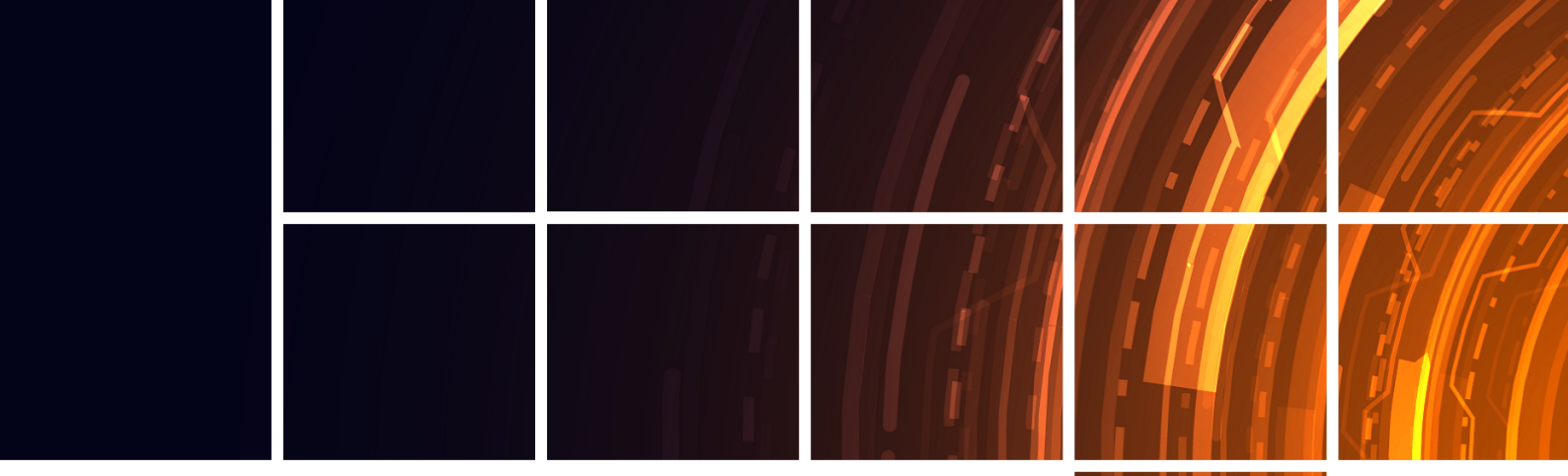


POWER BI ADOPTION FRAMEWORK

A playbook to guide you through successfully developing a data culture with Microsoft Power BI





