

Build, Manage, Grow

Quick Agenda

- What Is a BI Process
- The WHY
- Components of a (Successful) Process
- Build
- Manage
- Grow

BI Processes – Lets Talk About It

- Simple Definition:
 - How a Power BI Pro, team, or creators consistently communicate, develop, and deploy reports, data, and solutions to their stakeholders
- But its not simple when applied
- It's the How, whom, and why

Quick & Practical Must Have of Process

- Consistent, re-used, and nearly automated workflows
- Communication, triggers, and actions
- Understanding on the players involved, when involved, and how
- Never cheated, always used (universally applied)
- Measurable timeframes, can scale up or down
- Applied variables to impact conclusion or completion

No Process Rules Alone

What is the Goal of Process

- **No Process Rules Alone**
 - No Process should exist within and for itself. Any process put in place must have a clear objective and a clear understanding of what and who it effects
- **What Are we Trying to Do with Process?**
 - Why are so focused on clear Processes
- **Establishing Expectations, Building Trust**



Mapping Objective Branches

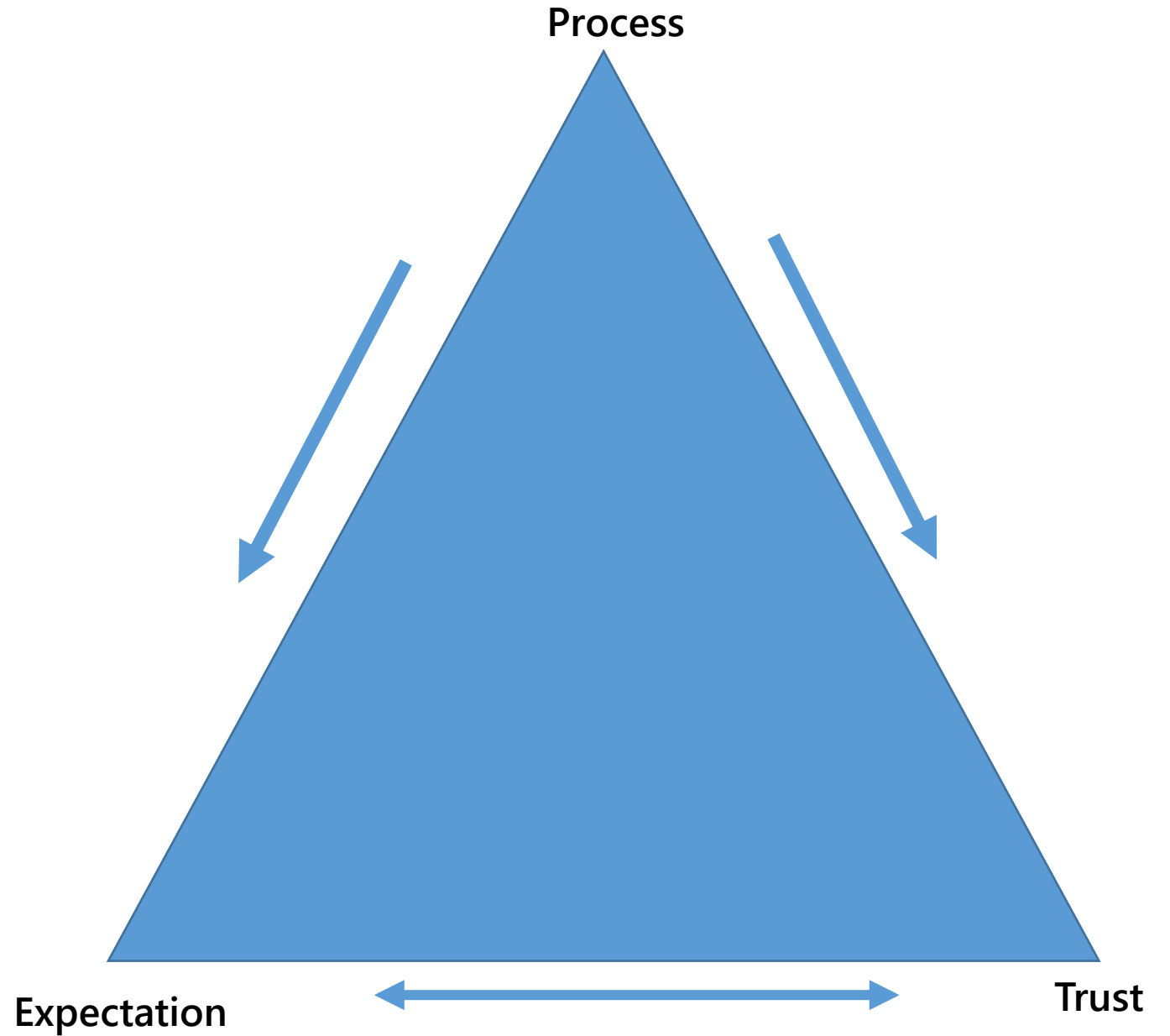
Why try to follow a process in one area but not follow in another?

