Learnings from Governance Projects

Budapest BI Forum 2022

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Introduction

Mihaly Kavasi
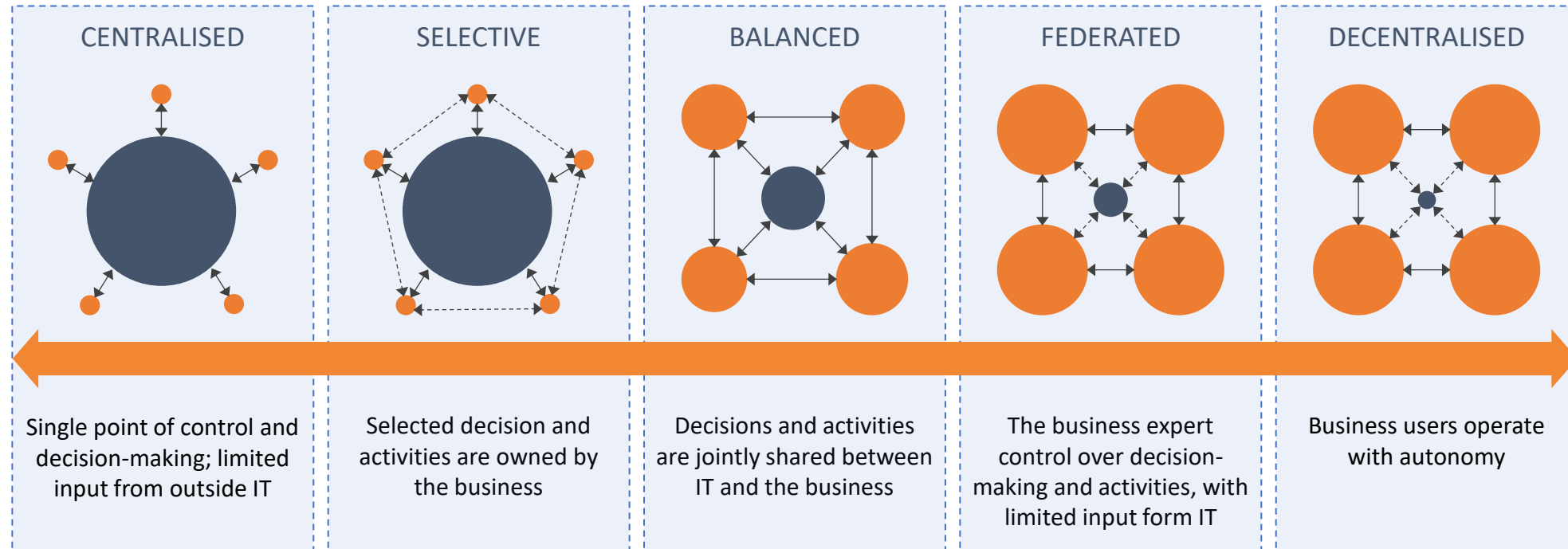
Group Manager

Delivery Lead and Trainer

Avanade

- ✓ 6+ Years of Power BI Experience
- ✓ 5+ Year of Training Experience
- ✓ Microsoft Certified Solution Expert – Data Management and Analytics
- ✓ Microsoft Certified Trainer
- ✓ Azure Enterprise Data Analyst
- ✓ Fasttrack Recognized Solution Architect
- ! First conference speech

Before your embark on a governance project

- Need to understand the organizations current operating model and culture

  - Current setup

  - Important stakeholders

  - Historic reasons about the current operation model and culture

  - What are the biggest pain points

- Governance recommendations should take into account the current operation model

CENTRALISED	SELECTIVE	BALANCED	FEDERATED	DECENTRALISED
Single point of control and decision-making; limited input from outside IT	Selected decision and activities are owned by the business	Decisions and activities are jointly shared between IT and the business	The business expert control over decision-making and activities, with limited input form IT	Business users operate with autonomy

Client Examples

Multinational Service Provider

- Management led initiative

- Centralized BI solutions

- Self-Service is limited

- 2.000 active users

- Handful of BI analysts

- Using Power BI for 2,5 years

UK Retail Giant

- Business led initiative

- Departmental BI

- Unlimited self-service

- 4.000 active users

- Hundreds of creators

- Using Power BI for 1,5 years

Problems they faced

Multinational Service Provider

- Central team reporting throughput was limited

- Business initiatives\changes took too long

- "Shadow BI" reappeared by exporting data out of Power BI or directly from source

