

#FABCONSQLCON2026

FABCON

Microsoft Fabric
COMMUNITY CONFERENCE

SQLCON

Microsoft SQL
COMMUNITY CONFERENCE

ATLANTA MARCH 16 - 20, 2026



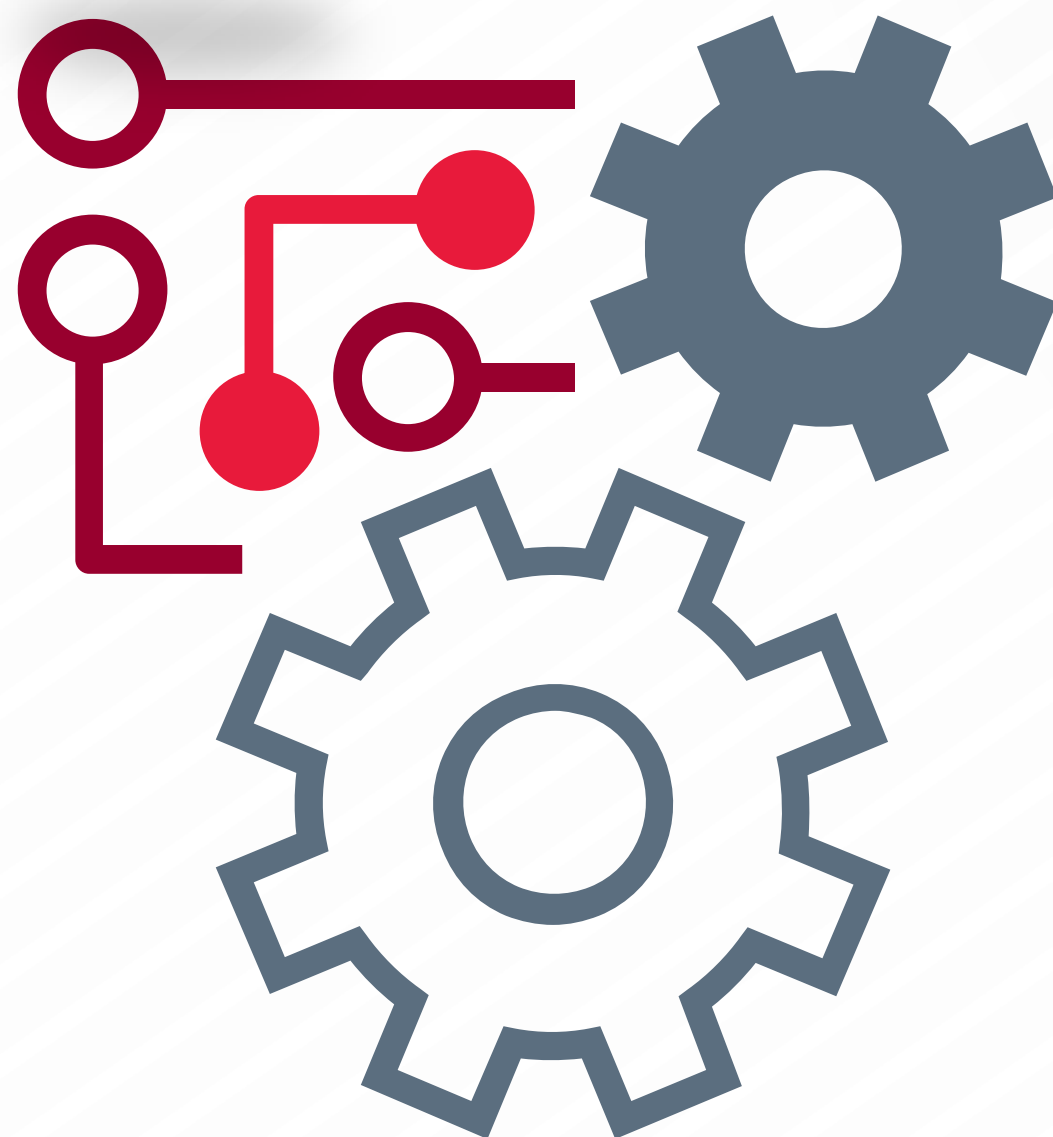
Rich Lamorena

Principal, Data & AI Practice Leader
BDO USA



Noah Mattern

Data & AI Solution Director
BDO USA



Performance Management

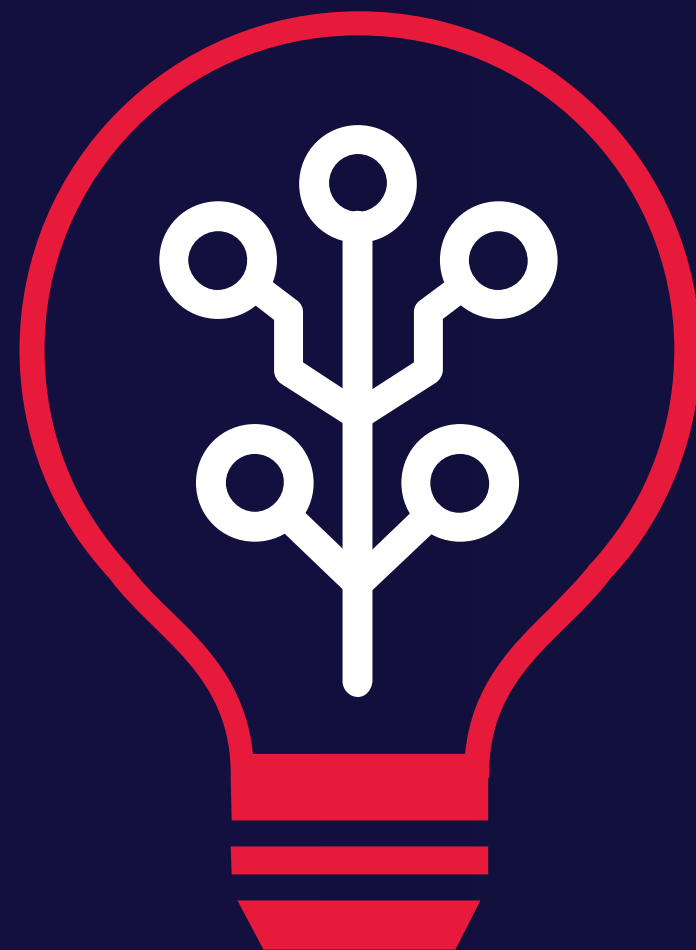
THE NEXT FRONTIER OF
ORGANIZATIONAL INTELLIGENCE

Unlocking insights with Microsoft
Fabric, Copilot, and Foundry.

Imagine a Future...

Humans and AI agents seamlessly
driving company results with
consistent, measurable criteria





SECTION 1

Introduction to Frontier Firm Vision

“The Year the Frontier Firm Is Born”

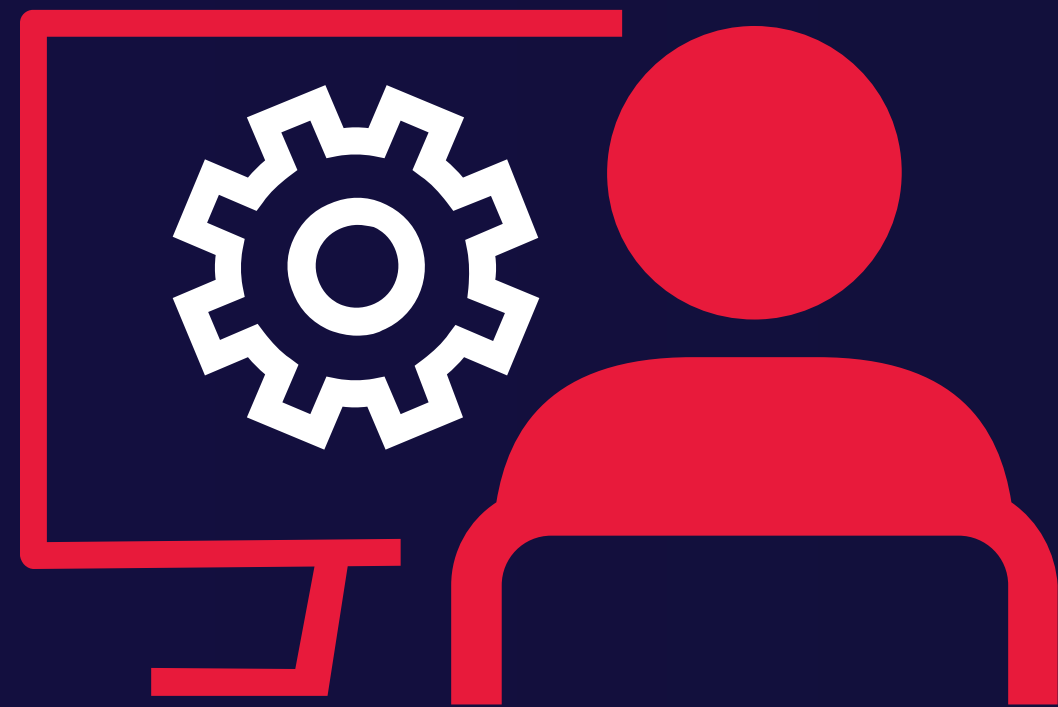
MICROSOFT 2025 WORK TREND INDEX

- ▶ Reveals the emergence of “Frontier Firms” – organizations that successfully integrate AI agents into daily workflows
- ▶ Based on a global study of **31,000 professionals** across **31 countries**
- ▶ Frontier Firms are outperforming peers: **71%** report thriving, compared to **37%** of other companies
- ▶ Highlights a **four-stage AI adoption journey**
- ▶ Emphasizes the new role of “agentic” leaders who manage AI agents to drive results
- ▶ **82%** of business leaders say 2025 is a make-or-break year to adopt AI strategically
- ▶ Offers insights for companies looking to scale, stay agile, and redefine productivity in the AI era

BDO Recommendation: A defined KPI blueprint needs to blend the performance management of **both** humans and AI against established business targets.

Source: [2025: The Year the Frontier Firm Is Born](#)



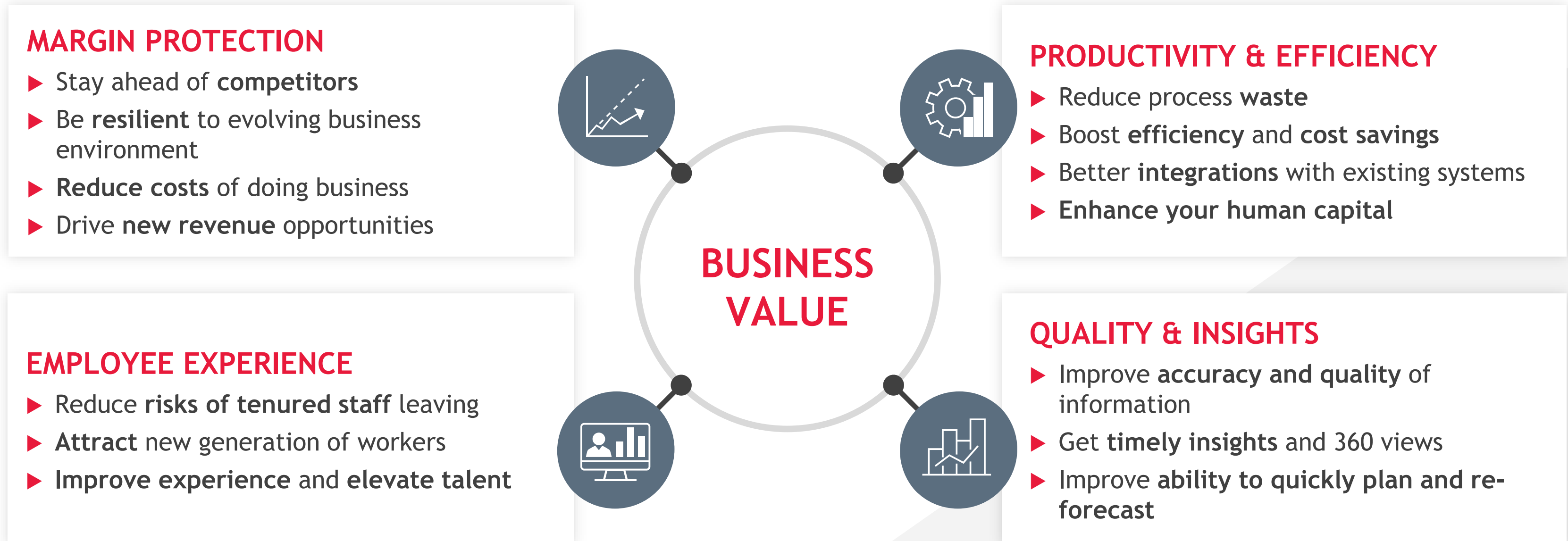


SECTION 2

Business Case For Performance Management

WHY NOW?

