Sample Power BI Business Insights Dashboard

Michael Armes, MBA

Synthetic sample data built to mirror a Canadian financial institution

Executive Overview (Business-First)

This Power BI dashboard was designed to provide an executive-level view of revenue performance, growth dynamics, and concentration risk within a retail banking context. The primary objective is to allow senior leaders to quickly assess overall performance, identify key drivers, and understand where deeper analysis is required.

The top-level KPIs summarize balance, revenue, account growth, and attrition, giving immediate visibility into both scale and momentum. A monthly revenue trend highlights volatility and directional movement over time, while product and customer segment breakdowns surface the structural drivers behind aggregate results.

Interactive slicers allow leaders to narrow context by time period, region, and product without cluttering the core view. This design ensures the dashboard supports both rapid scanning and focused exploration, enabling informed decisions around growth strategy, product focus, and customer prioritization.
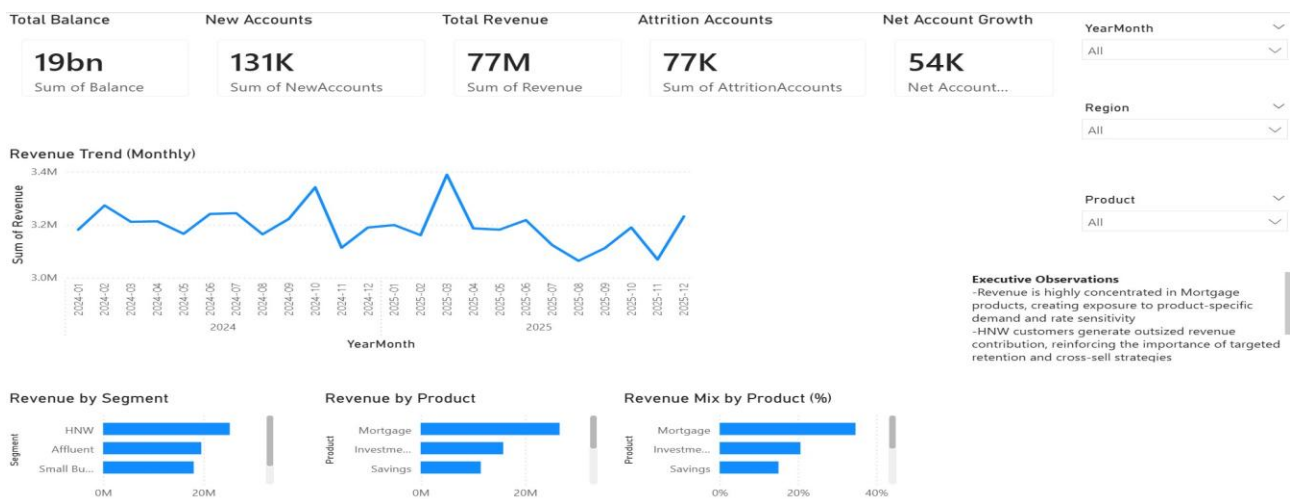

Key Executive Signals

- Revenue is highly concentrated in Mortgage products, increasing exposure to product-specific demand and interest-rate sensitivity

- High Net Worth (HNW) customers contribute disproportionately to total revenue, reinforcing the importance of targeted retention and cross-sell strategies

- Net Account Growth provides a clearer performance signal than gross additions alone by incorporating attrition

- Revenue trends show periods of volatility, suggesting the need to monitor sustainability rather than relying onpoint-in-time performance

Insight Development & Drill-Through Analysis
From Summary to Drivers

While the executive summary answers "How are we doing?", deeper analysis is often required to answer "Why?". To support this, the dashboard incorporates a structured drill-through experience that allows users to move from high-level signals to specific drivers without overcrowding the main page.

