Power BI Governance Accelerator

Keys to Success in Planning a Power BI Deployment

visualbi
LOOK FORWARD. THINK AHEAD.

www.visualbi.com

Power BI Governance Areas of Focus
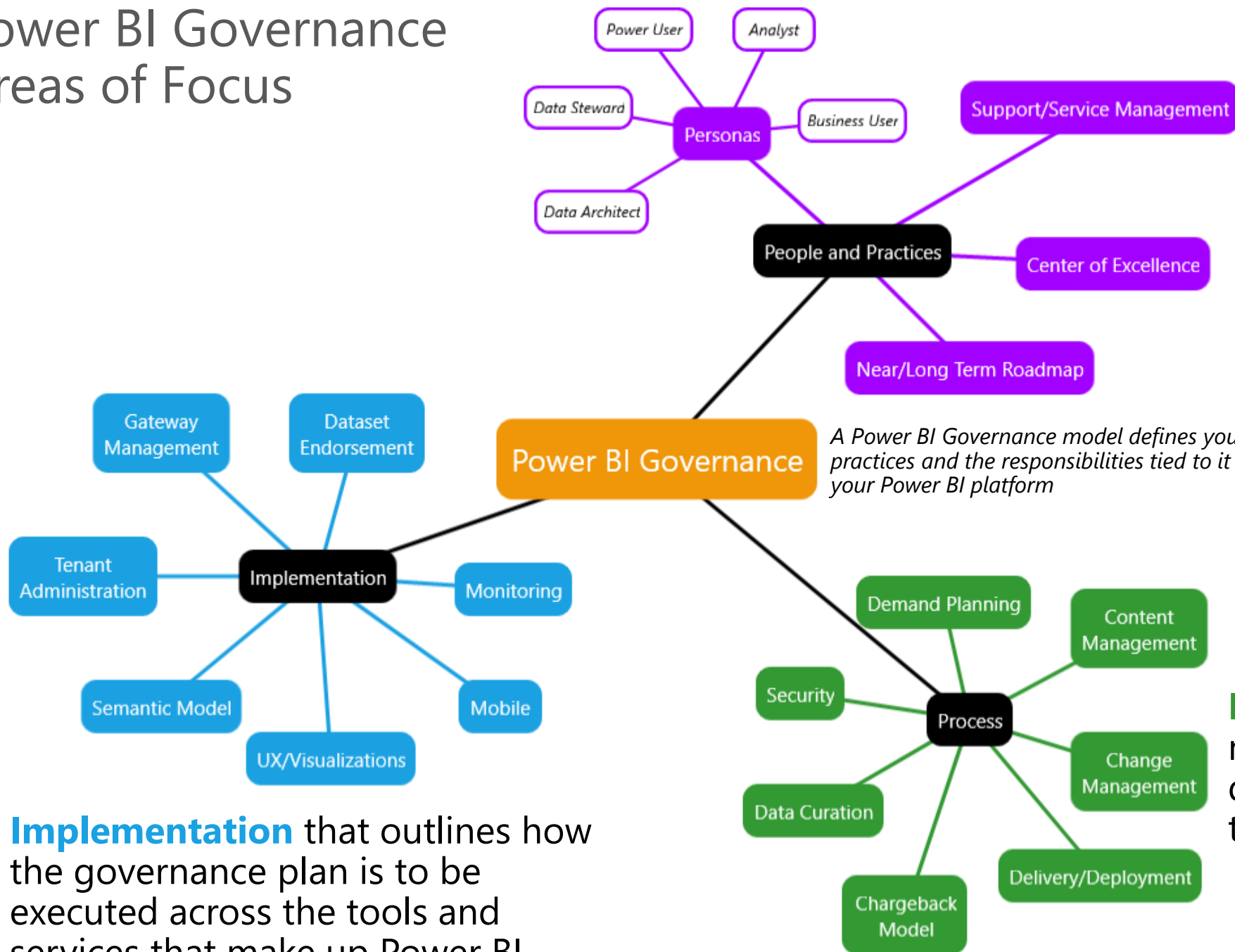
People and Practices to provide focus on primary drivers of a governance program by assigning roles and responsibilities across the organization

A Power BI Governance model defines your organization's Power BI procedures, required practices and the responsibilities tied to it that ensure the efficient and secure usage of your Power BI platform