- **Trust in data decreased**

- **Business Users satisfaction decreased**

UK Retail giant

- Vast amounts of reports was created

- Often duplications, different definitions for same metrics

- Support was limited from a Central team

- Resource management and Performance issues

- **Trust in data decreased**

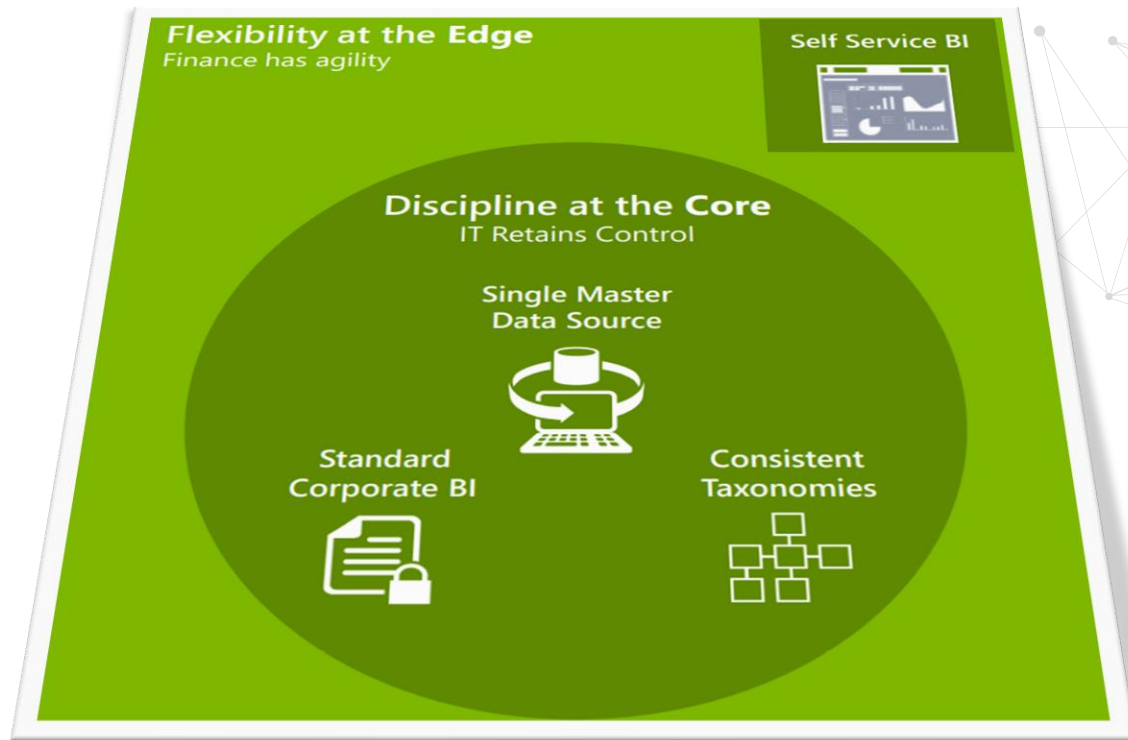- **Business Users satisfaction decreased**

Root cause analysis

- After understanding the current state, we need to understand the **why**.

- Both cases the issue was the **limited resources of the central teams** to create and support analytics.

- Needed to find a way to **cooperate** more effectively **with business** so it can **maximize** its **efficiency**.

