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.

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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 / analist / user / ..?

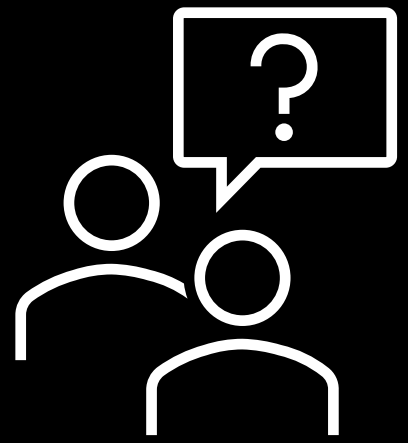
Could you raise your hand if you don’t do anything with Power BI?

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

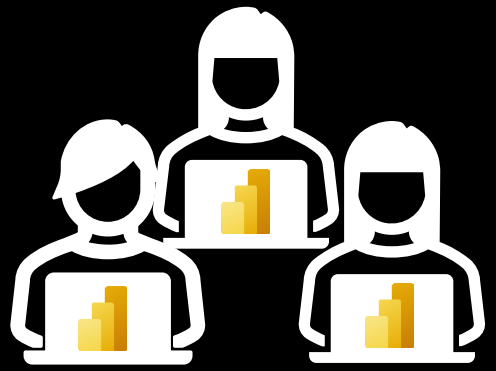


Governance
Adoption

Strategies

Scenario 1

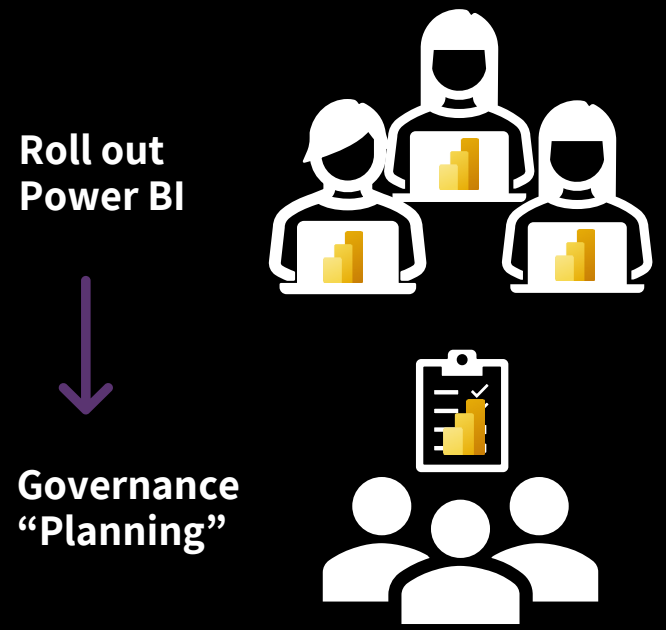
Roll out Power BI



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

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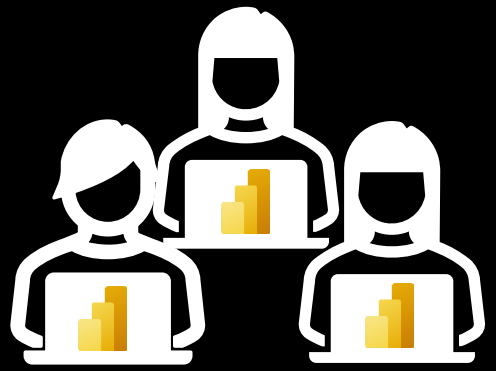
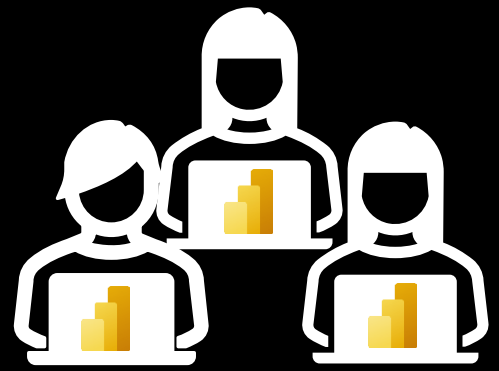


Governance “Planning”

Scenario 2

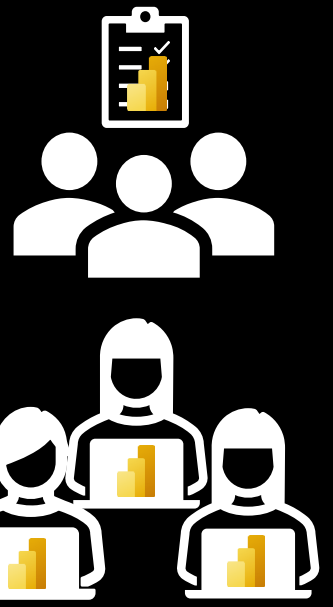
Governance Planning

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



Strategies

Scenario 1

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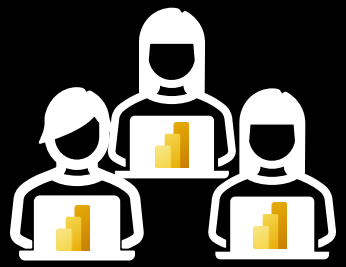
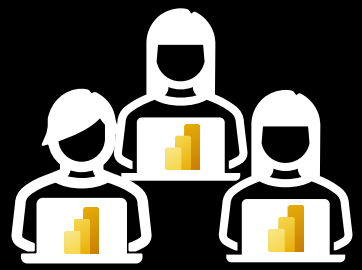


Governance "Planning"

Scenario 1.5

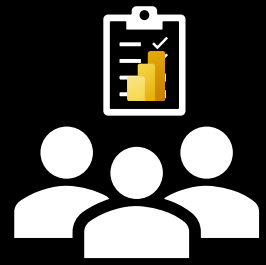
Governance Planning

Roll out Power BI

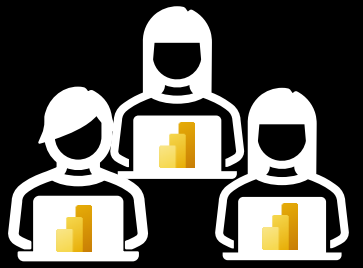


Scenario 2

Governance Planning



Roll out Power BI



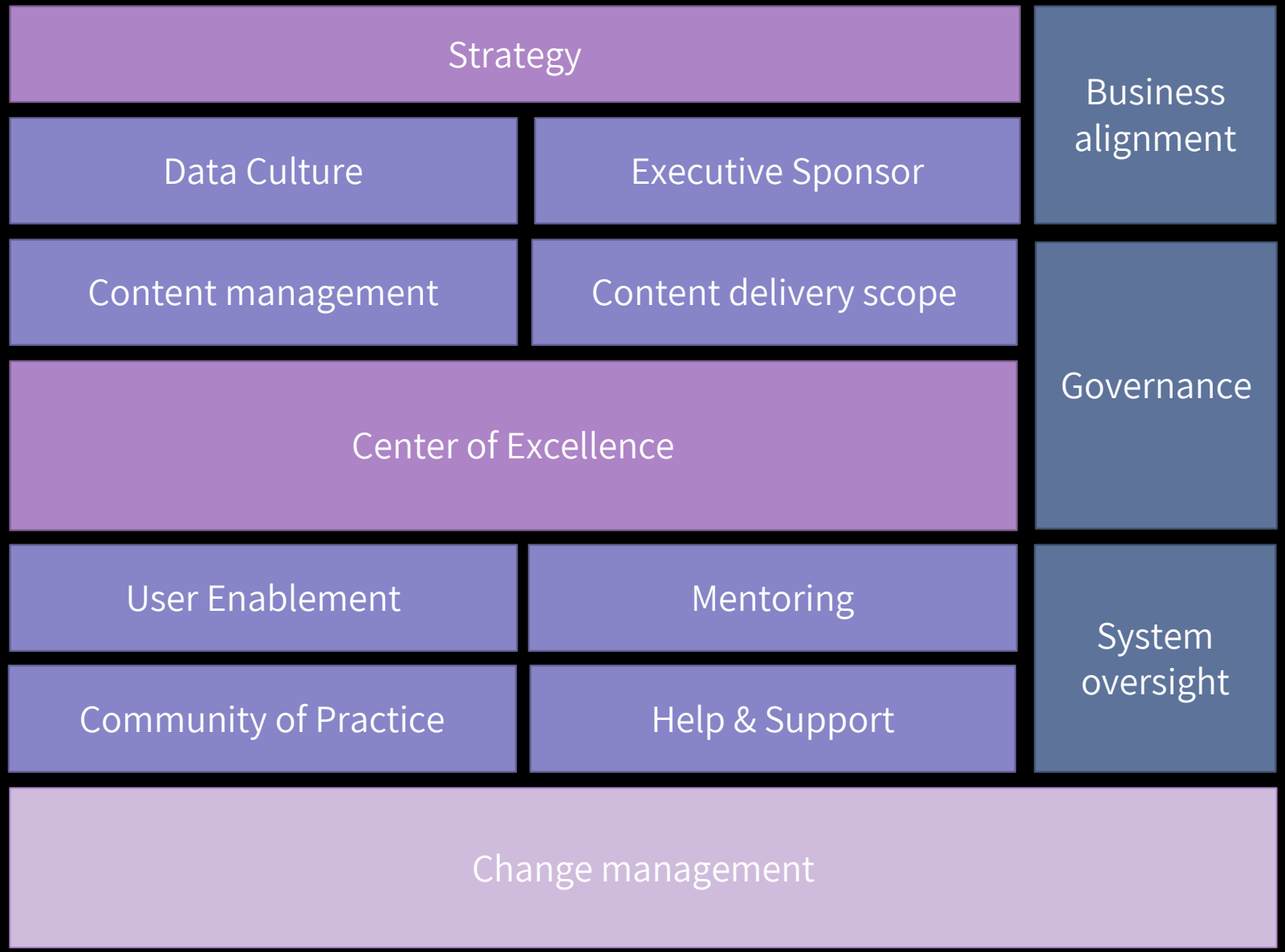
So..