Process that outlines the necessary execution to deliver BI services under the governance program
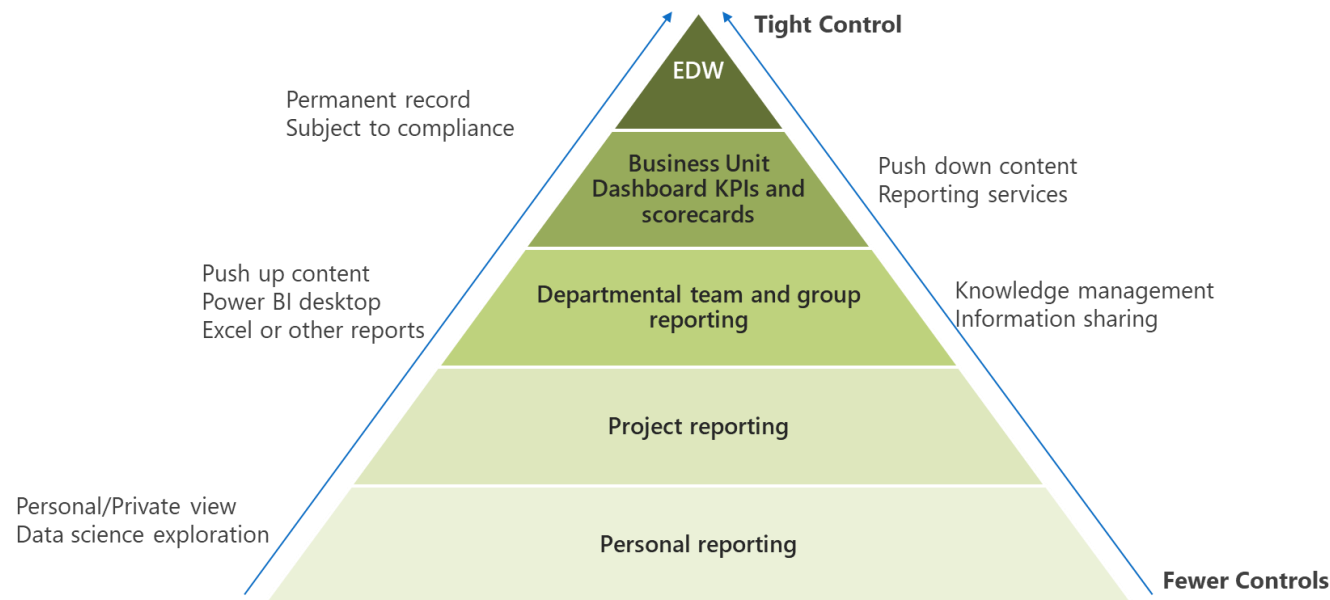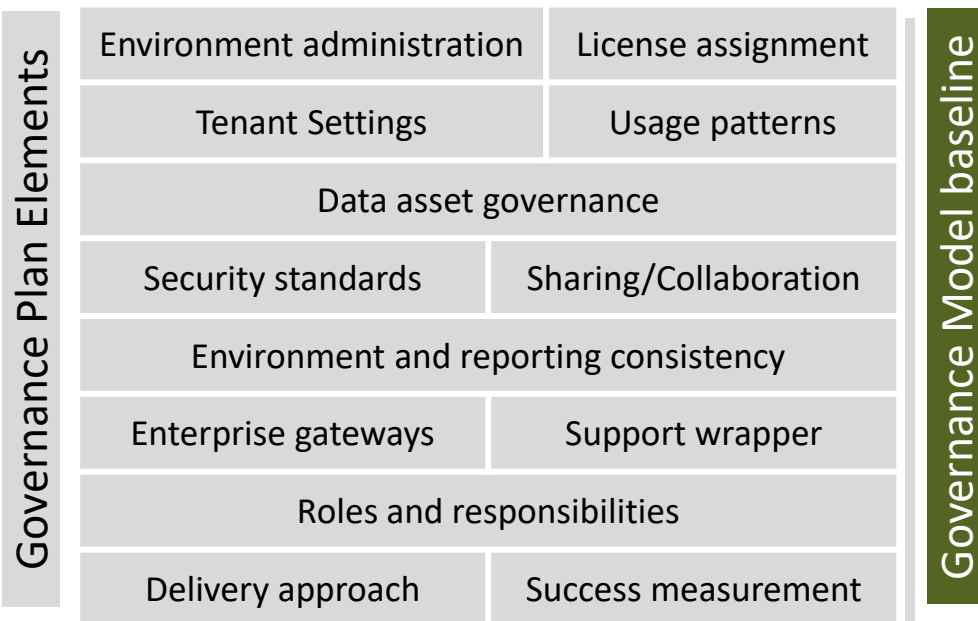
Implementation that outlines how the governance plan is to be executed across the tools and services that make up Power BI

Power BI Governance model Scope and Goals

- Vision of Power BI usage and an outline of its Roadmap

- Strategic and operational Governance policies (business + functional)

- Ensure the ability to secure your data + provide confidence to users

- Establishing rules for your organization's (BI) data usage

- Establishing how compliance data is handled in Power BI

- Reducing risks and lowering the overall cost of ownership of Power BI

- Improving communications between BI teams members

- Permissions model, access management, information security strategy

- Process for provisioning new Power BI reports

- Power BI support and training

Focus areas for forming an overall governance program for Power BI

visualbi
LOOK FORWARD. THINK AHEAD.

Governance Plan Elements

Environment administration	License assignment
Tenant Settings	Usage patterns
Data asset governance	
Security standards	Sharing/Collaboration
Environment and reporting consistency	
Enterprise gateways	Support wrapper
Roles and responsibilities	
Delivery approach	Success measurement

Governance Model baseline

Tight Control

EDW

Permanent record
Subject to compliance

Business Unit Dashboard KPIs and scorecards

Push down content
Reporting services

Push up content
Power BI desktop
Excel or other reports

Departmental team and group reporting

Knowledge management
Information sharing

Project reporting

Personal/Private view
Data science exploration

Personal reporting

Fewer Controls

Delivery and Deployment

BUSINESS-LED SELF-SERVICE BI
Business users have highest involvement and control across structured and non-structured, non-governed data

IT-MANAGED SELF-SERVICE BI
Business users employ Power BI as a reporting layer over standardized and governed data sources

CORPORATE BI
IT retains full ownership and released reports to users for consumption

Monitor and Measure

USABILITY AND PERFORMANCE
Measure system use and frequency, and track popular reports and dashboards. Deliver value to users and drive adoption by monitoring rendering speed and report performance

SECURITY
Continue security monitoring to help ensure compliance with regulatory requirements.

