A DYNAMICSCON PRESENTATION

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Planning Steps for a Power BI Report

Belinda Allen

Microsoft

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How to fall down the stairs:
Step 1
Step 2
Step 3
Step 6
Step 12
Step 24

Planning Steps for a Power BI Report

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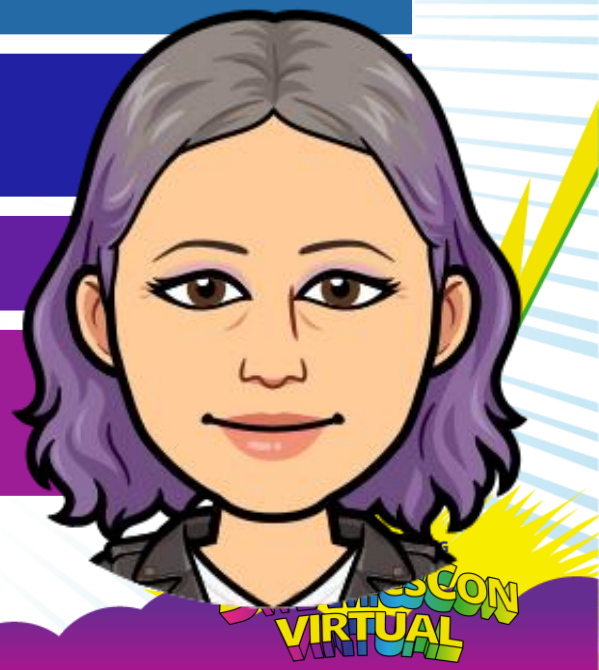
About Belinda Allen

Charleston, SC	• I lived the longest in New York City
Microsoft Partner	• Smith & Allen Consulting, Inc. – 32 years
Microsoft MVP	• 11 years / 5 years GP and 6 years Power BI
Microsoft MCT	• 12 years (with a hiatus in the middle)
Co-Authored 2 books	• BI and Dynamics GP
I love learning	• Technology, Wood Turning, Cooking
I love hobbies	• Newest hobby: Pickleball • Favorite: Knitting/Crocheting



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Agenda

- **Questions at the start of the Project**
  - Overview
  - Users, Designers and Developers
  - Use of the Reports
  - Report Branding
  - Report Layout (UI)
- **Questions During the Project**
  - User Experience (UX)
  - Ongoing user growth
- **Questions After the Project**
  - Preparing for the next Report
- **Q&A**

Pre-Project

Identify the Project Team (Stakeholders)

From Wikipedia, the free encyclopedia

Project stakeholders are persons or entities who have an interest in a given project. According to the Project Management Institute (PMI), the term *project stakeholder* refers to "an individual, group, or organization, who may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of a project".

https://adoption.microsoft.com/powerplatform/

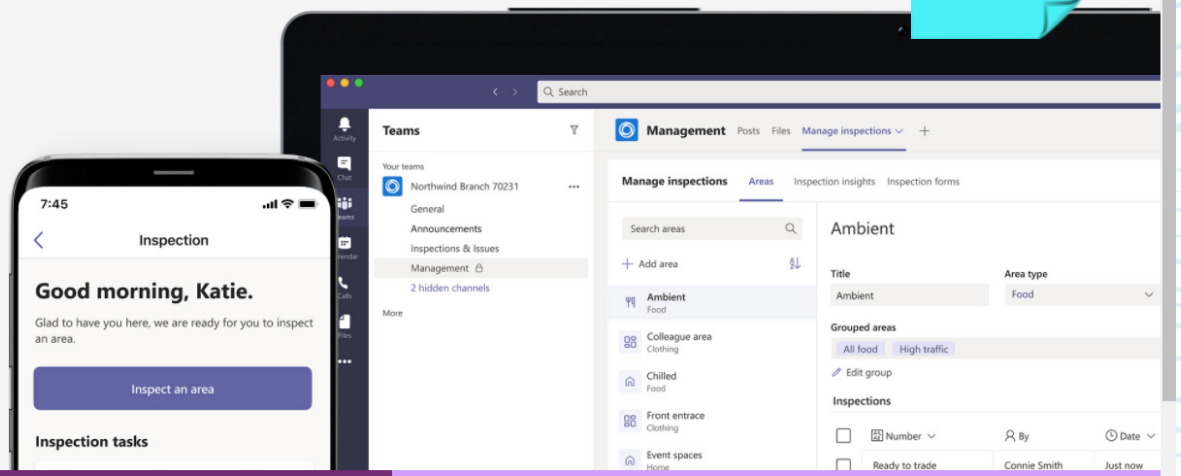
Microsoft | Microsoft Adoption

Roles | Products | Solutions | Resources | Training | Special Events | Communities | Virtual Hub

Resources

Microsoft Power Platform Adoption

Work together to meet challenges effectively with Microsoft Power Platform—analyze data, build solutions, automate processes, and create virtual agents.



