analysis efforts by 30% across business functions.

Conclusion:

The client faced limited operational visibility due to fragmented systems and delayed reporting across more than 100 retail stores. UBTI implemented Microsoft Fabric as a unified analytics platform, enabling centralized data management, secure governance, and real-time reporting. This led to real-time operational visibility across stores, high-performance Power BI analytics, secure and governed data access, and a scalable architecture for future growth. The solution helped the client transition their analytics capabilities from delayed reporting to real-time retail intelligence. Following the successful implementation, the client is now expanding Microsoft Fabric capabilities to support end-to-end logistics and supply chain analytics.



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ABOUT US

UB Technology Innovations, Inc. (UBTI) is a leading global technology solution provider with over 3 decades of experience across all industries, specializing in Capital Markets (Asset Management), Logistics, and Healthcare. We are the preferred Microsoft Solutions Partner backed by a world-class team of Microsoft Certified experts with rich experience in Azure Cloud Platform and Data Analytics.



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