DATA SOURCE USAGE
Review data source usage information to identify potential flaws in data integrity or even overlap in effort.
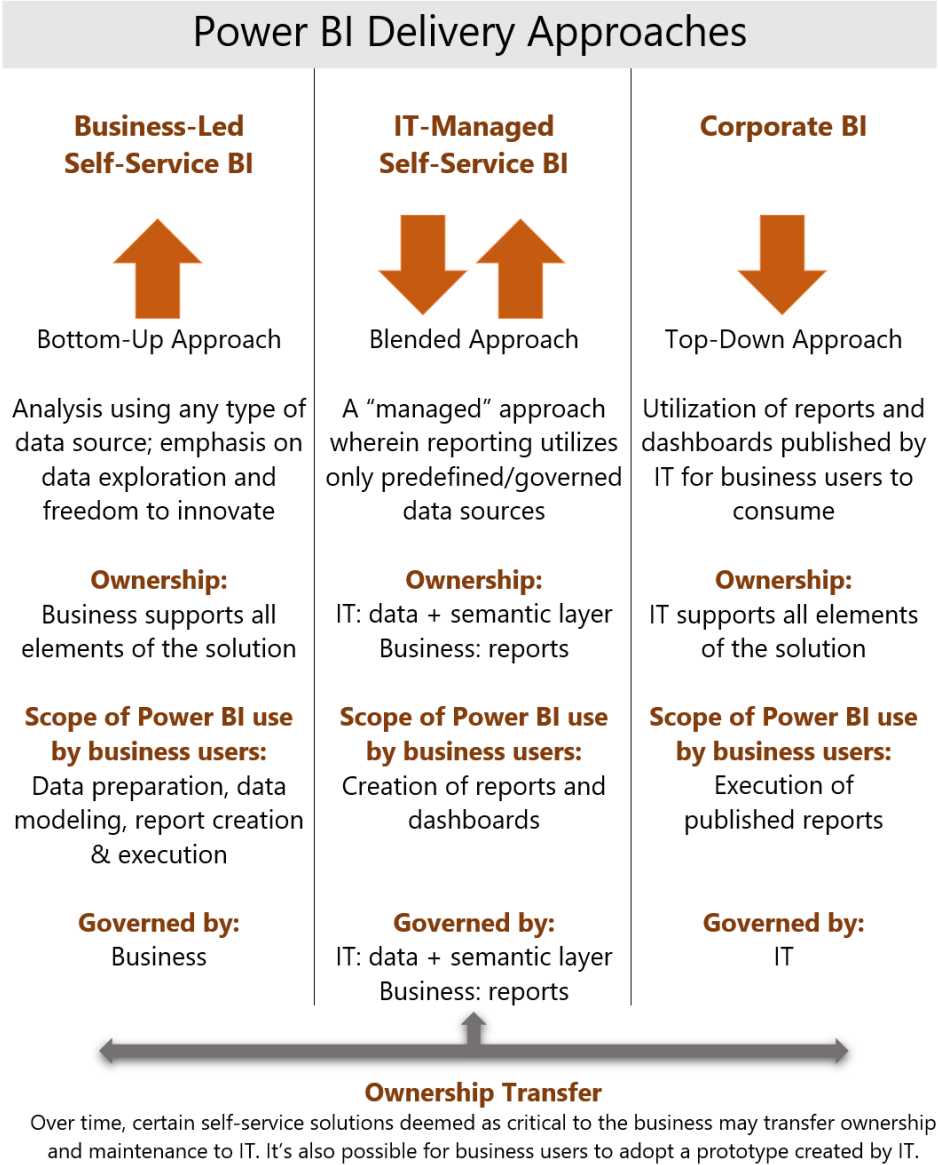
A critical aspect of success and adoption relates to **data source usage**

Important to understand if the data Power BI users will expect to consume includes external data not currently maintained as part of an enterprise process (including data which is currently cleansed, cataloged by a dedicated team, typically IT)

Improving data quality, reliability, and accuracy can have a positive impact on innovation and data exploration efforts

Distinction around source data access is key to understanding how to ultimately deploy Power BI, as well as the process, roles and responsibilities associated with this deployment

If data source usage is well understood, the decisions made around this key topic can ultimately promote long-term self-service BI success

Power BI Delivery Approaches

Business-Led Self-Service BI	IT-Managed Self-Service BI	Corporate BI
Bottom-Up Approach	Blended Approach	Top-Down Approach
Analysis using any type of data source; emphasis on data exploration and freedom to innovate	A "managed" approach wherein reporting utilizes only predefined/governed data sources	Utilization of reports and dashboards published by IT for business users to consume
Ownership: Business supports all elements of the solution	**Ownership:** IT: data + semantic layer Business: reports	**Ownership:** IT supports all elements of the solution
Scope of Power BI use by business users: Data preparation, data modeling, report creation & execution	**Scope of Power BI use by business users:** Creation of reports and dashboards	**Scope of Power BI use by business users:** Execution of published reports
Governed by: Business	**Governed by:** IT: data + semantic layer Business: reports	**Governed by:** IT

Ownership Transfer

Over time, certain self-service solutions deemed as critical to the business may transfer ownership and maintenance to IT. It's also possible for business users to adopt a prototype created by IT.

