

Enhanced User Adoption


Free Template

Ready to use

PBI User Confidence Checklist #14

- ✓ step-by-step guide
- ✓ web & mobile version
- ✓ data quality & trust
- ✓ purpose & relevance
- ✓ learning & help

Wondering if your users trust
your Power BI report?

 **Users won't
adopt what they
don't trust.**



Strengthen User Confidence



Data Transparency:

Show data sources and refresh schedules.



Metric Clarity:

Provide clear definitions and calculation logic.



Support & Guidance:

Include in-report tooltips and contact information.

1 Data Quality & Trust

- ✔ Display last refresh timestamp clearly in the report
- ✔ Explain update frequency (e.g., daily, hourly)
- ✔ Show data quality checks or validation results
- ✔ Mention if/when the data has been tested or signed off
- ✔ Identify who verifies the data and calculations

Purpose & Relevance



State the **business purpose** of the report



List **decisions** the report is intended to support



Describe **how the report** makes users' work easier



Provide a way to **report bugs** or issues



Explain how users can **submit feature requests**



Include **a roadmap or version history** for transparency

3 Learning & Help



Link to **short training videos** or tutorials



Provide a **quick-start or user guide** within the report



List **contact persons** or support channels



Name the **report owner or responsible person/team**



Confirm **regular monitoring** and **maintenance processes**

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Alex Badiu

@alexandru-badiu