- 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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System oversight
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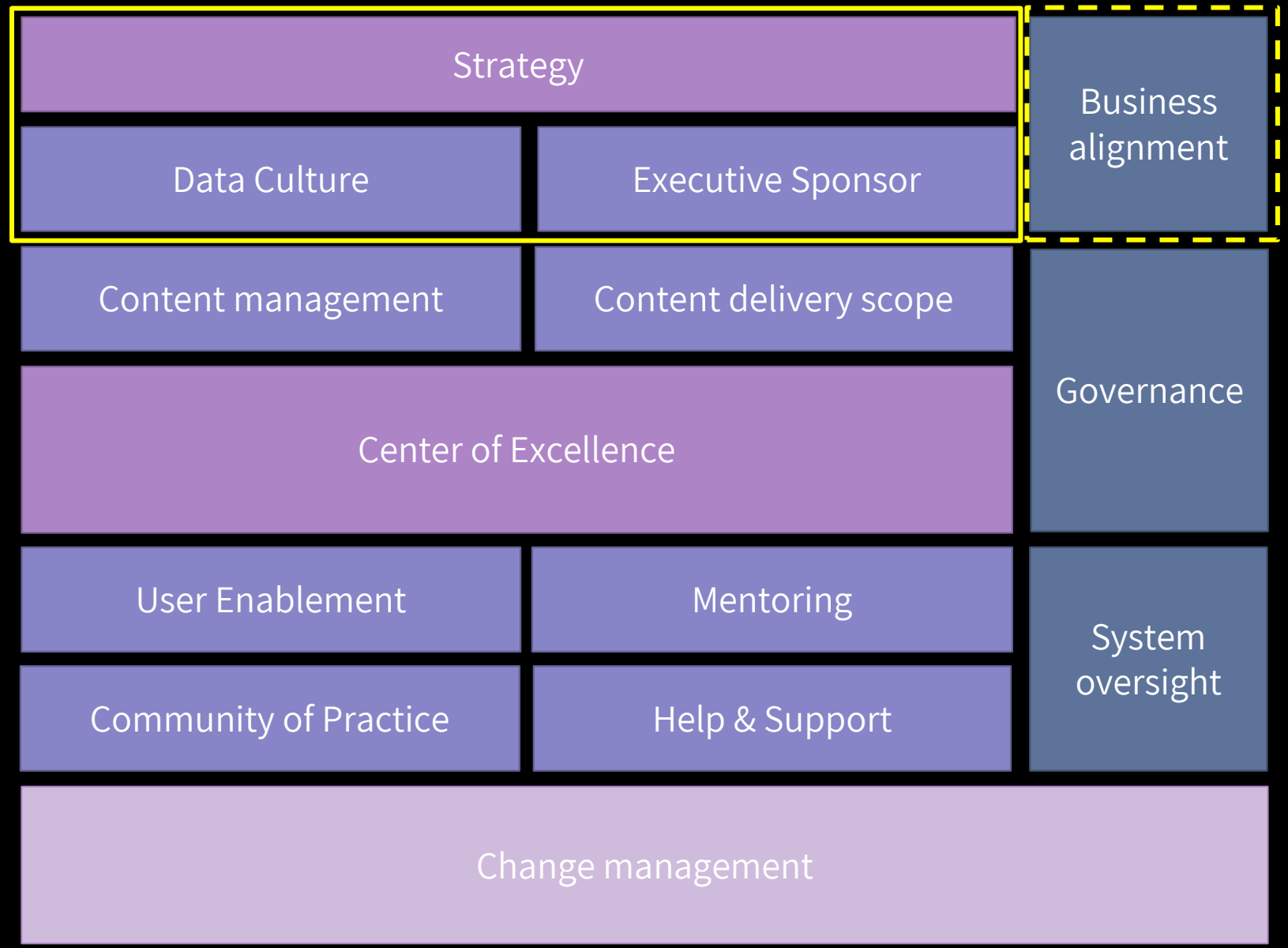
Help & Support
Change management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Data Culture

- 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

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

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Disclaimer: Without sponsor you will most likely fail. ☹