Adoption workbook

This workbook will help you jumpstart your Microsoft Power Platform adoption.

Download workbook >

Adoption best practices

This adoption best practices documentation provides proven guidance that's designed to help you create and implement the business and technology strategies necessary for your organization to succeed with Microsoft Power Platform.

Get the best practices >

Adoption Maturity Model

Learn about consistent themes, patterns, practices and behaviors that underpin the progress of successful organizations as they implement comprehensive digital transformation with Microsoft Power Platform.

Learn about the maturity model >

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Assemble your team

Any successful project begins by bringing the right team together. Your project stakeholders should include representatives across your organization who have accountability for project success.

Role	Responsibilities	Department	Who?
Executive Sponsor	Communicate high-level vision and values of the Microsoft Power Platform to the company	Executive Leadership	[Enter Name Here]
Success Owner	Ensure the business goals are realized from the adoption process	Any department	[Enter Name Here]
Champions	Help evangelize Power Platform. Create a circle of influence and can feed back to the Adoption team what works/what doesn't work.	Multiple departments	[Enter your Champions Lead here]
Training Lead	Manage and communicate training content about Power Platform – can be internal or external vendor	IT or other	[Enter Name Here]
Department Leads (Stakeholders)	Identify how specific departments will use the Power Platform and encourage engagement	Any department (management)	[Enter Name Here]
Communication Lead	Oversee company-wide communications about the Power Platform	Corp Communications, IT or other	[Enter Name Here]
Power Platform Admin Team	Responsible for establishing an environment strategy, setting up data loss prevention (DLP) policies, and managing users, capacity, and licensing. They also make data available to makers through connectors, integration, or migration.	IT	[Enter your Admin Lead Here]
Power Platform Nurture Team	Organizes app-in-a-day events and hackathons, provides mentorship to makers, ensures new makers get off to a good start, and generally evangelizes the platform. Provide business change management.	Multiple departments	[Enter your Nurture Lead Here]

Note: Though we recommend having each of these roles fulfilled, in smaller organizations some of these roles may be carried out by the same person.

First Meeting

Overview

Resources

- **Is your company already using Power BI?**
  - Pro, PPU, Premium or Free?

Feature [3]	Power BI Pro	Power BI Premium Per user	Power BI Premium Per capacity
Collaboration and analytics			
Mobile app access	●	●	●
Publish reports to share and collaborate	●	●	
Paginated (RDL) reports	●	●	●
Consume content without a per-user license			●
On-premises reporting with Power BI Report Server			●

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https://powerbi.microsoft.com/en-us/pricing/

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Overview

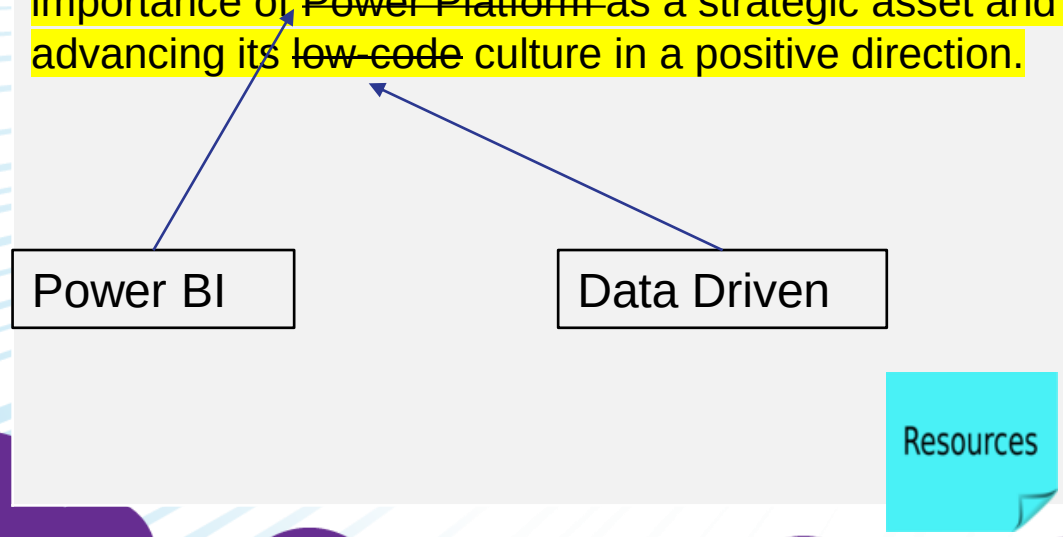
- What is your experience with Power BI?

Role	Responsibilities	Department
Executive Sponsor	Communicate high-level vision and values of the Microsoft Power Platform to the company	Executive Leadership
Success Owner	Ensure the business goals are realized from the adoption process	Any department

Identify an executive sponsor

There are multiple ways to identify an executive sponsor.

