



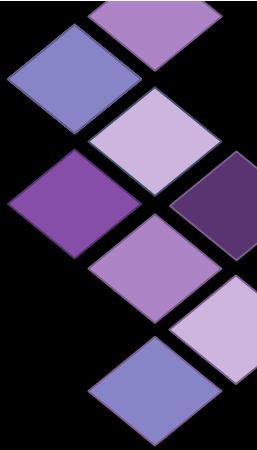
Power BI Governance & Adoption.

Paulien van Eijk

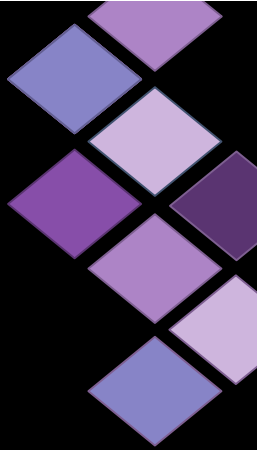
March 2024

What is this session about?

This session focuses on the governance and adoption of Power BI within an organization in which Power BI is already being (widely) used by users with limited governance and adoption.



Don't forget to submit your session feedback!



Paulien van Eijk

Data & Analytics Consultant
Macaw Netherlands

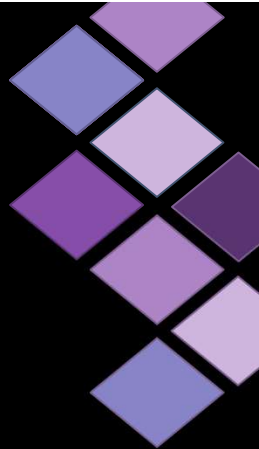


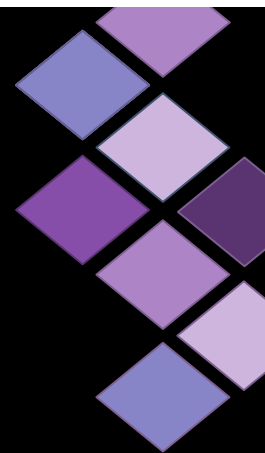
linkedin.com/in/Paulien-van-Eijk



PowerBIPrincess.com

FAVORITE STUFF:





Now it's time to get to know you!

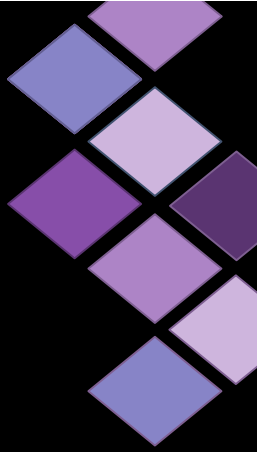


**Could you raise your hand if you
are an **external** Power BI
consultant / developer / specialist /
architect / user / .. ?**

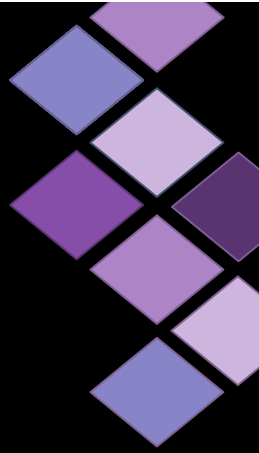


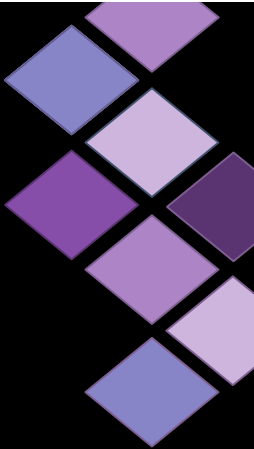
**Could you raise your hand if you
are an *internal* Power BI developer
/ specialist / architect / analyst /
user / ..?**

**Could you raise your hand if you
don't do anything with Power BI?**



Could you raise your hand if you know what the company policies and best practices are regarding sharing Power BI reports with users?





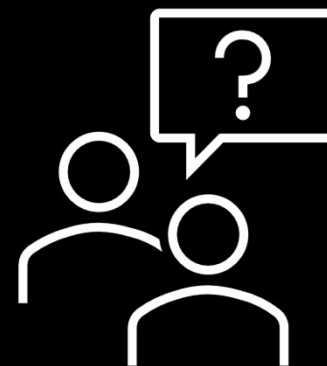
**Could you raise your hand if you
know **who to ask** within the
company to set up a Power BI
Premium capacity?**



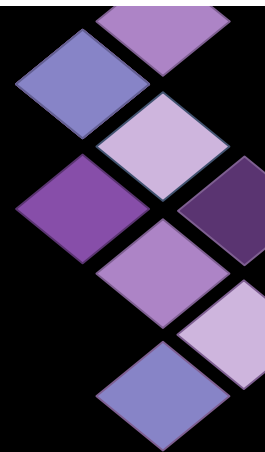
**Could you raise your hand if you
know who is allowed to change
Power BI tenant settings?**



Nice workout



Governance
Adoption



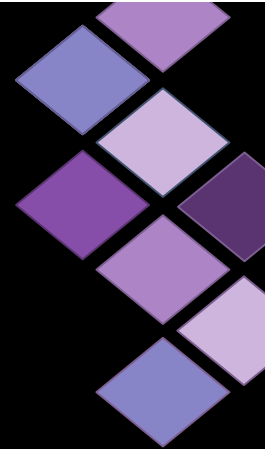
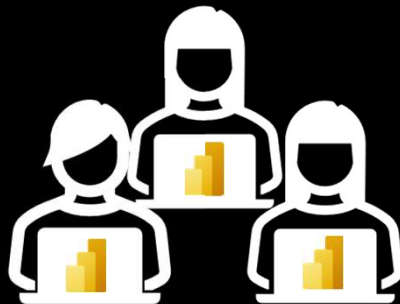
Strategies

Scenario 1

Roll out
Power BI

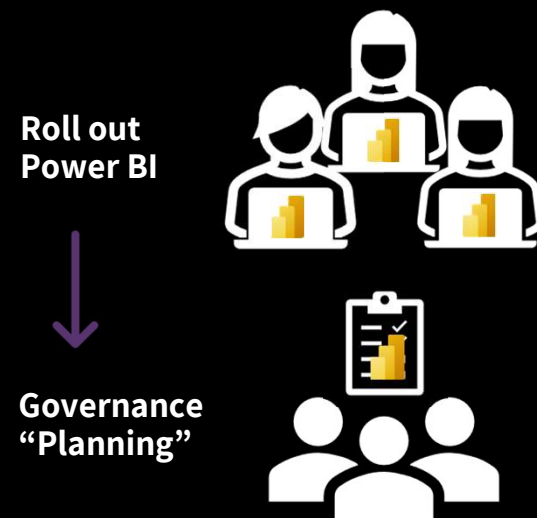


Governance
“Planning”



Roll out Power BI first

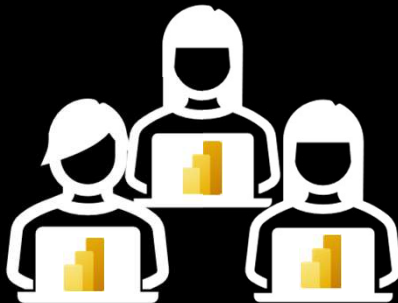
- + Immediately start creating solutions
- + Quick wins
- + No restrictions
- Best practices not applied from the start
- Reestablish governance is not easy
- No processes in place



Strategies

Scenario 1

Roll out
Power BI



Governance
"Planning"



Scenario 2

Governance
Planning



Roll out
Power BI



Governance planning first

- + Support user community
- + Meet security and compliance requirements
- + Clear processes
- Slow start
- Theory and practice are not always the same