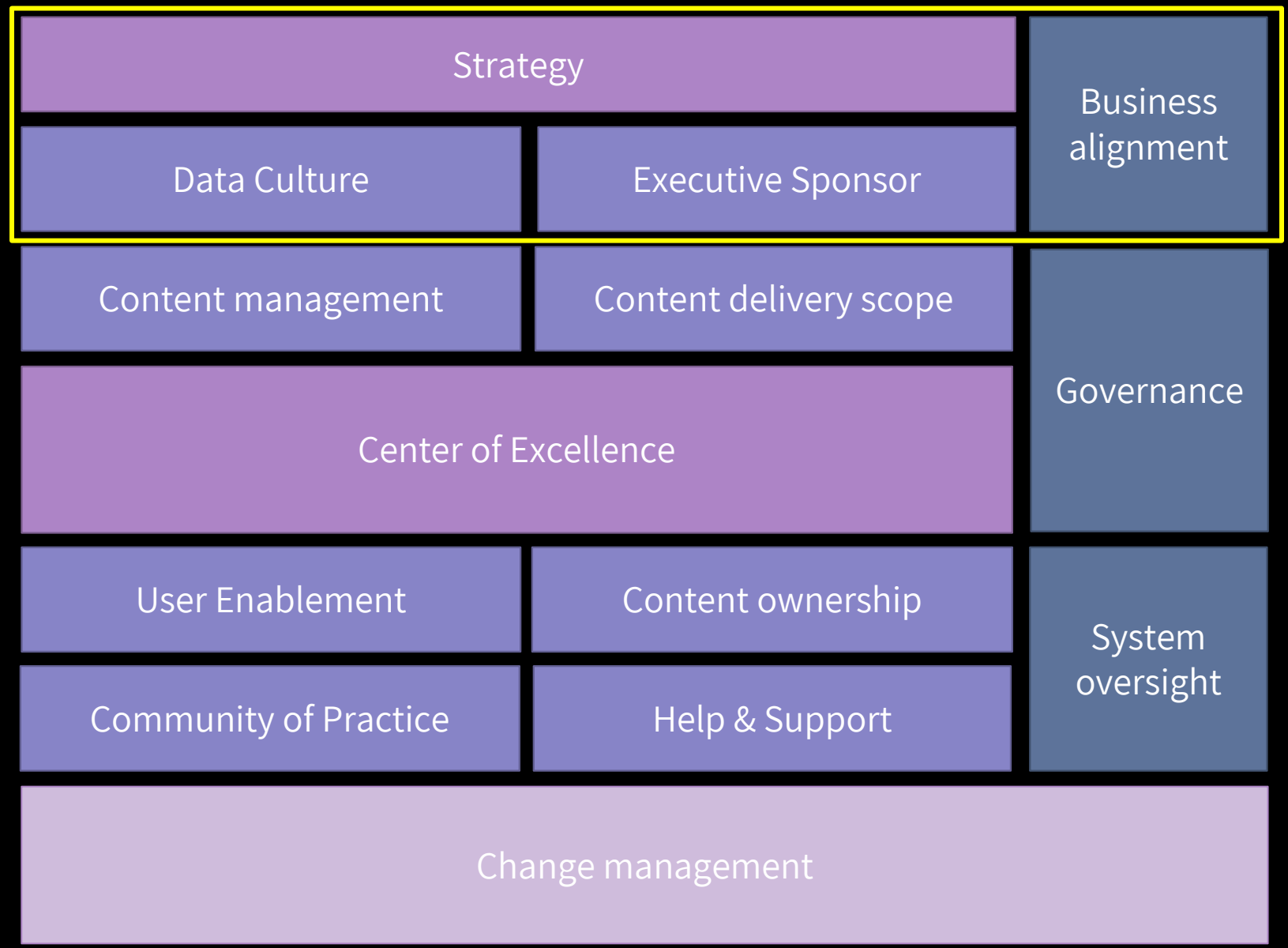
Business alignment

- 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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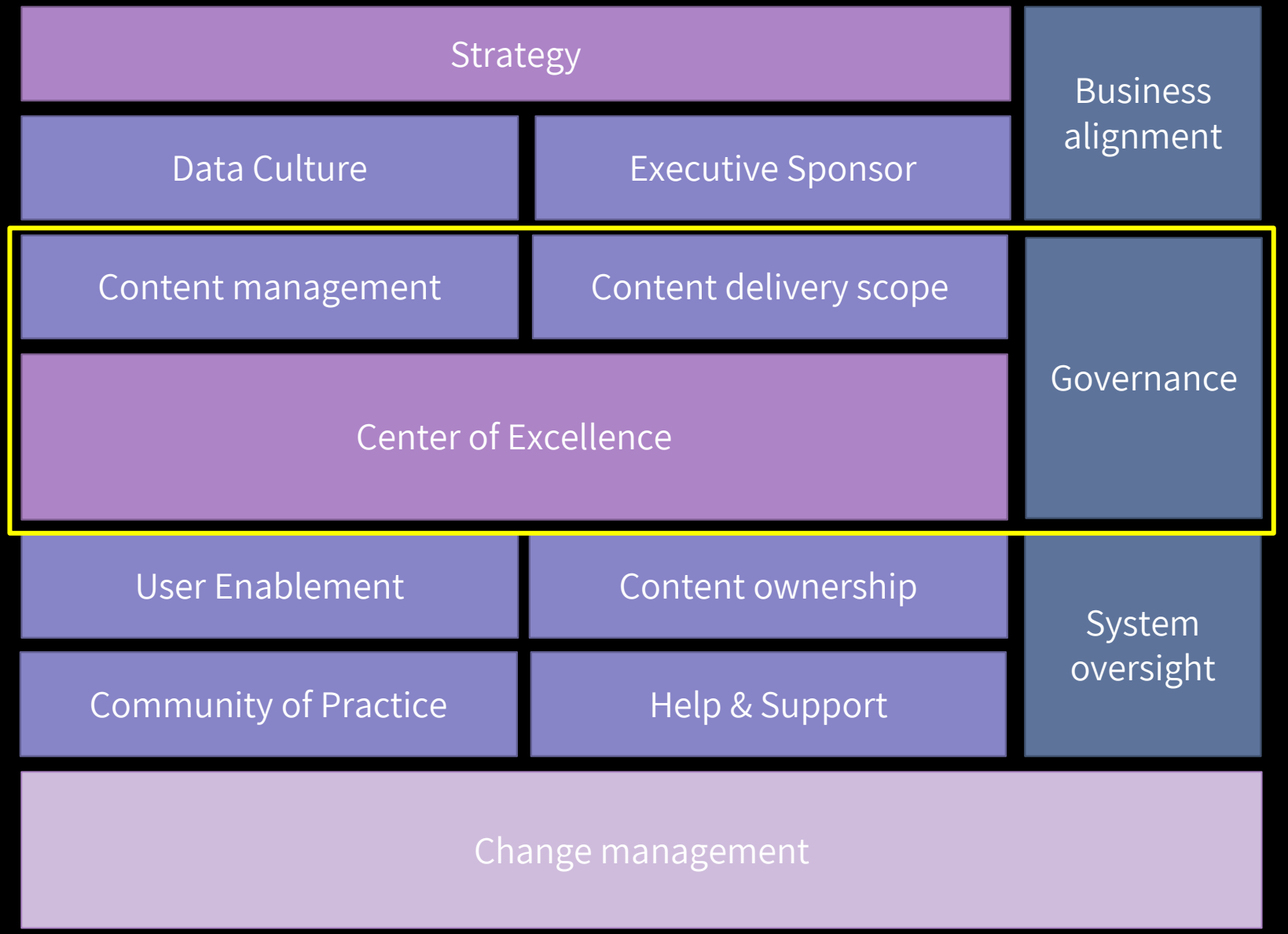
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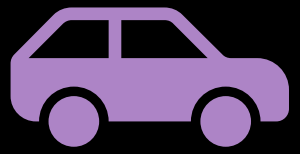
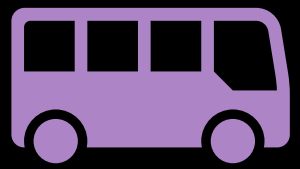
Content delivery scope

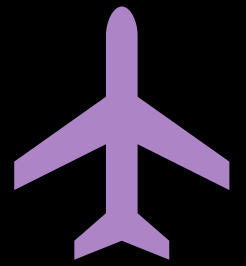
Personal BI



Team BI



Departmental BI



Enterprise BI

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 delivery scope

Enterprise BI

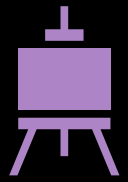
Departmental BI

Team BI

Personal BI

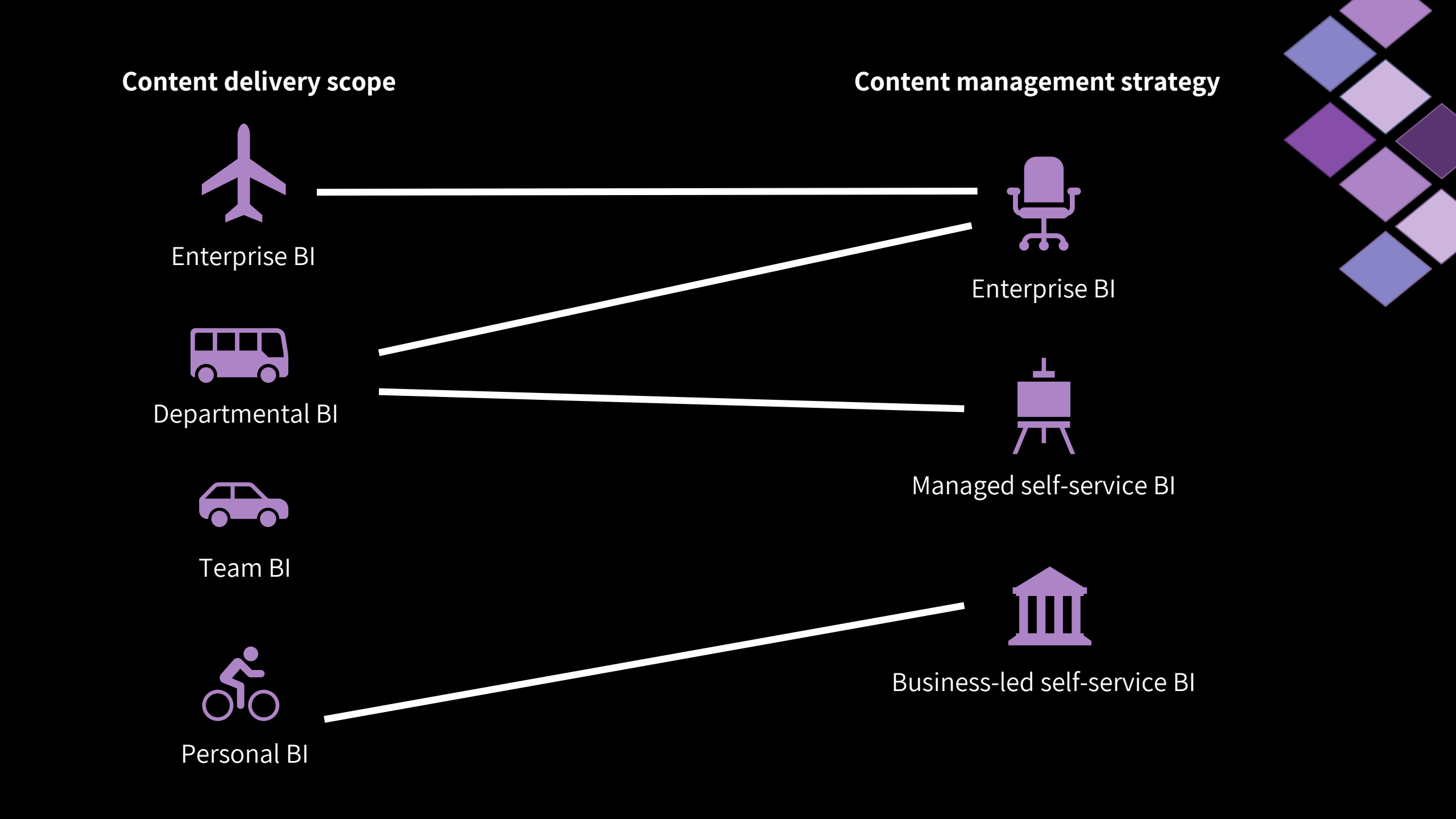
Content management strategy

Enterprise BI



Managed self-service BI

Business-led self-service BI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Content management strategy
Enterprise BI
Enterprise BI
Departmental BI
Managed self-service BI
Team BI
Business-led self-service BI
Personal 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 Powre 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

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- Team of specialists with Power BI knowledge and business knowledge
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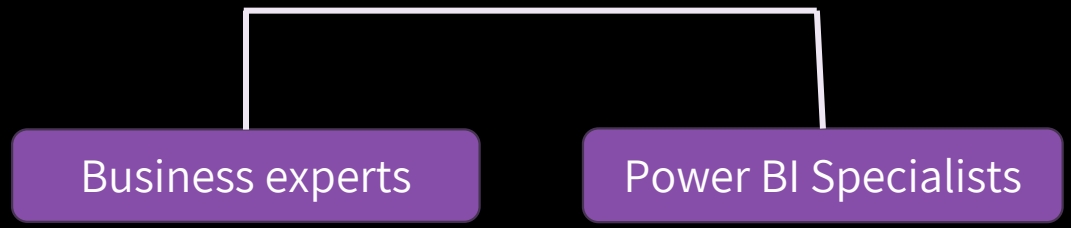
Goals

- Guiding and educating internal users to increase their skillset
- Create consistency and transparancy for user community
- Reducing techical 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