Real and Growing Impact of AI



AI Adoption is Rising, Boosting Productivity and ROI

\$3.7x

for every \$1 a company invests in a successful generative AI deployment, the **ROI is \$3.7x**.³

70%

of transformations fail to achieve their desired results due to **change management** challenges.²

75%

of knowledge workers around the world use generative AI at work.¹

1. [AI at Work Is Here. Now Comes the Hard Part](#)
2. [Boston Consulting - How to Create a Transformation that lasts.](#)
3. [IDC's 2024 AI opportunity study: Top five AI trends to watch - The Official Microsoft Blog](#)

Data Readiness is Critical to AI Evolution

DATA ALIGNS TRUST BETWEEN HUMANS AND AI

Through 2025, **30%** of generative AI (GenAI) projects will be abandoned after proof of concept due to poor data quality, inadequate risk controls, escalating costs or unclear business value.



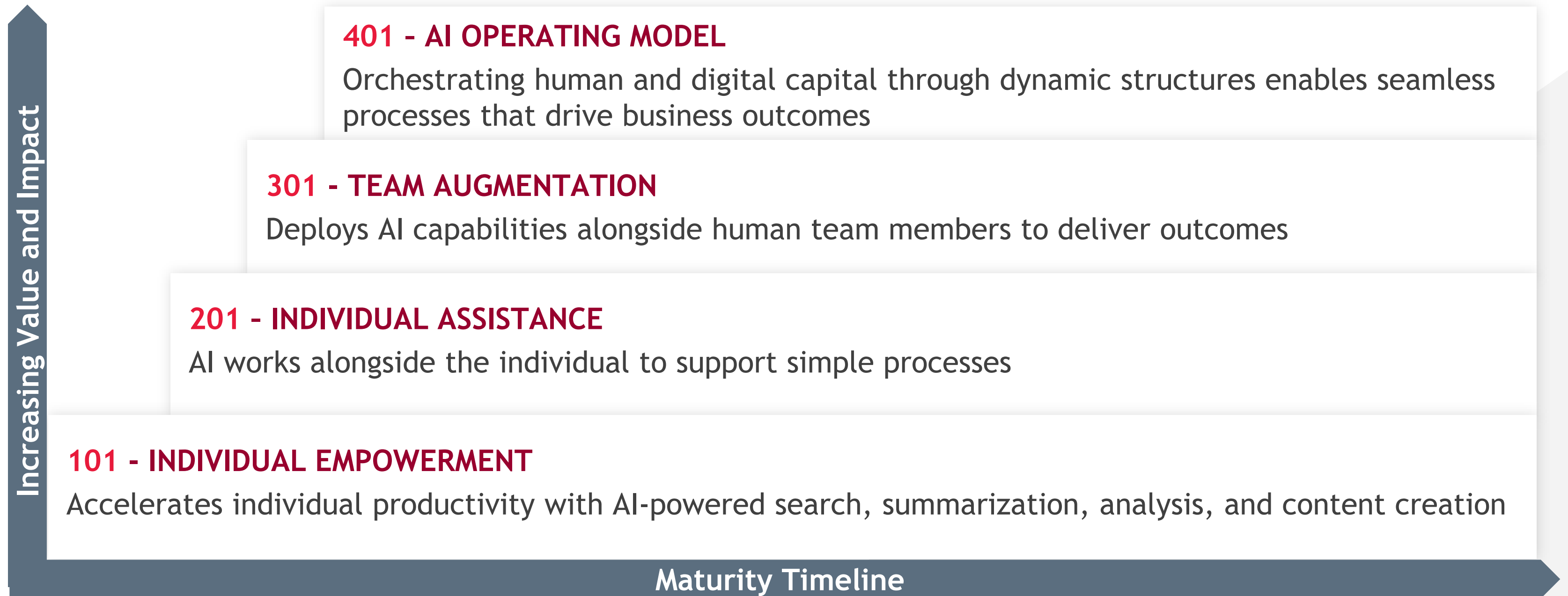
AI-ready data means that your data must be representative of the use case, key patterns, errors, outliers and unexpected emergence that is needed to train or run the AI/ML models.

Data readiness for AI is not something that is build once and for all - it is a process, and a practice based on availability of metadata to align, qualify, and govern the data, supported by right integrations and modern data platform setup.

Evolving State of AI's Impact on Organizations

TRANSFORMING TEAMS AND ORG STRUCTURES THROUGH THE DEPLOYMENT OF AI

AI transformation begins by empowering individuals and advances through team-based process improvements being driven by organizational outcomes. The result is a more agile and dynamic workforce and ultimately creating scale.

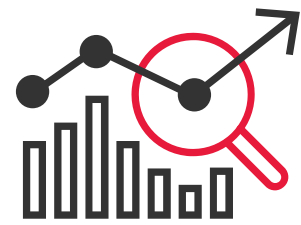


KPI Blueprint: Attribution Process

MEASURING COMPANY PERFORMANCE IMPACTS ATTRIBUTED TO PEOPLE AND TECHNOLOGY

With a proper data and AI platform configured, you can measure critical KPIs like sales, revenue, and profitability. Take it one step further by attributing those KPIs to people, organizational initiatives, and technology investments where ROI can be directly reviewed.

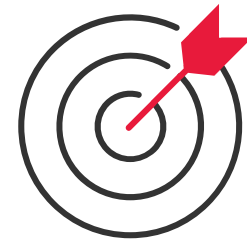
Prerequisite: Business alignment to track, govern, and measure KPIs



Define KPIs

Define the specific hard and soft KPIs based on company goals and availability of data to measure.

Initiation



Set Goals and Targets

Set targeted goals (by people, teams, departments, job functions, and AI innovations).

Periodically



Review and Manage

Measure and drive performance continuously utilizing actual KPI results.

Continuously



ATTRIBUTION

With the right level of invested configuration in your data & AI platform, measure and associate/attribute company KPIs like invoiced revenue and profitability to the following corporate investments:

- ▶ Individual team members
- ▶ Teams (by organizational structure like departments or “virtual” teams of people)
- ▶ Sales strategy initiatives
- ▶ Marketing initiatives
- ▶ Digital and AI tool investments

Recommended KPIs for Professional Services

Below is intended to be a starting point and will need to be tailored to your firm:



Top Line Measures

- ▶ Pipeline
- ▶ Sales Revenue
- ▶ Billed Revenue
- ▶ Invoiced Revenue
- ▶ YoY Growth
- ▶ AR Aging
- ▶ Marketing Attribution



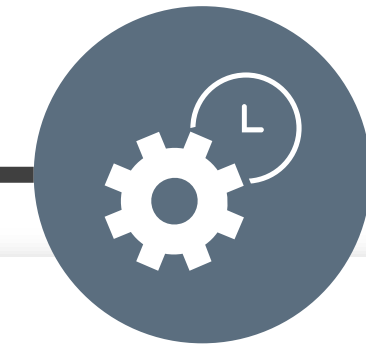
Bottom Line Measures

- ▶ Gross Contribution
- ▶ EBITDA
- ▶ Expense Alignment
- ▶ Forecast Accuracy



Rates and Pricing

- ▶ Average Rates
- ▶ Pricing and Realization
- ▶ Service Line Profitability



Utilization

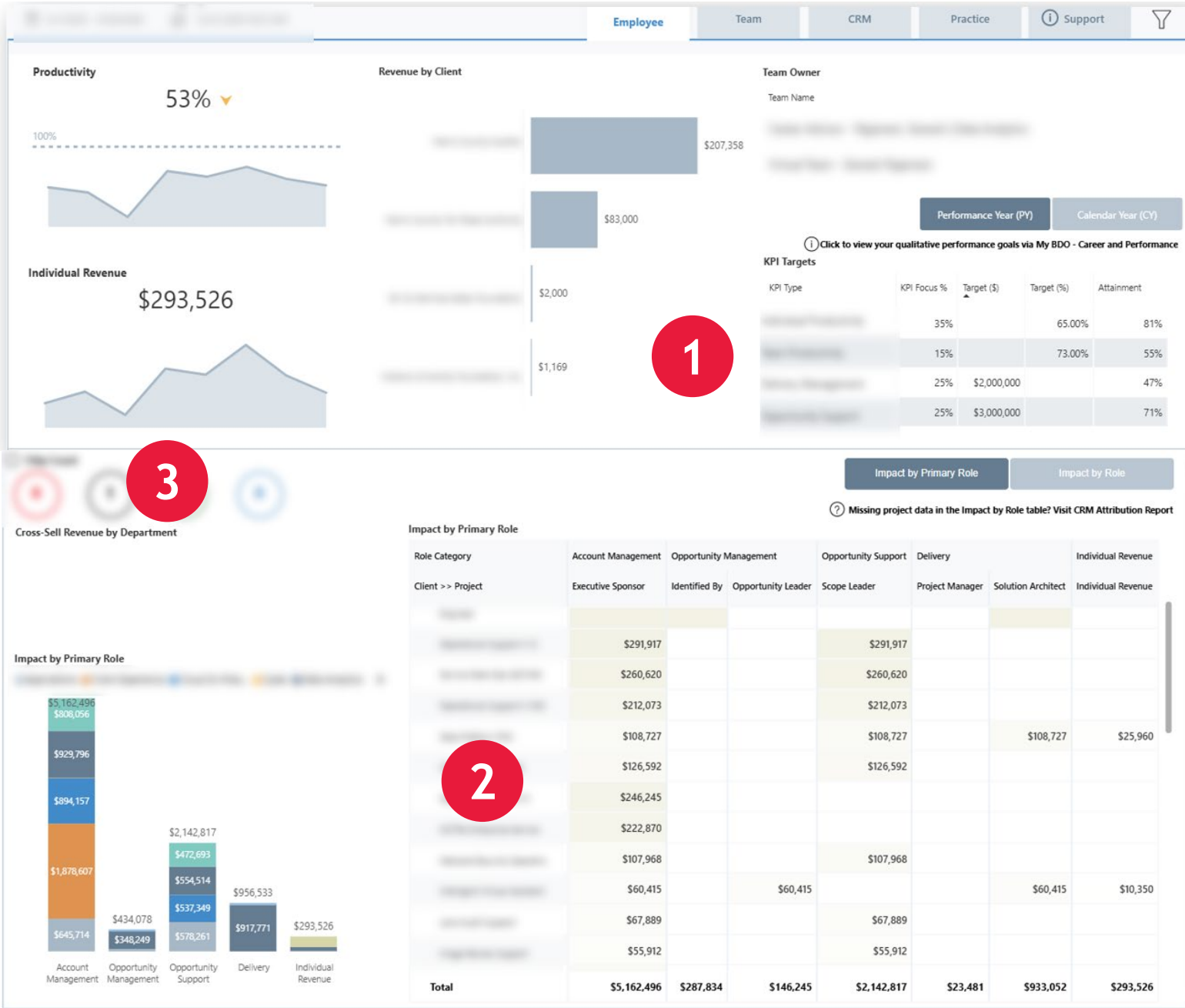
- ▶ Billable Hours/ Available Hours
- ▶ Capacity and Headcount
- ▶ Seasonal Forecasts vs. Actuals
- ▶ Talent Acquisition Time to Fill

Governed Measurement of KPI Goals

1 This dashboard shows comprehensive performance details for an individual team member, business initiative like marketing campaign, team performance, or AI initiative. The right summarizes hard KPI performance expectations vs. attainment to date.