Top down	Bottom up
An executive sponsor may be selected by a more senior executive. For example, the Chief Executive Officer (CEO) may nominate the Chief Information Officer (CIO) or Head of Digital Transformation to advance the low-code adoption. Having an executive sponsor at the C-level is an excellent indicator. It indicates that the organization recognizes the importance of ~~Power Platform~~ as a strategic asset and is advancing its ~~low-code~~ culture in a positive direction.	Alternatively, a candidate for the executive sponsor role could emerge due to the success they've experienced with Power Platform. For example, a business unit within the organization, such as Finance, has organically achieved great success with respect to their use of Power Platform. A leader, such as the Finance Director, may then grow into the executive sponsor role by sharing successes with other business units across the organization. With a bottom-up approach, the sponsor may be able to make some progress, but they won't have formal authority over other business units. Without clear authority, it's only a matter of time until challenges occur that are beyond their level of authority. For this reason, the top-down approach has a higher probability of success. However, initial successes with a bottom-up approach can convince leadership to increase their level of sponsorship.



Overview

- **What are your expectations (goals) with Power BI?**

Goal	How it benefits the organization
Access to Current Data	Provide executives and managers the ability to see all data through yesterday, everyday, from anywhere
Make Data-Driven decisions	Empower executives and managers to decide on sale prices based on inventory that needs to move from lack of sales, being old, and over buying.

What item(s) would constitute this project as being a success?

Define your success criteria

Identify key performance indicators (KPIs) that should improve based on adopting various business scenarios.

Establish KPI benchmarks using SMART goals

Resources

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Identify SMART success criteria

Resources

S **Specific:**
Clear and unambiguous. Answering questions "What, why, who, and where?"

M **Measurable:**
Concrete, clearly demonstrating progress.

A **Achievable:**
Reasonable, not extreme.

R **Realistic:**
In line with the realities of the stakeholders.

T **Time related:**
Linked to a specific target date. Answering the question "when?"

Use these examples to define success benchmarks

Success measure	Measurement method	Example goal
Reduced operating costs • Replace third-party tools with Power Platform • Use Power Platform for development of custom solutions • Avoid on-premise run costs by retiring legacy and on-prem solutions and replacing them with Power Platform solutions	Quantitative • # of third-party applications retired • # of legacy solutions retired • # of Power Platform solutions used in production	• Replace 20% of third-party apps by end of year • Replace 10% of legacy and on-prem apps • Reduce custom software development by 10% • Use x number of Power Platform solutions in production
Increased productivity • Faster time to market through using low code and reducing development time of solutions • Increased number of makers able to develop tools that can replace paper and manual processes • Ability to complete tasks on a mobile device instead of having to go to a desk.	Quantitative • Process efficiency gains • Time savings by using Power Platform solution instead of paper/manual processes • Qualitative • End user surveys	• x number of makers • x amount of time saved by using Power Platform solution instead of manual process • 10% fewer repetitive tasks • 20% fewer data entry errors / less data loss on manual processes
Improved collaboration • Reduce Shadow IT by having full visibility of Power Platform solutions that are being built • Fusion team collaboration between low-code and pro-code makers	Qualitative • Maker surveys • End-user surveys	• x number of makers • Satisfaction score on end-user surveys
Improved employee engagement • Employees are motivated to help the organization achieve its digital transformation goals • Employees have increased learning opportunities and career paths available to them	Qualitative • Employee surveys	• Employee engagement improves by 15% within 6 months • x number of employees who complete training / advance their career with Power Platform

Resources

Define your success benchmarks

Success measure	Measurement method	Example goal

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Resources

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Users, Designers and Developers

Resources

- **Who are the intended consumers of the report?**
- **Will the report be shared internally? How?**
- **What is the size of the audience?**
  - Individual, Team, Department, Enterprise
- ***Do the users have experience in power BI and/or using Visual Reports?***

Do show Power BI during this meeting?

NO

Resources

The Report

- **Can you provide a summary of this report?**
  - Do this exist already, can you show it to me?
  - If it exists, what are you trying to change about it?
  - If it does not exist, do you have a drawing of what you want to see?
- **If it doesn’t exist, Whiteboard the report at this time.**

Resources

The Report

- **Are you on a Calendar Year or Fiscal Year?**
  - If you are on a Fiscal Year, are your periods calendar months?
- **Why is this project needed?**
- **What question(s) is the report designed to answer?**
- **What story is the report designed to tell?**

Resources

The Report

- **What Action is this report designed to trigger?**
- **What decision is the report designed to support?**
- **Objectives for:**
  - Report viewers
  - Report analysts
  - Overall business
- **What insight should stand out first?**

Resources

“I want this report, just like Excel.”