- Do we know where our processes end, and the new ones should begin?
- Do we know who is affected, and what situations may arise?

Why try to create a process if there is no culture change?

- Process is a means to a greater end, not the end goal
- Good process does not mean good culture

Dependencies of Process*



Courtesy of Mike Carlo

The Balancing Act

Process should always be driving towards establishing expectations

- Expectations that become routine cultivate more trust
- Trust drives Culture
- Call it the "Dance"

A single break from the Process, or break from the normal invites chaos

- Losing Trust is the HARDEST quality to gain back in our world
- Users will always go to where they can rely on the Data

No Process Rules Alone

Build, Manage, Grow

Three Applied & Structured Processes

Build

- How do we build, scope, and create Reports for users?

Manage

- How do we maintain, control, and keep content accurate and relevant?

Grow

- How do we consistently work towards the adoption of a data-driven culture?

Build

The Foundation of Expectations

The "Build" Process

The "Start", OR the best place to begin to cultivate process

- This is where Reports dreams become reality
- From Idea to Model

When does it Start?

- From the ask
- Most Important aspect of Build -> Before opening a .pbix

The “Build” Process – Template

1. User Requests Report (How, to where, to whom?)
2. BI Team Assessment of Request (Is this Business Value, does it exist)?
3. Scoping & Discovery (Who is in the “play”, the interview of the report need)
4. Milestone 1 – Project Sign Off
5. Sandbox Phase (Are we on the right track, interactive feedback)
6. Milestone 2 – Sandbox Sign Off
7. Development (design, labels, Q&A)
8. Gold Review
9. Milestone 3 – Gold Sign Off and Production Kick Off
10. Roadshow and Deployment – (how do you promote, share, etc)
11. Document and manage

No Process Rules Alone

Manage

Where Process Goes to Die

OR

Building Trust

The “Manage” Process

Not a Linear Model

- Recurring processes and workflows
- Based on date or situations

Manage = Maintain = Mature = Govern

- Who can publish, deploy, and share.
 - How do we manage this?
- Is Content relevant, accurate, and needed?

A Note on “Manage” Templates & Process

Dictated by triggers and situations -> More than One

- Recurring processes and workflows
- Based on date or situations

The “Manage” Process – Maintain

Example of Recurring Process

1. Monthly Alert or Time of Week, month, quarter hits
2. Workspace Admins review their content / data
3. Who is publishing, creating?
4. (Decision Tree) -> Is it up to date? Is naming conventions, visuals, standard?
5. Refresh History & Views

Business Rules & Logic Changes (Change Management)

1. Source to enter an upcoming change (think TICKET)
2. (Decision Tree) -> Is it a OKR, Universal KPI?
3. Document Dependencies (dataflows, reports, DAX)
4. Communication with Authors
5. Communication with Company on upcoming Changes
6. Develop, Test system
7. Deploy

The “Manage” Process – Mature

Report Authors & Data Analyst

1. New Data Analyst / Author on Department, Team
2. Understand their stakeholders, responsible Content
3. Training
4. Workspace Admin (where are they publishing) and Q&A process
5. Oversee

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Grow

Creating a Culture

The “Grow” Process

Understanding The Success of the BI Team

- What should we be measured on?
- How are we evaluating Success?

Roadmap & Targets to Increase Adoption

- How are we driving user engagement in reports?
- What is success for Power BI?



The “Grow” Process – Think Campaign

Many micro-processes aiming for a better goal

Roadmap & Targets to Increase Adoption

The "Grow" Process - Template

1. Monthly / Weekly Review of Usage Analytics

1. Identify top performing Reports, new reports launched usage

2. Upcoming Reports -> Roadshows & Training

1. Documentation & resources for users to learn more

3. Training / News / Education -> Roadshows

1. Providing monthly meetings for users to learn new reports, updates, how-tos
2. Center of Excellence, support (where can someone go to get help?)

4. Feedback Loop

1. Feedback Forms, Discovery Calls with Teams

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Wrapping Up

Essentials of Each Process

Build

- Do you have a Ticket System?
- Do you have an Data Input / Scoping Requirements?
- Empowering Stakeholders

Manage

- What is your Change Management
- What are your internal Roles & Responsibilities?

Grow

- Where can someone get support?
- Where are we measuring our own success?

Universal Requirements

- Roles & Responsibilities
- Executive Buy In
- CONSISTENT AND CLEAR PROCESS
- Do not stray
- Systems, applications in place for ease of use
- Time

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