Power BI Planning and Deployment Journey

Create/enhance your Power BI Strategy with focus on end user needs, rationalizing data sources, and establishing key performance indicators to drive success

Establish new insights from your data using sophisticated visualizations to help support decision making at all levels of your organization

Build upon the foundation of your analytics to support the needs of your business by expanding use of Power BI in the organization

PLAN ▸▸▸ BUILD ▸▸▸ RUN AND MANAGE

- **Identify End User Personas and their needs**
- **Rationalize source systems**
- **Data Governance**
- **Mapping and Measures**
- **Key Performance Indicators**

- **Provide clarity on the important measures and critical data to drive efficiencies within your business**
- **Build adherence to data governance requirements**
- **Design value-add visualizations with End user Personas needs in mind**

- **End User training and enablement to provide quick ramp-up on delivered dashboards**
- **Center of Excellence to drive productive use and adoption**
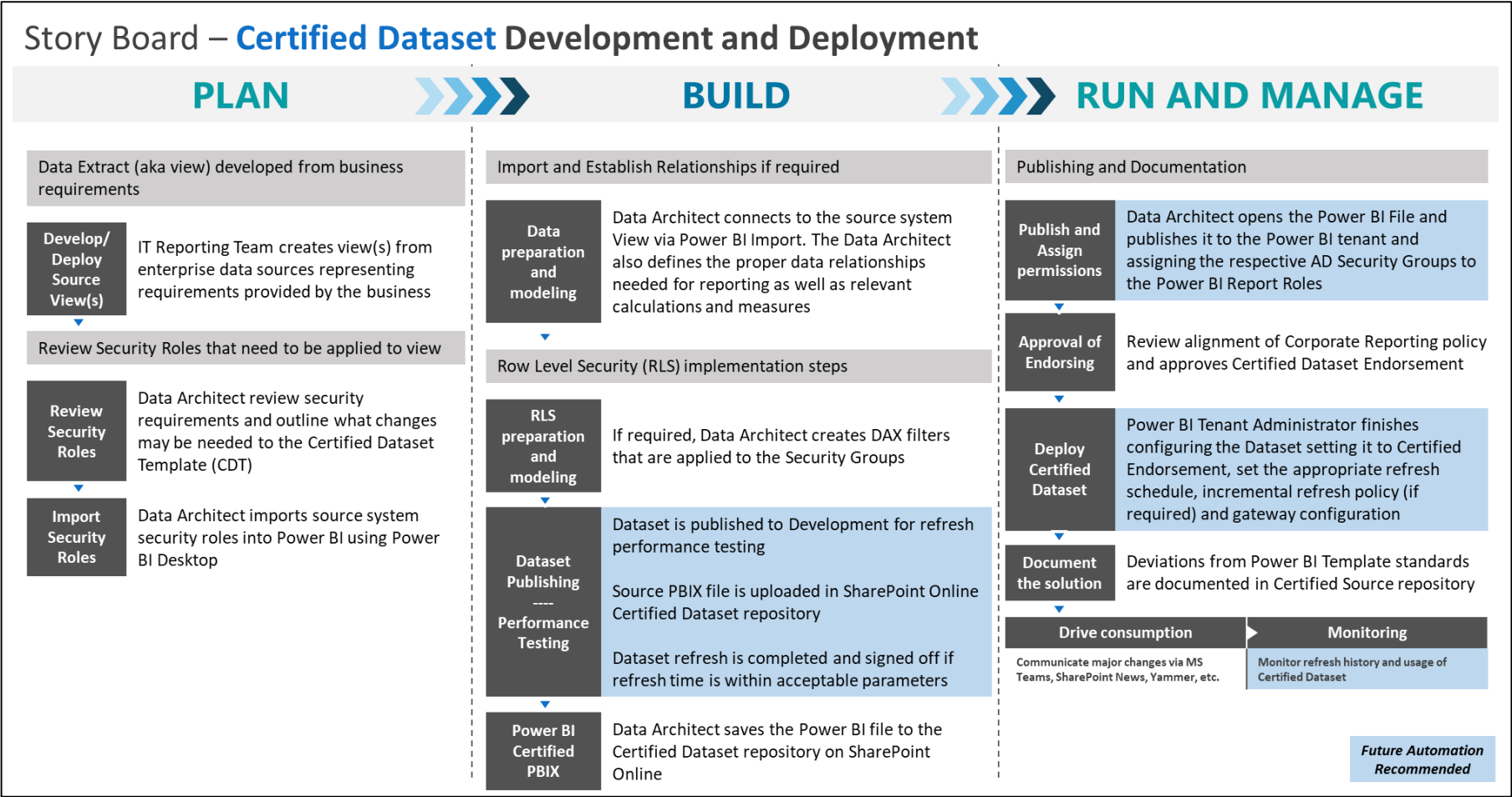
Deployment Strategy	Power BI Center of Excellence	Training and Enablement

Power BI Governance

Governance Story Boards provide conceptual flow of processes across roles and technologies.

They can be used in training and readiness to describe a prescriptive approach in accomplishing the most common tasks when applying Power BI Governance

Story Board – **Certified Dataset** Development and Deployment

PLAN	BUILD	RUN AND MANAGE

PLAN

Data Extract (aka view) developed from business requirements

| **Develop/ Deploy Source View(s)** | IT Reporting Team creates view(s) from enterprise data sources representing requirements provided by the business |

Review Security Roles that need to be applied to view

| **Review Security Roles** | Data Architect review security requirements and outline what changes may be needed to the Certified Dataset Template (CDT) |

| **Import Security Roles** | Data Architect imports source system security roles into Power BI using Power BI Desktop |

BUILD

Import and Establish Relationships if required

| **Data preparation and modeling** | Data Architect connects to the source system View via Power BI Import. The Data Architect also defines the proper data relationships needed for reporting as well as relevant calculations and measures |

