Power BI
REPORT CHECKLIST

The following checklist should serve as a starting point to creation of a Power BI Report Development process within organizations. Some of the most important points, split in relevant categories are already outlined.

Power BI
REPORT CHECKLIST

DataTraining.io

Storytelling with KPIs

- ☐ Are the most important KPIs clearly visible, readable and understandable?
- ☐ What conclusions would you make based on the data you see?
- ☐ Is the reference/context for the KPIs clear?
- ☐ Is the development over time a part of the report?
- ☐ Is every visual clear (axis, labels, descriptive titles)?
- ☐ Do visuals make sense (are the numbers adding up)?
- ☐ Are the visuals for the most part mutually exclusive and collectively exhaustive:
  Do you show the same thing twice? Do you show KPIs that can be inferred from other visuals?
- ☐ Is there a logical order? Most general to most detailed?
- ☐ Do you use tooltips and drilldown functionalities?

Design and layout

- ☐ Is the design as minimalistic as possible?
- ☐ What is unnecessary and could be deleted?
- ☐ Do different colors represent different KPIs consistently?
- ☐ Is there a design guideline you need to follow (company colors, logos, structure)?
- ☐ Is the report not overwhelming?
- ☐ Are the colors distinct enough (suitable for colorblind)?
- ☐ Are visuals and placeholders aligned?
- ☐ Is the visual report structure logical?
- ☐ Is the use of white space effective?
- ☐ Do you use icons to improve readability? Are they universally understandable?

Functionality and UX

- ☐ Is the data filtering complete? Are all useful breakout options included?
- ☐ Do the visuals make sense after slicer selections (i.e. only 1 datapoint shows)?
- ☐ Is the navigation between pages intuitive?
- ☐ Do you have/need:
  - Navigation
  - Homepage
  - Refresh button
  - Timestamp
  - Info buttons
- ☐ Have you shown the report to both stakeholders and not stakeholders? Can they understand it?
- ☐ Have you clicked on every button? Does it all work as intended?
- ☐ Have you checked the report experience on the Service and on mobile devices?

Do you want to learn Power BI Design? [Join Us](#)
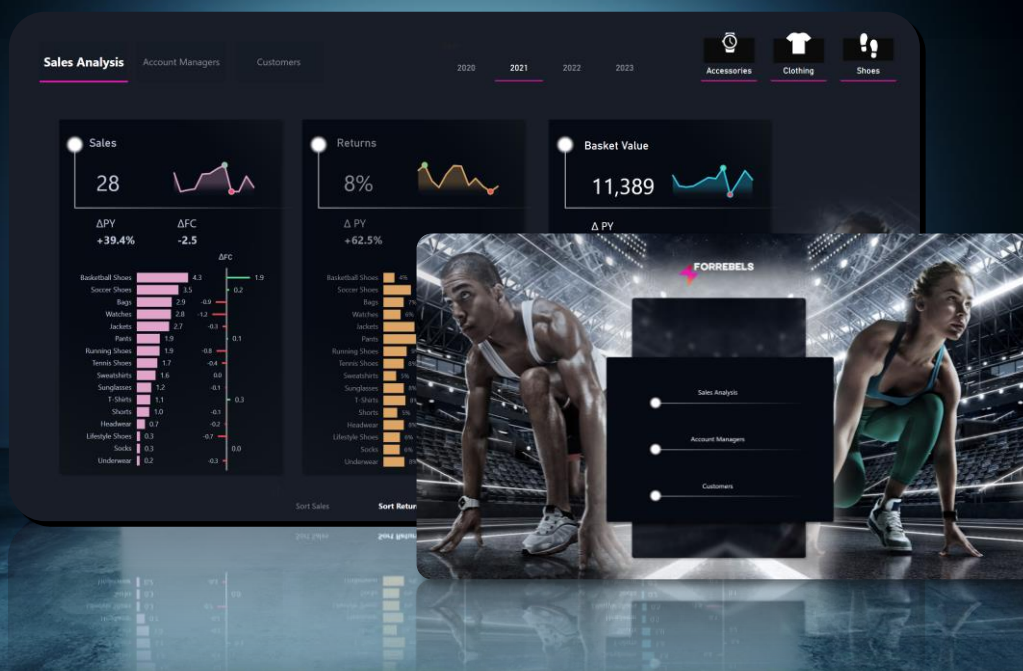
Power BI
DESIGN TRANSFORMATION

Learn to consistently develop amazing Power BI Reports:

- Real Time Learning 28h (all recorded)
- 4 Implementation Assignments and Guidance
- 6h of Power BI Design Video Content (1 year)
- 18h+ Power BI Essentials Access (1 year)
- 8 Self-reflection Emails
- Power BI Report Development Framework
- Complete Power BI Design Report Checklist
- 4 Power BI Templates
- 2 additional Practice Cases
- 1:1 with the Bas to review your report
- Certificate of Completion (that you can easily share on LinkedIn!)

Book a call   **Learn more**

Power BI
REPORT LAUNCH

Get our team to build your Power BI Reports:

- Requirements gathering
- Data model and measures creation
- Visuals design proposal, sketching & development
- Report layout
- UX elements
- Testing and revisions
- Documentation

Book a call   **Learn more**