Designed by Freepik

Future Business Intelligence Platform according to Microsoft

Flexibility at the Edge
Finance has agility

Self Service BI

Discipline at the Core
IT Retains Control

Single Master Data Source

Standard Corporate BI

Consistent Taxonomies

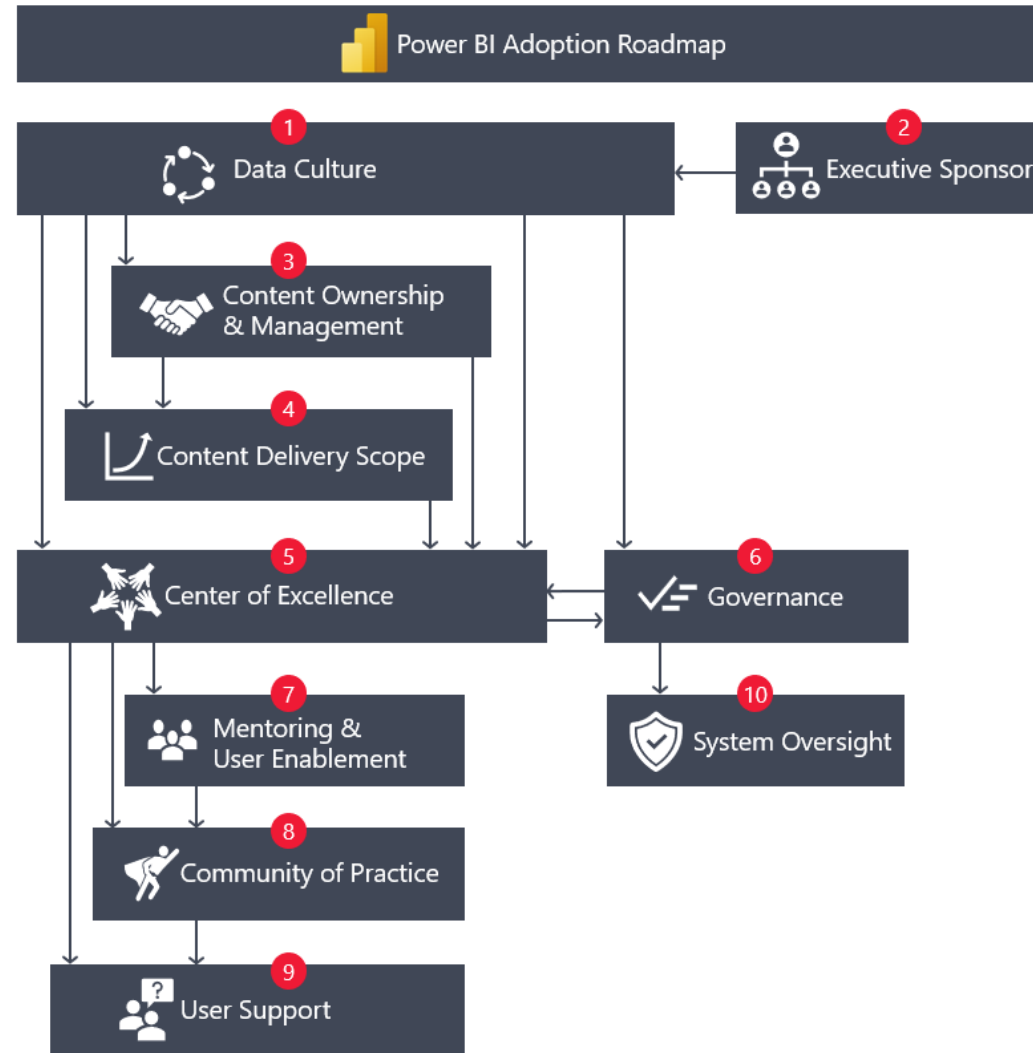## "Discipline at the core, flexibility at the edge"

Microsoft's BI Transformation

Why?
- Inconsistent data definitions, hierarchies, metrics, and Key Performance Indicators (KPIs). For example, each country had their own way of reporting on new revenue. There was no consistency, yet much confusion.
- Analysts spending 75% of time collecting and compiling data.
- 78% of reports being created in "offline environment".
- Over 350 centralized finance tools and systems.
- Approximately $30 million annual spend on "shadow applications".