Row Level Security (RLS) implementation steps

| **RLS preparation and modeling** | If required, Data Architect creates DAX filters that are applied to the Security Groups |

Dataset Publishing ---- Performance Testing	Dataset is published to Development for refresh performance testing
	Source PBIX file is uploaded in SharePoint Online Certified Dataset repository
	Dataset refresh is completed and signed off if refresh time is within acceptable parameters

| **Power BI Certified PBIX** | Data Architect saves the Power BI file to the Certified Dataset repository on SharePoint Online |

RUN AND MANAGE

Publishing and Documentation

| **Publish and Assign permissions** | Data Architect opens the Power BI File and publishes it to the Power BI tenant and assigning the respective AD Security Groups to the Power BI Report Roles |

| **Approval of Endorsing** | Review alignment of Corporate Reporting policy and approves Certified Dataset Endorsement |

| **Deploy Certified Dataset** | Power BI Tenant Administrator finishes configuring the Dataset setting it to Certified Endorsement, set the appropriate refresh schedule, incremental refresh policy (if required) and gateway configuration |

| **Document the solution** | Deviations from Power BI Template standards are documented in Certified Source repository |

Drive consumption	**Monitoring**
Communicate major changes via MS Teams, SharePoint News, Yammer, etc.	Monitor refresh history and usage of Certified Dataset

Future Automation Recommended

www.visualbi.com

Content Management and Report Authoring

Review existing processes around Power BI report development:

- Permissions model, access management, information security strategy

- How are PBIX files handled? Where are they stored? Naming conventions? Version history?

- Policies around using custom visuals. What visualizations can be utilized?

- Ensuring strict and clearly communicated development practices
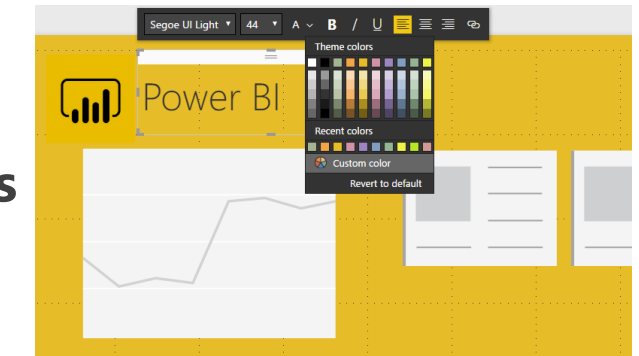
- Process for provisioning new Power BI reports

Storage and Collaboration
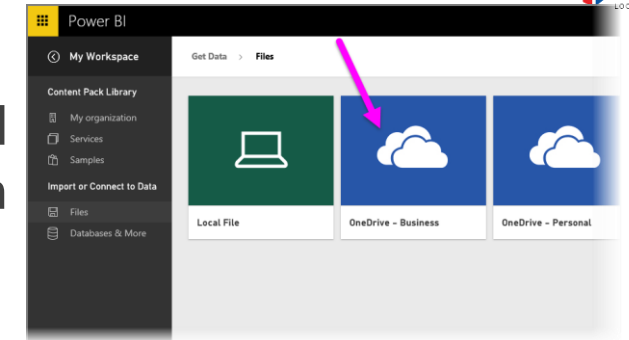
Modeling and Authoring

Templates

Delivery and Deployment
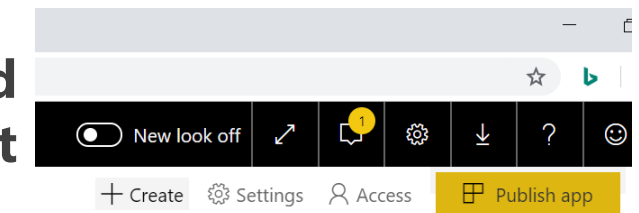
User Experience Standards

Visual BI will bring its visualization expertise and experience to establish visualizations standards that:

Define a Clear Purpose

Know the Audience

Use Visual Features to Show the Data Properly

Follow a methodology for accessibility, mobility and performance

Proven Practices
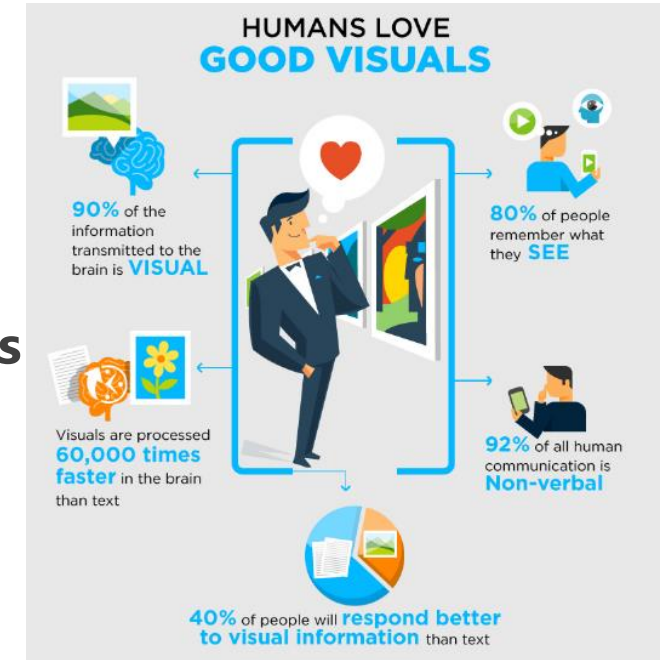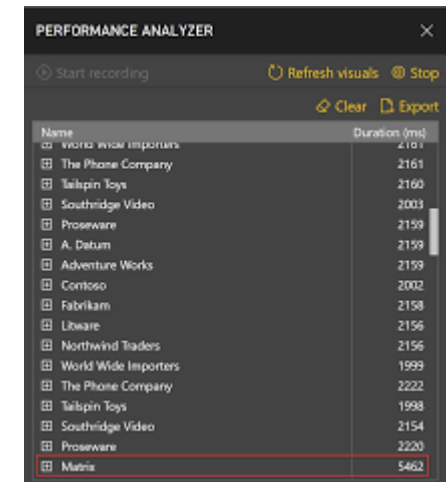
Accessibility