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Name	Company	E-Mail	Mobile Number	Addres	City	State/Provir	ZIP/Postal Code	First Na	Last N	Credit Limit	CustomerID	Balance
2	Dan Aykroyd	Gray Sloan Hospital	Dan.Aykrod.MD@Gra	765-555-9864	8756 Rani	Seattle	WA	87961	Dan	Aykroyd	25000.00	112	156.00
3	John Belushi	Gray Sloan Hospital	DrBelushi@GraySloa	765-555-9864	8756 Rani	Seattle	WA	87961	John	Belushi	25000.00	113	2687.00
4	Chevy Chase	Gray Sloan Hospital	DrChevyChase@Sacr	765-555-9864	8756 Rani	Seattle	WA	87961	Chevy	Chase	30000.00	111	6581.00
5	Michael Che	New Amsterdam Medical Center	DrChe@Amersterdar	212-869-8600	486 Broad	New York	NY	10015	Michael	Che	50000.00	115	49999.00
6	Billy Crystal	Sacred Heart Hospital	DrCrystal@SacredHe	609-444-8000	800 Melro	Beverly H	CA	90210	Billy	Crystal	50000.00	119	2681.00
7	Jane Curtin	Chicago Hope Hospital	DrCurtin@ChicagoHo	555-865-8369	457 Super	Chicago	IL	40006	Jane	Curtin	25000.00	105	24690.00
8	Chris Farley	Gaffney Chicago Medical Center	DrFarley@Gaffney.fa	555-087-9871	1005 Cubs	Chicago	IL	40008	Chris	Farley	25000.00	109	24695.00

Do you want analytics or Data Access?

Mike Carlo-ish

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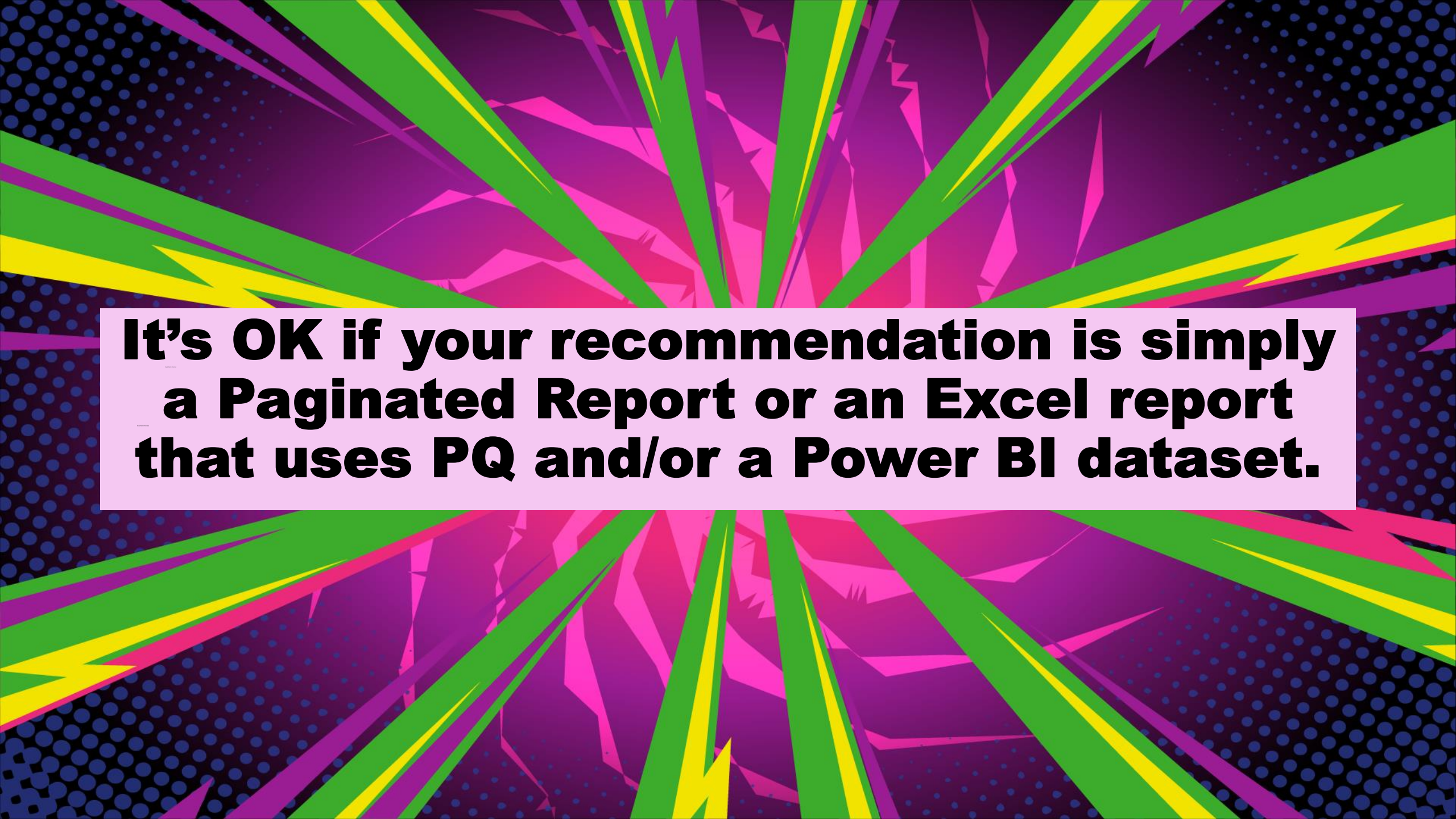

It’s OK if your recommendation is simply a Paginated Report or an Excel report that uses PQ and/or a Power BI dataset.