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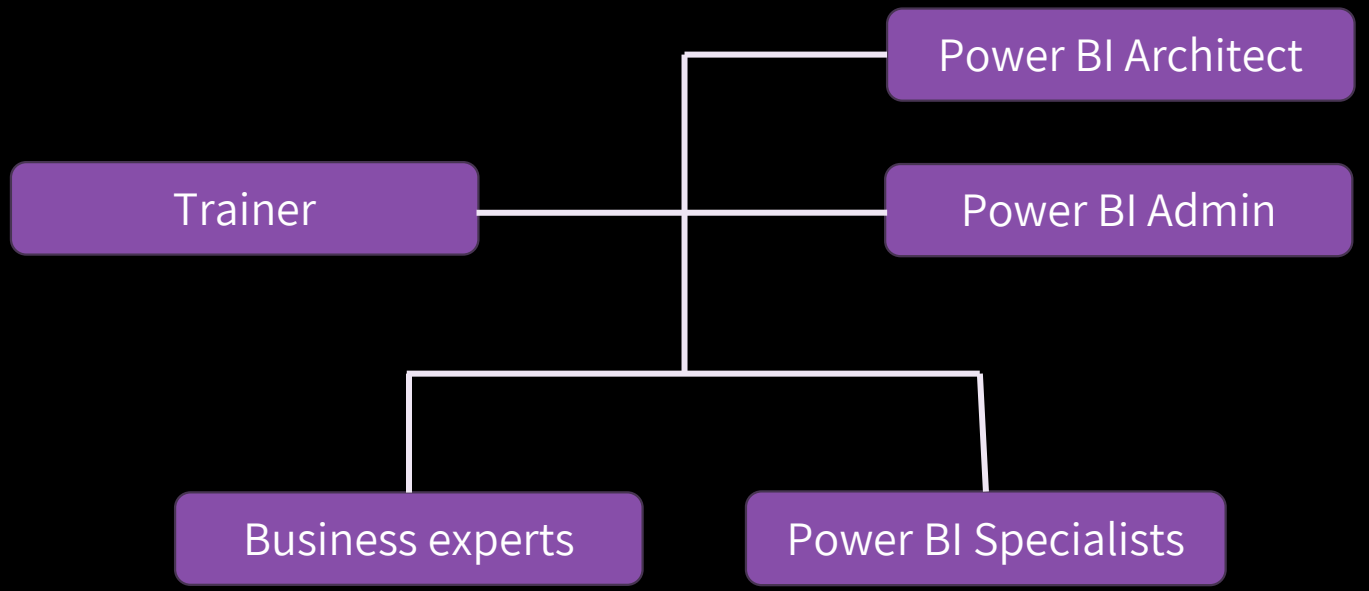

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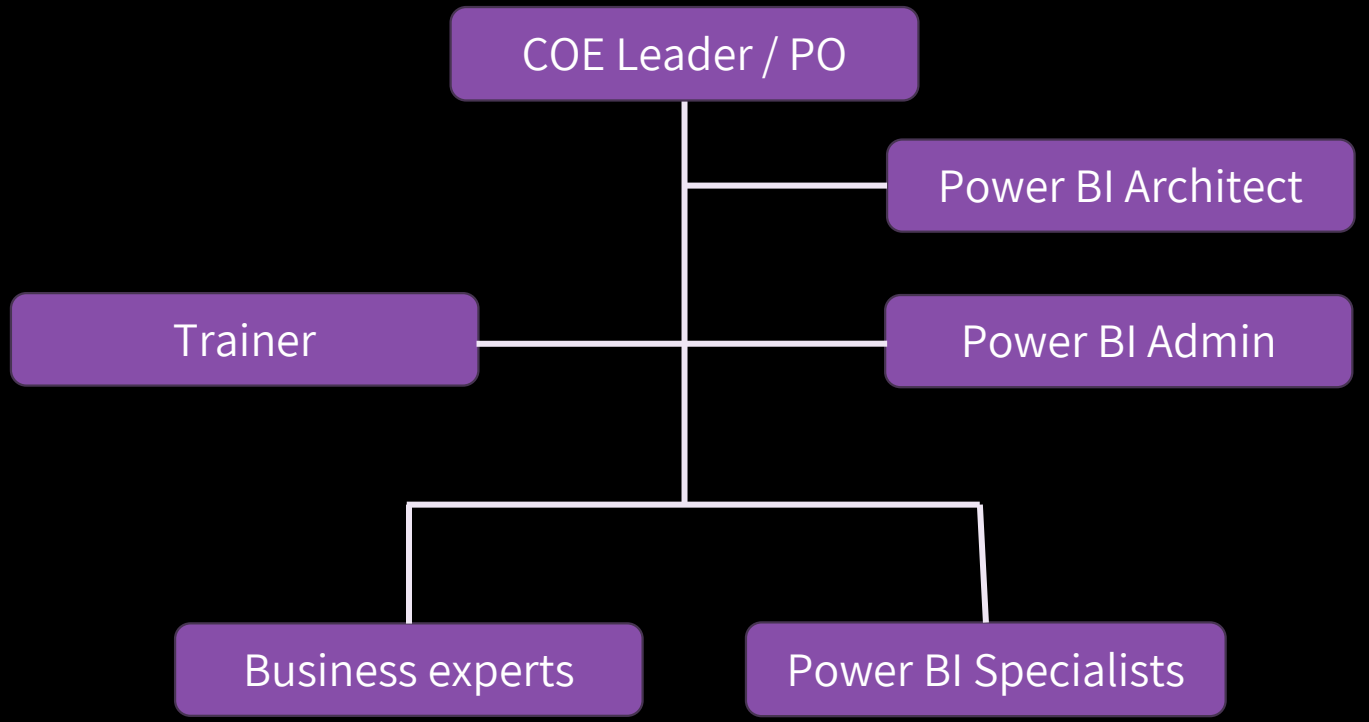
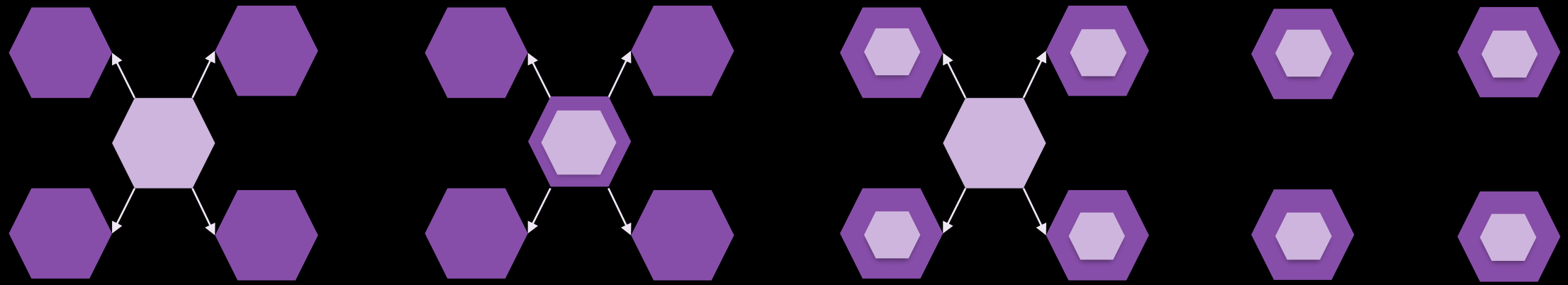


Structure of a Power BI Center of Excellence?

Business experts

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

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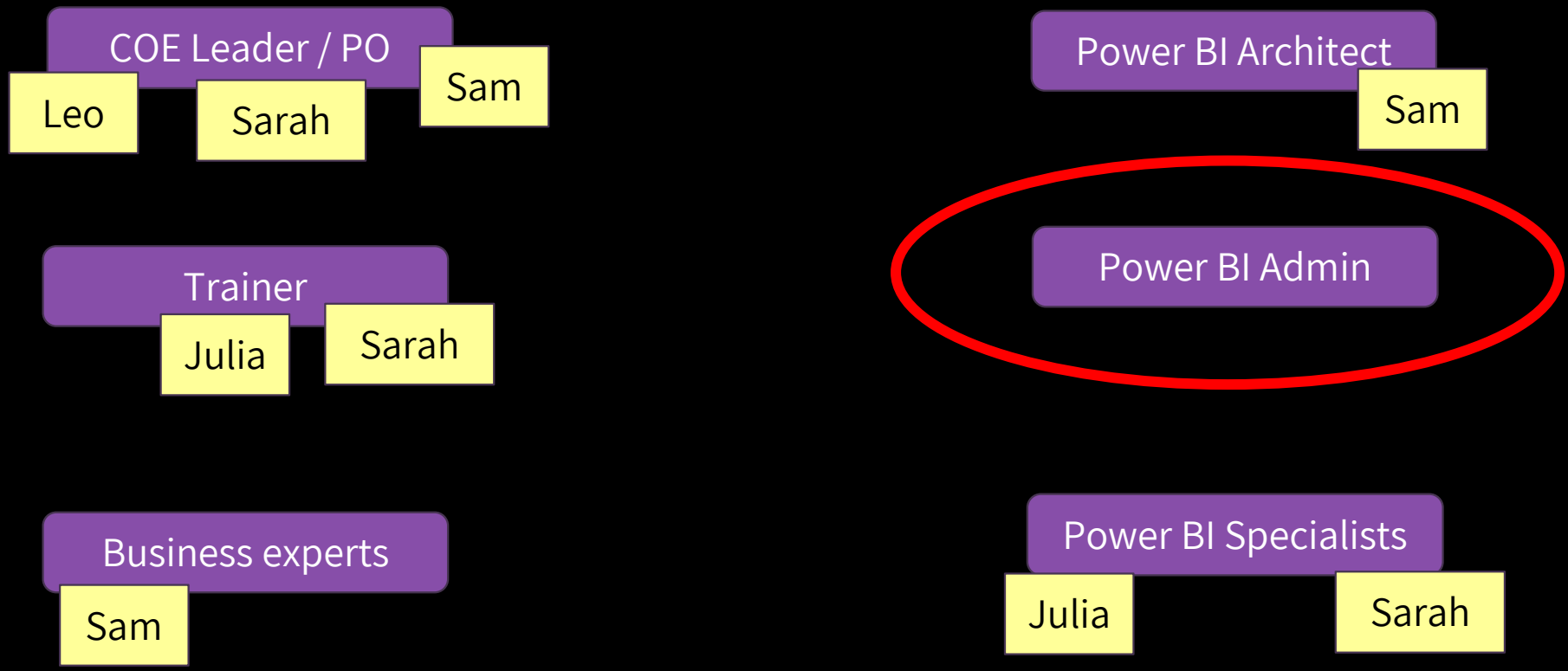
- ? Integration with other products
- ✗ Documentation
- ☑ Templates

