

CASE STUDY

BI Reimagined Agentic Dashboard Delivery

An AI-orchestrated workflow for faster, more consistent business intelligence delivery



Faster
Delivery



Greater
Consistency



Real
Business Impact

Executive Summary:

Traditional Power BI and enterprise dashboard development is slowed by communication delays, fragmented role handoffs, manual documentation and repeated clarification cycles. A large enterprise needed a more coordinated way to move from business requirements to reliable dashboard delivery.

Factspan developed BI Reimagined, an AI orchestrated workflow that integrates specialized agents across intake, data discovery, development, validation and documentation. The approach delivers an overall 40%–50% efficiency gain and expands monthly delivery capacity for the BI team.

About the Client

The client is a large enterprise with complex Power BI and business intelligence requirements across multiple teams, data sources and reporting environments. Its traditional delivery model depended on separate project managers, data engineers, BI developers, web developers and QA specialists.

Project Highlights:



40%–50% faster delivery:

AI assisted workflows reduced dashboard delivery effort.



2x higher capacity:

Monthly output increased from 5 to 9–10 dashboards per 25 member team.



3 persona delivery model:

Role heavy handoffs were consolidated into focused ownership.



Human governed

automation: Three agents supported delivery with review checkpoints.





Business Challenge:

Dashboard development involved multiple handoffs between business stakeholders, project managers, developers, data engineers and QA teams. Requirements were often clarified through repeated communication, while data discovery, semantic modelling, dashboard construction, validation and documentation were handled as separate activities.



This created delivery delays, duplicated effort and inconsistent documentation. The client needed a coordinated approach that could improve delivery speed while preserving business context, data quality, data lineage and human oversight.



Our Solution:

Factspan developed BI Reimagined, an AI orchestrated workflow built around three core personas: the AI Project Manager, the AI BI Engineer and the Domain Experience Specialist. The AI Project Manager manages intake, BRD creation, user stories, Jira tracking and stakeholder alignment. The AI BI Engineer combines data discovery, dashboard development, calculation logic and visual and data validation. The Domain Experience Specialist provides business context, UX direction and support for complex domain requirements.

Three specialized agents coordinate the workflow. The Business Analyst Agent captures requirements, creates BRDs and wireframes, identifies KPIs and generates Jira stories. The Developer Agent supports data discovery, SQL and BigQuery query generation, semantic modelling, DAX development and dashboard assembly. The Operations Agent performs visual and data checks, regression testing, release deployment and documentation. Human reviewers validate key outputs throughout the lifecycle to maintain data dictionary compliance, lineage and reporting quality.



Tools Used

- Microsoft Copilot Studio
- Power Automate
- Claude Code
- GitLab Duo
- Power BI
- BigQuery
- SQL
- DAX
- Jira
- Confluence
- GitLab



Solution Architecture

