Ready to use PBI User Confidence Checklist #14

- Step-by-step guide
- web & mobile version
- **Ø** data quality & trust
- Ø purpose & relevance
- **(2)** 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.

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

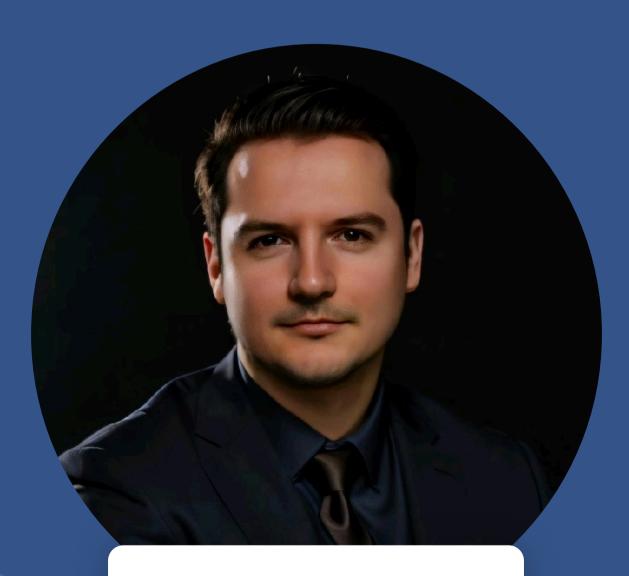
- State the **business purpose** of the report
- List decisions the report is intended to support
- Describe how the report makes users' work easier
- Provide a way to report bugs or issues
- Explain how users can submit feature requests
- Include a roadmap or version history for transparency

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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