Resources

Data Sources

- What is/are the source(s) of data for this report?
- Is/are the data source(s) validated and certified?
- What data validation checks are required?
- How will we connect to the data sources?
- Who define groupings, if necessary?
- Who will proof the dataset?

Resources

Data Security

- How will the report be shared?
- Do we need an AAD Group?
- Does the report need RLS? Source for filter?
- Does the report need OLS? Source for filter?
- Can we change the data source to improve security/performance?

Resources

Branding & UI

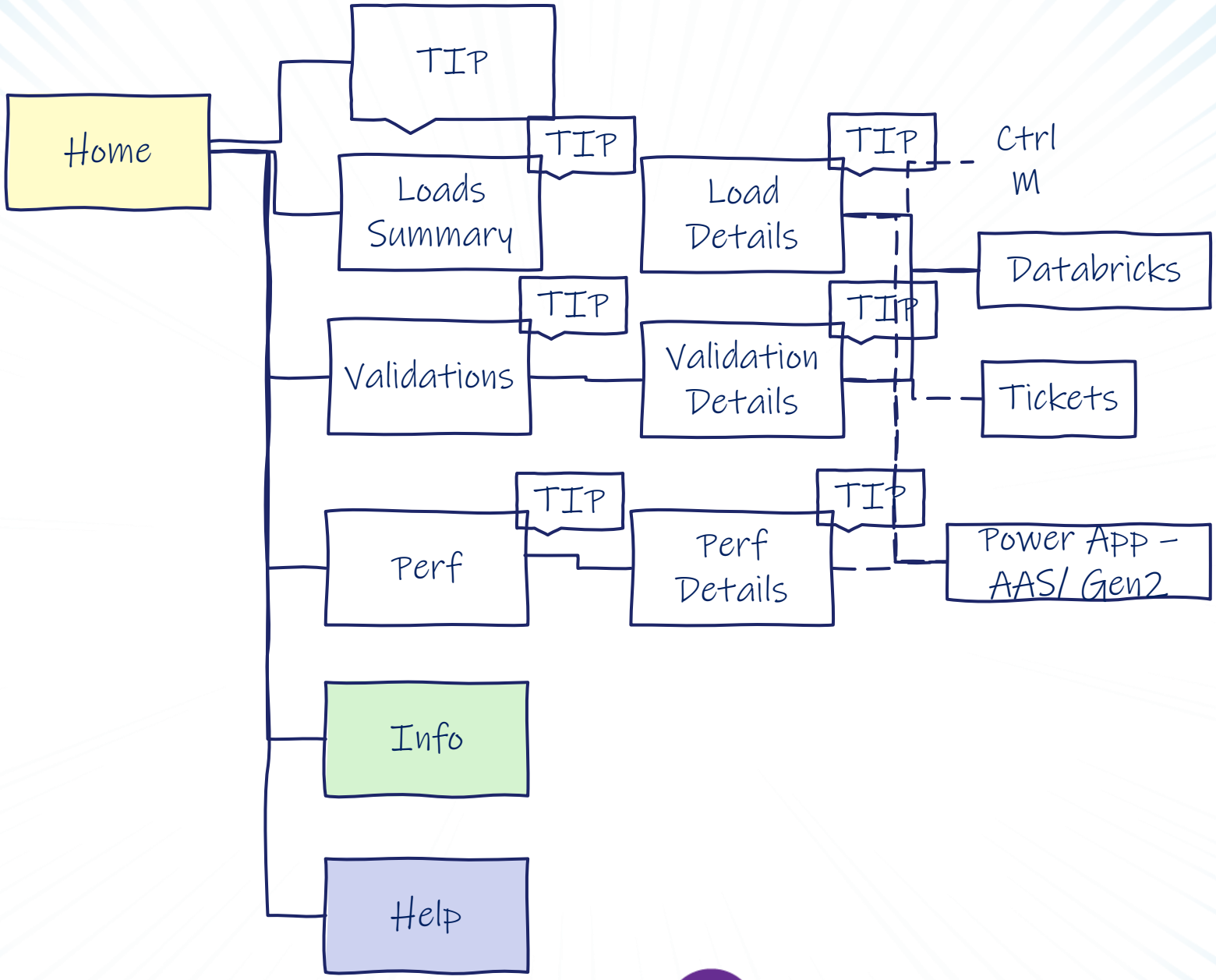
- Ask for a Branding Guide
- Use a (Power BI) Theme

https://themes.powerbi.tips/

WIREFRAME

Resources

- Start with User Experience and understanding audience
- Move on to overall flow of information
- Layout each page with a focus on Action
- Define Data to support needs
- Work Data >> Report >> User



Resources

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KPI

KPI

KPI

KPI

TITLE

LOGO

Navigation

Navigation

Navigation

Navigation

Navigation

Button

?