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

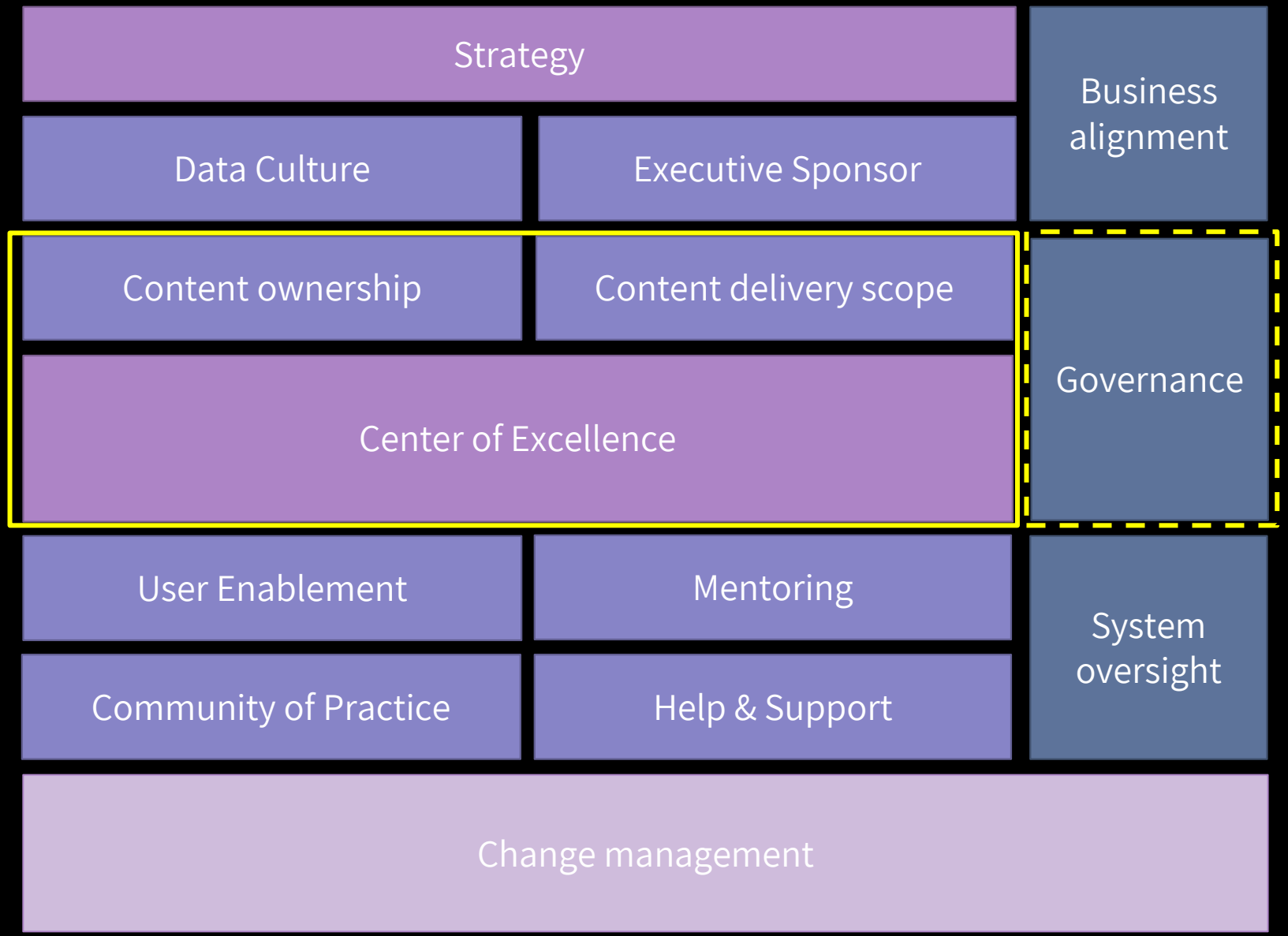


Governance

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
- Content ownership responsibilities are clear and adopted
- Consistency and standardization of solutions
- Reducing risk of data leakage and misuse of data.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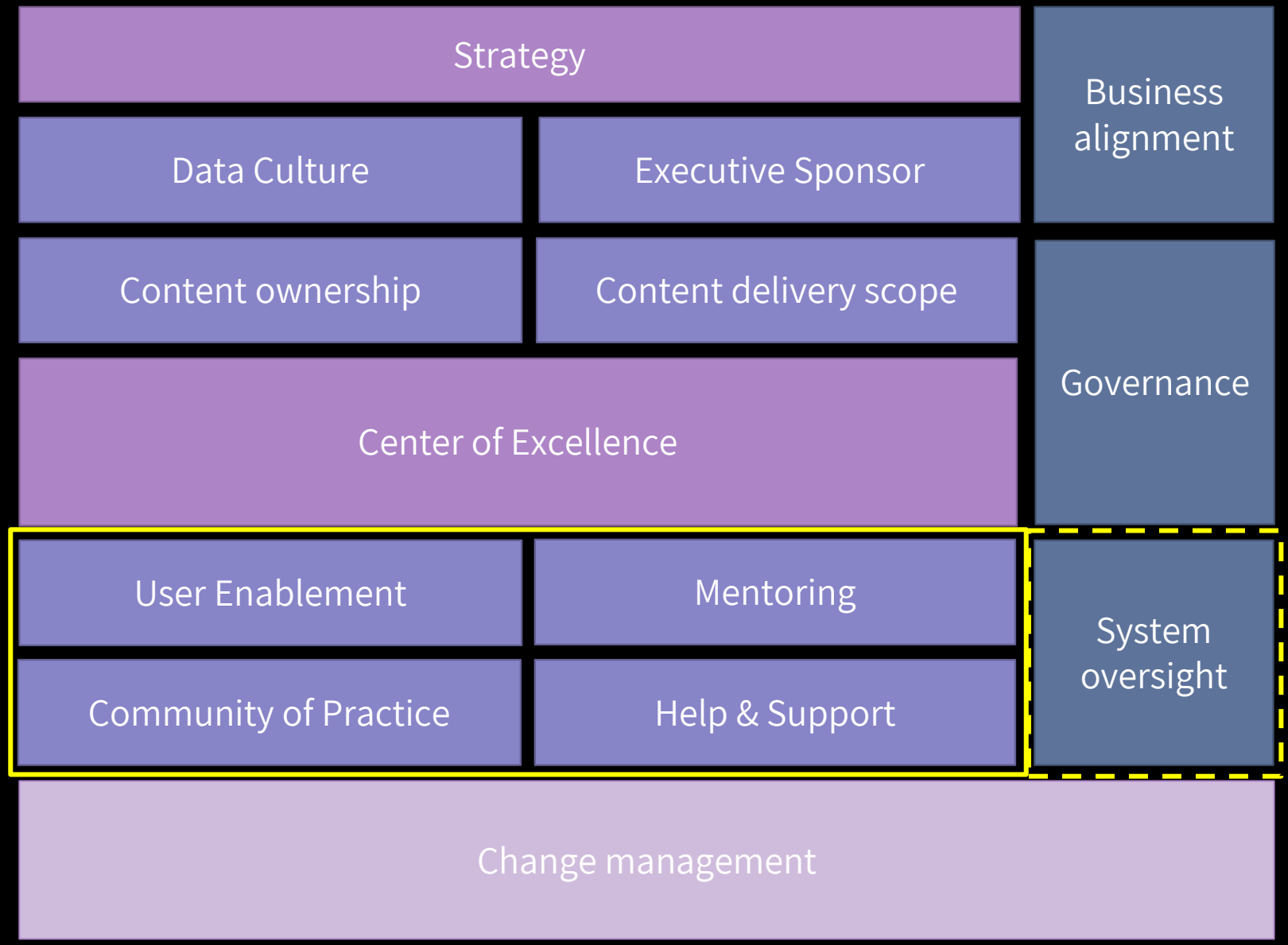
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Adopti

- But defi se objectives is one thir
- Users ac ay-to-day life..