Governed Self-Service BI

- Create an effective framework to maximize value from data
  - Define roles and responsibilities – not to limit, but for improved efficiency
  - Support adoption – to increase impact
  - Create guardrails to make it clear how to use the data as intended
  - Increase trust in data and insights
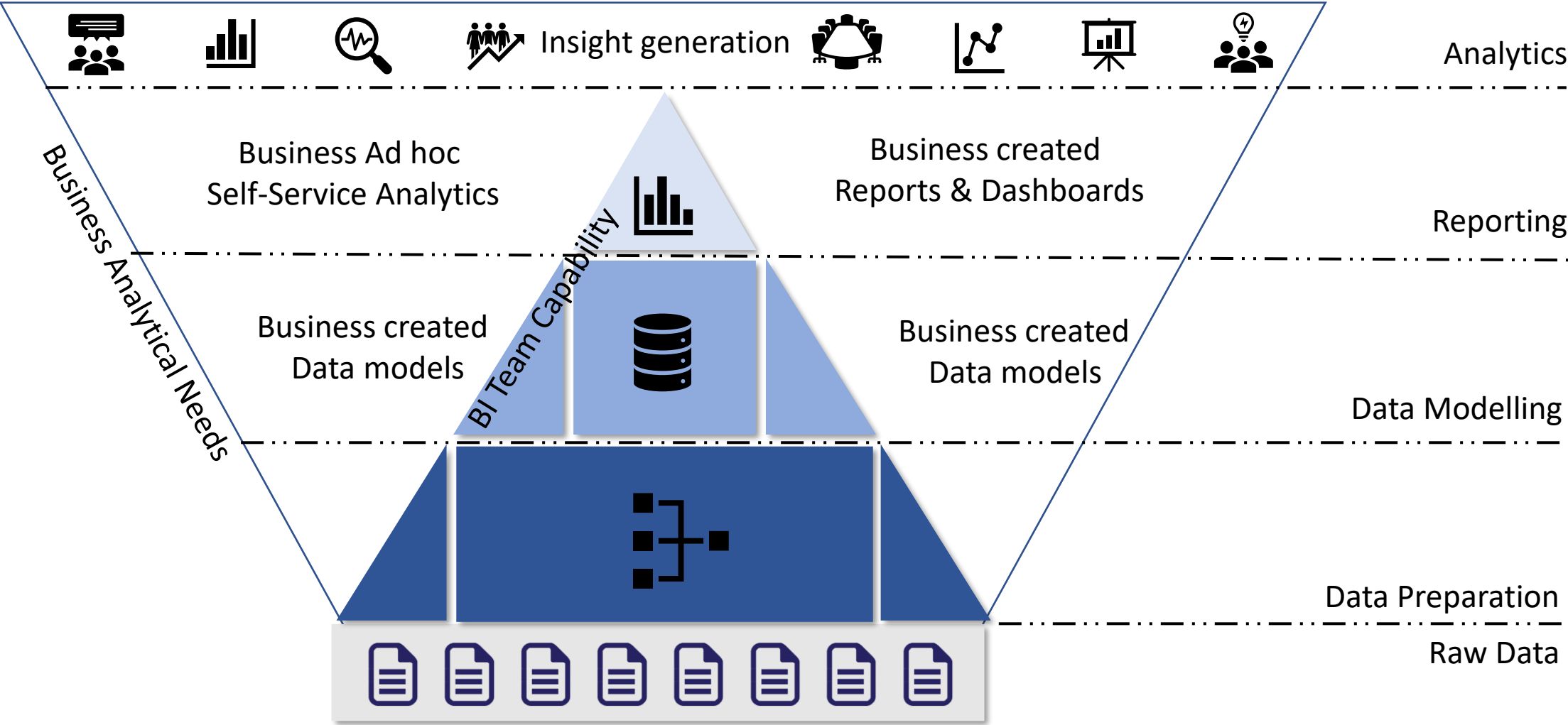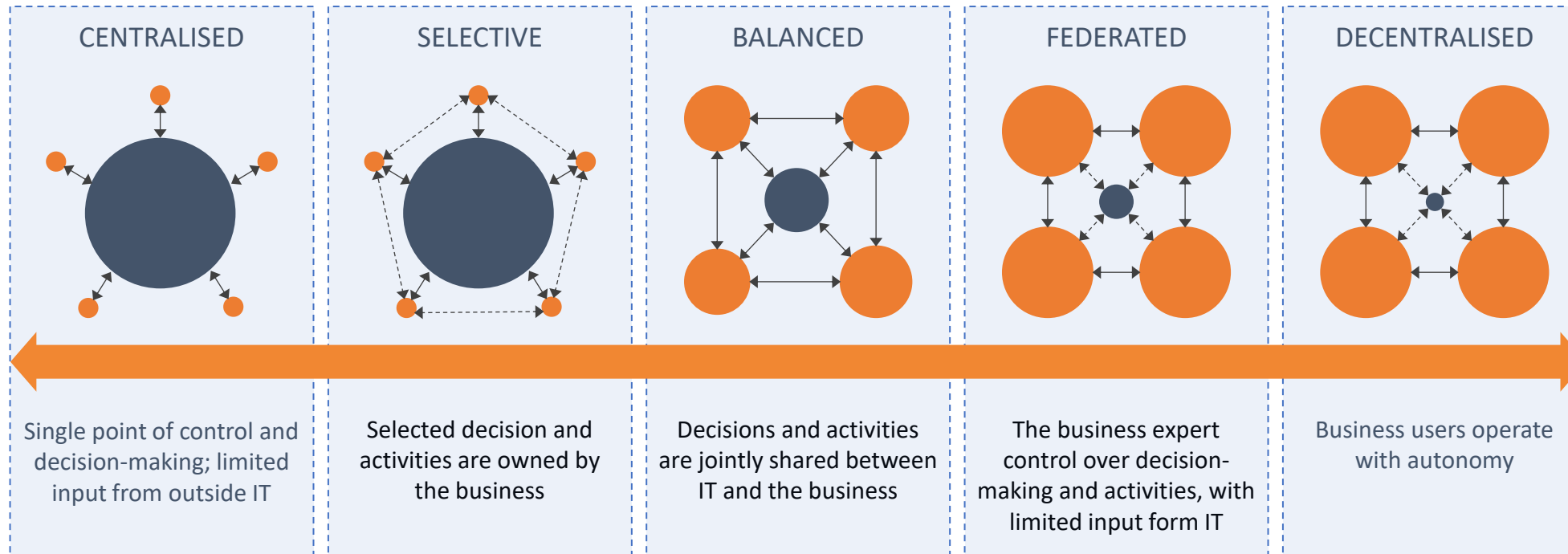 - Empower users at each level of self service.