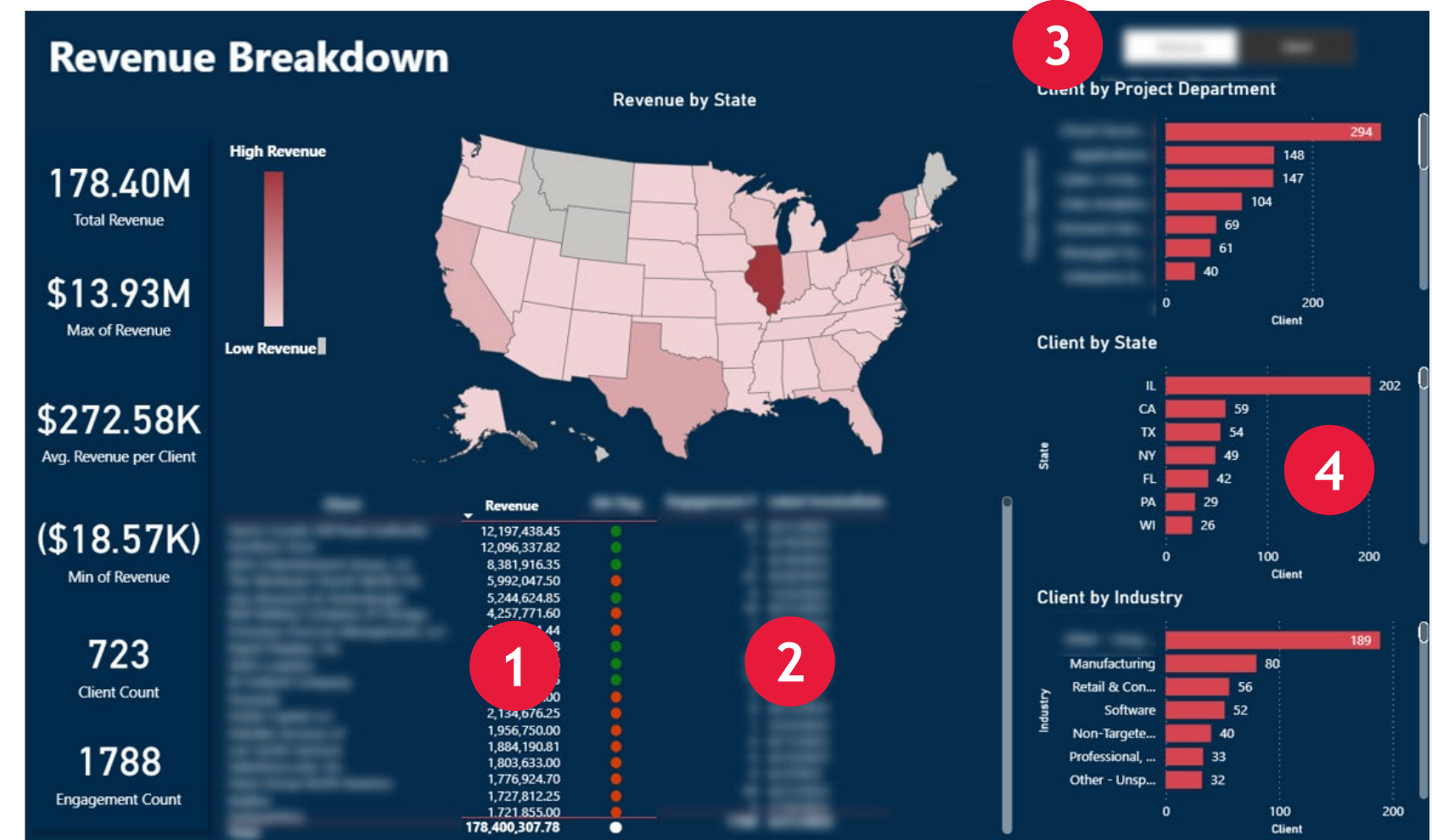
2 A good attribution model will ensure that KPI measurement (like revenue) follow the firm’s established rules. It shows the role performed during the KPI goal attainment (for example an individual who leads a sales deal closure vs. an AI agent that is utilized to support the sale).

3 This section shows soft KPI attainment (in this example positive survey feedback), to provide additional context on the performance.



Detailed Context of KPI Attainment

- 1 Analyze KPI actuals for an individual, team, marketing campaign, or AI initiative. Color coded indicators show areas of performance enhancement or attention required.
- 2 Analyze details like the individual leader accountable or other supporting context to identify where to follow up.
- 3 Toggle between different views of hard KPIs vs. soft KPIs, so you get specific lenses on performance context.
- 4 Filter or drill into details like employee, team, service line, client, geographic region, industry, or AI initiative for further business context and planning.



Guiding Advice



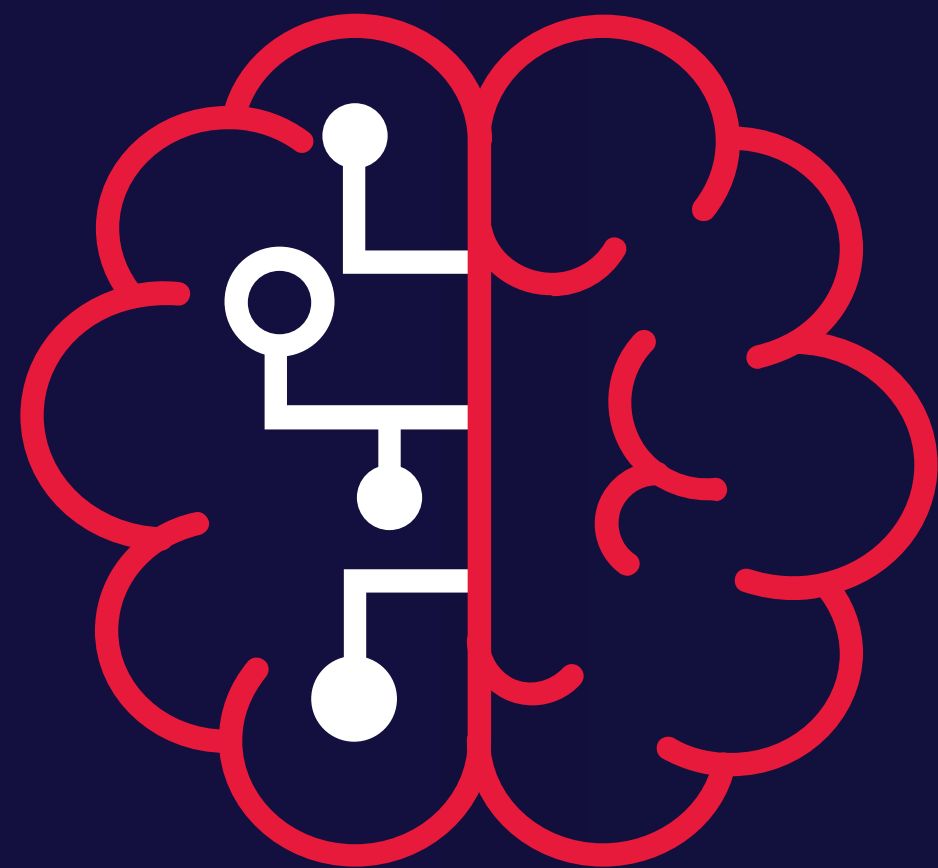
FABRIC: AI READY DATA

- ▶ It's okay to move quickly and build one-off operational reports
- ▶ But to build long term intelligence for humans and AI, your enterprise data fabric matters
 - Descriptive analytics and semantic models
 - Data science and advanced analytics
 - Leveraging evolving Microsoft Fabric IQ, Foundry IQ, and Work IQ



AI DEVELOPMENT MINDSET

- ▶ **Low Code** - for rapid delivery and early end user feedback
- ▶ **Pro Code** - to fully control what you build and customize

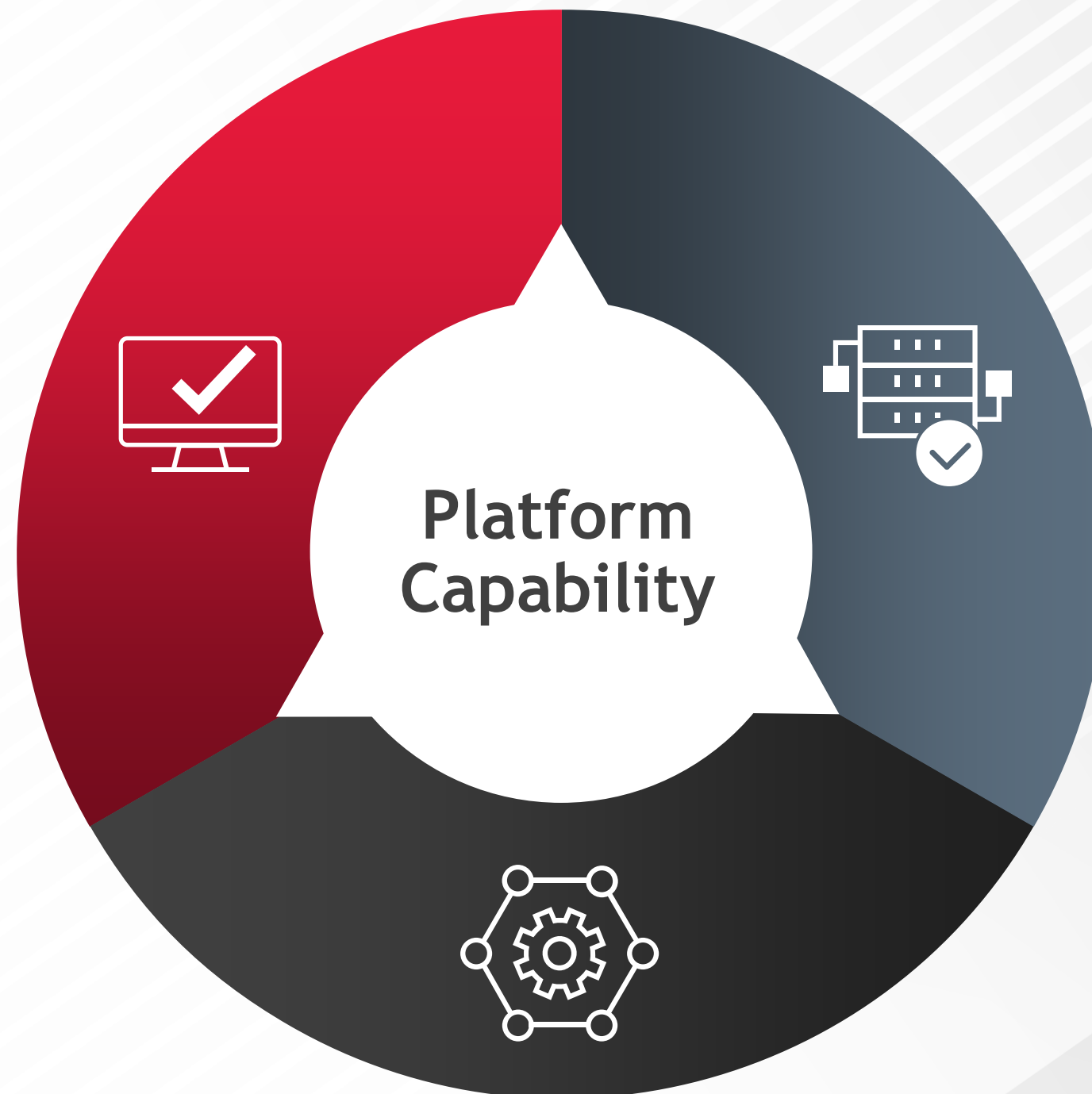


SECTION 3

Microsoft Fabric - Central Data Intelligence

Fabric Data Platform

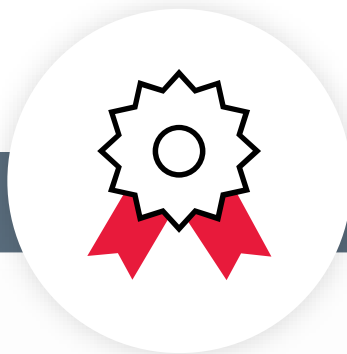
Native support for semantic models



Unified, lake-centric architecture

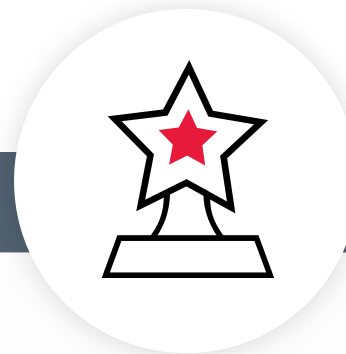
Seamless access across domains
(finance, ops, people)

