

# Power BI Centre of Excellence Starter Checklist

12 Decisions Before You Build Anything

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## 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

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### 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

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### 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

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### 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)

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### DECIDE

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

### OUTCOME

- ✓ Trust becomes visible and managed

## 8. Data Source & Model Standards

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### 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

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### 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

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### DECIDE

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

### OUTCOME

- ✓ Fewer production surprises

## 11. Monitoring, Audit & Usage Insights

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### 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**

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### **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

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CHECKLIST ITEM	PRIMARY MICROSOFT DOCUMENTATION
1. CoE Mission & Scope	Fabric Adoption Roadmap — Centre of Excellence
2. Executive Sponsorship	Fabric Adoption Roadmap — Governance
3. Tenant Strategy	Fabric Adoption Roadmap — Overview
4. Licensing Model	Power BI Premium capacity guidance
5. Security & Identity	Power BI security planning
6. Workspace Strategy	Workspace-level planning
7. Content Lifecycle	Endorsement (Promoted & Certified) overview
8. Data Source & Model	Fabric Adoption Roadmap — Data culture
9. Self-Service Guardrails	Content ownership and management
10. Deployment & ALM	Deployment pipelines overview
11. Monitoring & Audit	Modern usage metrics
12. Enablement & Community	Fabric Adoption Roadmap — User support

## Executive 1-Page: 12 Decisions Leadership Must Approve

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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.*

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