Designed by pch.vector / Freepik

Microsoft Power BI Adoption Roadmap

https://learn.microsoft.com/en-us/power-bi/guidance/powerbi-adoption-roadmap-overview

Different levels of Self-Service

Business Analytical Needs

BI Team Capability

Insight generation

Business Ad hoc
Self-Service Analytics

Business created
Reports & Dashboards

Business created
Data models

Business created
Data models

Analytics

Reporting

Data Modelling

Data Preparation

Raw Data

Organizational Operating Model & Culture

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Accuracy and Consistency is more important

Flexibility and Agility is more important

Our recommendation:

Be more flexible

Be more organized

Things to consider:
- Reporting operating models essentially differ in how much centralised responsibility is assumed, versus local business unit autonomy
- Change management is a challenge in an operating model change, big risk of organizational resistance.
- Change have to be gradual.

Varying operating models for different type of reporting

- The balance between central and local responsibility can vary across the types of Reporting:
  - Enterprise Reporting should be owned by a central function, also same rule are applied to those reports where the business want to transition the ownership to the central team
  - Business owned Critical Reporting needs tighter governance and additional support from the central teams
  - No critical team and Self-serve reporting can be fully decentralised, central function just provides guidance and basic support when needed

CENTRALISED	SELECTIVE	BALANCED	FEDERATED	DECENTRALISED

ENTERPRISE/MANAGED REPORTING   CRITICAL REPORTING   BUSINESS UNIT/SELF-SERVICE REPORTING

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Recommendation 1 - Increase throughput by sharing tasks between IT and Business

Ideation → Prototyping → Iterations → Initial adoption → Stabilization → Wide adoption

Business

Central BI
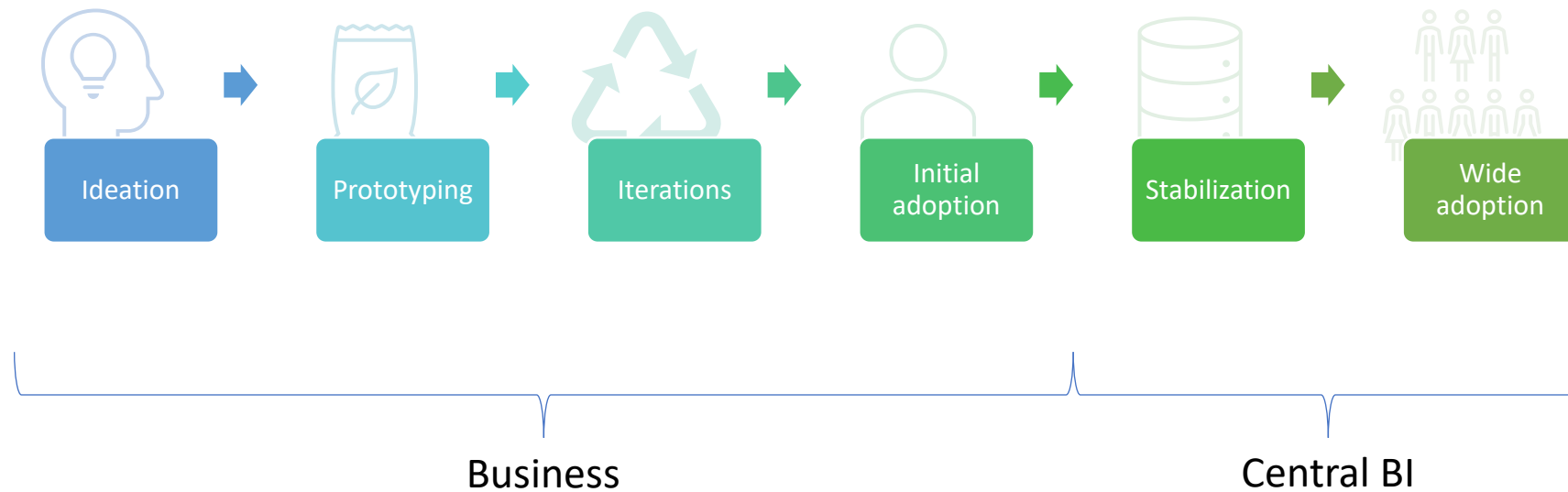
Recommendation 2 – Understand and Train the Business

