Power BI Centre of Excellence Starter Checklist

12 Decisions Before You Build Anything

Kristina Bachová · Freelance Power BI Specialist

1. CoE Mission & Scope

DECIDE

- What problem the CoE exists to solve
- Whether the CoE focuses on self-service only or also enterprise BI
- Advisory only, delivery, or hybrid
- Centralised, federated, or mixed governance model

OUTCOME

- ✓ Clear mission statement
- ✓ Explicit "in-scope" and "out-of-scope" list

2. Executive Sponsorship & Decision Rights

DECIDE

- Executive sponsor with final decision rights
- Escalation path for standards, licensing, platform choices
- RACI for IT, CoE, and business

OUTCOME

- ✓ Governance authority is explicit

3. Tenant Strategy (One Tenant, Many Experiences)

DECIDE

- Enterprise single-tenant strategy (recommended)
- Workspace separation instead of tenant separation
- Representation of dev / test / prod

OUTCOME

- ✓ Documented, Microsoft-aligned tenant usage model

4. Licensing Model & Cost Ownership

DECIDE

- Pro vs Premium Per User vs Premium Capacity
- Central funding vs chargeback
- Criteria for moving to Premium

OUTCOME

- ✓ Licensing decision tree
- ✓ Cost ownership model

5. Security & Identity Model

DECIDE

- Azure AD groups as the standard for access
- Business or IT owning row-level security
- External sharing stance: **Allowed** / **Restricted** / **Blocked**

OUTCOME

- ✓ Repeatable and auditable security pattern

6. Workspace Strategy & Naming Standards

DECIDE

- Workspace purpose categories (Personal / Team / Certified)
- Business-first naming convention
- Who is allowed to create workspaces

OUTCOME

- ✓ Team members know where content belongs

7. Content Lifecycle (Develop → Promote → Certify)

DECIDE

- Standards for Promoted vs Certified
- Who can certify
- Deprecation rules

OUTCOME

- ✓ Trust becomes visible and managed

8. Data Source & Model Standards

DECIDE

- Approved and restricted data sources
- Shared datasets / semantic models as default
- Modelling standards (star schema, proper DAX measure placement)

OUTCOME

✓ Consistency and reuse by design

9. Self-Service Guardrails

DECIDE

- What users can do freely
- What requires IT / CoE approval
- What is not permitted
- How Excel, Desktop, and dataflows interoperate

OUTCOME

✓ Safe, scalable self-service environment

10. Deployment, ALM & Automation

DECIDE

- Manual vs automated deployments
- Pipeline, API, or DevOps use
- Version control expectations

OUTCOME

✓ Fewer production surprises

11. Monitoring, Audit & Usage Insights

DECIDE

- Adoption metrics (active users, reuse, etc.)
- Performance and refresh monitoring
- Audit log retention and review cycles

OUTCOME

✓ Data-driven governance

12. Enablement, Support & Community

DECIDE

- Training by audience role
- Support channels (office hours, ticketing, CoP)
- Use of champions

OUTCOME

✓ Adoption scales through people

Final Gate — Before Anyone Builds Anything

✓ All 12 decisions documented

✓ Sponsor approval obtained

✓ CoE vs IT vs business responsibilities are clear

⚠ If skipped now, these decisions will return under pressure.

Reference: Primary Microsoft Documentation

CHECKLIST ITEM	PRIMARY MICROSOFT DOCUMENTATION
1. CoE Mission & Scope	Power BI Adoption Roadmap — Organisational alignment & BI strategy
2. Executive Sponsorship	Power BI Adoption Roadmap — Governance
3. Tenant Strategy	Power BI tenant administration & governance planning
4. Licensing Model	Power BI licensing & Premium capacity guidance
5. Security & Identity	Power BI security best practices
6. Workspace Strategy	Power BI workspace planning & governance
7. Content Lifecycle	Endorsement (Promoted & Certified) overview
8. Data Source & Model	Semantic modelling & star schema guidance
9. Self-Service Guardrails	Self-service BI at scale
10. Deployment & ALM	Deployment pipelines & ALM
11. Monitoring & Audit	Audit logs, monitoring, and usage metrics
12. Enablement & Community	Power BI Adoption Roadmap — User enablement

Executive 1-Page: 12 Decisions Leadership Must Approve

Before scaling Power BI, leadership must explicitly decide:

- **Why the CoE exists** — Enable self-service, deliver enterprise BI, or both
- **Who owns decisions** — Named executive sponsor and clear decision rights
- **How the tenant is used** — Single tenant, structured environments
- **How licensing is funded** — Pro vs Premium, chargeback or central
- **How security works** — Azure AD groups, RLS ownership, sharing stance
- **Where content lives** — Workspace purpose, naming, creation rules
- **How trust is signalled** — Promote vs Certify criteria
- **What standards apply** — Approved sources, shared semantic models
- **How self-service is governed** — Guardrails, not roadblocks
- **How changes are deployed** — Pipelines, automation, rollback
- **How usage is monitored** — Adoption, performance, audit
- **How users are enabled** — Training, support, community

If these decisions are not made deliberately, they will be made implicitly — by default settings and user behaviour.

Kristina Bachová · Freelance Power BI Specialist · kristinabachova.com