The Analyst's Upgrade

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GabMetrix

A New Way to Think - Power BI vs Excel

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Excel Is Cell-Based; Power BI Is Model-Based

🟩 Excel → Grid of cells

🟨 Power BI → Relationships + Data model

Calculations – Formulas vs Measure

🟩 Excel
→=SUM(A1:A5)

🟨 Power BI →
SUM(Sales[Amount])

Context Matters (A Lot)

🟩 Excel → =Cell A1 is always A1

🟨 Power BI → The same measure gives different results in different visuals

Interactivity Is Default

🟩 Excel → Static reports unless you use
slicers

🟨 Power BI → Click anything → Everything
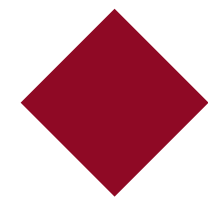updates

Summary – Your New Mindset

1. Build a data model, not a worksheet

2. Let context drive calculations

3. Design dashboards, not just reports

4. Focus on reusability, not repetition

Taming the Data – Power Query 101

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Power Query : Your Data Prep Kitchen

🟩 Excel → Clean inside the worksheet

🟨 Power BI → Clean once, then reuse

Key Transformations

1. Remove columns you don't need

2. Fill blanks / remove errors

3. Split columns

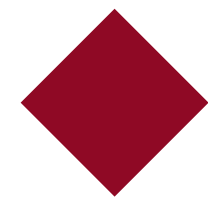4. Change data types (text, number, date)

Append vs Merge

1. Append = stack rows

2. Merge = add columns by matching rows

Applied Steps = Reusable Recipe

1. Each step saved in sequence

2. Can refresh anytime

3. No re-doing work for new data

Summary – What You Gained

1. You don't clean data manually anymore

2. Steps are saved & repeatable

3. You avoid messy formulas in the final report

4. You think like a data engineer (a bit)

Visuals & Interaction –
What Makes a Dashboard 'Pop'

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Visuals Are Not Decoration

1. Each chart = one question answered

2. Clarity > complexity

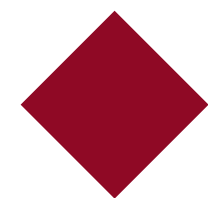3. Don't repeat Excel's mistake of overcrowding

Interactive Elements = Instant Personalization

1. Slicers, filters, tooltips

2. Let the user ask questions without writing formulas

3. No extra work for you — they explore what they want

Design Tips That Work Every Time

1. Consistent font & layout

2. Use white space generously

3. Avoid more than 2–3 colors

4. Align visuals neatly — grid layout

5. Title every chart clearly

Summary – What You Gained

1. You design for decisions, not decoration

2. Interactive dashboards put the user in control

3. Clean design makes your work feel premium

4. Power BI makes your insights feel like apps

From Your Screen to the World: Sharing in Power BI

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Power BI Service

1. Upload your report to the Power BI service

2. Accessible via browser

3. Control who can view it

4. Mobile-ready, responsive

Sharing Options That Make Sense

1. Private sharing (within organization / specific emails)

2. Public link (great for portfolios)

3. Embed in websites or Notion pages

4. Schedule refreshes (Pro only)

Exporting & Backup Options

1. Export as PDF (great for email reports)

2. Export to PowerPoint

3. Always save a local .pbix file

4. Versioning: save dated backups

Summary – You're Now Share-Ready

1. You're not making static reports — you're building interactive apps

2. Easy to update, refresh, and re-share

3. Looks great on phones, laptops, and big screens

4. Sharing → Visibility → Value

Get in touch with me

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