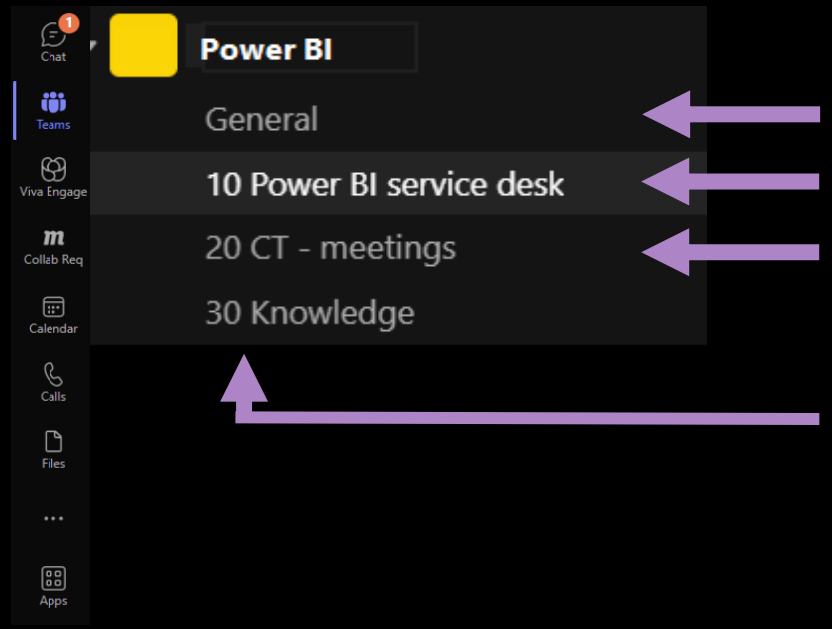
Adoption

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

User enablement

Empowering users to leverage Power BI for data driven decisions.

- Create a centralized portal



Channel for generic CoE announcements

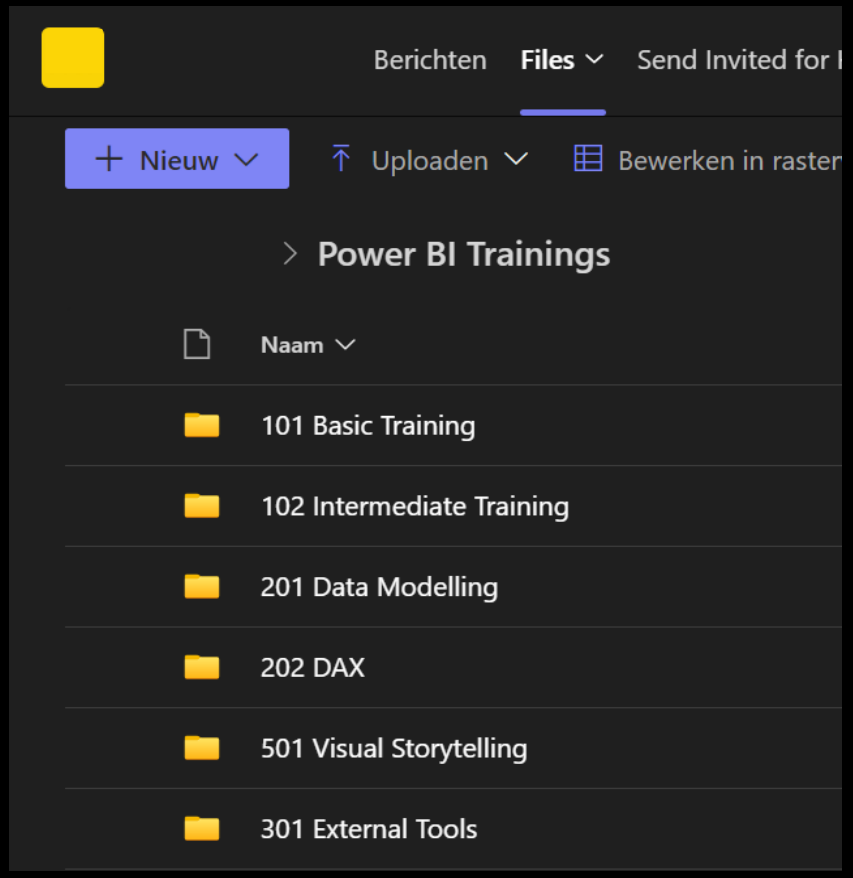
Channel to ask questions

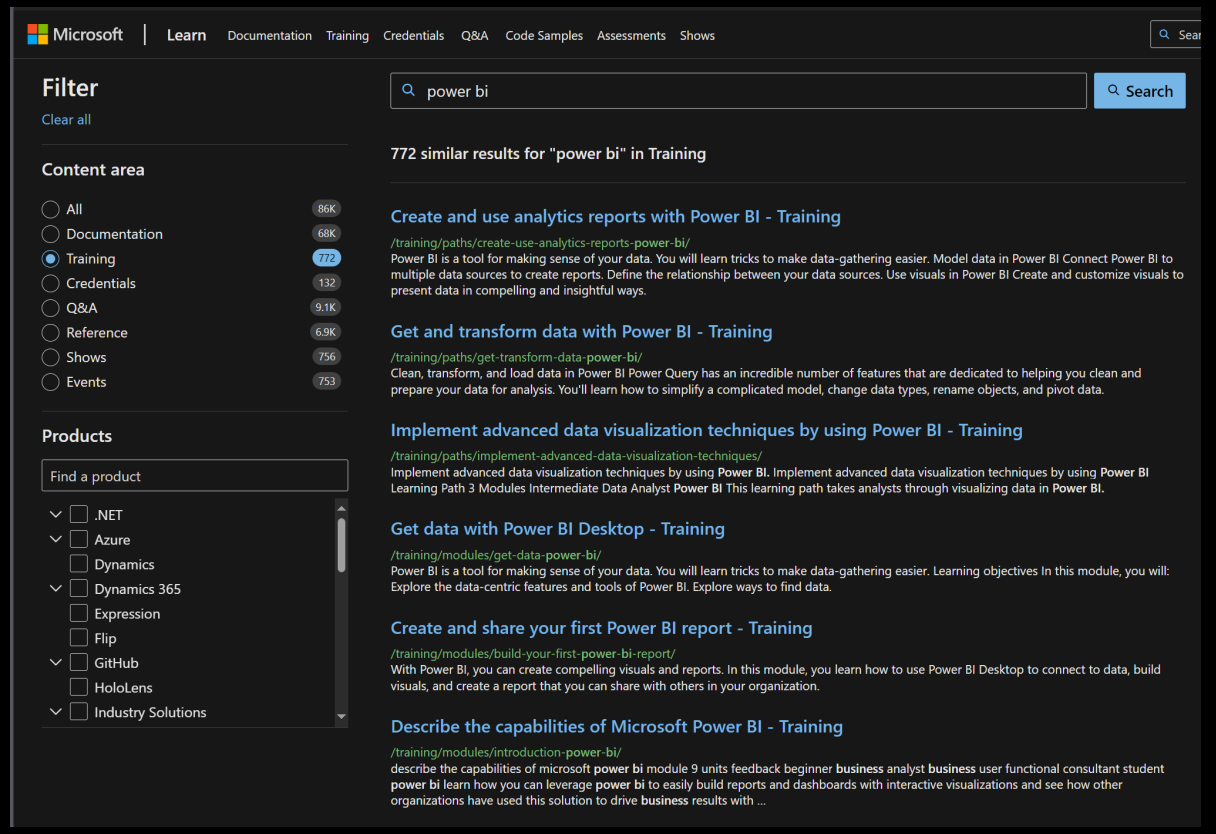
Channel for meetings such as:
- Monthly updates
- Q&A office hours

