

EXECUTIVE BRIEFING

PORTFOLIO COMPANION BRIEF

SENIOR BUSINESS INTELLIGENCE SOLUTIONS ARCHITECT

Email: manuel@munozdaworks.com

LinkedIn: [linkedin.com/in/manuel-munoz-jr-82325b214](https://www.linkedin.com/in/manuel-munoz-jr-82325b214)

Portfolio: munozdaworks.com

ABOUT THIS DOCUMENT

This briefing accompanies the full interactive portfolio at munozdaworks.com (Access Code: **dataworks2026**). It is designed to be read in 10 minutes and shared directly with hiring managers, recruiters, and panel members. It provides a structured view of my 15+ years of technical experience, architectural reasoning, verified credentials, and professional recommendations.

HOW I PRACTICE — PROFESSIONAL IDENTITY

I am an enterprise Business Intelligence Solutions Architect specializing in the Microsoft Fabric and Power BI data platforms. My core practice focuses on designing clinically honest semantic layers, scalable medallion architectures, and governed self-service BI systems. I translate ambiguous business needs into high-performance reporting pipelines, establishing single sources of truth that leaders can audit and trust.

Core Focus: Delivering security-first BI architectures that bridge technical execution with business strategy. While my primary focus is semantic design and front-end visualization, I work closely with engineering teams to align upstream data warehousing and Delta table storage with critical analysis goals.

INDEPENDENT PUBLISHING

Writing is a standing part of my professional practice. The most substantial of that work is my ten-volume book series, **Microsoft Fabric Insights: Thread by Thread** (three volumes complete: Book I — Data Governance & Security, Book II — Data Ingestion, and

Book III — Data Transformation). Every volume in this series comes out of production work—the architectures that held, the ones that didn't, and the reasoning that separated them.

INDUSTRY & ENTERPRISE FOOTPRINT

My career spans direct consulting and architecture engagements across eight major Fortune 100 and multinational corporations, particularly in highly regulated sectors where lineage and governance are critical constraints:

ORGANIZATION	SECTOR	REPRESENTATIVE ARCHITECTURAL CONTRIBUTION
Wells Fargo	Financial Services	Delivered enterprise risk visualization frameworks, integrating KRIs into audit-ready executive dashboards to accelerate decision-making cycles.
PayPal	Financial Services	Designed PayPal's first formal data analytics dashboard for Sarbanes-Oxley (SOX) compliance monitoring, replacing manual tracking with a unified semantic layer.
USAA	Financial Services	Developed operational risk and compliance metric dashboards, translating complex control regulations into clear performance indicators.
CVS Health	Healthcare	Architected cybersecurity risk metrics dashboards, implementing robust drillthrough paths to consolidate audit findings and streamline readiness reviews.
McCormick	Food Manufacturing	Modernized QA defect tracking across global plants by building a serverless ingestion and Power BI reporting pipeline using existing Microsoft 365 licensing.
Northrop Grumman	Defense	Created business intelligence and automation solutions within classified environments requiring strict data security, lineage, and audit protocols.
Santander Bank	Financial Services	Architected operational risk reporting frameworks, designing semantic models that simplified tracking of internal controls for senior leaders.
BBVA Compass	Financial Services	Built standardized risk reporting packages to replace fragmented, ad-hoc spreadsheets across multiple retail and corporate banking lines.

TECHNICAL ARCHITECTURE STACK

My capabilities are structured across key architectural layers rather than a flat keyword index. I prioritize push-upstream modeling and robust security constraints at every stage:

DATA SOURCES & STORAGE

Microsoft Fabric, OneLake, Lakehouses, Warehouses, Azure Data Lake Storage (ADLS) Gen2, SQL Server, T-SQL, Dataverse, PostgreSQL, MySQL.

INGESTION & TRANSFORMATION

Power Query (M), Dataflows Gen2, visual pipeline modeling, KNIME Analytics Platform, Alteryx Designer, automated query-folding architectures.

MODELING & GOVERNANCE

Power BI Semantic Models, advanced DAX, Kimball Star Schema, Row-Level Security (RLS), Object-Level Security (OLS), lineage tracking.

ANALYSIS & VISUALIZATION

Power BI Desktop, Power BI Service, Tableau Desktop & Server, Power BI Report Builder (SSRS paginated reports), advanced analytical Excel.

AUTOMATION & DELIVERY

Power Automate flow pipelines, custom Power Apps front-ends, SharePoint lists, intake automation, Visio process modeling (BPMN 2.0 certified).

AI & INTELLIGENT TOOLS

Microsoft Fabric Data Agent (conversational BI over semantic models), Copilot Studio agents, OpenAI ChatGPT, Anthropic Claude, custom LLM prompts.

SIX SPECIALTIES & DOMAIN STRENGTHS

SEMANTIC MODELING & DAX

Star-schema-first model design, time intelligence, calculation groups, Performance Analyzer, and DAX Studio optimization.

MICROSOFT FABRIC ARCHITECTURE

Direct Lake storage mode, Medallion layouts (Bronze/Silver/Gold), capacity budgeting (F-SKUs), and deployment pipelines.

GOVERNANCE & SECURITY (RLS/OLS)

Row-level and object-level security, tenant administration, data lineage, and audited workspace segregation.

ENTERPRISE RISK & KRI FRAMEWORKS

Integration of Key Risk Indicators (KRIs), SOX auditing metrics, and executive decision-support visualization.

