Power BI Governance Accelerator
Keys to Success in Planning a Power BI Deployment
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

**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

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**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

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**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.
Establishing Power BI Governance shapes organization success across delivery and agility

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

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### Power BI Delivery Approaches

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

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**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

<table>
<thead>
<tr>
<th>PLAN</th>
<th>BUILD</th>
<th>RUN AND MANAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Identify End User Personas and their needs</td>
<td>- Provide clarity on the important measures and critical data to drive efficiencies within your business</td>
<td>- End User training and enablement to provide quick ramp-up on delivered dashboards</td>
</tr>
<tr>
<td>- Rationalize source systems</td>
<td>- Build adherence to data governance requirements</td>
<td>- Center of Excellence to drive productive use and adoption</td>
</tr>
<tr>
<td>- Data Governance</td>
<td>- Design value-add visualizations with End user Personas needs in mind</td>
<td></td>
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<tr>
<td>- Mapping and Measures</td>
<td></td>
<td></td>
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<tr>
<td>- Key Performance Indicators</td>
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</tr>
</tbody>
</table>

**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.

*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.
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
Power BI Governance

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.
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.

Microsoft Power BI Training
- Basic Topics
- Advanced Topics

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

- **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

<table>
<thead>
<tr>
<th>Lunch and Learns</th>
<th>Self-Paced Learning</th>
<th>Learning On Demand</th>
<th>Day 1 Launch</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
<td>Four weekly 1 hour sessions with specific Power BI topic lead by combination of Power BI Technical Lead and Department Power User</td>
<td>Five self-paced labs (maximum of 10 steps each) that demonstrate Power BI basics using your existing reports and a relative business scenario</td>
<td>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</td>
</tr>
<tr>
<td><strong>Deliverable</strong></td>
<td>Schedule of topics with appropriate Department Power Users</td>
<td>Documentation of self-paced labs available for specific topics related to Departmental reports</td>
<td>Onsite Power BI technical SME to provide hands-on assistance with launch day assistance</td>
</tr>
<tr>
<td><strong>Delivery Method</strong></td>
<td>PowerPoint and live Power BI reports</td>
<td>Online videos that support lab scenarios</td>
<td>Hands on, 1:1 assistance to end users who need additional Power BI coaching</td>
</tr>
<tr>
<td></td>
<td>Word/PDFs that document a real business scenario</td>
<td>Pre-recorded video with the Enablement Lead and Power User sharing the scenario and steps</td>
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**ENABLEMENT MODALITIES**

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

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