Medallion Architecture



Bronze

- ▶ Raw, uncurated source data from ERP, SPA, HRIS, ATS, LMS, etc.
- ▶ Maintains traceability and auditability for finance and HR data



Silver

- ▶ Enriched, conformed data
- ▶ Standardize formats, filter data, fix source errors, remove duplicates, add lineage attributes, join data from multiple systems for MDM



Gold

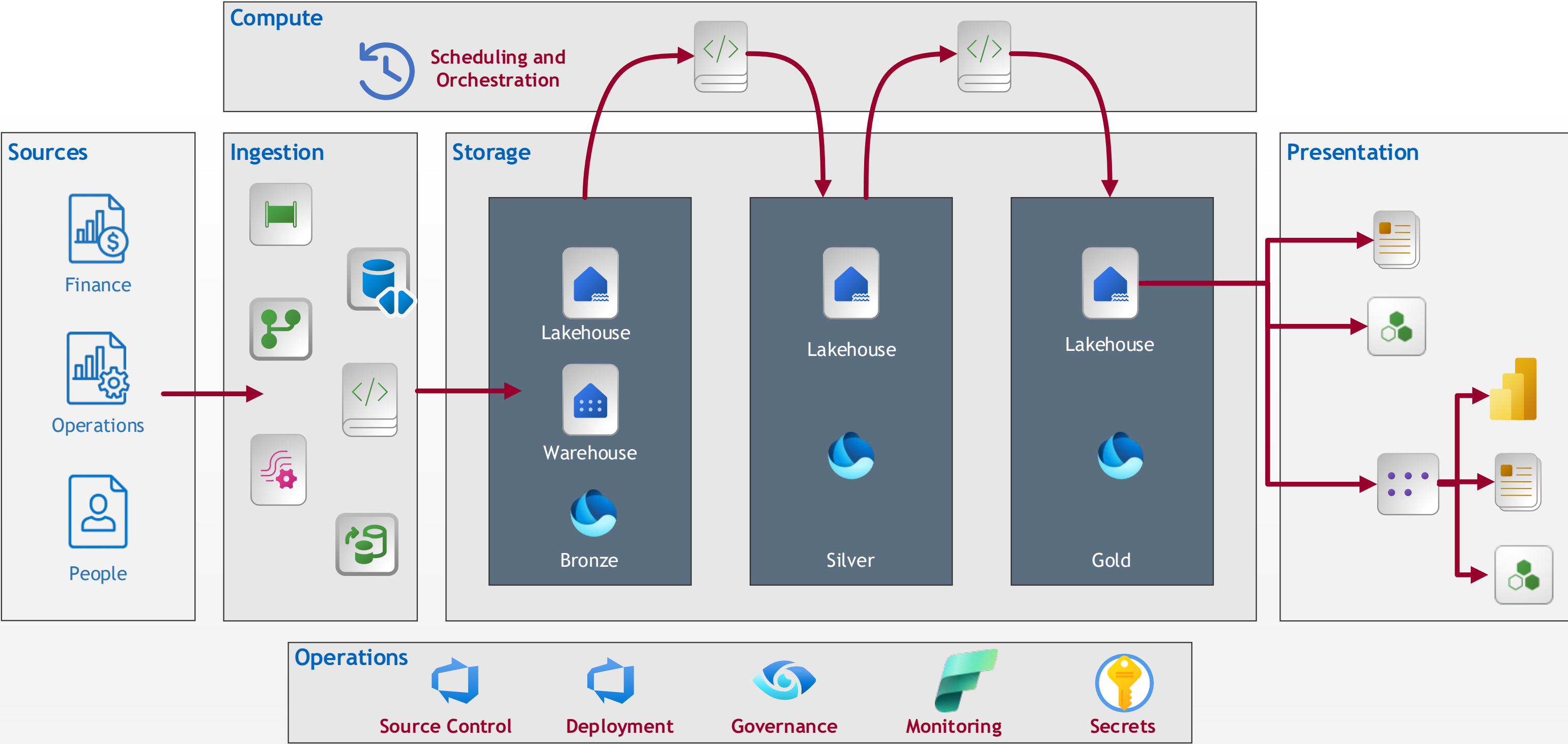
- ▶ Dimensional modeling and aggregation
- ▶ Data aligned with business entities with human-readable table/column names
- ▶ Business rules applied and views created for semantic model/reporting



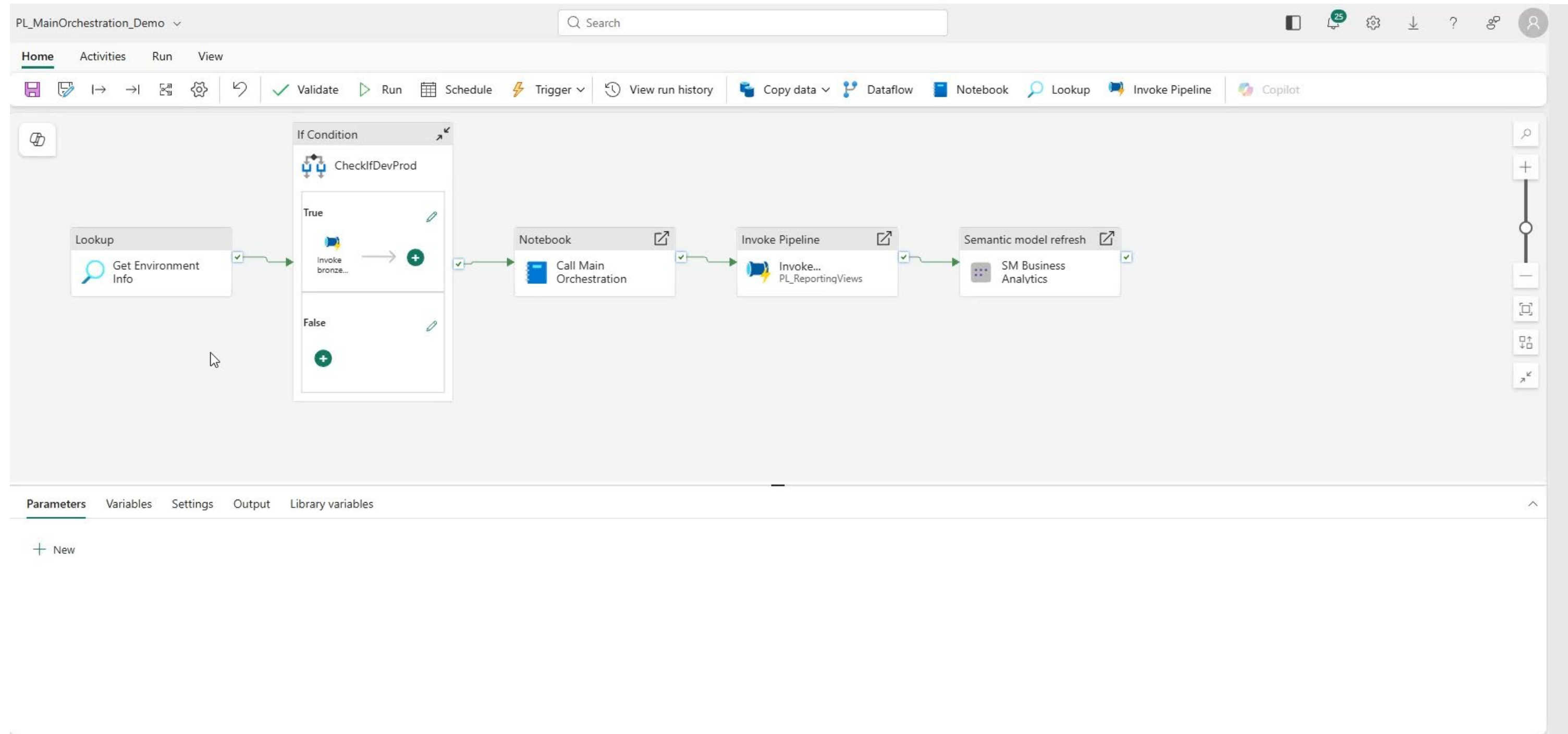
Semantic Model

- ▶ Logical description of analytics domain with metrics and business friendly terminology
- ▶ Unify sources to compute project margin, contribution margin, employee utilization, bench time analytics etc.

Fabric Architecture



Fabric Architecture Demo

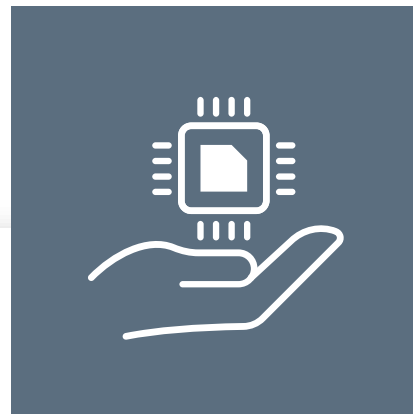




SECTION 4

Advanced Analytics and Data Science

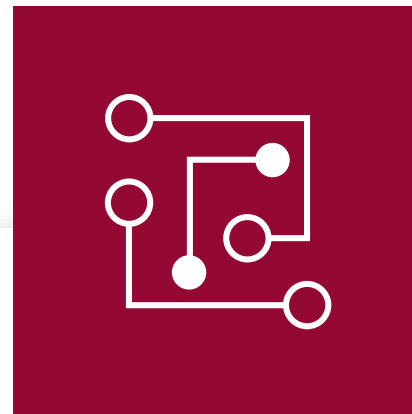
Data Clustering



Data Extraction

Aggregate metrics by PM and Consultant

- ▶ Hours
- ▶ Revenue
- ▶ Client volume
- ▶ Time since hire



Data Preparation

Normalize features with StandardScaler function in Python for clustering



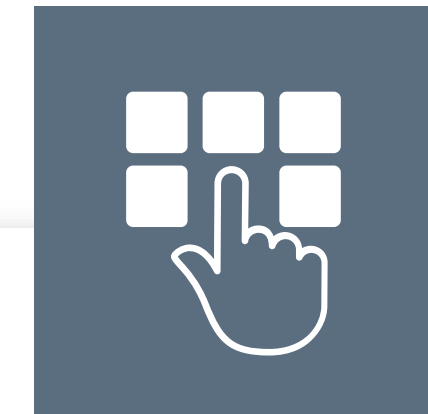
Clustering Analysis

K-Means elbow analysis and segmentation into clusters for PMs and Consultants



Visualization

t-SNE 2D plot of data to reveal distinct clusters, trends, and outliers



Business Labeling

Assign labels to each PM and Consultant cluster, and load data into Fabric lakehouse for creating PM/Consultant risk matrix