Channel to share information:
- Webinars
- Blogs
- Youtube videos

User enablement

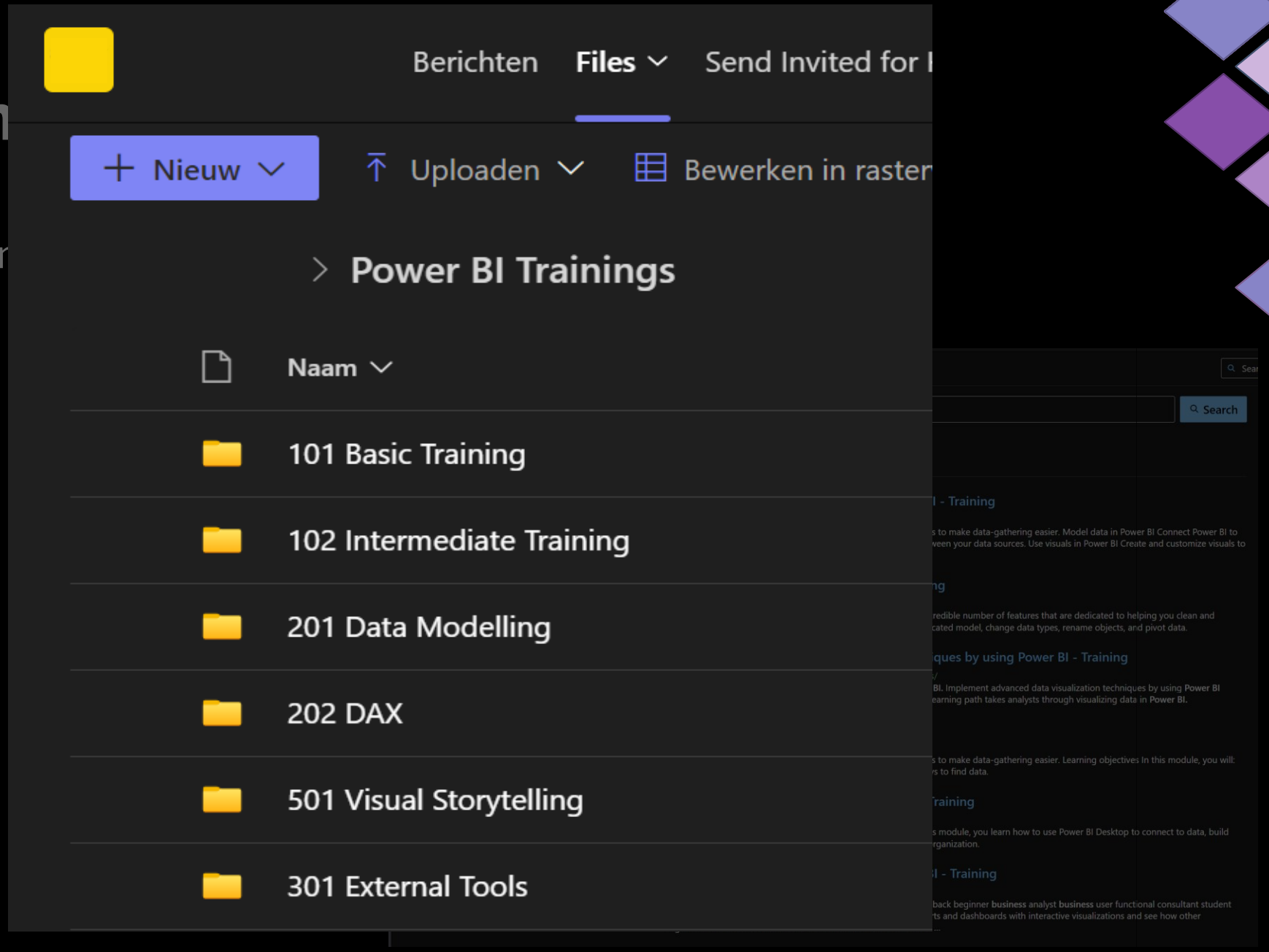
- Consider what training services the COE can support:

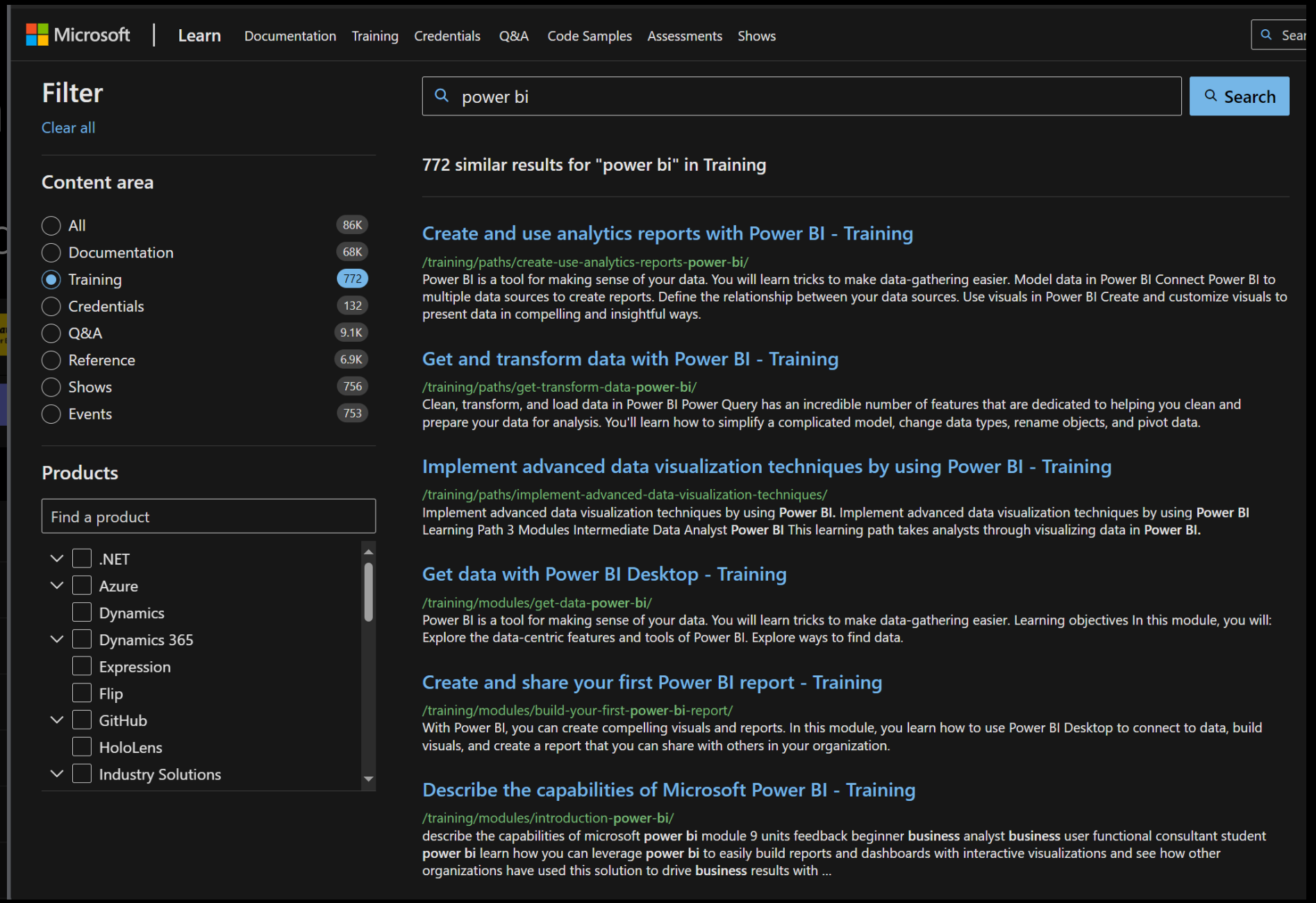




Enablemen

- Consider what r




Microsoft | Learn Documentation Training Credentials Q&A Code Samples Assessments Shows
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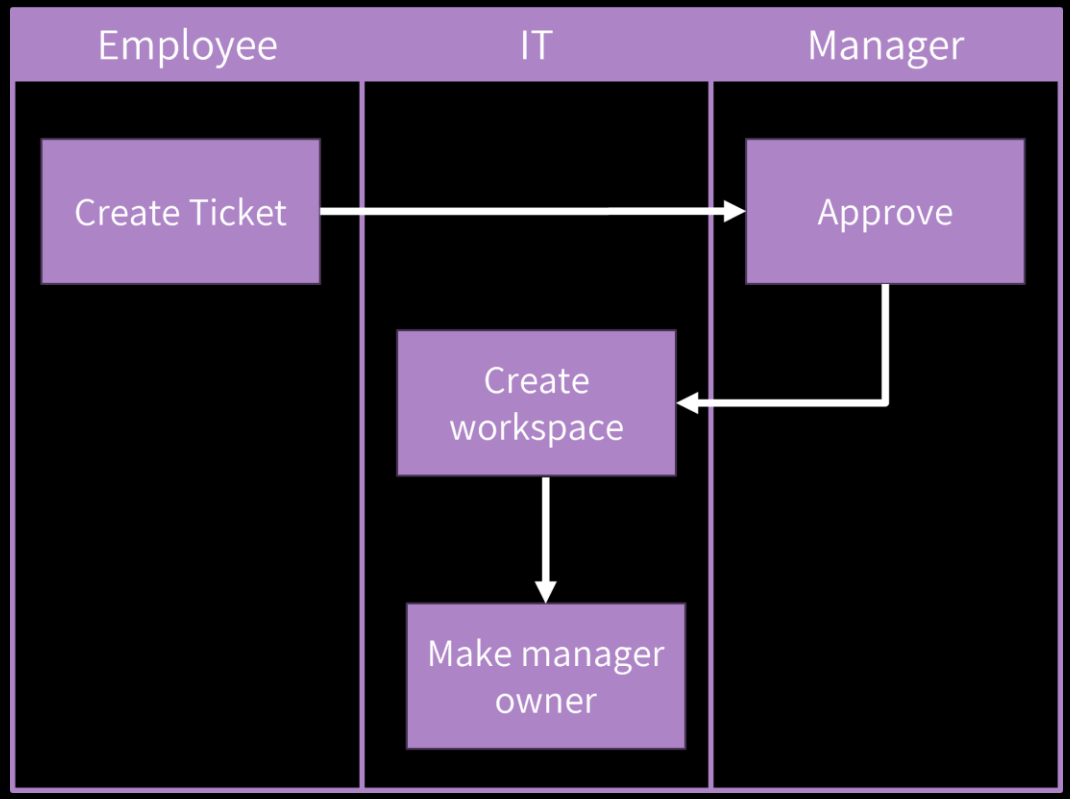
All 86K
Documentation 68K
Training 772
Credentials 132
Q&A 9.1K
Reference 6.9K
Shows 756
Events 753
Products
Find a product
.NET
Azure
Dynamics
Dynamics 365
Expression
Flip
GitHub
HoloLens
Industry Solutions
power bi
Search
772 similar results for "power bi" in Training
Create and use analytics reports 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 ...