Mobile Experience

Performance

Visual BI will analyze and recommend which type of end-user support is best across identified Personas

Options considered to include tiered support, swarming, and content embedded within the reports

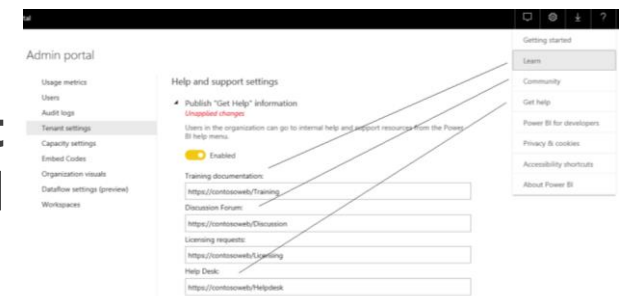Note that Personas may have their unique support model

Tiered Support
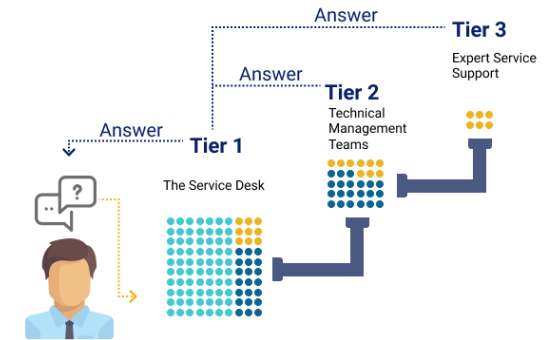
Swarming
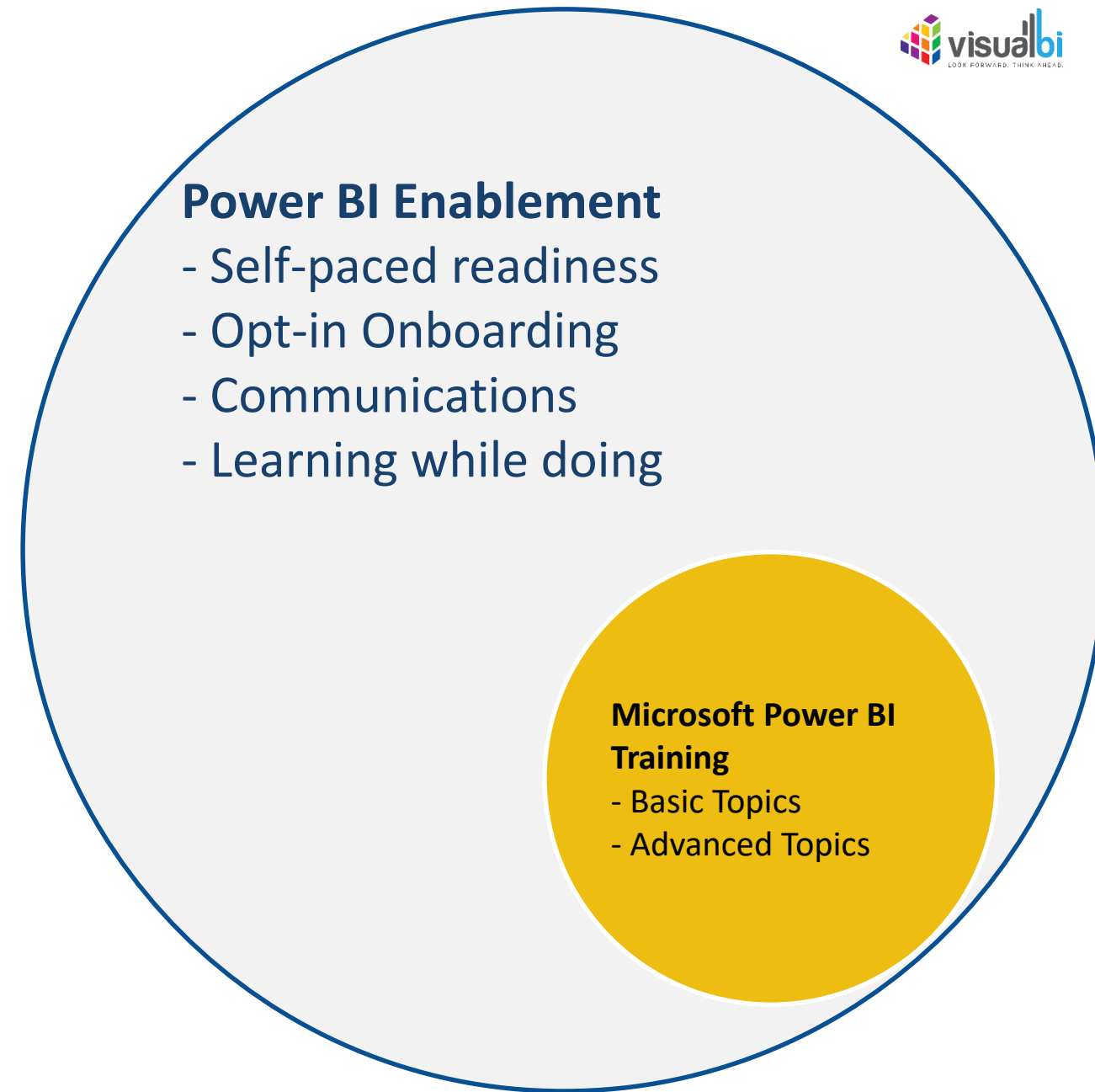