RISK ANALYSIS

Deployment Checklist



- ✓ Dev, test, and production workspaces are setup in Fabric to support multiple environments
- ✓ Entra ID security groups are created by environment to control access to the workspaces and resources within
- ✓ The risk analysis clustering model uses data from the gold layer of the medallion architecture that lives in a Fabric lakehouse
- ✓ CI/CD pipelines in DevOps are used for deployment of resources within the solution between environments:
 - ✓ The lakehouse that has the gold layer data and any shortcuts
 - ✓ A series of notebooks that performs clustering of PMs and consultants and then creates a matrix of those clusters for visualization
 - ✓ The notebooks are setup to process and apply the clustering model to data from the current year by default to identify revenue leakage risks. They can easily be updated to analyze data for prior years through a notebook parameter.
 - ✓ The CI/CD pipeline replaces GUIDs for lakehouses (and their workspace) that the notebooks are attached to based on the environment
 - ✓ The lakehouse that stores the clustered data and matrix for visualization
 - ✓ Semantic model built on top of the processed data combined with other gold layer tables
 - ✓ Risk analysis dashboard in Power BI
 - ✓ A data pipeline that orchestrates the execution of notebooks and refreshes the semantic model and the schedule it executes on

RISK ANALYSIS
Demo



Risk Matrix - Non-billable Dollars

2025 Risk Matrix

Consultant Cluster		1 - Junior	2 - Intermediate	3 - Senior	4 - Management	5 - Senior Management	Other	Total
PM Cluster	1 - Project Coordinator	\$3,563,230	\$1,347,915	\$10,168,345	\$6,412,535		\$15,954,699	\$37,446,724
	2 - Project Manager	\$268,775	\$613,025	\$3,876,230	\$4,250,875		\$3,247,880	\$12,256,785
	3 - Program Manager	\$1,261,935	\$120,810	\$2,714,415	\$793,100		\$4,911,586	\$9,801,846
	Other	\$287,074	\$52,430	\$481,340	\$95,925		\$1,666,740	\$2,583,509
	Total	\$5,381,014	\$2,134,180	\$17,240,330	\$11,552,435		\$25,780,904	\$62,088,864

** DATA USED IS FULL YEAR OF 2025 / *** "Others" not part of Data Science Grouping

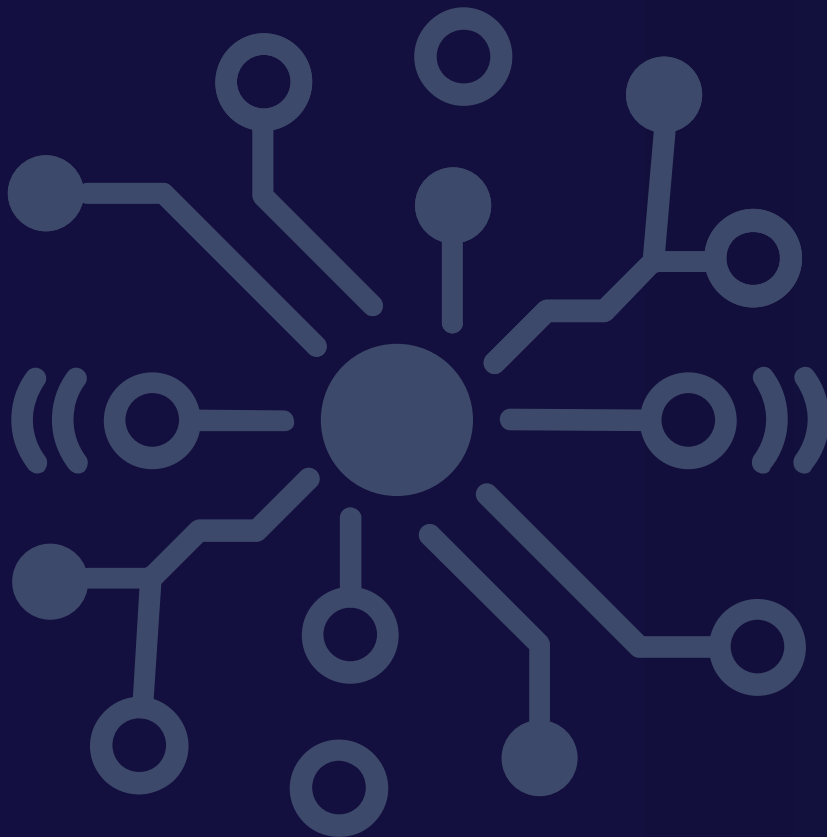
Risk Matrix - Non-billable Dollars As Percentage of Revenue

2025 Risk Matrix

Consultant Cluster		1 - Junior	2 - Intermediate	3 - Senior	4 - Management	5 - Senior Management	Other	Total
PM Cluster	1 - Project Coordinator	12.81%	4.09%	10.34%	5.05%	0.00%	36.03%	10.64%
	2 - Project Manager	11.85%	3.06%	11.77%	3.08%	0.00%	24.23%	5.67%
	3 - Program Manager	19.62%	2.48%	16.58%	4.83%	0.00%	23.06%	14.57%
	Other	32.32%	21.47%	14.31%	8.77%	0.00%	32.83%	23.47%
	Total	14.47%	3.71%	11.42%	4.13%	0.00%	30.69%	9.72%

** DATA USED IS FULL YEAR OF 2025 / *** "Others" not part of Data Science Grouping

RISK ANALYSIS
Demo



Risk Analysis - PM Groups						
Project Coordinator						
	Typical Characteristics: • Shorter tenure • Low amount of projects • Low Revenue • Smaller Clients	Avg Tenure (Months)	Avg Project Count	Avg Non-billable Hrs Ratio	Avg Total Revenue	Avg Client Volume
		61	20	13.9%	\$1.1M	3.6
Project Manager						
	Typical Characteristics: • Medium tenure • Medium amount of projects • Medium Total Revenue • Medium Clients	Avg Tenure (Months)	Avg Project Count	Avg Non-billable Hrs Ratio	Avg Total Revenue	Avg Client Volume
		116	119	11.1%	\$7.9M	4.9
Program Manager						
	Typical Characteristics: • Longer tenure • Higher amount of projects • High Total Revenue • Large Clients	Avg Tenure (Months)	Avg Project Count	Avg Non-billable Hrs Ratio	Avg Total Revenue	Avg Client Volume
		117	146	5.7%	\$18.7M	11.0
** DATA USED IS FULL YEAR OF 2025						

RISK ANALYSIS Demo

Risk Analysis - Consultant Groups

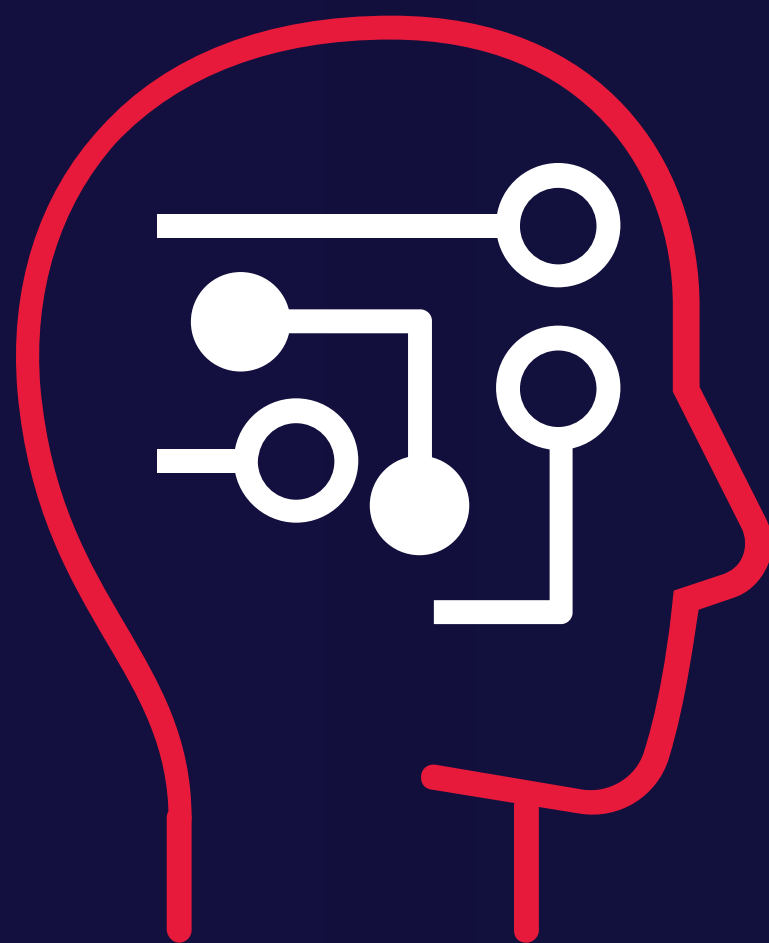
Junior		Avg Tenure (Months)	Avg Project Count	Avg Non-billable Hrs Ratio	Average Total Revenue	Average Client Volume
	• Shortest Tenure (or brand new) • Very Low amount of projects • High non-billable hours ratio • Low Total Revenue • Smaller Clients	16	7	18.4%	\$638.1K	3.7
Intermediate		Avg Tenure (Months)	Avg Project Count	Avg Non-billable Hrs Ratio	Avg Total Revenue	Avg Client Volume
	• Short Tenure • Very few projects • Low Total Revenue • Small Clients	27	5	5.9%	\$864.5K	6.4
Senior		Avg Tenure (Months)	Avg Project Count	Avg Non-billable Hrs Ratio	Average Total Revenue	Average Client Volume
	• Medium Tenure • Low amount of projects • Medium Total Revenue • Medium Clients	32	16	12.0%	\$2.3M	5.1
Management		Avg Tenure (Months)	Avg Project Count	Avg Non-billable Hrs Ratio	Average Total Revenue	Average Client Volume
	• Lengthy Tenure • Medium Project Amount • Medium-to-High total revenue • Large clients	53	11	4.2%	\$2.7M	7.8
Senior Management		Avg Tenure (Months)	Avg Project Count	Avg Non-billable Hrs Ratio	Average Total Revenue	Average Client Volume
	• Lengthy Tenure • Many projects • Very High Total Revenue • Medium to Large Clients	163	76	--	\$1.9M	6.9

** DATA USED IS FULL YEAR OF 2025



SECTION 5

Data Agents



DEMO
Fabric Data Agents

Generative AI Trends

93%

Organizations are experimenting with multiple models¹

61%

People are wary about trusting AI systems³

50%

Enterprises using generative AI will launch agentic AI pilots by 2027²

30%

Or fewer generative AI experiments moved to production⁴

1. [16 Changes to the Way Enterprises Are Building and Buying Generative AI | Andreessen Horowitz](#)
2. [Autonomous generative AI agents | Deloitte Insights](#)

3. [Trust in artificial intelligence - 2023 Global study on the shifting public perceptions of AI, KPMG](#)
4. [GenAI and the future enterprise | Deloitte Insights](#)