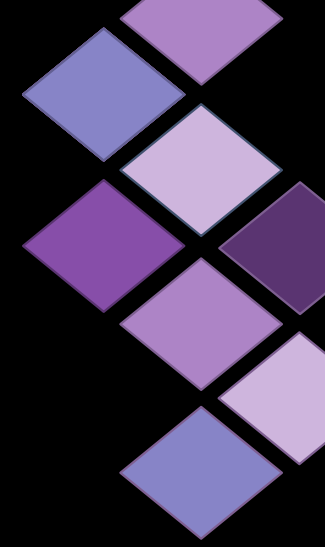
User enablement

- Create a consistent process
  - How to request a workspace
  - How to request a capacity
  - How to request a pro license



Mentoring

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



Mentoring - Best practice review

Community of Practice

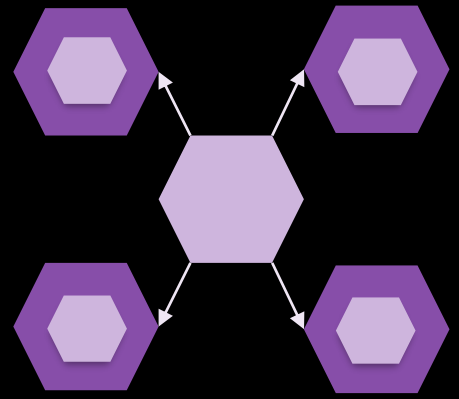
Everyone with an interest in Power BI

- 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.

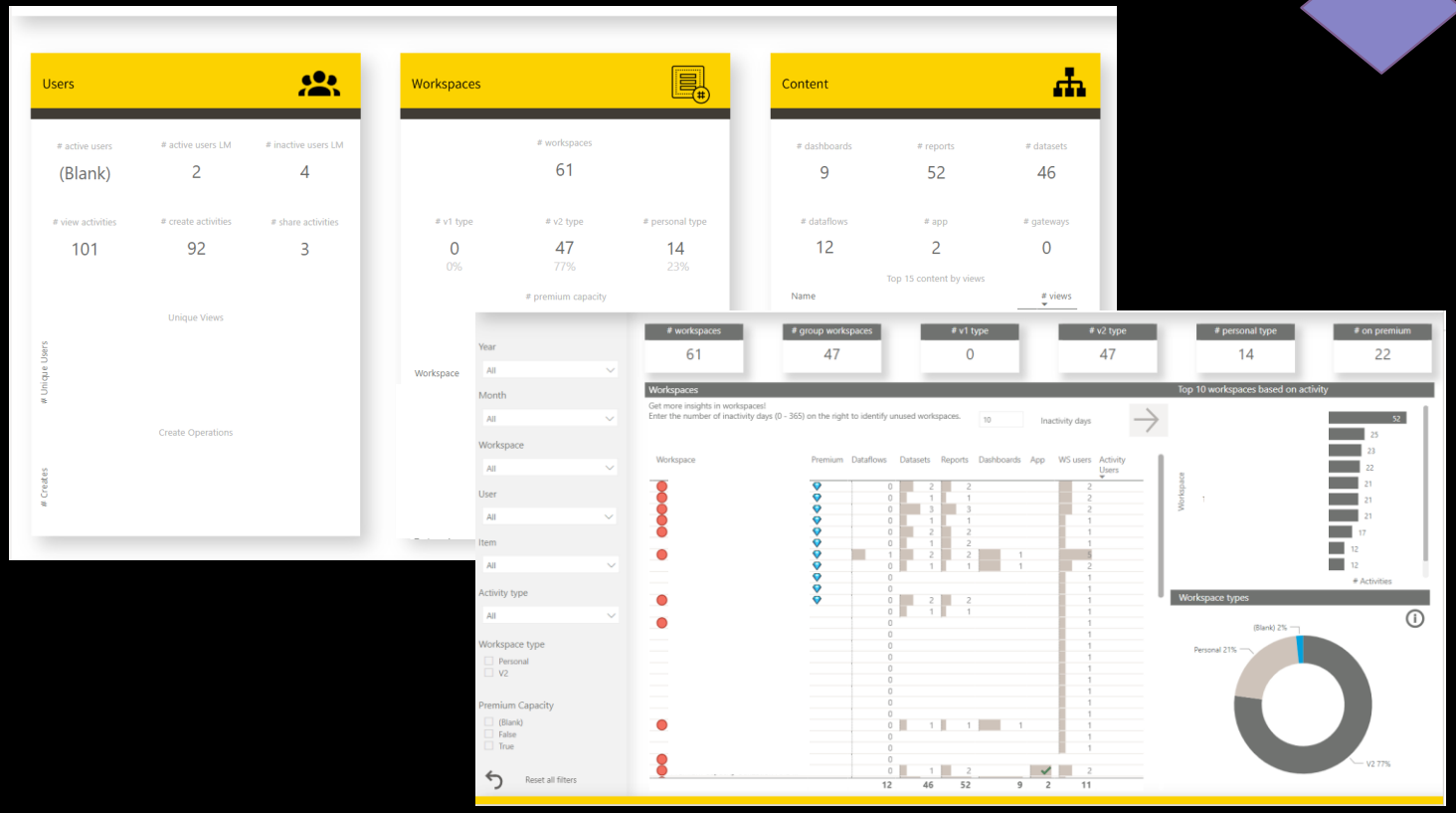
Internally	Externally
• Intra-team support • Internal community support • Help desk support	• Microsoft support • Community support • Administrator support

System Oversight (Power BI Admin)

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

Set up monitoring

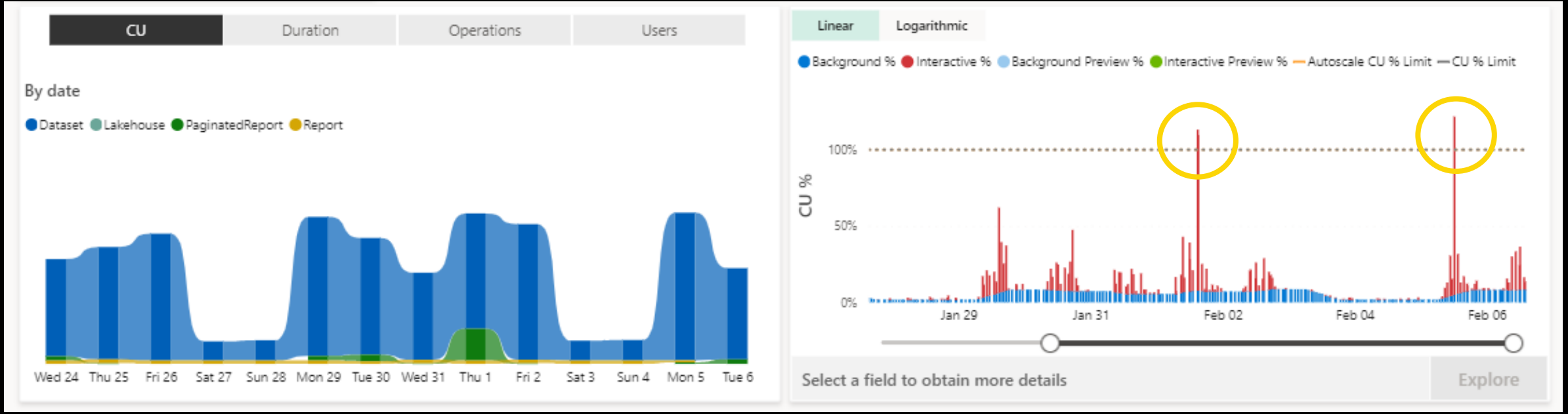
- How many users do you have?
- Are using AD groups to share Enterprise reports?



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. P-SKU or F-SKU (or other SKUs)
- Multiple smaller capacities or one large capacity
- Reserved instances vs. pay-as-you-go
- Autoscaling or scripts for scaling

System Oversight (Power BI Admin)

Tenant settings

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

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

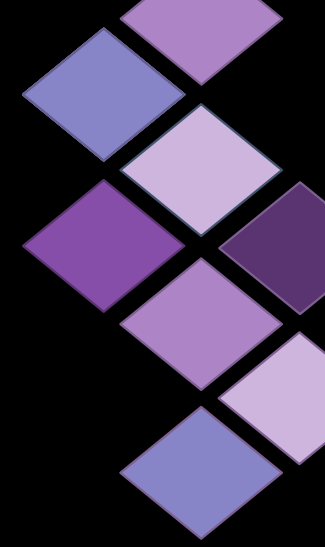
Communication is KEY

- 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**

Change management is a profession on its own

So, things you need are

- A good strategy



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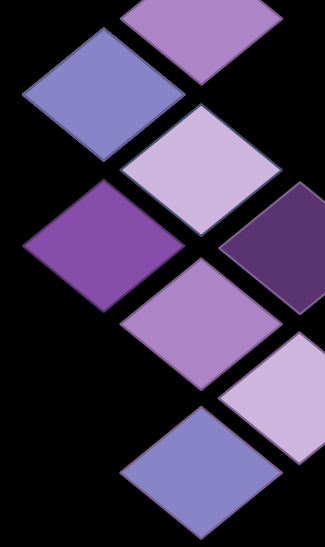
- Gather a group of motivated people to reach the goals you have set together

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 ✓

Q&A.