Governance
Planning

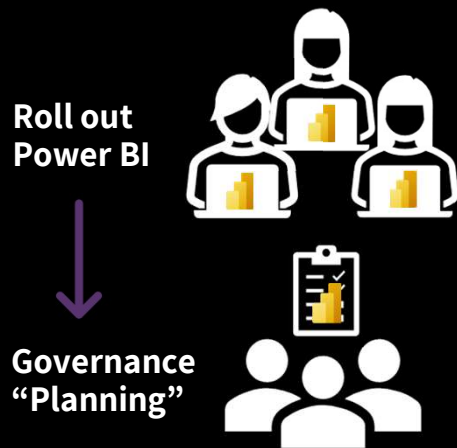


Roll out
Power BI

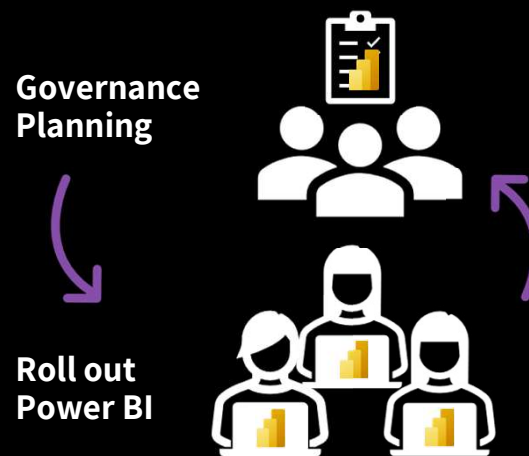


Strategies

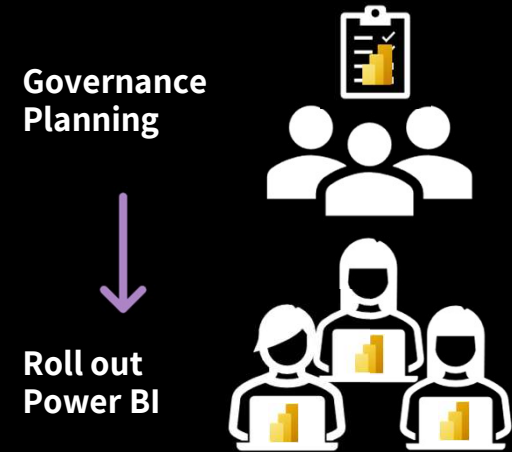
Scenario 1



Scenario 1.5



Scenario 2



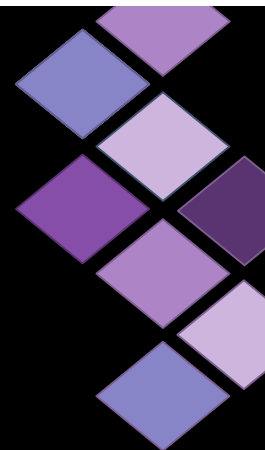


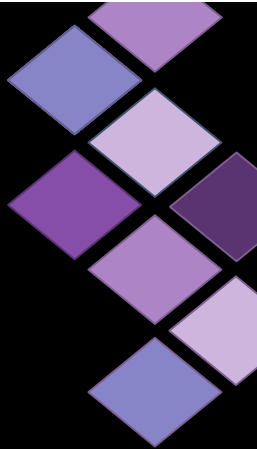
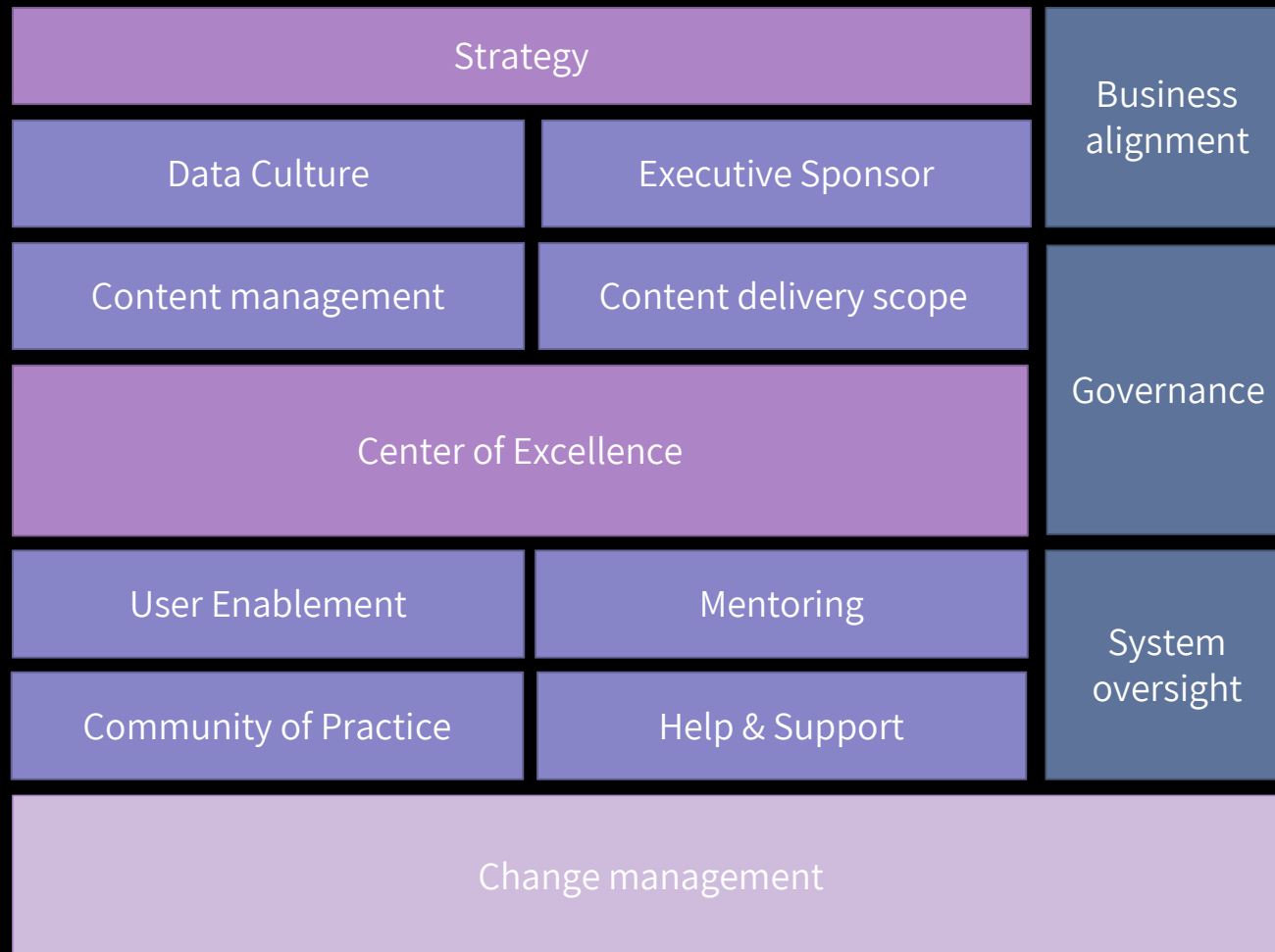
So..

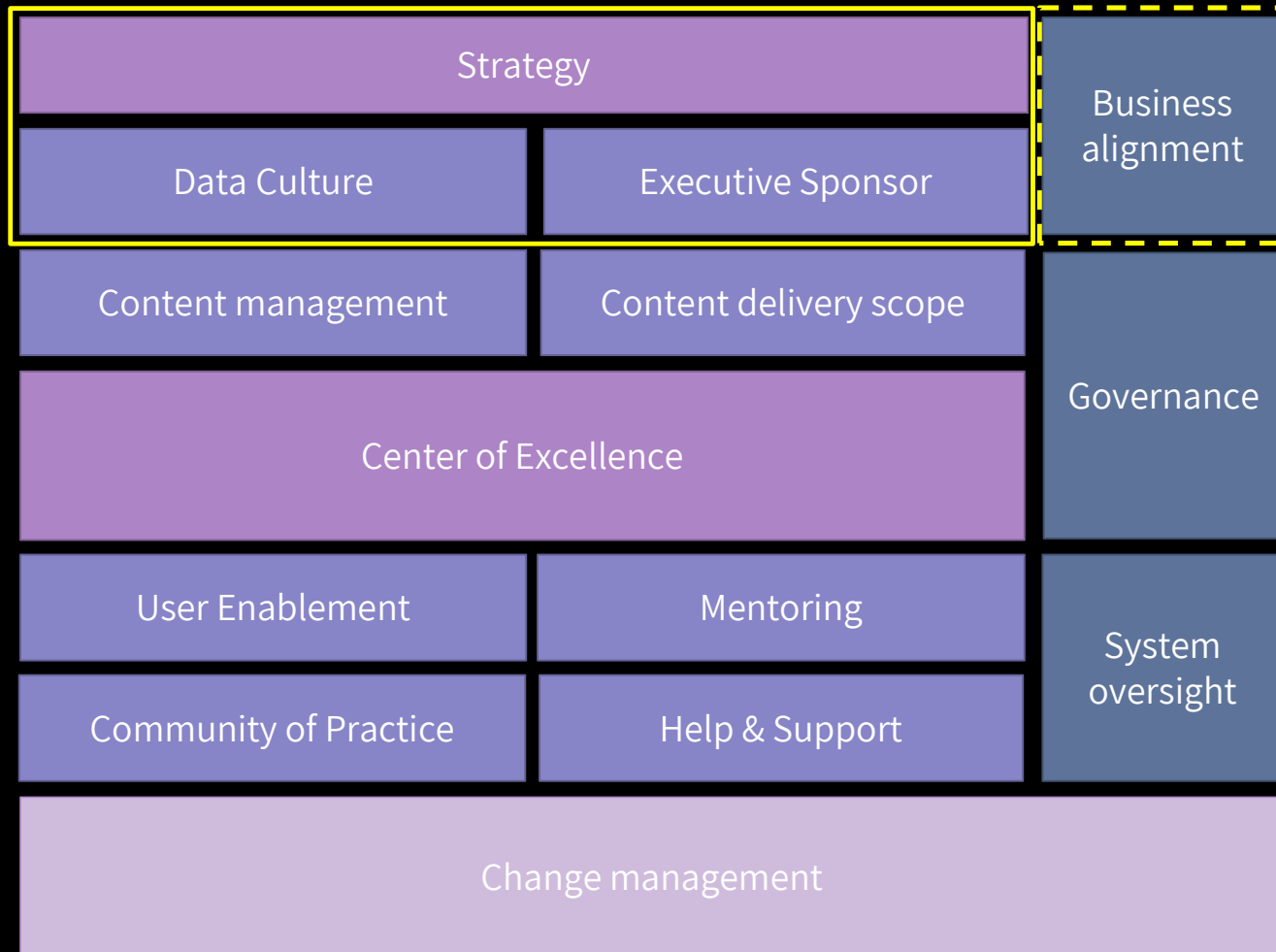
- Power BI is (ready to be) used in the organization
- But we are running into some challenges
 - Requesting a Power BI capacity seems impossible
 - The reports that are build are used for exporting to excel instead of using the report itself
 - The Power BI REST API is not available to be used, so automation is impossible
 - Refreshes of semantic models take forever

How can we start addressing all these issues? Where do you start?

Power BI Governance and Adoption Roadmap

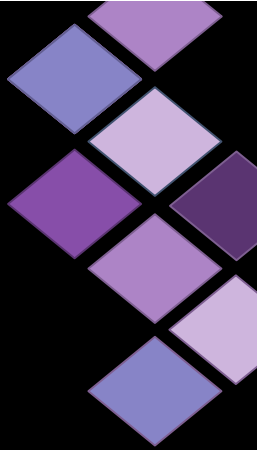






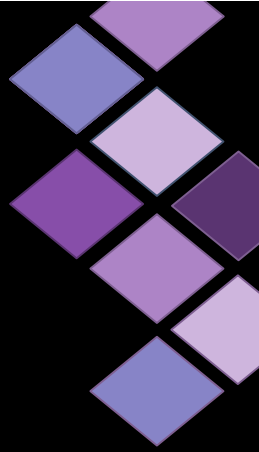
Data Culture

- The behaviors and norms that encourages the use of data.
- Think of data culture as what you do without thinking or when no one is looking
- Your data culture is not a set of rules (that's governance), but can/will be the results of the governance rules.. or lack of rules.



Executive sponsor

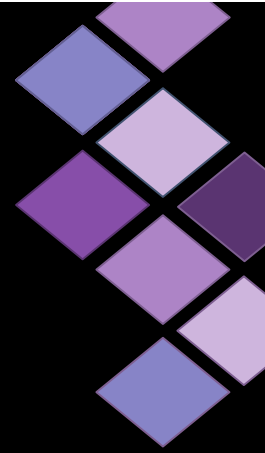
A healthy data culture starts with an executive sponsor



$$\text{Executive sponsor} = \frac{(\text{Credibility} + \text{influence} + \text{authority})}{\text{Broad organizational influence}}$$

Executive sponsor

A healthy data culture starts with an executive sponsor

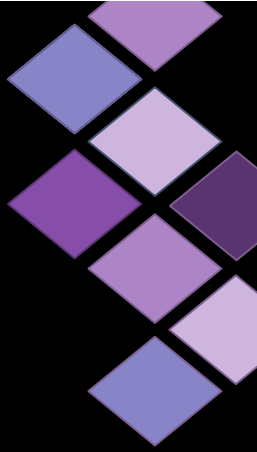


$$\text{Executive sponsor} = \frac{(\text{Credibility} + \text{influence} + \text{authority})}{\text{Broad organizational influence}}$$