Fabric Data Agent Demo

Power BI Sandbox_jason_mitchell

Search

Sandbox_jason_mitchell

+ New item New folder Import Migrate

Filter by keyword Filter

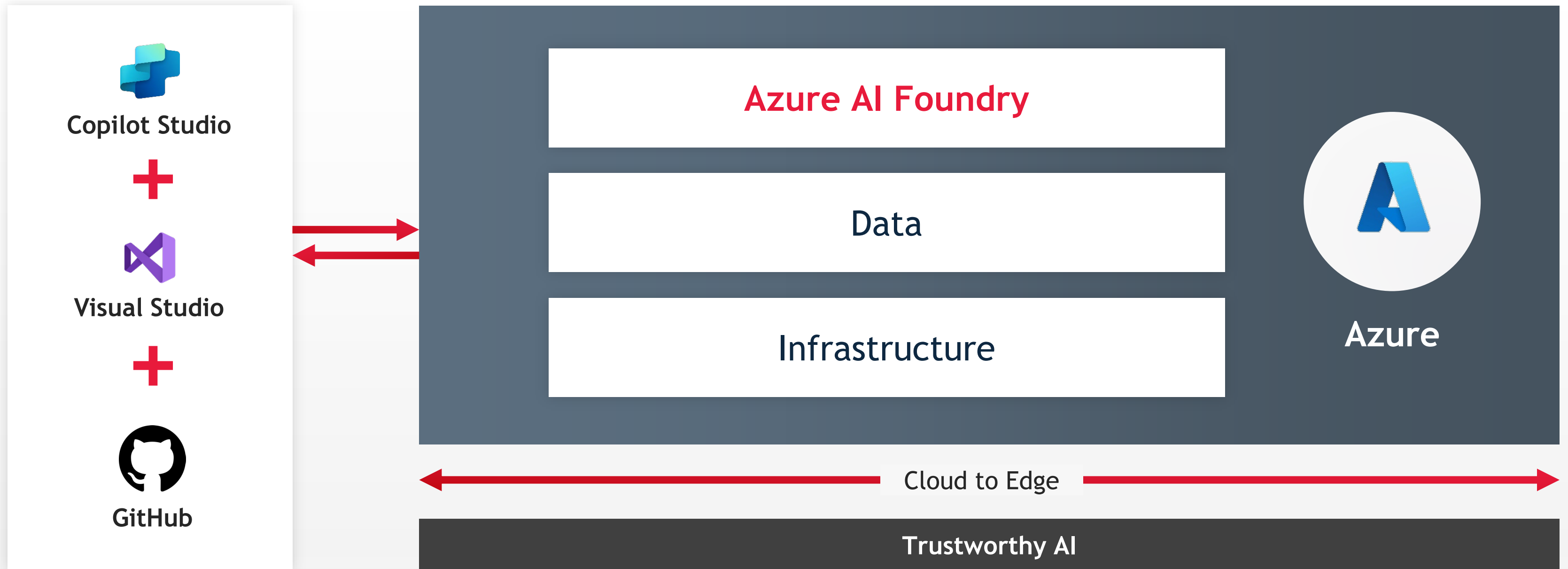
	Name	Status	Type	Task	Owner	Refreshed	Next refresh	Endorsement	Sensitivity
☐	Dataverse	☆ ...	Pipeline	—	Modern Work	—	—	—	—
	DemoML		ML model	—	Jason Mitchell	—	—	—	—
	IVA_Sales_Demo		Semantic mo...	—	Jason Mitchell	11/14/2025, 2:2...	N/A	—	—
	IVA_Sales_Demo		Lakehouse	—	Jason Mitchell	—	—	—	—
	IVA_Sales_Demo		SQL analytics ...	—	Jason Mitchell	—	—	—	—
	Product Report		Report	—	Sandbox_jaso...	1/28/2026, 9:32:2...	—	—	—
	Purchase_Agent_Lakehouse		Data agent	—	Jason Mitchell	—	—	—	—
	Sales Data		Semantic mo...	—	Jason Mitchell	1/28/2026, 9:32:...	N/A	—	—
	Sales_Agent_Lakehouse		Data agent	—	Jason Mitchell	—	—	Promoted	—
	Sales_Agent_Semantic		Data agent	—	Modern Work	—	—	—	—
	Store Report		Report	—	Sandbox_jaso...	1/28/2026, 9:32:2...	—	—	—



DEMO Copilot Studio

COMPLETE TECH STACK TO BUILD YOUR GENERATIVE AI SOLUTIONS

Copilot and AI Stack



Copilot Studio Demo

Home

Agents

Flows

Tools

...

Copilot Studio

Environment
BDO Skunkworks (defa...

Settings ? MW

Fabric Sales Agent

Overview Knowledge Tools Agents Topics Activity Evaluation Analytics Channels

Published 1/22/2026 Publish Settings ... Test

Details

Edit

Name

Fabric Sales Agent

Description

You are a sales agent that will utilize a Fabric Data Agent to respond to questions about sales data. Created by: Jason Mitchell

128/1024

Select your agent's model

Your agent will primarily use the model for reasoning and responding. Experimental models are subject to [preview terms](#). [Learn more](#)

GPT-4.1 (Default)

Analytics

Open Analytics

Check your agent's key performance info from the last 7 days.

Conversation sessions ⓘ

Engagement ⓘ

Satisfaction score ⓘ

7 ↑

100% ↑

--

Instructions

Edit

You are an agent answering questions about Sales Order and Purchase Order information. The information will come from two different Fabric Data Agents. If the user question is about sales information or customer information, use the Sales Data Agent. If the user question is about purchase order or supplier information, use the Purchase Order Data Agent. If you are unsure, ask the user to clarify whether they are asking a sales or purchase order question.

Test your agent

+

...

×

Hello, I'm Fabric Sales Agent, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

8 minutes ago

Ask a question or describe what you need

0/2000

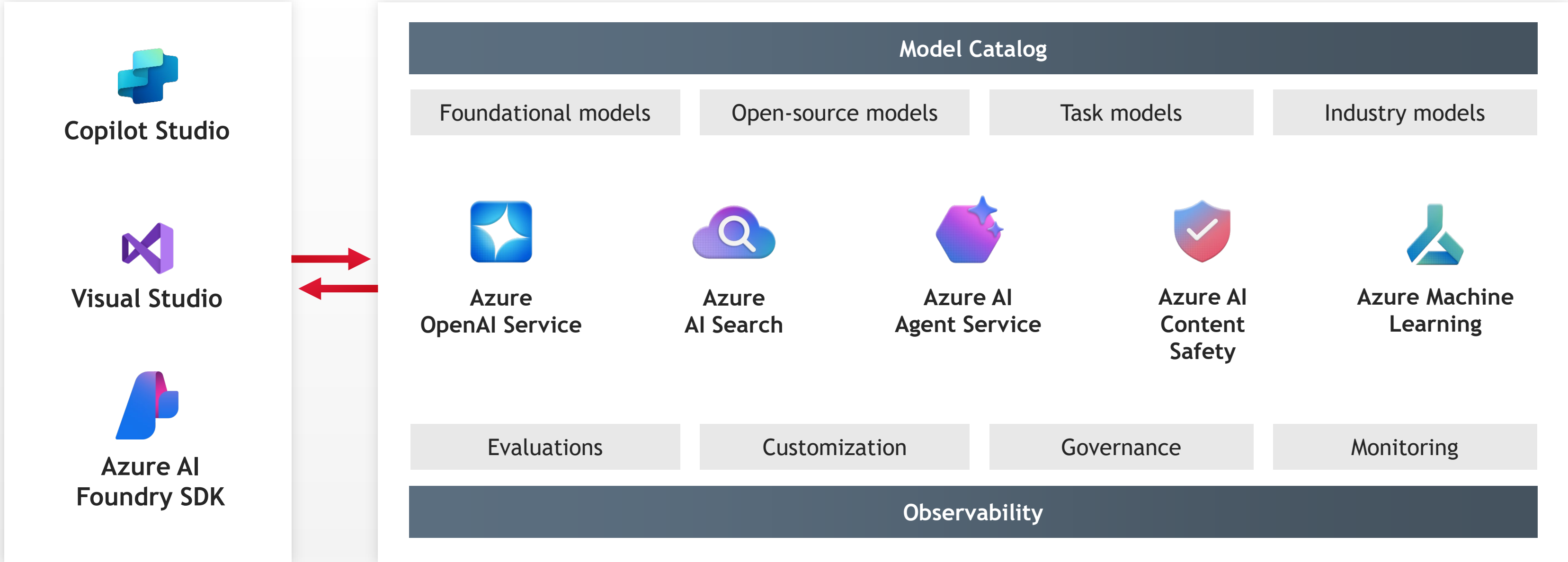
Send

You're testing your agent's real responses and capabilities. [Find troubleshooting help here](#). Make sure AI-generated content is accurate and appropriate before using. [See terms](#)