LINK

HELP / Information

Resources

HERO VISUAL

TOOL TIP

VISUAL

VISUAL

VISUAL

HERO VISUAL

TEXT

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor

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DYNAMICSCON VIRTUAL

KPI

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Resources

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Button

TOOL TIP

Navigation

?

HELP / Information

Menu

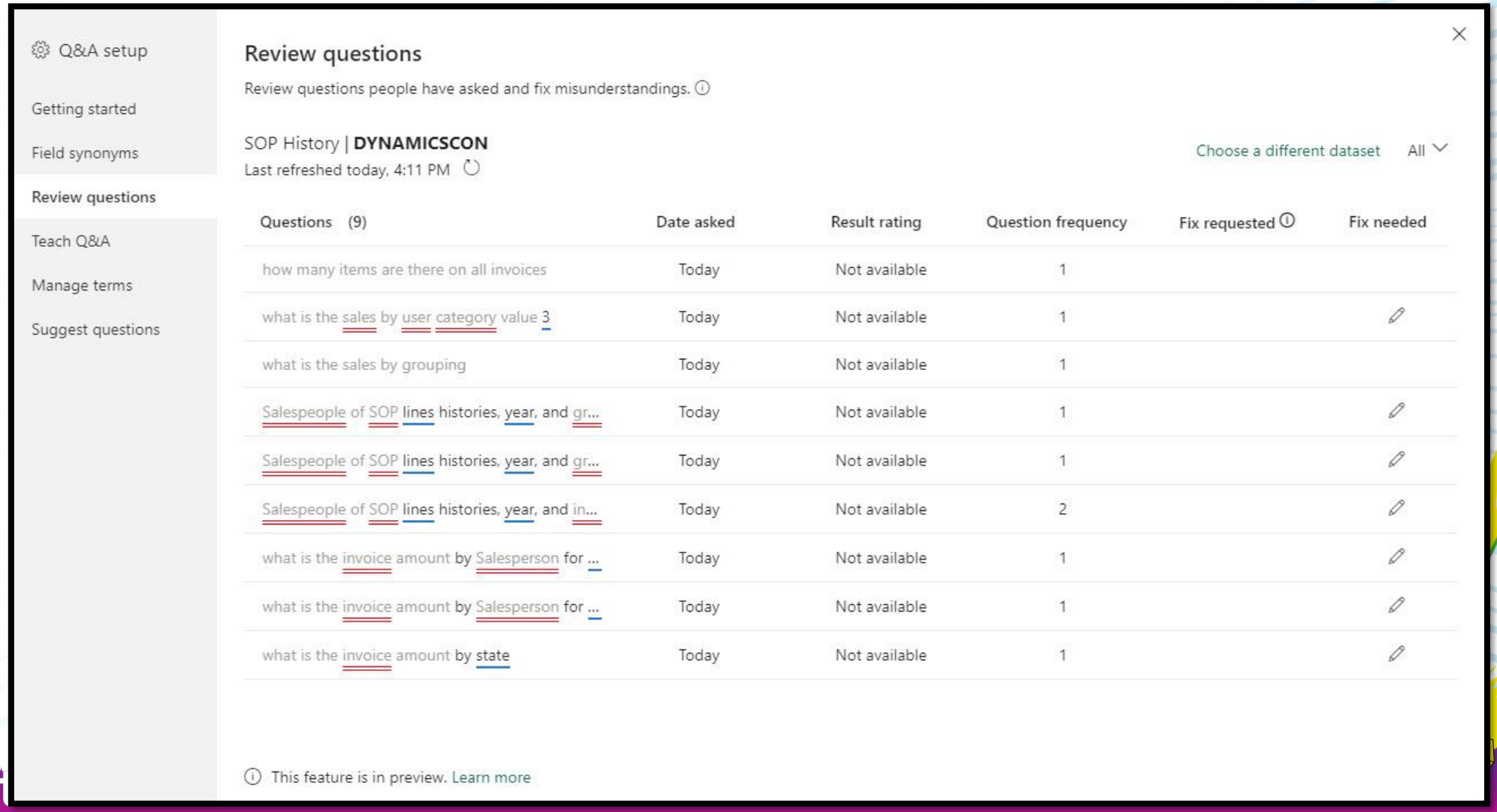
BOOKMARK

GROUPING

LINK

UX & Ongoing User Growth

- Q&A



Resources

UX & Ongoing User Growth

- Office Hours
- Show & Tell session (offer a $10 gift certificate to presenter)
- Join User Groups
- A Power BI Center of Excellence (COE) is an internal team of technical and business experts.