Disclaimer: Without sponsor you will most likely fail. 😞

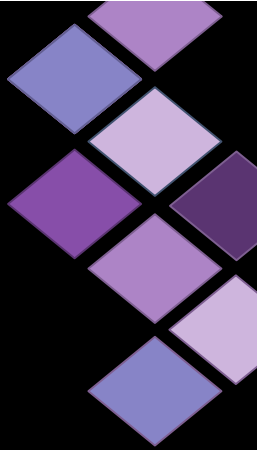
Business alignment

- Data strategy
- Data culture
- Business objectives
- BI strategy



Business alignment

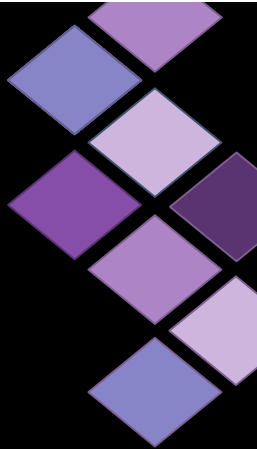
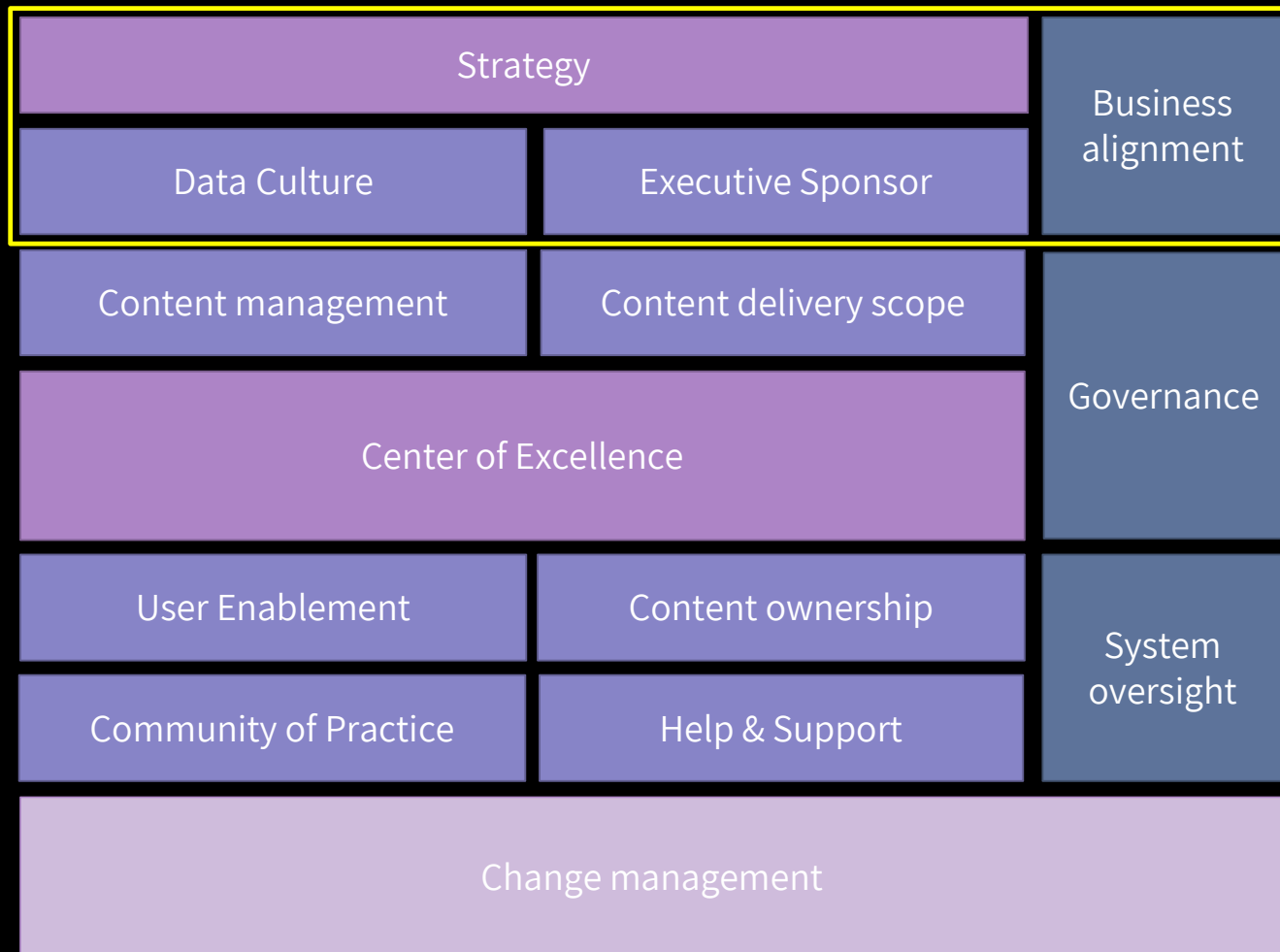
- ✓ Data strategy – be a data driven company
- ✓ Data culture – only making decisions when it is backed by data
- ✓ Business objectives – reaching multiple KPI's
- ✗ BI strategy – data only available for management

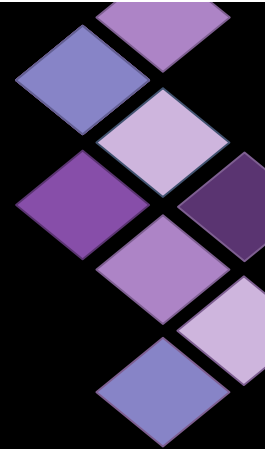
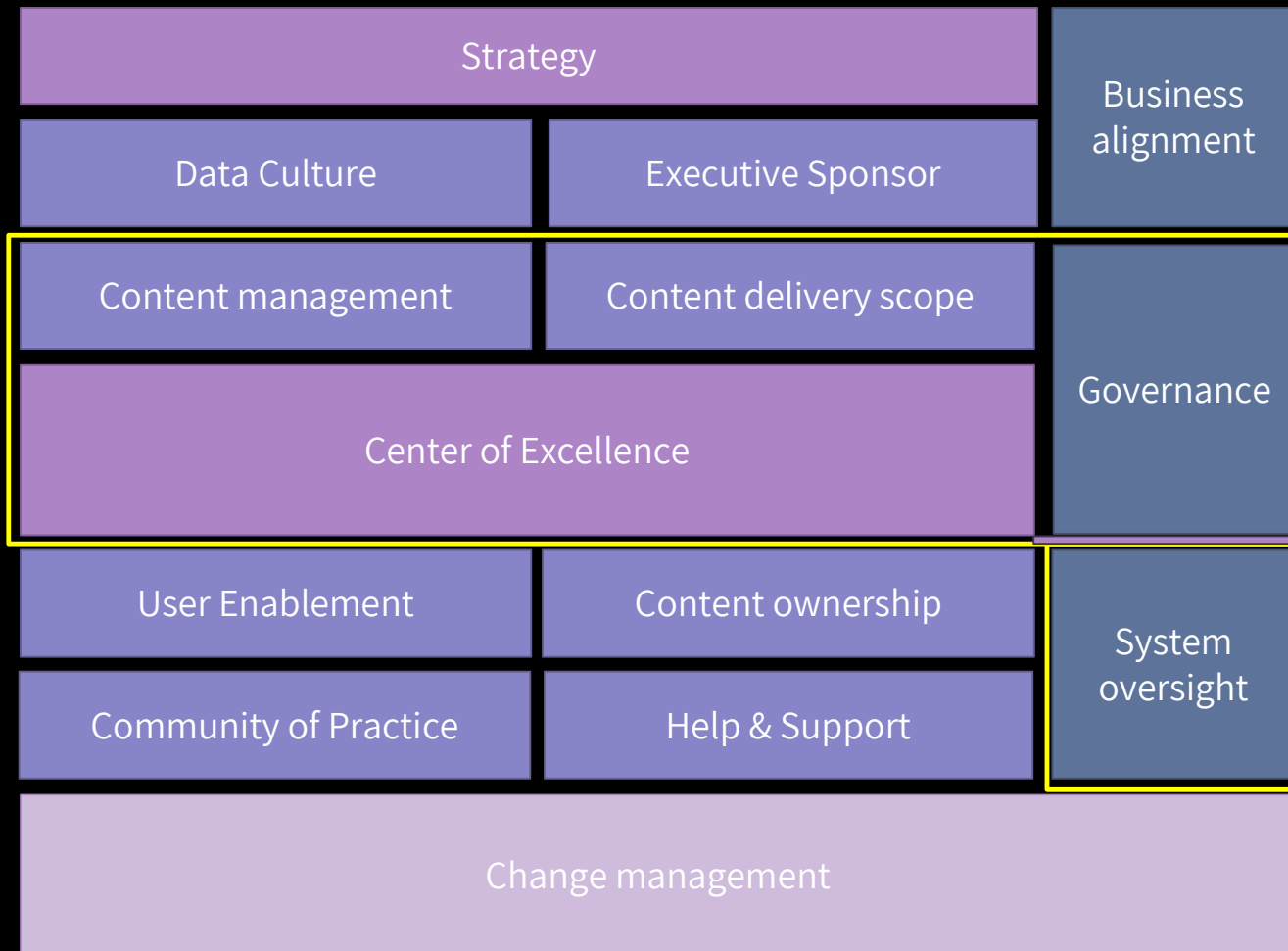




Customer Case







Content delivery scope



Personal BI



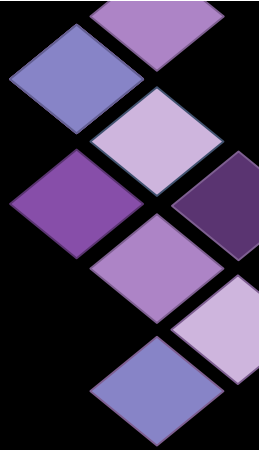
Team BI



Departmental BI

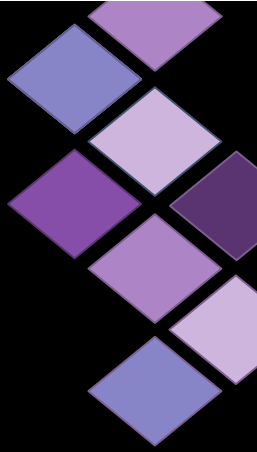


Enterprise BI



Content management

business intelligence (BI) content is owned and managed.



Content management

There are three primary strategies for how business intelligence (BI) content is owned and managed.

		Dataset owner	Report owner
	Business-led self-service BI	Business	Business
	Managed self-service BI	IT	Business
	Enterprise BI	IT	IT

Content management

There are three primary strategies for how business intelligence (BI) content is owned and managed.



Business-led self-service BI

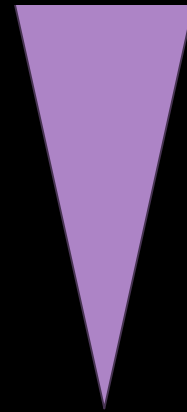


Managed self-service BI

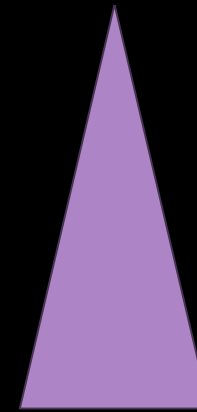


Enterprise BI

Flexibility



Control



Content delivery scope



Enterprise BI



Departmental BI



Team BI



Personal BI

Content management strategy



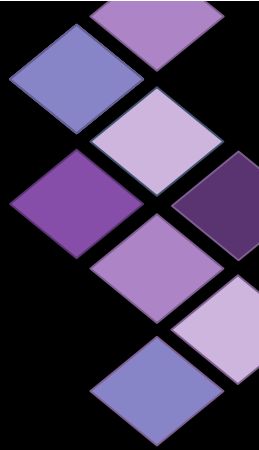
Enterprise BI



Managed self-service BI



Business-led self-service BI



Content delivery scope

Content management strategy



Enterprise BI



Departmental BI



Team BI



Personal BI



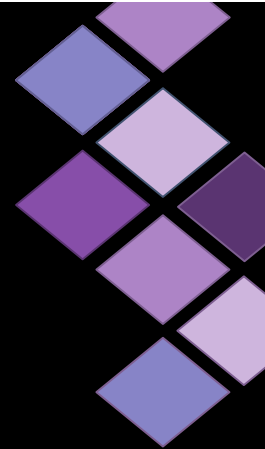
Enterprise BI



Managed self-service BI



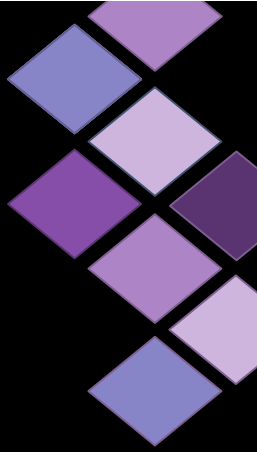
Business-led self-service BI



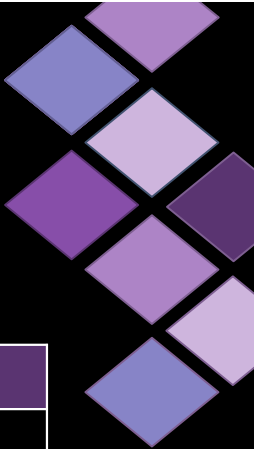
Content management

Who owns and manages what?

- Assign clear roles and responsibilities
 - If you are a dataset owner, what does it mean to be a dataset owner?
 - If you re a report owner, what does it mean to be a report owner?
 - Who is allowed to get access to the workspace, and in which role?
- Adopt roles and responsibilities
 - You can be a dataset owner, but I have no clue what I am doing?



Example – Managed self-service BI



Task	Owner
Making data available in platform for Power BI	IT
Determine and provide access to data in platform	IT
Importing data from platform to Power BI	IT
Create relationships	IT
Create dataset measures	IT
Publish dataset to Power BI service	IT
Create report measures	Business
Create report	Business
Publish report to Power BI service	Business
Provide access to report	Business



Customer Case



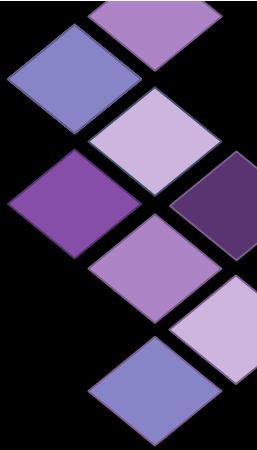
But who is going to implement and adopt all these ideas, vision and strategies?