# Recommendation 3 – Setup proper access management policies
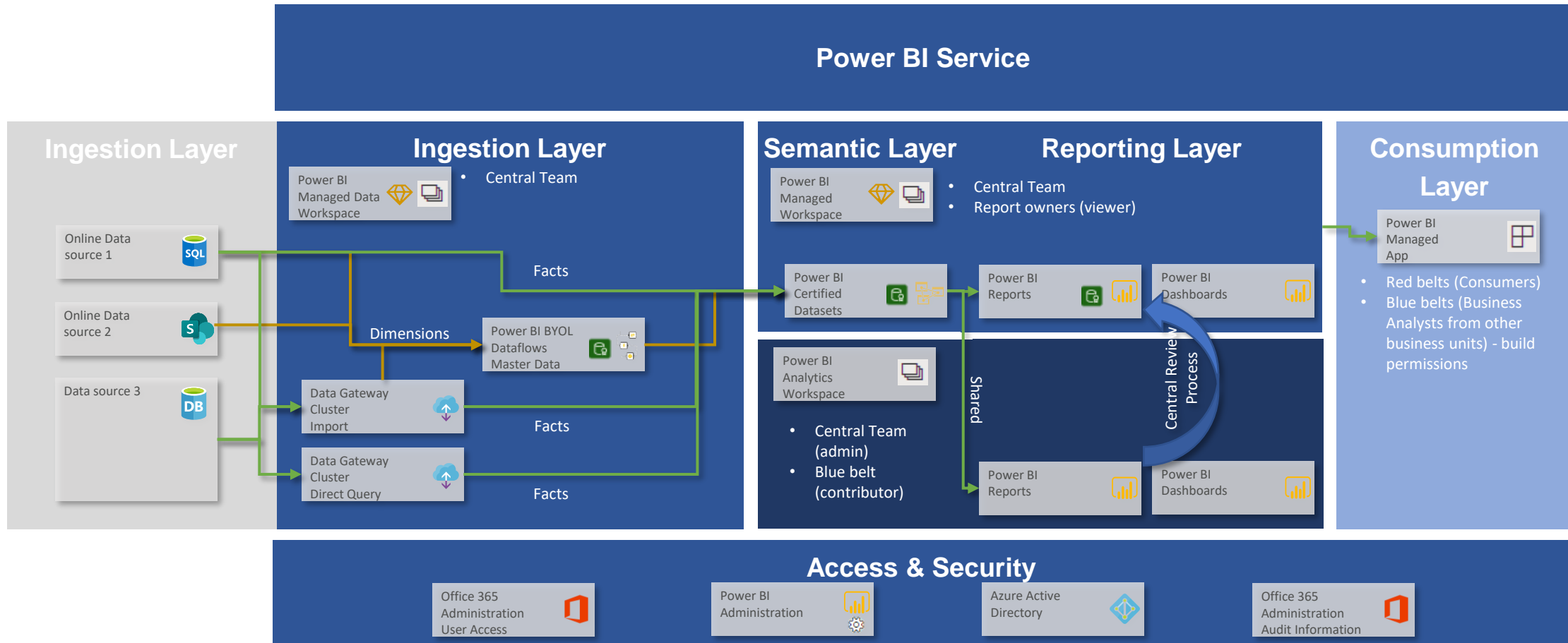
- Blue belts will be given built permissions on the datasets they need to be able to use
- Wider distribution of reports is only allowed from the managed workspaces and after the Central Team review process has been passed.