Resources

After the Project
Did you achieve these defined success benchmarks?

Success measure	Measurement method	Example goal
Reduced operating costs • Replace third-party tools with Power Platform • Use Power Platform for development of custom solutions • Avoid on-premise run costs by retiring legacy and on-prem solutions and replacing them with Power Platform solutions	Quantitative • # of third-party applications retired • # of legacy solutions retired • # of Power Platform solutions used in production	• Replace 20% of third-party apps by end of year • Replace 10% of legacy and on-prem apps • Reduce custom software development by 10% • Use x number of Power Platform solutions in production
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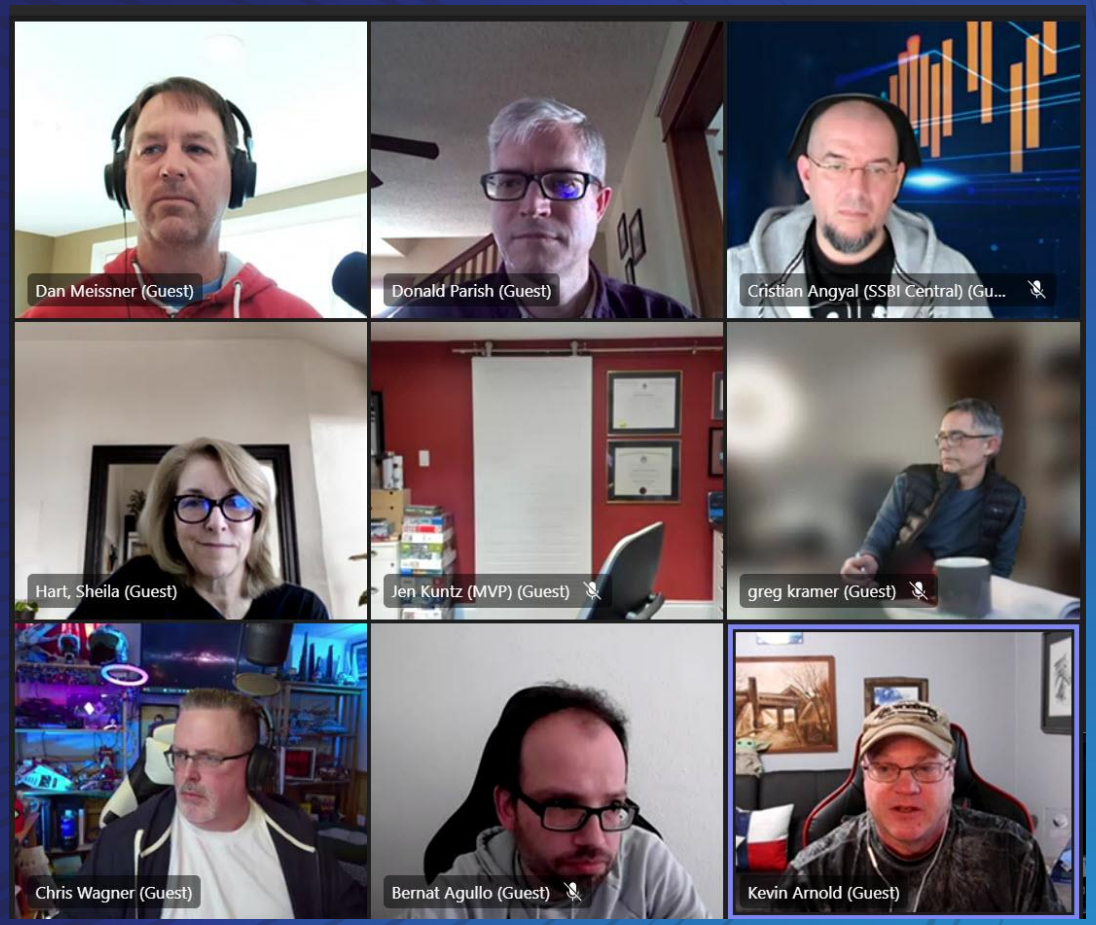
After the Project

1. Share an ROI with Executive Sponsor and Success Owner.
2. Review your notes:
   No doubt you'll have another recommendation for another Power BI Project.

Special thanks to #SML – all 100+ of you!