Power BI Center of Excellence

What is a Power BI Center of Excellence?

- Team of specialists with Power BI knowledge and business knowledge
- (In)formally recognized

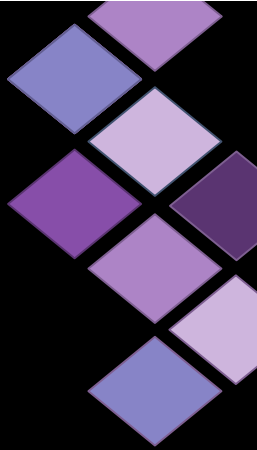


What is a Power BI Center of Excellence?

- Team of specialists with Power BI knowledge and business knowledge
- (In)formally recognized

Goals

- Guiding and educating internal users to increase their skillset
- Create consistency and transparency for user community
- Reducing technical debt
- Promoting the adoption and usage of Power BI



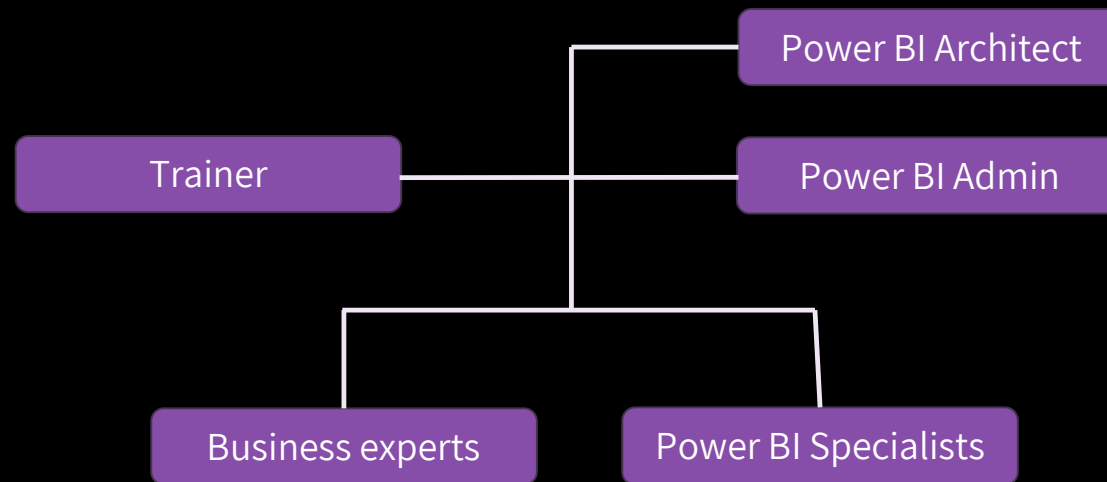
Members of the Power BI Center of Excellence

- Team of specialists with Power BI knowledge and business knowledge
- (In)formally recognized



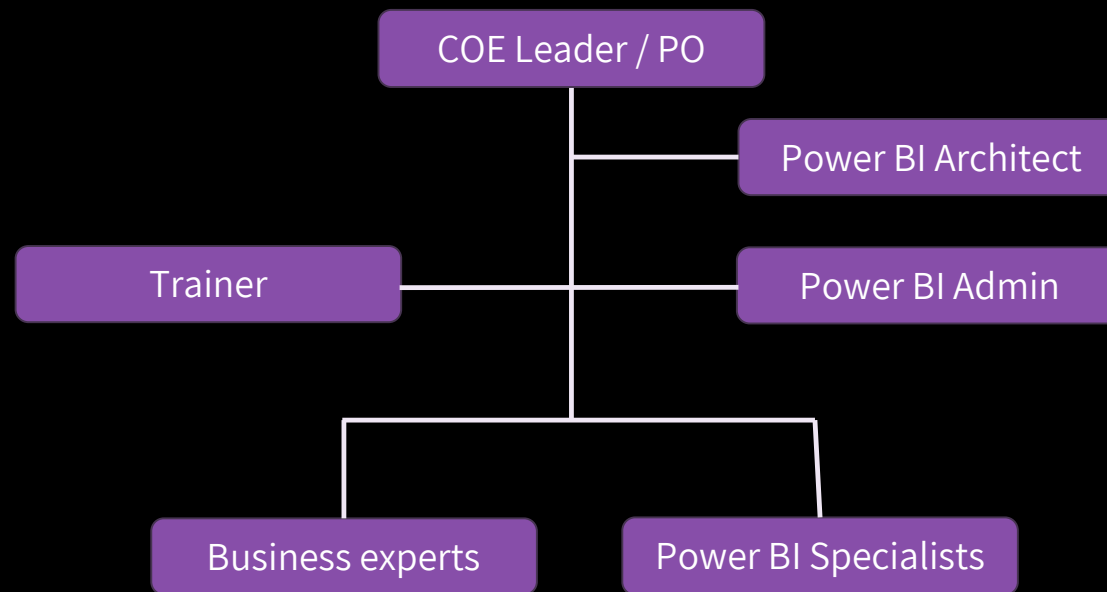
Members of the Power BI Center of Excellence

- Team of specialists with Power BI knowledge and business knowledge
- (In)formally recognized

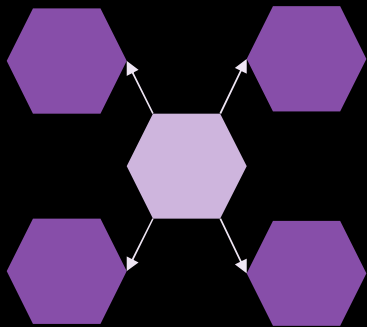


Members of the Power BI Center of Excellence

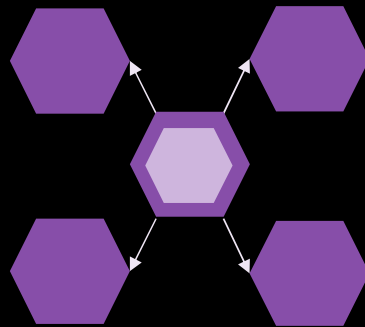
- Team of Power BI specialists with technical knowledge and business knowledge
- (In)formally recognized



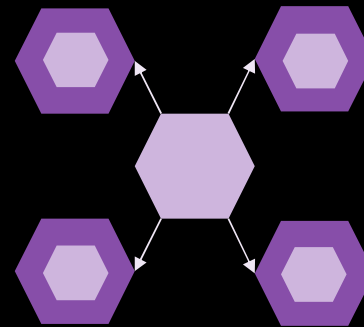
Structure of a Power BI Center of Excellence?



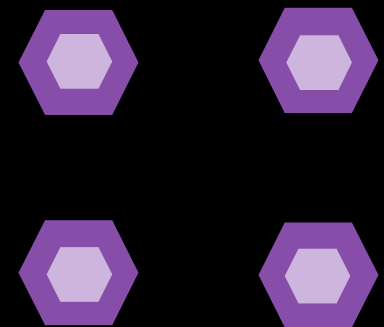
Centralized



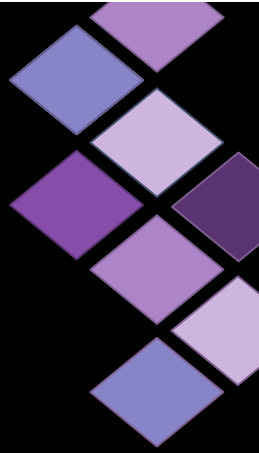
Unified



Federated

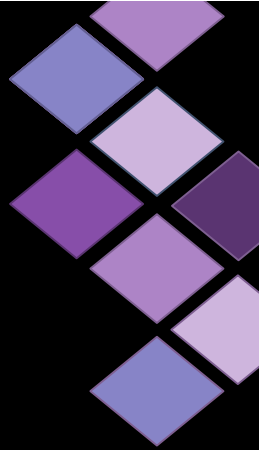


Decentralized



Responsibilities of a Power BI Center of Excellence

- Skills mentoring
- Cost management
- Create and update centralized portal
- Training
- System oversight
- Governance
- Internal community
- Knowledge sharing
- Communication
- User support
- Solution design
- Solution development
- Set up best practices
- Integration with other products
- Documentation
- Templates



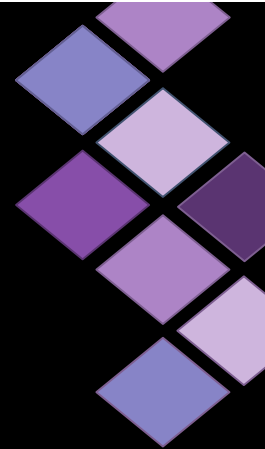


Customer Case

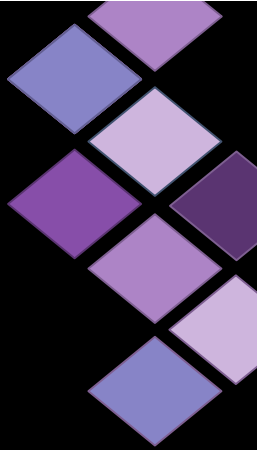


Responsibilities of a Power BI Center of Excellence

- ☑ Skills mentoring
- ✗ Cost management
- ☑ Create and update centralized portal
- ☑ Training
- ✗ System oversight
- ✗ Governance
- ☑ Internal community
- ☑ Knowledge sharing
- ✗ Communication
- ☑ User support
- ✗ Solution design
- ☑ Solution development
- ☑ Set up best practices
- 🟡 ? Integration with other products
- ✗ Documentation
- ☑ Templates



Members of the Power BI Center of Excellence



COE Leader / PO

Leo

Sarah

Sam

Power BI Architect

Sam

Trainer

Julia

Sarah

Power BI Admin

Business experts

Sam

Julia

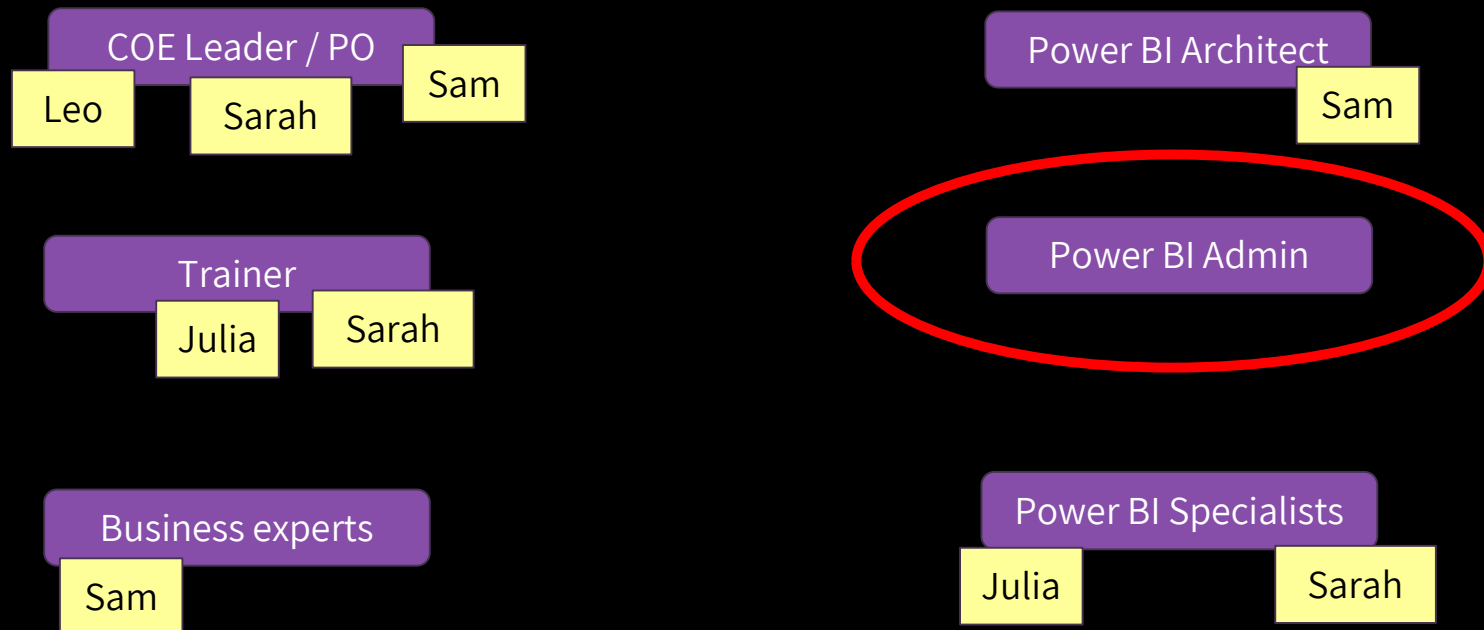
Power BI Specialists

Julia

Sam

Sarah

Members of the Power BI Center of Excellence

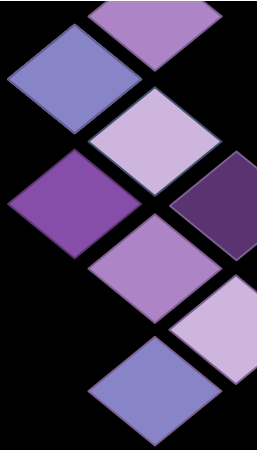


Governance

Governing *what users do with the data, not the data itself*

Objectives for Power BI governance:

- Empower users to make decisions with data within the defined boundaries
- Improve user experience by providing:
 - Clear and transparent guidelines
 - Consistent and standardized solutions
- Content ownership responsibilities are clear and adopted
- Reducing risk of data leakage and misuse of data.

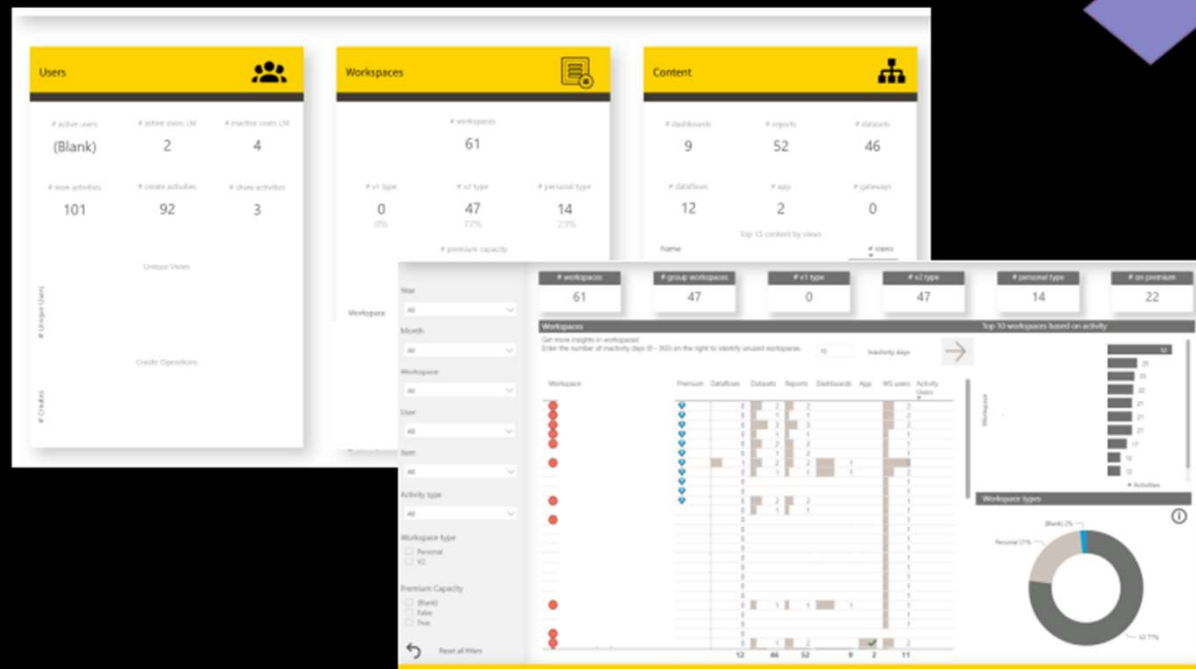


System Oversight (Power BI Admin)

The ongoing, day-to-day, administrative activities.

Set up monitoring

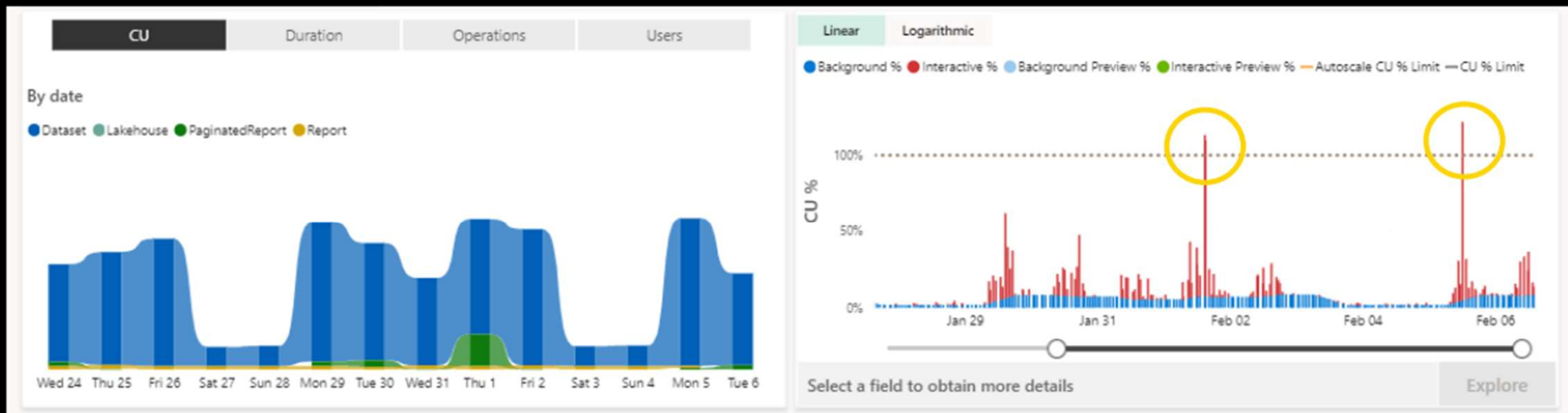
- How many users do you have?
- Are using AD groups to share Enterprise reports?



System Oversight (Power BI Admin)

Set up capacity monitoring

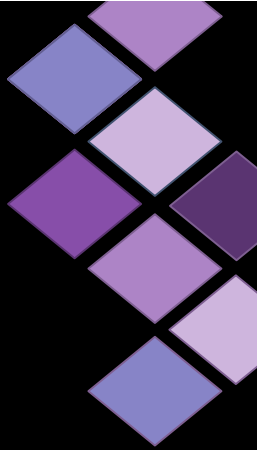
- Are the capacities at capacity?
- Cross charging



System Oversight (Power BI Admin)

Cost Management

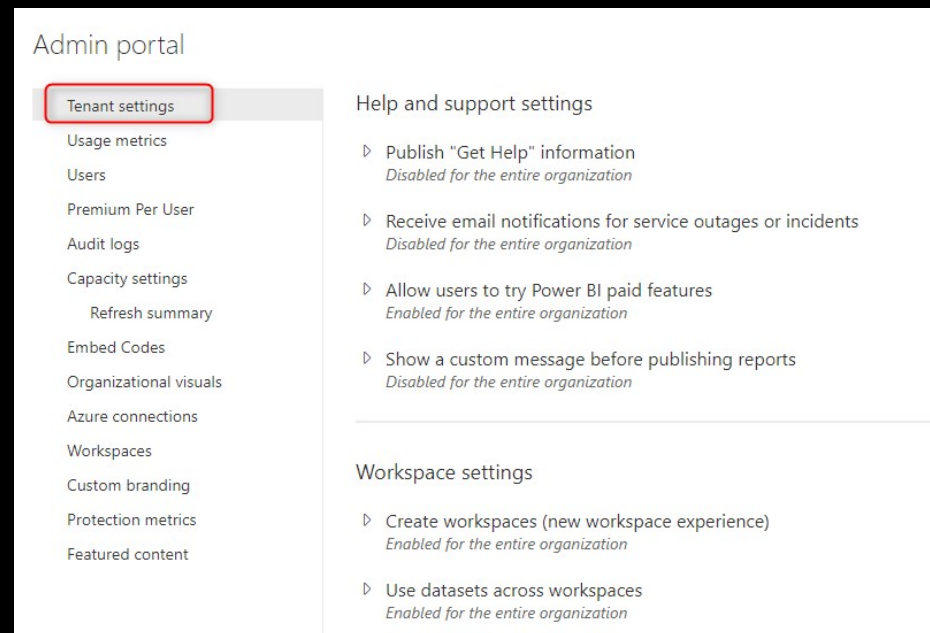
- Does everyone need a Power BI pro license?
- E5 licenses or single Power BI pro licenses?
- PPU vs. F-SKU (or other SKUs)
- Multiple smaller capacities or one larger capacity
- Reserved instances vs. pay-as-you-go
- Scaling

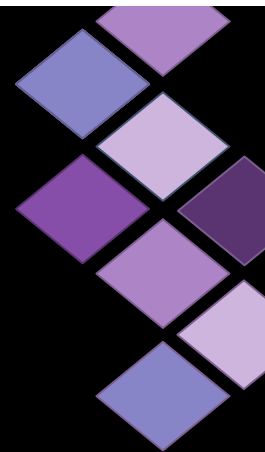
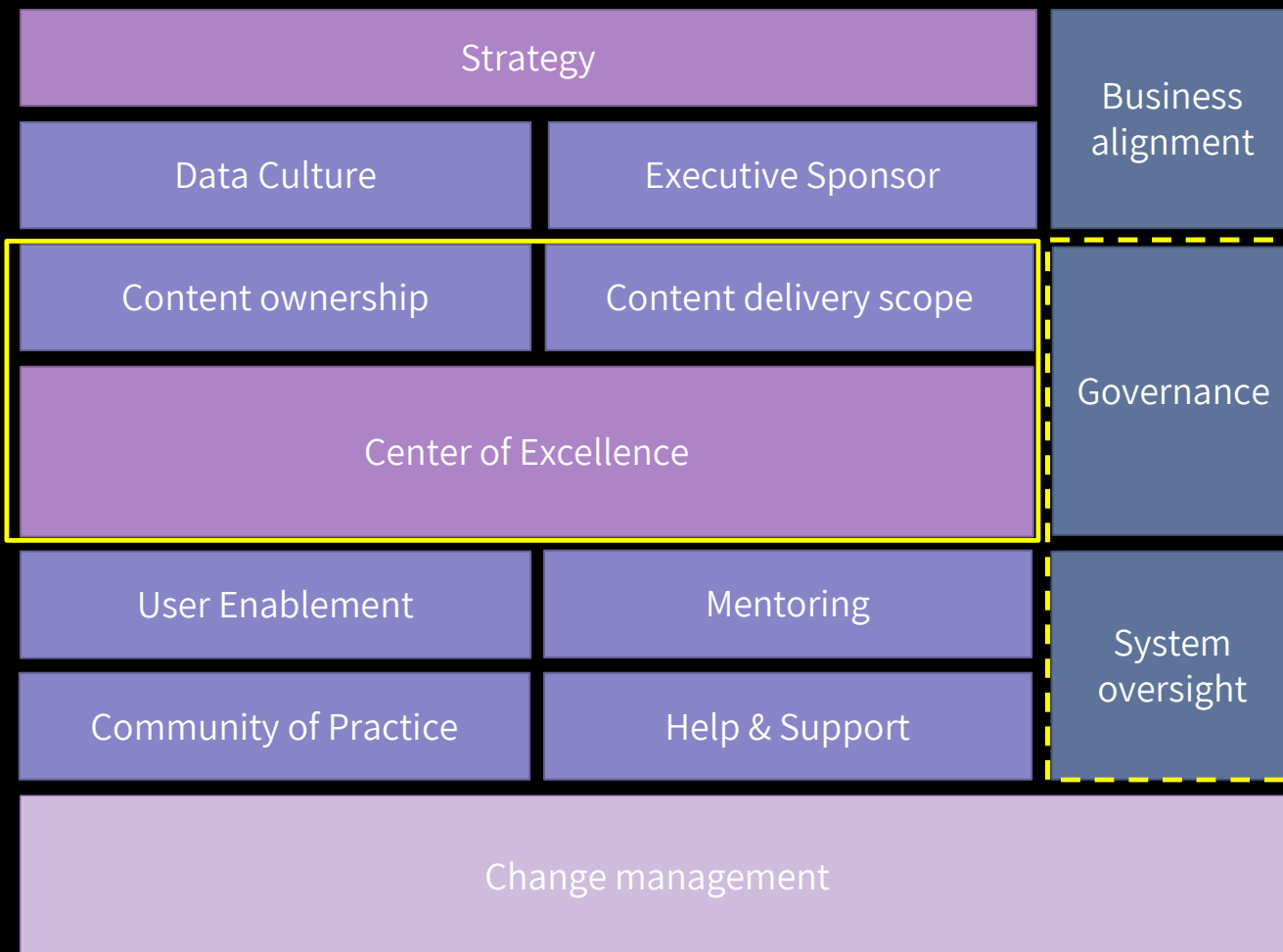