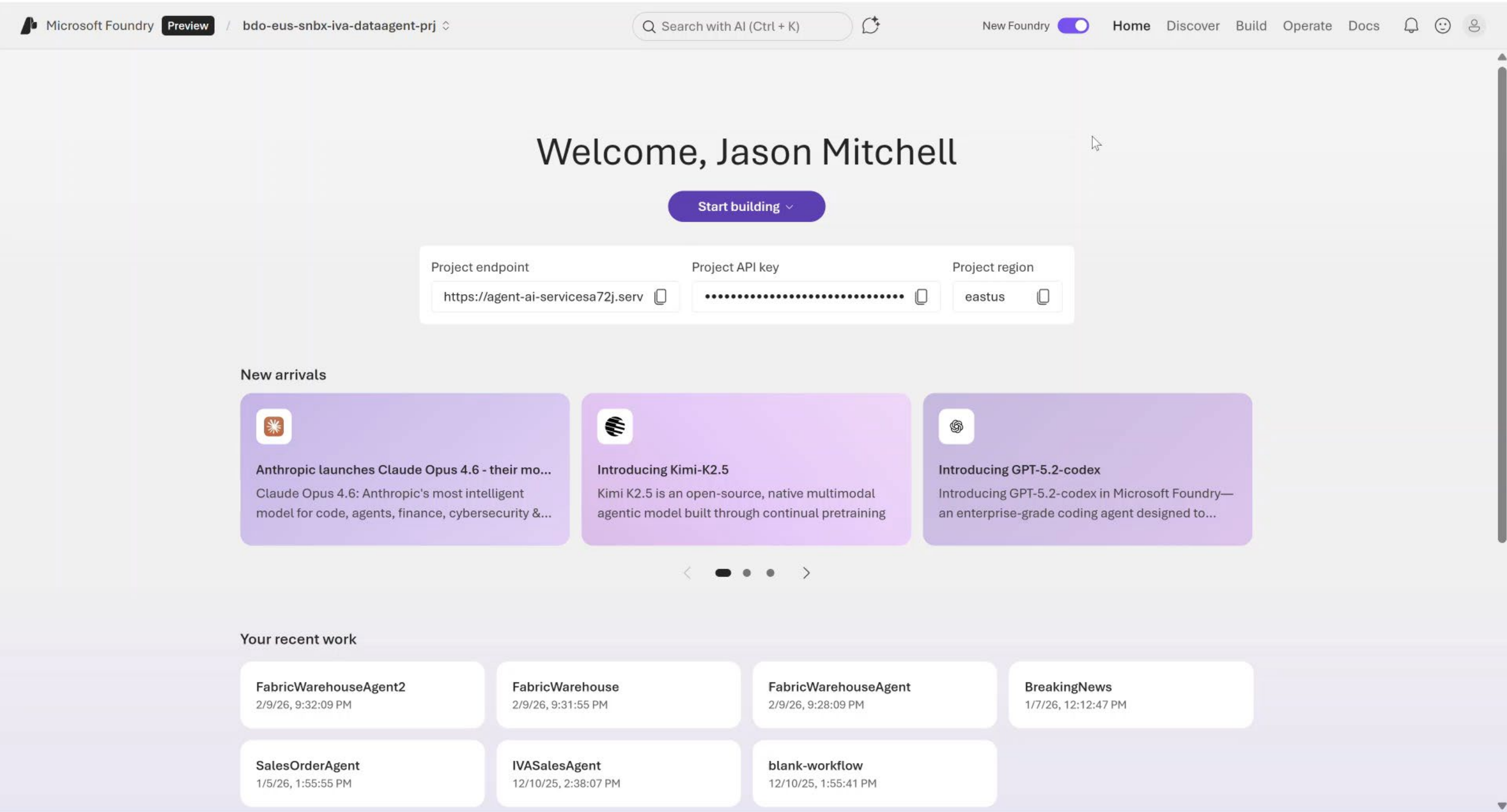


DEMO Foundry

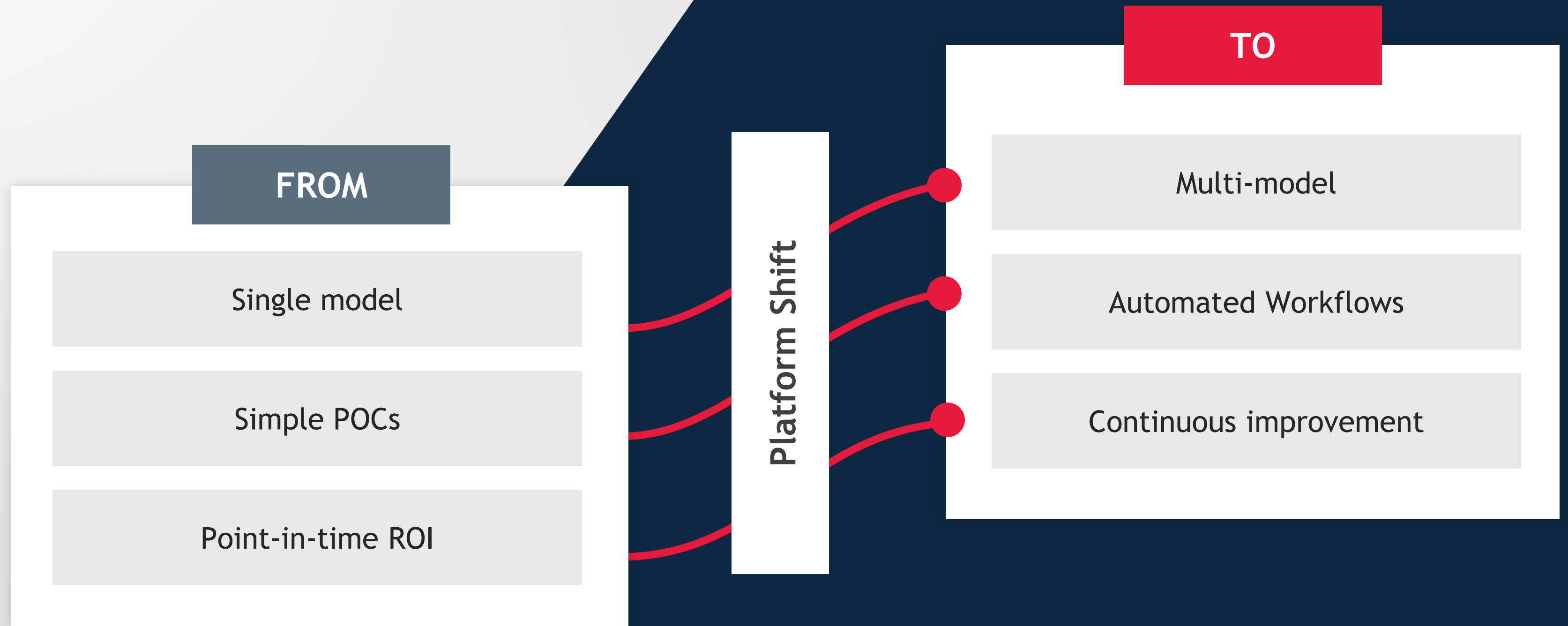
Azure AI Foundry



Foundry Demo



The Next AI Platform Is Here



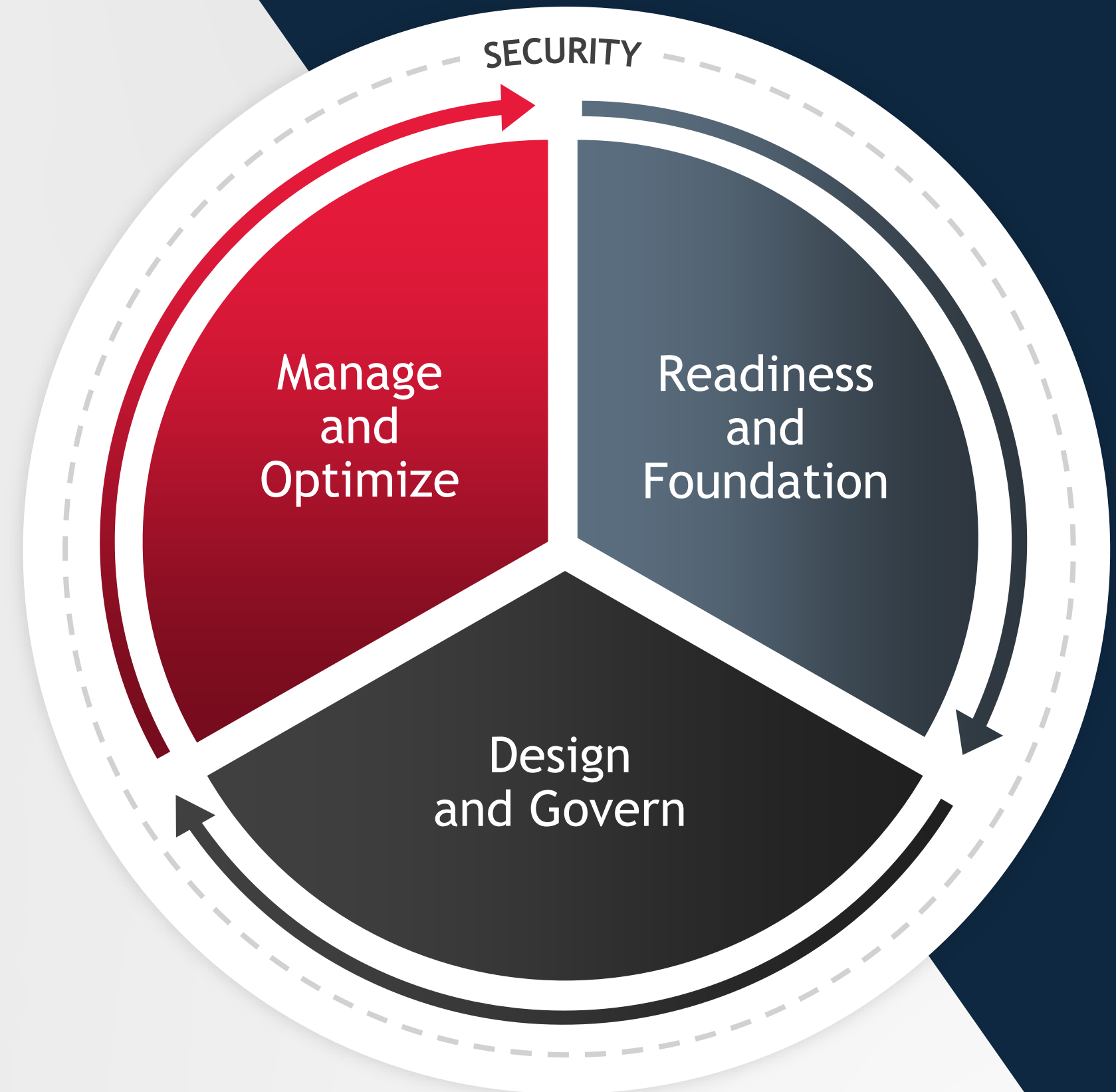
Innovate with Azure AI Platform

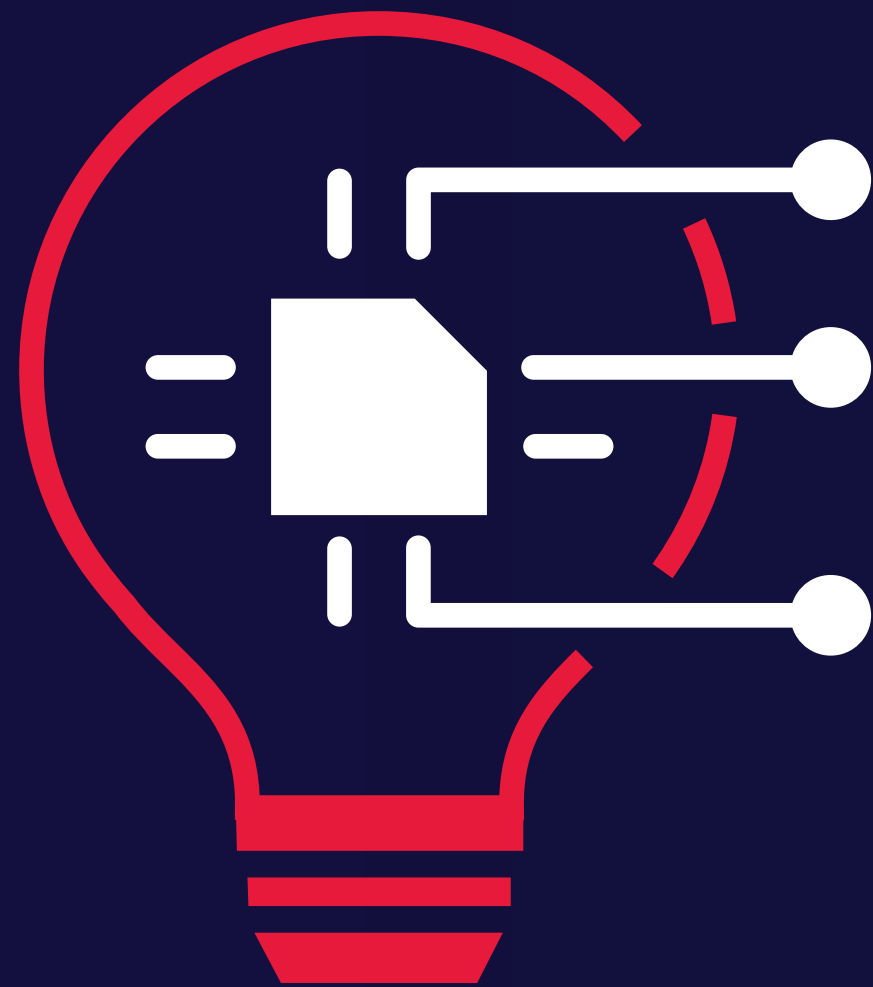
ESSENTIALS FOR GETTING AI READY

- ▶ Adopt financial best practices
- ▶ Pricing
- ▶ Skilling
- ▶ Migrate and modernize workloads and data collocation
- ▶ Platform landing zone

- ▶ Trustworthy AI: security, privacy and transparency
- ▶ Architectural guidance
- ▶ Generative AIOps
- ▶ Data governance

- ▶ Monitoring and security
- ▶ Management and optimization
- ▶ Architectural assessments and remediations

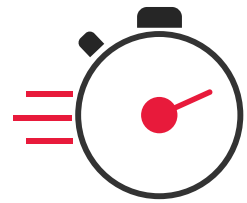




SECTION 6

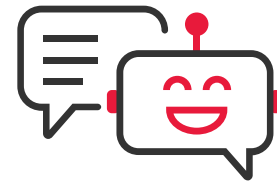
Emerging AI Features In Fabric and Foundry

Emerging Features - Foundry



Move from prototype to production in hours, not weeks:

The new Microsoft Agent Framework and Hosted Agents let you build, test, and deploy multi-agent AI systems with enterprise-grade security—no Kubernetes or container headaches.



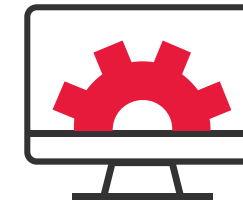
Orchestrate any model, anywhere:

Model Router and BYO Model Gateway let you mix and match thousands of models (including Claude, GPT, and your own) with unified governance and compliance—no code changes required.