Content Embedded

Power BI Training and End User Enablement

Enablement with Training is key to driving productive use of Power BI

Traditional Training focuses on the "How" and the "What"

Enablement focuses on harnessing learning into action at the speed of the individual learner

Power BI Enablement
- Self-paced readiness
- Opt-in Onboarding
- Communications
- Learning while doing

Microsoft Power BI Training
- Basic Topics
- Advanced Topics

Drive adoption of Power BI in your organization
Deliver tailored training to help reinforce data governance policies across all audiences

Visual BI Power BI Training can be tailored for unique needs across both technical and non-technical audiences

MICROSOFT POWER BI — **2 DAYS**

BASIC TOPICS
⊕ Acquire Data
⊕ Edit Queries
⊕ Hierarchies
⊕ Custom Formulas
⊕ Build Visualization
⊕ Building Reports
⊕ Share Dashboards using Power BI Service

ADVANCED TOPICS
⊕ Connecting to Client Data and Exploring Other Business Use Cases
⊕ DAX Scripting, NLP, Quick Insights and Other Features
⊕ Custom Extensions & Azure Integration

Business Users
(Lines of Business, Less Technical)

Advanced Users
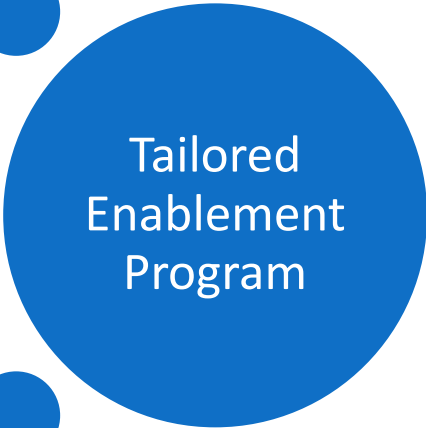*(IT, Engineering, Technical Domains)*

Sample approach to drive Power BI enablement and adoption across your organization

Business Context
(the "why")

Information Semantics
(the "what")

Insights from Visuals
(the "how")

Tailored Enablement Program

ENABLEMENT MODALITIES

Lunch and Learns
Self-Paced Learning
Learning On Demand
Day 1 Launch

	Lunch and Learns	Self-Paced Learning	Learning On Demand	Day 1 Launch
Description	Four weekly 1 hour sessions with specific Power BI topic lead by combination of Power BI Technical Lead and Department Power User	Five self-paced labs (maximum of 10 steps each) that demonstrate Power BI basics using your existing reports and a relative business scenario	Deliver a series of 2-3 minute pre-recorded demos of the Self-Paced Learning labs to reinforce key Power BI concepts	On the launch day for Department reports, have available a Power BI resource room for users to engage with technical experts for questions and getting started using reports
Deliverable	Schedule of topics with appropriate Department Power Users	Documentation of self-paced labs available for specific topics related to Departmental reports	Pre-recorded video with the Enablement Lead and Power User sharing the scenario and steps	Onsite Power BI technical SME to provide hands-on assistance with launch day assistance
Delivery Method	PowerPoint and live Power BI reports	Word/PDFs that document a real business scenario	Online videos that support lab scenarios	Hands on, 1:1 assistance to end users who need additional Power BI coaching

Sample Power BI Enablement Learning Path

- The End User learning path will originate from the topics identified by the Department Power User (with guidance from VBI Enablement Lead)
- Lunch and Learn topics will be decomposed into a series of 5 Self-Paced Learning Labs
- Each Self-Paced Learning Lab will have a Learning on Demand video to reinforce the learning

- Content requirements for each Department:
  - 4 Lunch and Learns
  - 5 Self-Paced Learning Labs for each Lunch and Learn
  - 1 Learning on Demand recording for each Self-Paced Learning
  - Total: 25 tailored content Items for Power BI End User enablement