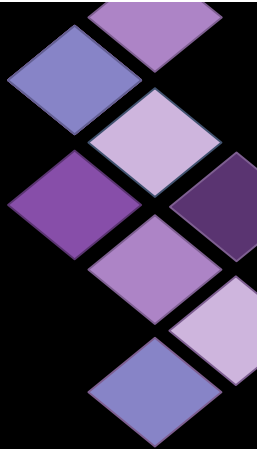
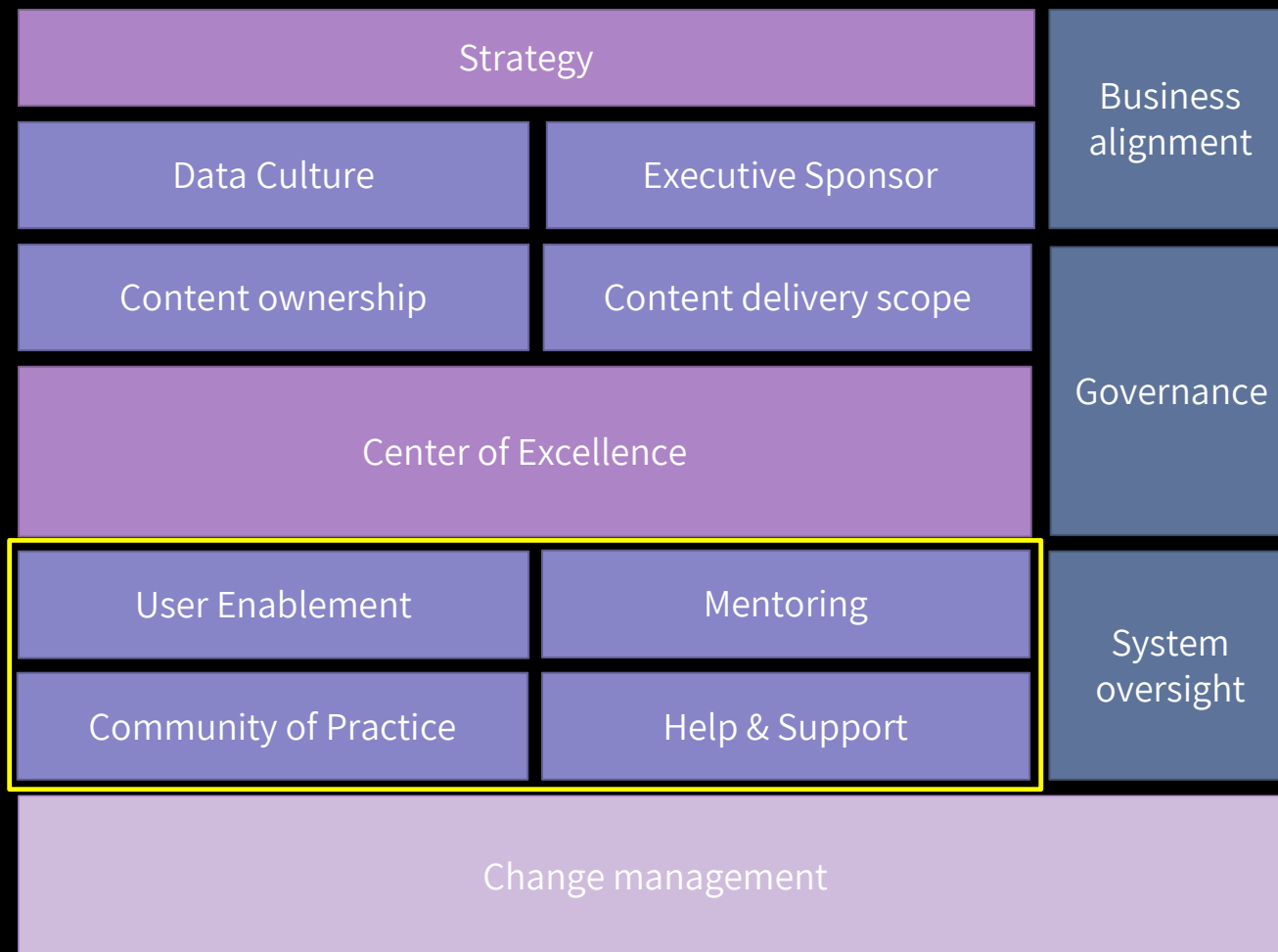
System Oversight (Power BI Admin)

Tenant settings

- Calling the (Admin) REST API
- Custom Visuals
- Fabric features
- Domains
- Publish to Web
- External users







Adoption

- But defining one thing
- Users adopt



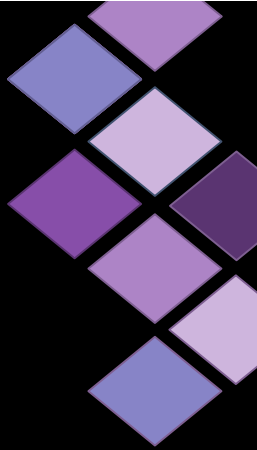
se objectives is

ay-to-day life..



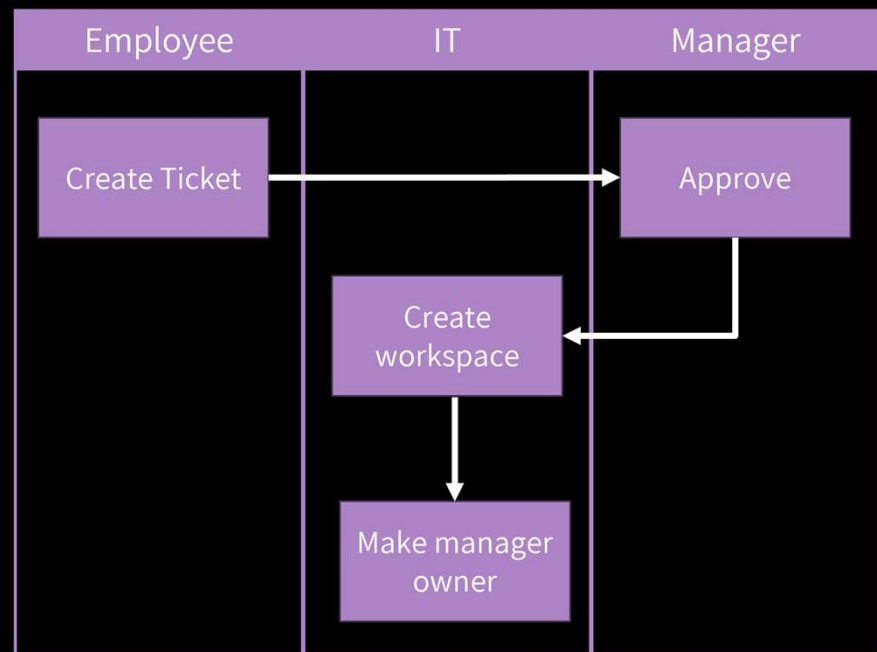
Adoption

- How?
 - User enablement
 - Mentoring
 - Community of practice
 - User support



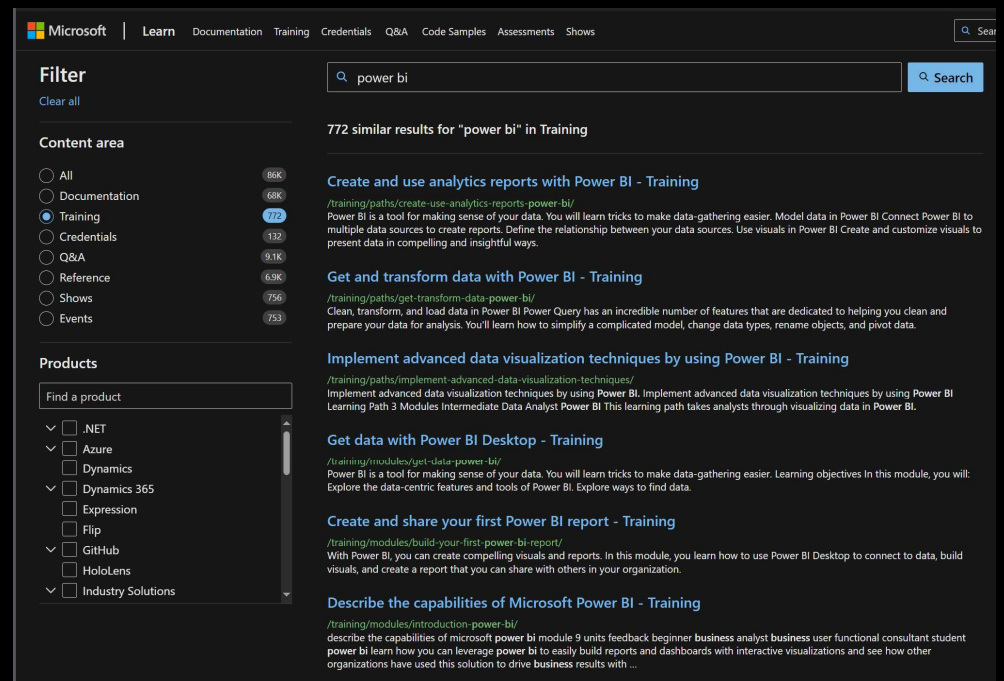
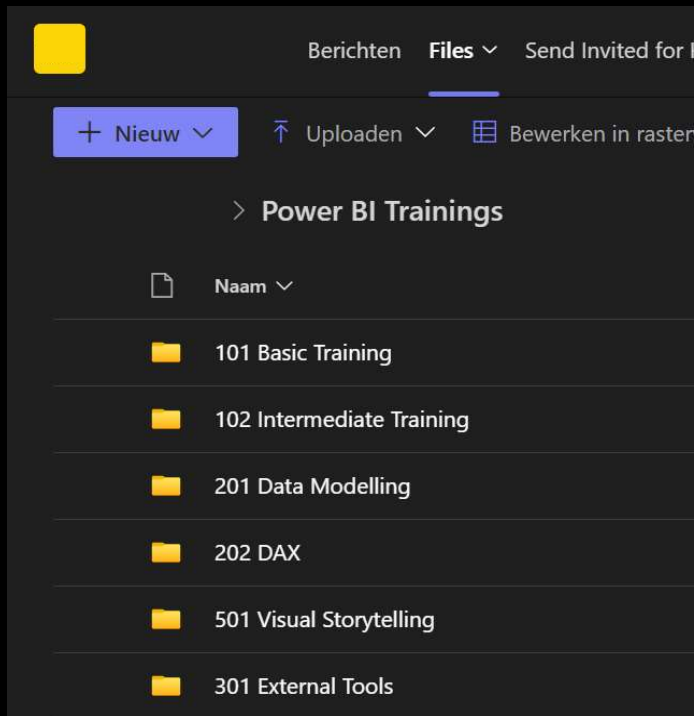
User enablement