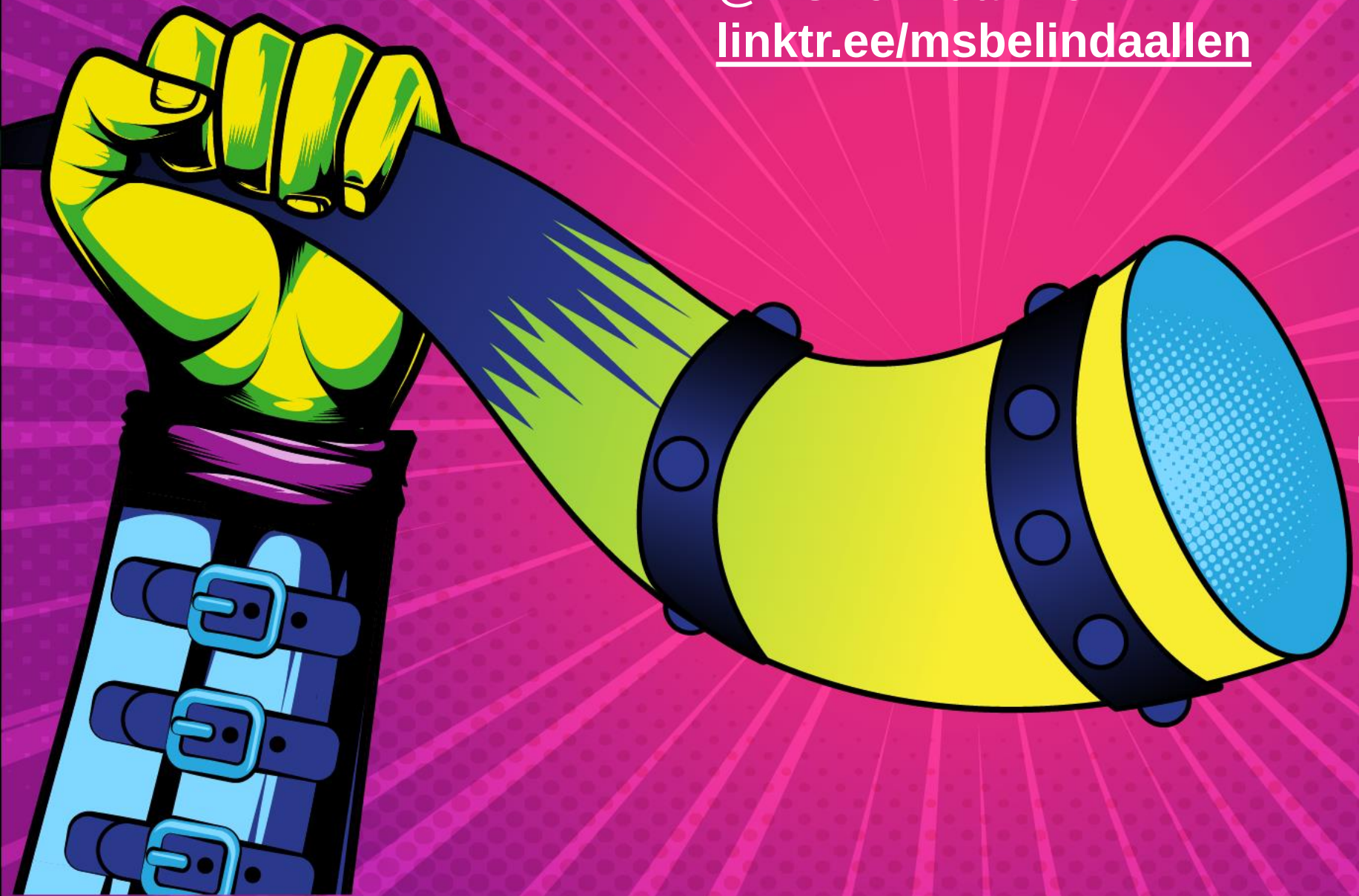


Jessica Jolly
Donald Parish
Cristian Angyal
Sheila Hart
Jen Kuntz
Greg Kramer
Chris Wagner
Fernando Calero
Mark Walter
Kevin Arnold
Sue Bayes
Antony Catella
James Bartlett
Dan Meissner
Rishi Sapra
Shawn Sissenwein

Jack Irby
Tom Greene
Bob Kundrat
Mike Ford
Bernat Agullo
Mira Abel
James Ward
Cristian Profitt
Greg Baldini
Chuy Varela
Bob Pieciak
And a bunch more…

Resources

Resources

- https://en.wikipedia.org/wiki/Project_stakeholder
- https://adoption.microsoft.com/en-us/powerplatform/
- https://powerbi.microsoft.com/en-us/pricing/
- https://www.youtube.com/watch?v=e_-pk23d50o&t=541s
- https://www.kratosbi.com/data-god-model **Data God Wireframe**
- https://storybi.com/contact/
- https://learn.microsoft.com/en-us/power-bi/guidance/powerbi-adoption-roadmap-center-of-excellence
- https://powerbi.tips/
- https://themes.powerbi.tips/
- https://learn.microsoft.com/en-us/power-bi/guidance/center-of-excellence-establish

Thanks for attending!
@MsBelindaAllen
linktr.ee/msbelindaallen