Recommendation 4 – Unified Experience for Consumers

- Published Report Packages (Apps) provides all the necessary information to the consumers that they can extract all the value

- Common design approach to lessen the learning curve for consumers

- Common design resources (images, backgrounds, color schemes)
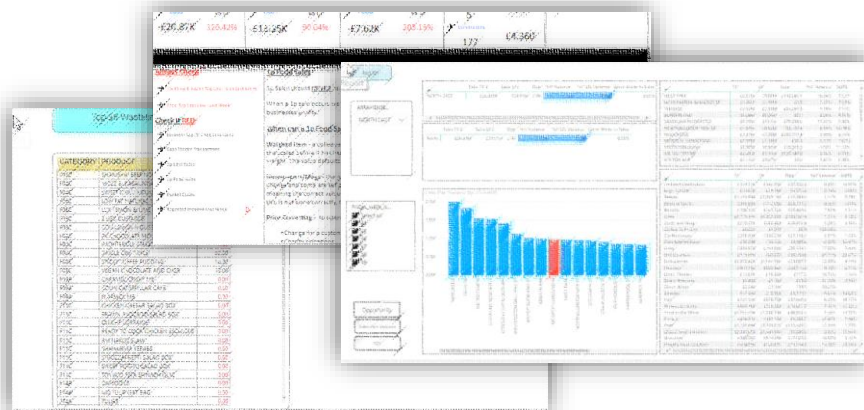
Different report designs create confusion and disengagement
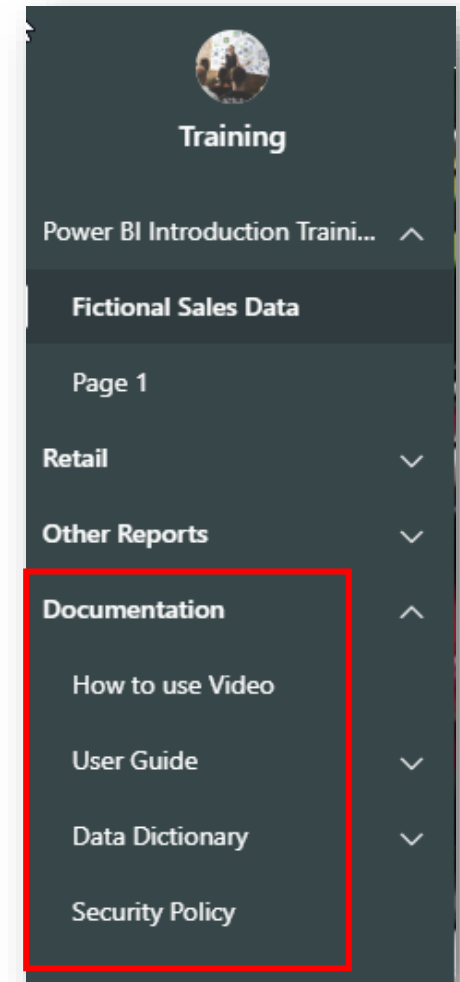
Proper documentation improve adoption

Recommendation 5 – Collecting audit and activity information

- All available audit and activity information are continuously collected and analysed