Week 1 Sample Agenda
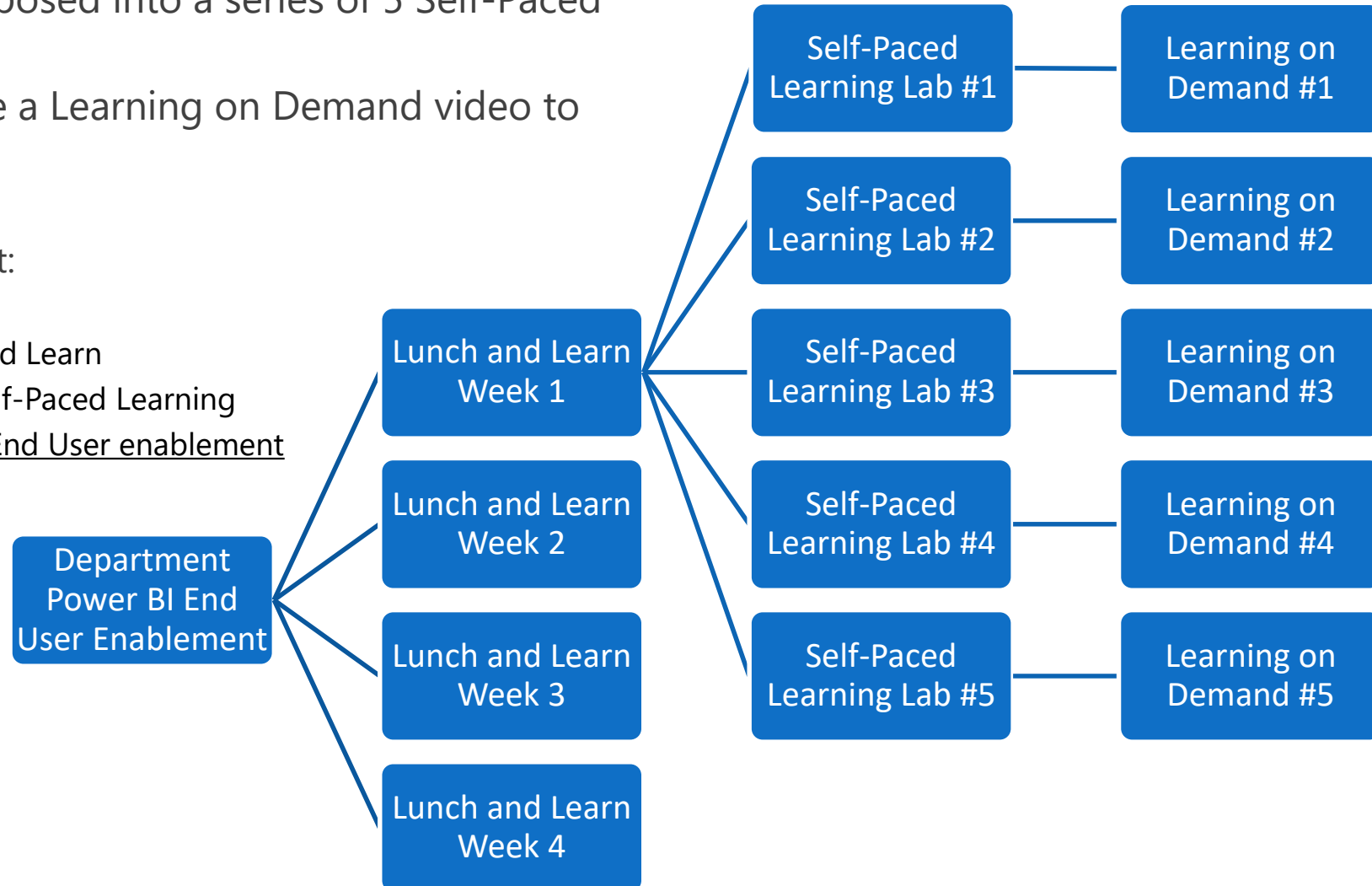
Day	Topic	Participants	Prepared Artifacts for Discussion
Day 1	Kickoff/Governance Engagement Review	Executive Sponsor(s)/Application Owner(s); Power BI Business Analyst(s)	Roles & Responsibilities matrix (completed by Customer)
	Power BI Data Sources and Refresh requirements	Application Owner(s); Database Administrators/Data Stewards; Business Data Owner(s)	Documentation of existing source systems in-scope for Power BI consumption
	Power BI Personas, Readiness and Power User Strategy	Application Owner(s); Data Steward(s); Business Data Owner(s); Power User Lead(s); End User Advocate	
Day 2	Power BI Support	Application Owner(s); BI Developers; Support Desk	Existing support desk SLAs, escalation policies
	Content Management and Report Authoring	Application Owner(s); BI Developers; Power BI Tenant/Office 365 Admin	
	Delivery/Deployment and Sharing of Power BI Reports	Application Owner(s); Power User Lead(s)	
	Security and Data Access; Gateway Management	Application Owner(s); Power BI Tenant Admin; IT Security Owner/Manager; Database Administrators	Documentation of source systems and outline any restrictive data policies
Day 3	UX/Visualization Standards	Application Owner(s); BI Developers; Power User Lead(s); UX/Marketing; Mobile Experience; End User Advocate	Existing branding standards (CSS, color palettes, logo usage guidelines)
	Tenant Configuration and Monitoring (Usage and Tenant Health)	Power BI Tenant Admin	
	Semantic Modeling and Certified Datasets	Application Owner(s); Business Data Owner(s); Data Stewards; Power BI Business Analyst(s)	Data dictionary or existing semantic models for in-scope data sources
Day 4	Change Management and Power BI	Application Owner(s); IT Governance	Documentation of existing change management process for IT deployments
	Power BI Center of Excellence - Charter and Rhythm of the Business	Executive Sponsor(s)/Application Owner(s); Power User Lead(s); Data Steward(s); Power BI Business Analyst(s)	
	Power BI Roadmap - Governance Findings and Strategy	Executive Sponsor(s)/Application Owner(s)	
Day 5	Recap and Review Open Items	As Needed from Customer Team	

Summary

- Governance is a key foundation for planning and executing a successful Power BI deployment

- Determining early the delivery and deployment policies for Power BI Reporting will help shape the correct implementation decisions

- Training for Power BI is a minimum requirement; Enablement provides a more sustainable adoption curve of Power BI within the organization

THANK YOU

For more information...

✉ solutions@visualbi.com

www.visualbi.com