- Create a “How to get started with”
- Create a consistent process
 - How to request Power BI Desktop
 - How to request a pro license
 - How to request a workspace



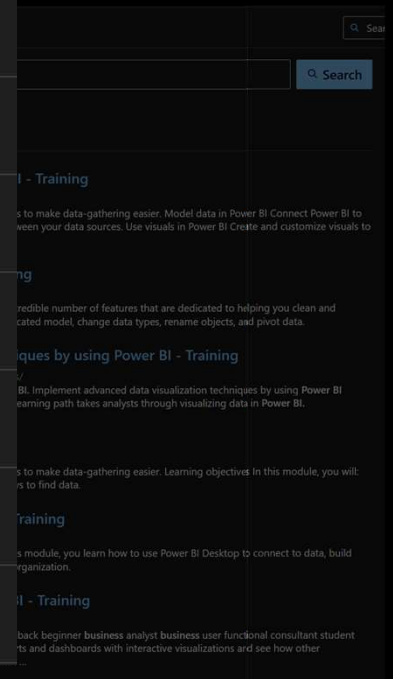
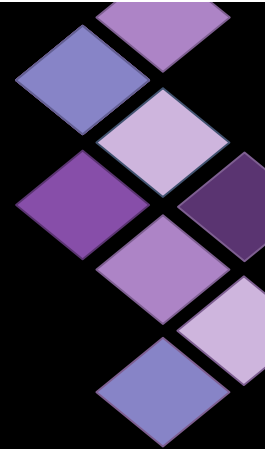
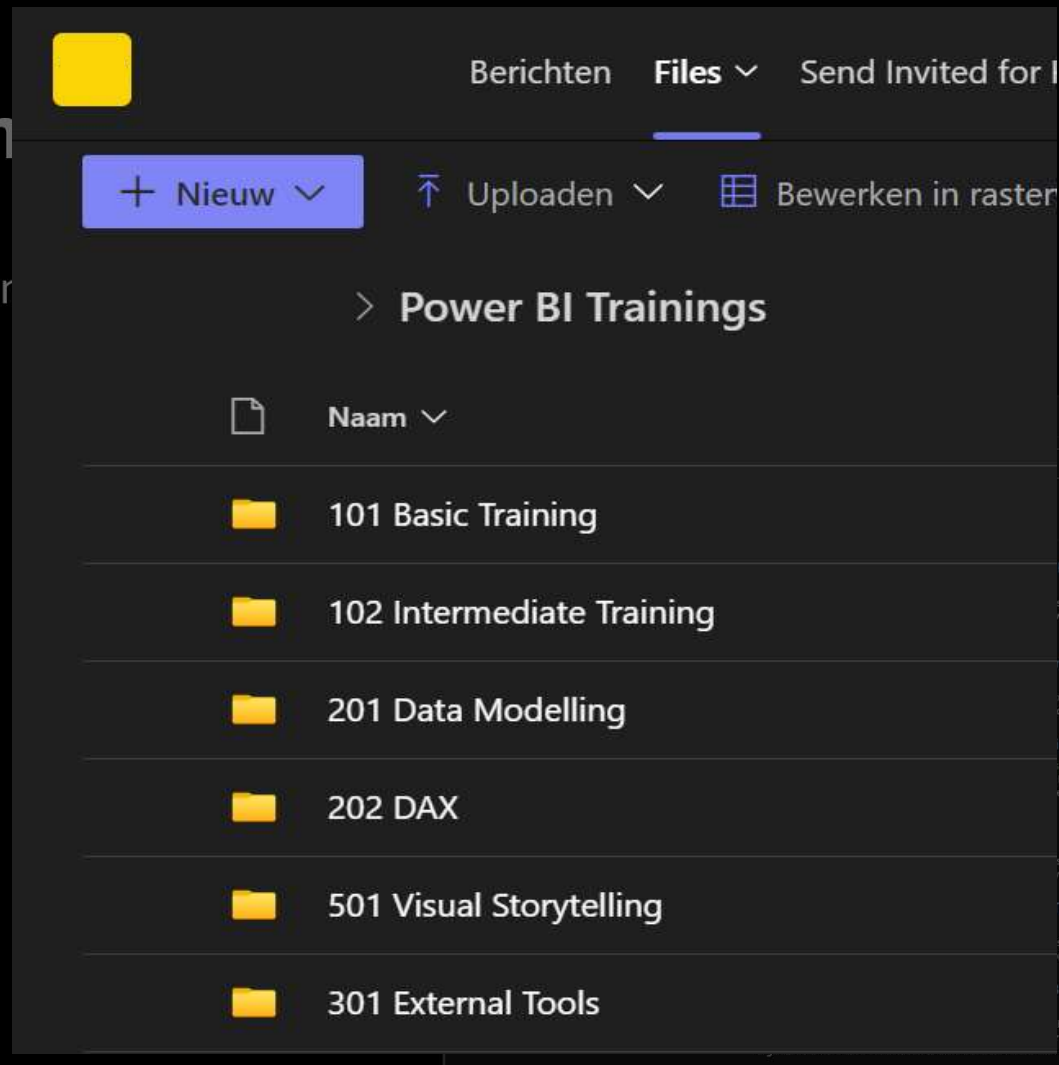
User enablement

- Consider what training services the COE can support:



Enablement

- Consider what r



Filter

Clear all

Content area

- ☐ All 86K
- ☐ Documentation 68K
- ☒ Training 772
- ☐ Credentials 132
- ☐ Q&A 9.1K
- ☐ Reference 6.9K
- ☐ Shows 756
- ☐ Events 753

Products

Find a product

- ✓ ☐ .NET
- ✓ ☐ Azure
- ☐ Dynamics
- ✓ ☐ Dynamics 365
- ☐ Expression
- ☐ Flip
- ✓ ☐ GitHub
- ☐ HoloLens
- ✓ ☐ Industry Solutions

power bi

Search

772 similar results for "power bi" in Training

Create and use analytics reports with Power BI - Training

</training/paths/create-use-analytics-reports-power-bi/>

Power BI is a tool for making sense of your data. You will learn tricks to make data-gathering easier. Model data in Power BI Connect Power BI to multiple data sources to create reports. Define the relationship between your data sources. Use visuals in Power BI Create and customize visuals to present data in compelling and insightful ways.

Get and transform data with Power BI - Training

</training/paths/get-transform-data-power-bi/>

Clean, transform, and load data in Power BI Power Query has an incredible number of features that are dedicated to helping you clean and prepare your data for analysis. You'll learn how to simplify a complicated model, change data types, rename objects, and pivot data.

Implement advanced data visualization techniques by using Power BI - Training

</training/paths/implement-advanced-data-visualization-techniques/>

Implement advanced data visualization techniques by using Power BI. Implement advanced data visualization techniques by using Power BI Learning Path 3 Modules Intermediate Data Analyst Power BI This learning path takes analysts through visualizing data in Power BI.

Get data with Power BI Desktop - Training

</training/modules/get-data-power-bi/>

Power BI is a tool for making sense of your data. You will learn tricks to make data-gathering easier. Learning objectives In this module, you will: Explore the data-centric features and tools of Power BI. Explore ways to find data.

Create and share your first Power BI report - Training

</training/modules/build-your-first-power-bi-report/>

With Power BI, you can create compelling visuals and reports. In this module, you learn how to use Power BI Desktop to connect to data, build visuals, and create a report that you can share with others in your organization.

Describe the capabilities of Microsoft Power BI - Training

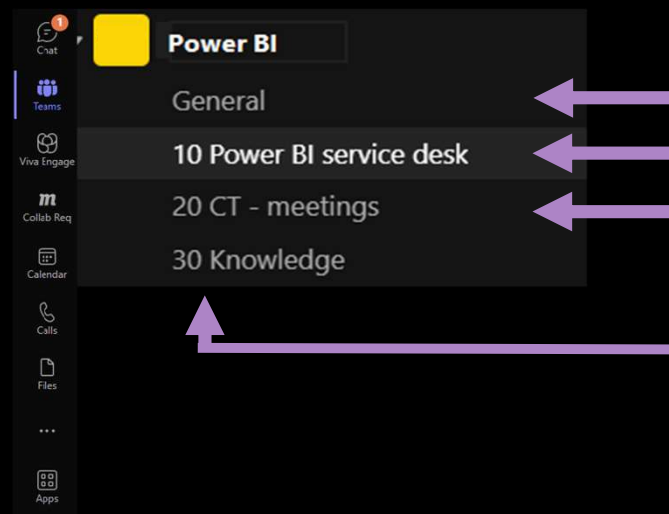
</training/modules/introduction-power-bi/>

describe the capabilities of microsoft power bi module 9 units feedback beginner business analyst business user functional consultant student power bi learn how you can leverage power bi to easily build reports and dashboards with interactive visualizations and see how other organizations have used this solution to drive business results with ...

User enablement

Enable users to accomplish as much as they can with Power BI within the guidelines

- Create a centralized portal



Channel for generic CoE announcements

Channel to ask questions

Channel for meetings such as:

- Monthly updates

- Q&A office hours

Channel to share information:

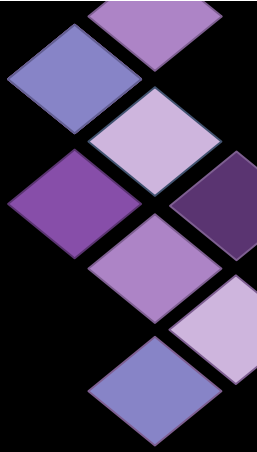
- Webinars

- Blogs

- Youtube videos


Mentoring

- Office hours
- Co-development projects
- Best practices reviews




Mentoring – Office Hours


Power Hour Power BI

 SELECT STAFF (OPTIONAL)

Paulien van Eijk

April 10 with Paulien van Eijk

 DATE

 TIME

< > April 2024

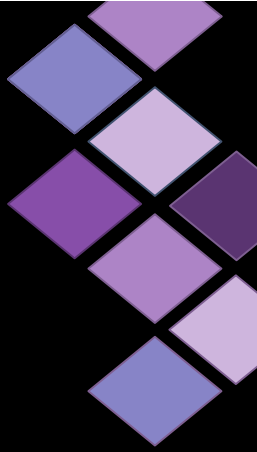
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