- Make information available to all the stakeholders to enable self-governance

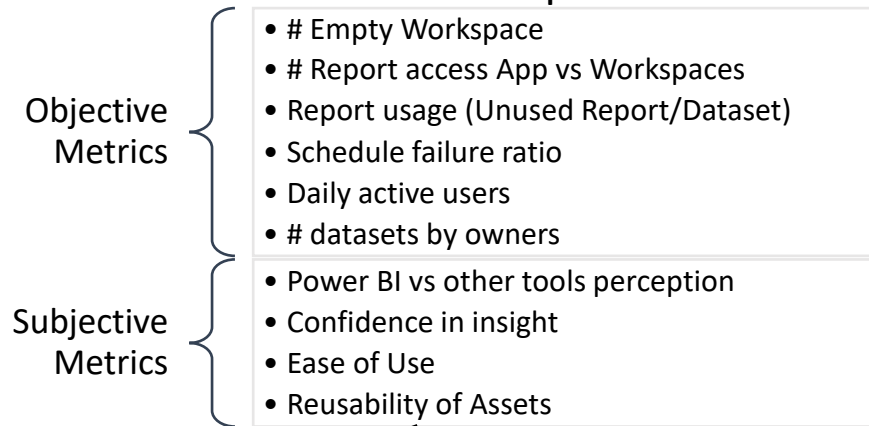https://selfservicebi.co.uk/power-bi-features/
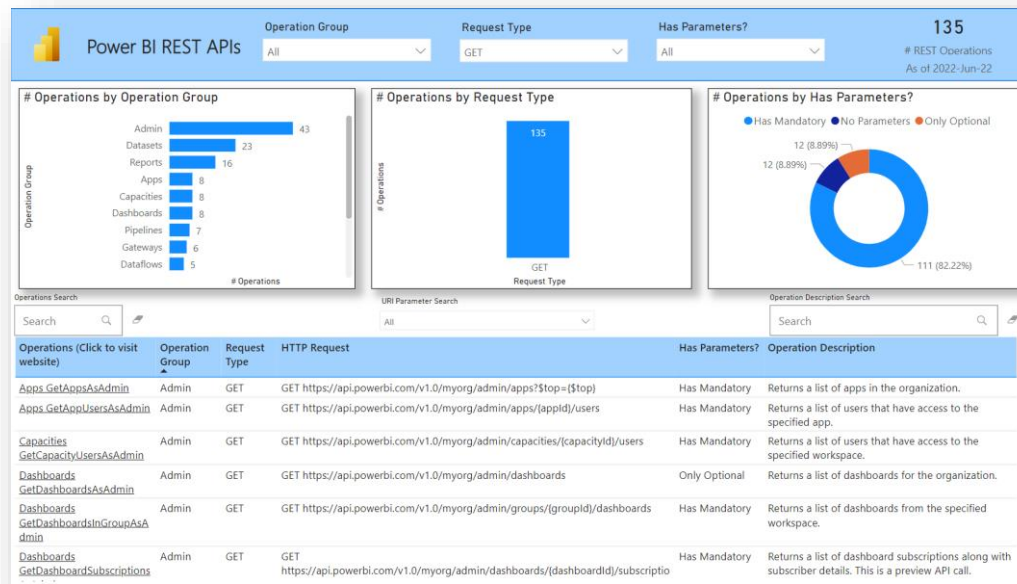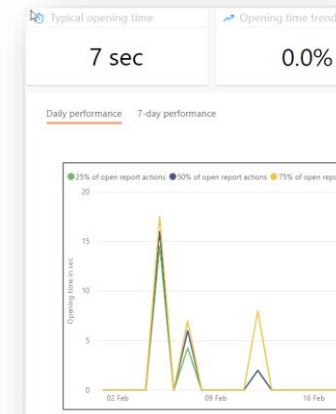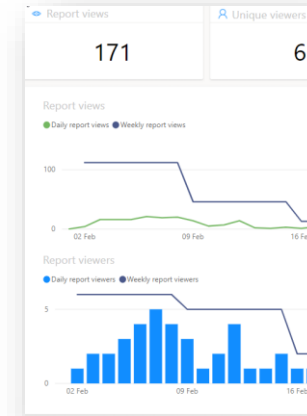
Governance implementation is a gradual process

- Continuous measurement of progress is necessary
- Clear KPIs are a key to ensure that we are heading in the right direction.
- The KPIs will change as the organization matures

Recommended initial KPI examples:

Objective Metrics
- # Empty Workspace
- # Report access App vs Workspaces
- Report usage (Unused Report/Dataset)
- Schedule failure ratio
- Daily active users
- # datasets by owners

Subjective Metrics
- Power BI vs other tools perception
- Confidence in insight
- Ease of Use
- Reusability of Assets

Foundations
Collect information and understand the current satisfaction of the userbase

Progressing
Roles & responsibilities
Secure data and access
New KPI examples:
- *Workspace role distribution*
- *Data exports*

Advanced
Improve performance & promote reuse
New KPI examples:
- *Dataset similarity*
- *Average query duration*
- *Report to Dataset ratio*
- *Data source reuse*

Established
Focus on maximizing the value from data
New KPI examples:
- *Time to insight*
- *Generated value*

Governance Maturity Curve

Thank you for your participation!