PROCESS AUTOMATION (POWER PLATFORM)

Low-code application design using Power Apps, complex workflow triggers in Power Automate, and Dataverse structures.

AI-AUGMENTED & CONVERSATIONAL BI

Microsoft Fabric Data Agents, custom Copilot Studio configurations, semantic AI prompt engineering, and metric search layers.

VERIFIED CREDENTIALS

My certifications formalize my hands-on technical depth built across 15+ years of data consulting. All credentials below are fully verifiable via the primary portfolio site:

CREDENTIAL TITLE	ISSUER	YEAR	STATUS
Microsoft Certified AI Transformation Leader AB-731	Microsoft Corporation	2026	Active
Certified Microsoft Power BI Data Analyst PL-300	Microsoft Corporation	2023	Active
Certified Tableau Desktop Specialist	Tableau Software LLC	2022	Active
Certified Alteryx Designer Core	Alteryx Corporation	2023	Active
Certified Basic Proficiency in KNIME Analytics Platform	KNIME	2023	Active
Certified CompTIA Data+	The Computing Technology Industry Association (CompTIA)	2023	Active
Certified Microsoft Office Specialist – Access Expert	Microsoft Corporation	2021	Active
Certified Expert in Business Process Management (OCBE)™	Object Management Group	2008	Active
Certified Power Platform Fundamentals PL-900	Microsoft Corporation	2025	Active

Forthcoming Milestones: DP-600 (Microsoft Fabric Analytics Engineer) & DP-700 (Microsoft Fabric Data Engineer).

CONTINUOUS LEARNING SNAPSHOT

In data technology, stagnant skills equal architectural decay. I track my training hours, courses, and credentials on a live, public dashboard referenced on my portfolio site:

12

COMPLETED COURSES

293

MODULES MASTERED

104+

PRACTICAL HOURS

RECENT & ACTIVE CURRICULUMS

- **Microsoft Fabric: Implement and Manage Analytics Solutions** — Coursera & Whizlabs (Completed April 2026)
- **Fabric Analyst in a Day** — Microsoft & Pragmatic Works (Completed April 2026)
- **Modern Data Architecture Fundamentals with Microsoft Fabric** — Microsoft & Coursera (Completed May 2026)

ARCHITECTURAL METHODOLOGY — CASE STUDIES

My portfolio includes three detailed case studies based on actual consulting architectures, illustrating distinct modes of structural decision-making:

1. ENTERPRISE RISK MANAGEMENT (ERM) FRAMEWORK

Stack: SQL SERVER • ALTERYX • POWER QUERY • POWER BI • DATA GOVERNANCE

Designed and implemented a centralized compliance intelligence platform for Meridian Health Network, replacing fragmented Excel-based risk tracking across six business units. Introduced a governed semantic model, standardized KRI definitions, and real-time executive dashboards — reducing audit preparation time by 92% and eliminating 45 days of reporting latency.

2. MULTI-CHANNEL MARKETING PERFORMANCE PLATFORM

Stack: MICROSOFT FABRIC • LAKEHOUSE • RFM MODELING • POWER BI • CLV MODELING

Designed and implemented a unified customer intelligence platform for a multi-brand retail group, replacing siloed channel reporting with a governed CLV and segmentation model across Microsoft Fabric and Power BI. Enabled marketing leadership to reallocate \$14.2M in spend by customer lifetime value — producing a 34% ROAS improvement and 2.1x CLV uplift in the Champions segment.

3. CAPITAL ALLOCATION & EXPENDITURE OVERSIGHT PLATFORM

Stack: POWER APPS • DATAVERSE • POWER AUTOMATE • SHAREPOINT • POWER BI

Architected a governance-grade capital oversight platform for a manufacturing enterprise — replacing a fragile, single-analyst Excel process tracking \$38M in annual spend. With no budget for a proper back-end system, the solution was engineered entirely on existing Microsoft 365 licenses: Power Apps, Dataverse, SharePoint, Power Automate, and Power BI. Delivered in five months at zero incremental technology cost, closing a two-year Internal Audit material weakness finding.

VERIFIED PROFESSIONAL RECOMMENDATIONS

"Manuel is one of the sharpest technical minds I've worked with. Beyond his deep expertise, he has a rare ability to step back, connect the dots, and account for the bigger picture including the intangible factors that often get overlooked. If you need clarity on a complex problem, he's the person you go to."

— Nisar Ahmed, Senior Manager, Cybersecurity Metrics & Reporting at CVS Health

"Manuel did amazing work and was consistently recognized as a top performer. I was especially impressed with his end-to-end solutions, his attention to detail, and his ability to present information in a way that clearly told the story to key stakeholders. If I ever have the opportunity to work with or hire him again, I would do so without hesitation."

— Jad Mahnken, Manager TA Production & Onboarding at Trinity Health

ENGAGEMENT MODALITIES & CONTACT

I am available for engagements where strategic analytics and technical integrity converge:

FULL-TIME ROLES

Senior BI Solutions Architect, specializing in Fabric and Power BI tenant-level infrastructure.

CONTRACT ENGAGEMENTS

Governed model design, migration of analytics estates to Fabric, and time intelligence optimization.

STRATEGIC ADVISORY

Capacity reviews, AI-augmented data search roadmaps, and requirements gathering workshops.