Ship agents to Teams and M365 with one click:

New low-code/no-code tools, templates, and deployment channels make it easy to launch and scale AI agents for your users.



Build smarter, more reliable workflows:

Multi-agent orchestration, persistent memory, and deep Microsoft 365 integration enable robust, context-aware solutions for complex enterprise scenarios.



Access the best models in one place:

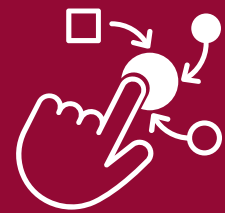
Azure is now the only cloud with both Anthropic's Claude and OpenAI's GPT models—choose the right tool for every job.

Emerging Features - Fabric



Fabric IQ

New semantic foundation within Microsoft Fabric. Fabric IQ is not a replacement for your data estate; it's a force multiplier for every investment you've already made.



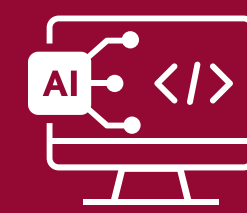
Ontology

Lets you define entity types, relationships, properties, and other constraints to organize data according to your business vocabulary.



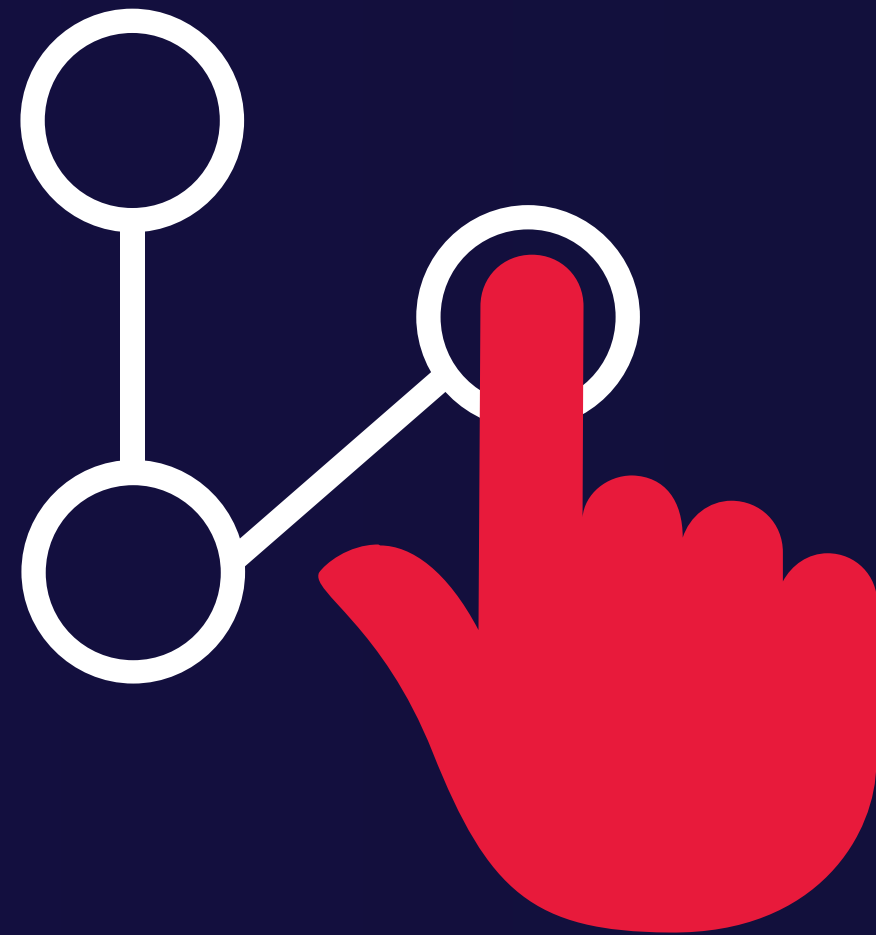
Anomaly Detection

With a no-code interface, automatic model selection, and flexible alerts, tracking changes and unexpected events is easy.



Create Embeddings in Eventhouse with built-in Small Language Models

Built-in Small Language Models (SLMs) in Eventhouse can generate text embeddings locally using ai_embeddings plugin (preview), enabling semantic search, RAG pipelines, and high-volume embedding generation without external endpoints, callout policies, or per-request costs.



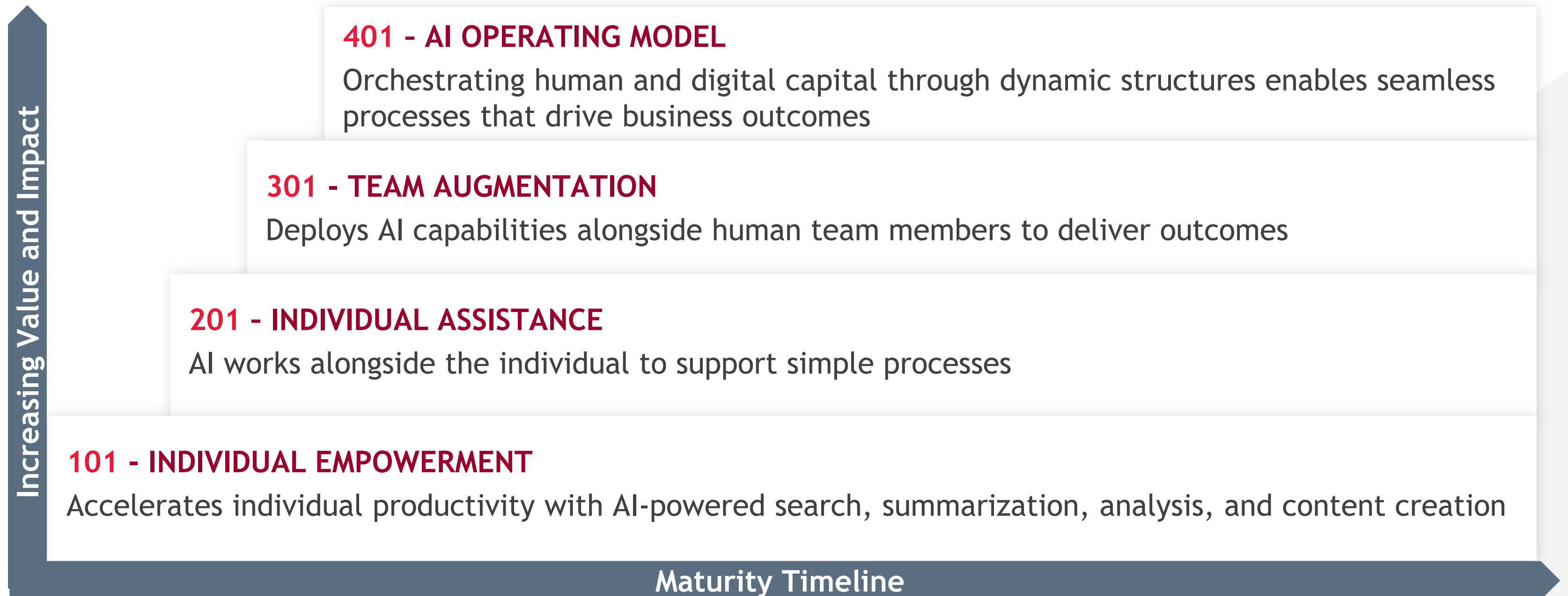
SECTION 7

Conclusion - Realizing the Frontier Firm

Evolving State of AI's Impact on Organizations

TRANSFORMING TEAMS AND ORG STRUCTURES THROUGH THE DEPLOYMENT OF AI

AI transformation begins by empowering individuals and advances through team-based process improvements being driven by organizational outcomes. The result is a more agile and dynamic workforce and ultimately creating scale.



Guiding Advice



FABRIC: AI READY DATA

- ▶ It's okay to move quickly and build one-off operational reports
- ▶ But to build long term intelligence for humans and AI, your enterprise data fabric matters
 - Descriptive analytics and semantic models
 - Data science and advanced analytics
 - Leveraging evolving Microsoft Fabric IQ, Foundry IQ, and Work IQ



AI DEVELOPMENT MINDSET

- ▶ **Low Code** - for rapid delivery and early end user feedback
- ▶ **Pro Code** - to fully control what you build and customize

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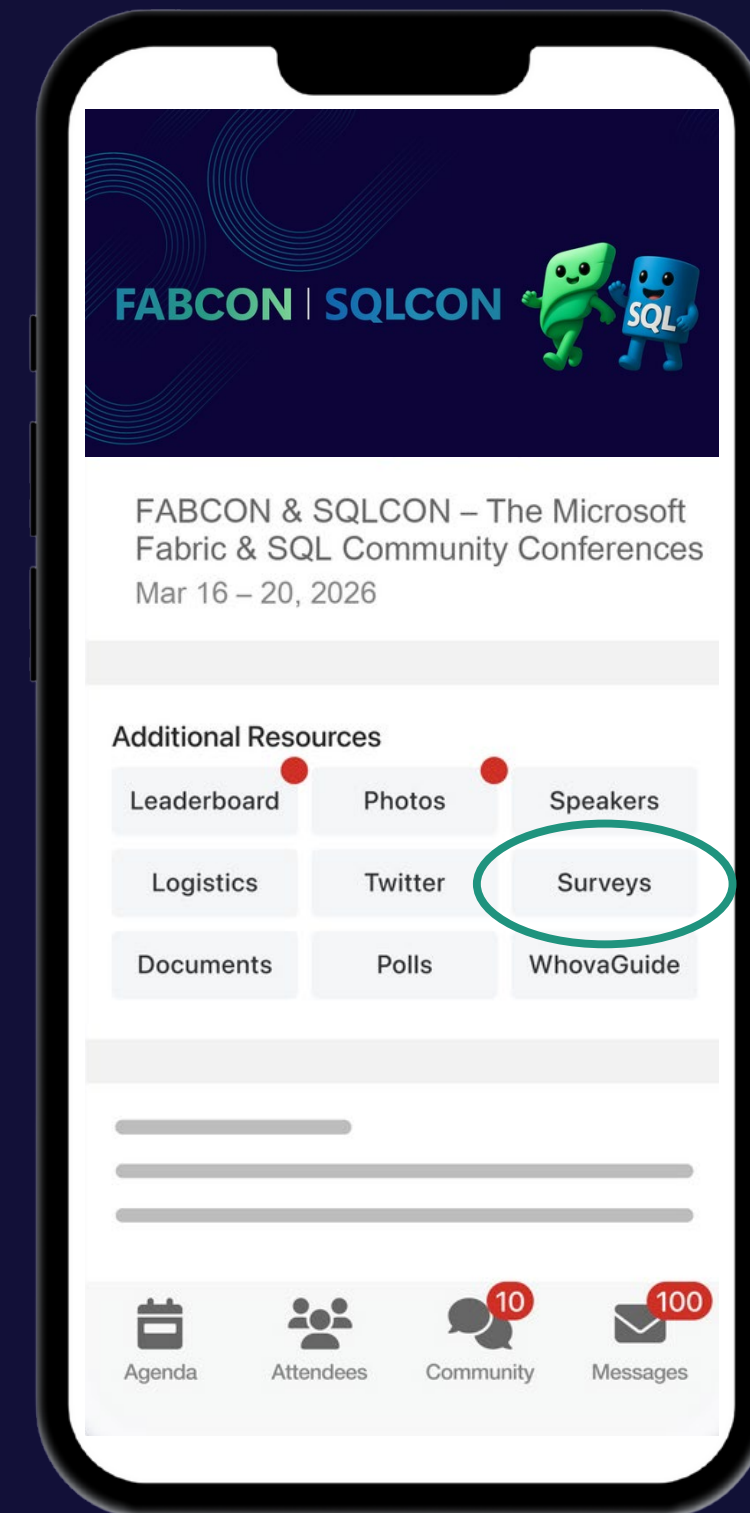
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