Right-click drill-through functionality enables users to isolate a specific product and view its performance in greater detail. This design pattern mirrors real-world analytical workflows, where executives identify a signal and analysts investigate the underlying contributors. The below attachments highlight what happens when isolating the mortgage product in drill through.
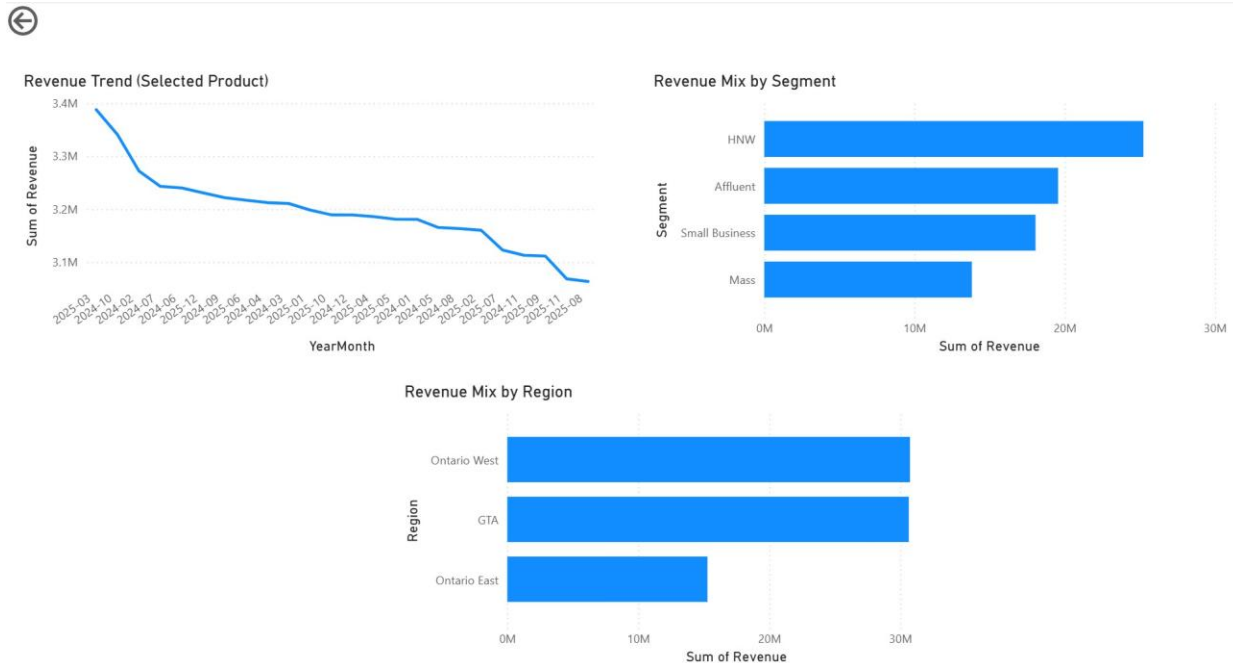
Product-Level Insights

- Revenue Trend (Selected Product): Highlights whether performance is improving, stabilizing, or deteriorating over time
- Revenue Mix by Customer Segment: Reveals which customer groups drive value within a product
- Revenue Mix by Region: Identifies geographic concentration and regional dependence

In the Mortgage example, revenue shows a gradual downward trend over time, while contribution remains heavily skewed toward HNW and Affluent segments. Regional mix indicates stronger performance in Ontario West and the GTA relative to Ontario East, suggesting uneven geographic exposure.

Why This Matters for Decision-Making

- Highlights concentration risk by product, segment, and region
- Enables targeted actions rather than broad, unfocused initiatives
- Supports strategic questions around portfolio diversification and customer prioritization

Technical Overview (Concise & Credible)

The dashboard is built on a star schema data model to ensure clarity, scalability, and predictable filtering behavior.

Fact Tables

• FactTransactionsMonthly: Core performance metrics including revenue, balance, new accounts, attrition, and net account growth
• FactLeadsPipeline: Supporting pipeline metrics for broader performance context

Dimension Tables

• DimDate: Centralized calendar table supporting consistent time analysis
• DimProduct: Product hierarchy and classification
• DimCustomerSegment: Customer segmentation attributes
• DimBranch: Branch, city, and regional descriptors

Relationship Strategy

• One-to-many relationships from dimensions to facts
• Single-direction filtering to avoid ambiguity and ensure slicers behave predictably
• Dedicated Date table marked as the model's official calendar to support time-based analysis

Design Principles Applied

• Executive-first layout with progressive disclosure of detail
• Minimal reliance on complex calculations to keep logic transparent
• Drill-through used instead of overcrowding visuals
• Clear separation between summary insights and analytical detail

How This Would Be Used in Practice

In a real organization, this dashboard would support monthly performance reviews, product strategy discussions, and regional planning sessions. Executives would rely on the summary page to identify signals, while analysts and managers would use drill-through views to investigate drivers and inform targeted actions.