5:50 PM

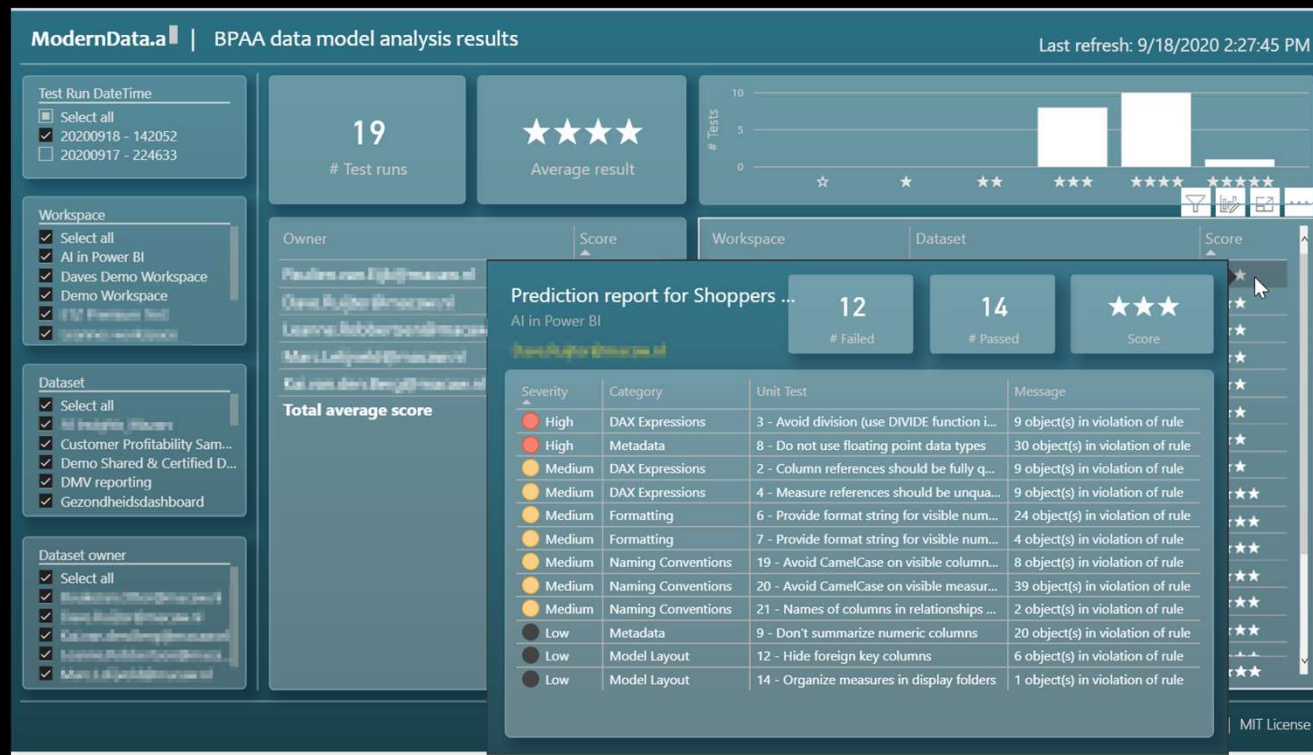
6:20 PM

Mentoring

- Office hours
- Co-development projects
- Best practices reviews



Mentoring - Best practice review

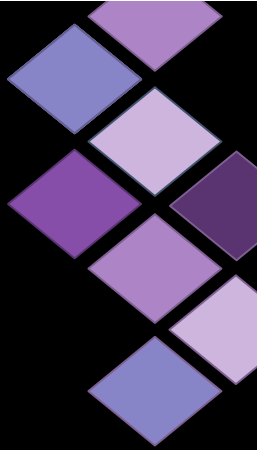


Blog: Dave Ruijter, Henko Kors - Check the quality of all Power BI data models at once with Best Practice Analyzer Automation (BPAA)

Community of Practice

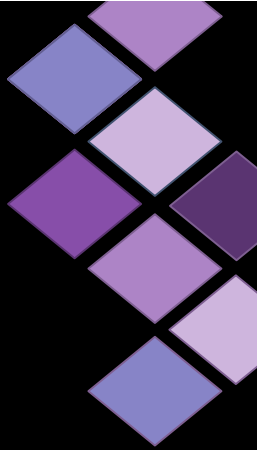
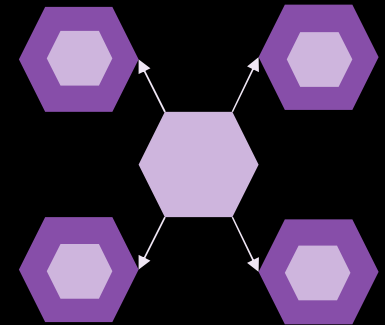
Everyone with an interest in Power BI

- CoE oversees the entire community
- Champions (Power Users)
- Content consumer
- Content creator



Community of Practice - Champions

- One of the driving factors behind adoption
- Satellite members of the CoE
 - Influence on data policies
 - Influence on creation of best practices and guidance



Help and Support

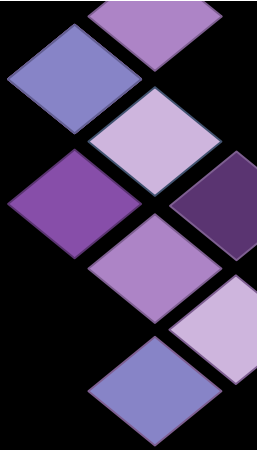
Establishing a support system with training, various levels of support and community.

Internally

- Intra-team support
- Internal community support
- Help desk support

Externally

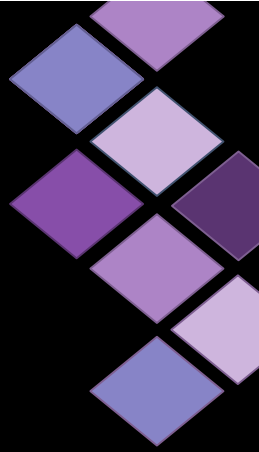
- Microsoft support
- Community support
- Administrator support



But the CoE can only do so much

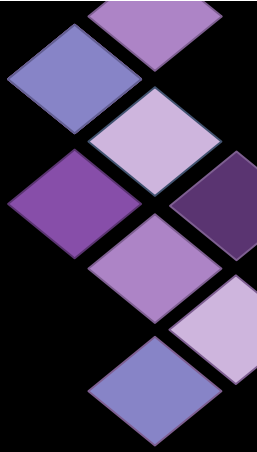
- It's the people who make or break the change
- The CoE can provide trainings, but if people don't attend them, they are useless
- The CoE can provide best practices, but if people don't follow them, they are useless
- The CoE can assign roles and responsibilities, but if people don't act, the roles are useless.

Change is about people, not technology and processes.



Don't come in with a BANG

- Imagine that

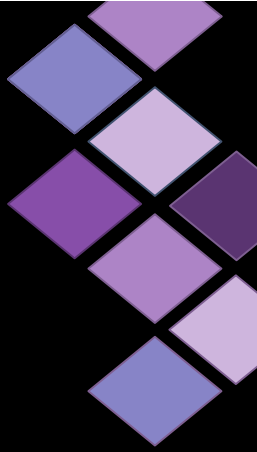




**As of today
“Export to Excel”
Is disabled**

Communication is KEY

- Not only in relationships..
- Communicate about:
 - **What?**
 - **Why?**
 - **When?**
- Don't forget to keep the door open:
 - **Where to find more information**
 - **Who to contact for questions**

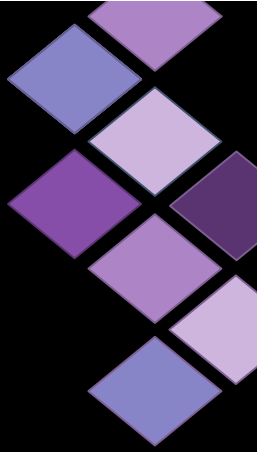


Communication is KEY

- **What?** Export to csv on our HR reports are disabled
- **Why?** To limit the possibility that private information of employees will be shared with employees who are not allowed to view this information
- **When?** As of October 15th, 2023
- **Where to find more information for alternatives:** Instead, it is advised to use the “Analyse in Excel” feature, which is described [here](#). In this way, you are still able to view the data in Excel, but only employees with access to the data are able to view the data in Excel.
- **Who to contact for questions:** Please reach out to the Power BI CoE: powerbicoe@bittersweet.com for more information, questions or feedback.

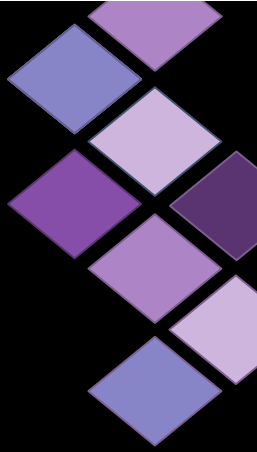


**Change management is a profession
on its own**



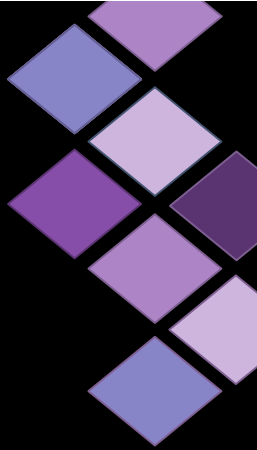
So, things you need are

- A good strategy



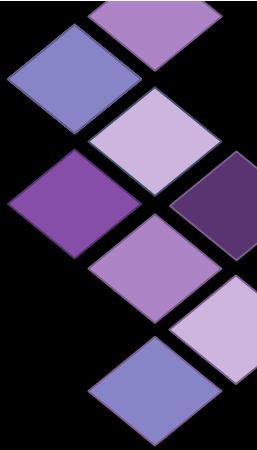
So, things you need are

- A good strategy
- Set of behaviours and norms (data culture)



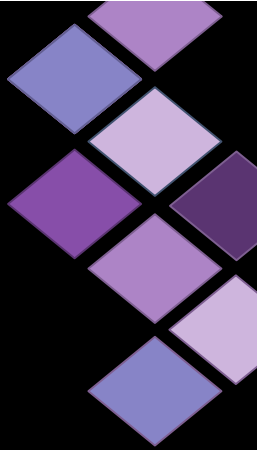
So, things you need are

- A good strategy
- Set of behaviours and norms (data culture)
- Someone with influence and authority (sponsor)



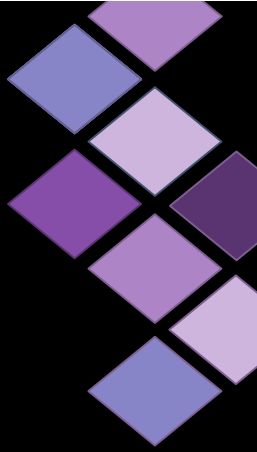
So, things you need are

- A good strategy
- Set of behaviours and norms (data culture)
- Someone with influence and authority (sponsor)
- Gather the required information (content scope and delivery)

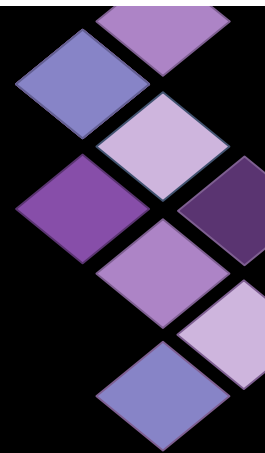


So, things you need are

- A good strategy
- Set of behaviours and norms (data culture)
- Someone with influence and authority (sponsor)
- Gather the required information (content scope and delivery)
- Gather a group of motivated people to reach the goals you have set together



Wait, this reminds me of something ...



Wait, this reminds me of something ...

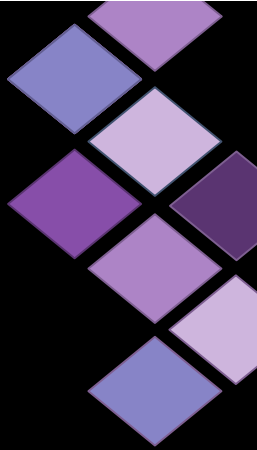


So, things you need are

- A good strategy - for obvious reasons ✓
- Set of behaviours and norms – pieces can only do certain moves ✓
- Someone with influence and authority – the Marshall ✓
- Gather the required information – using your scouts and spies ✓
- Gather a group of motivated people to reach the goals you have set – getting the flag with all your generals, captains, majors etc ✓



Don't forget to submit your session feedback!



Q&A