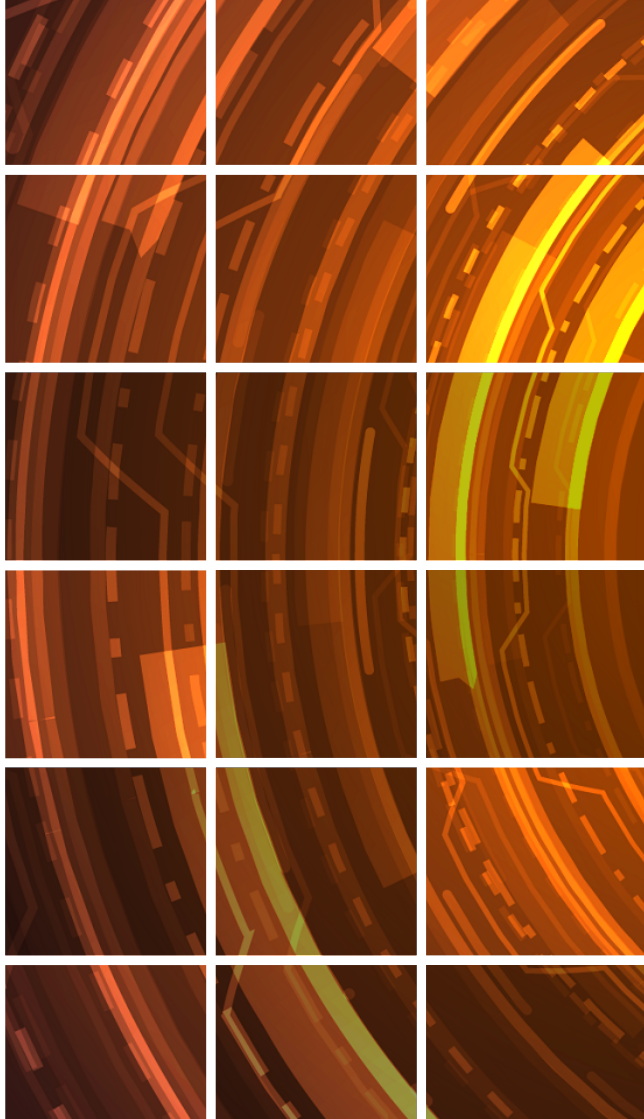
Smartbridge

Microsoft Solutions Partner
Data & AI
Azure

V2

Table of Contents

Starting Your Journey	03
The Smartbridge Power BI Adoption Framework	04
Skills Maturity	06
Self-Service Content and Data Availability	08
Best Practices and Guidance	11
Microsoft Fabric	18
What's Next?	20



Copyright © 2022 Smartbridge, LLC. All rights reserved.

Starting Your Journey

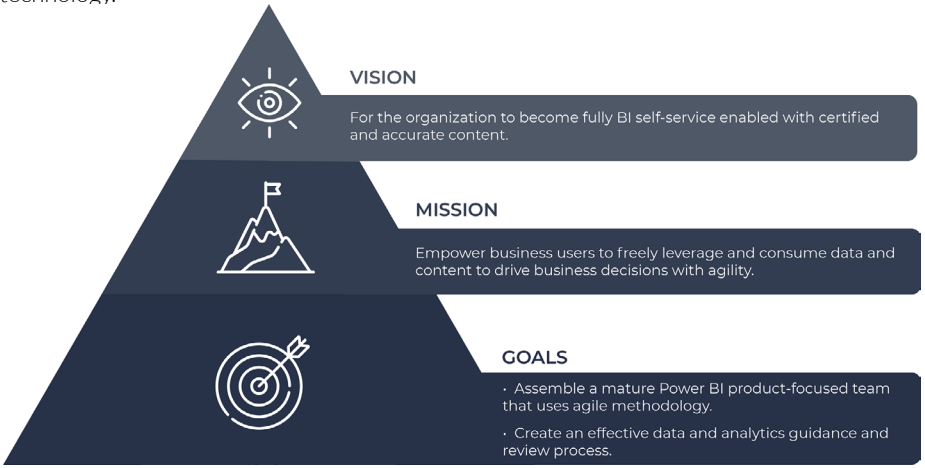
Deciding to use Power BI as a data-driven enterprise decision-making tool is an easy and economically savvy decision for organizations of any size. However, succeeding at scale is not easy and is full of potential pitfalls.

Microsoft does provide a general Power BI adoption roadmap to implement Power BI as an enterprise self-service BI tool.

However, the Smartbridge Power BI adoption framework is developed to meet users at their skill level. It is a summarized, yet exhaustive, template that will help you achieve a data culture for agile decision-making at scale.

Our extensive, research-based framework is designed for the organic skill set growth of your people, maturity of your business processes, and modernization of your technology.

A BI self-service program should enable business efficiency and agility to make fast data-driven decisions.



Example of a strong foundational core that will ensure self-service capabilities are established throughout the company.

Copyright © 2022 Smartbridge, LLC. All rights reserved.

The Smartbridge Power BI Adoption Framework

The framework in its full glory consists of these areas:

Power BI Skills Maturity
Identify the target users and personas by level of interaction with Power BI and create formal training to improve their Power BI skill sets.

Product Team Steering Committee
Identify the leadership and team that will drive the program and progress.

Power BI Foundation
Establish the necessary tech, data structure, security, and architecture for a stable BI platform.

Self-Service Content and Data Availability
Clearly define and understand who can see what content and how they will receive it.

Best Practices and Guidance
Establish effective user experience, reporting, collaboration, and sharing.

Workspace Management
Establish a model to enable personal, departmental, and enterprise content.

Dataset Management
Centralize the access point for data coming from disparate systems to provide a single source of truth.

Security
Use central management, secure policies, and one report to manage security.

Content Management
Establish a data certification and promotion process to ensure accuracy and consistency for data/content that is needed repeatedly.

Copyright © 2023 Smartbridge, LLC. All rights reserved.

Getting You Started on the Right Foot

Though we would love to cover all areas of the framework in this playbook, we will spotlight just a few to get you started.

- Power BI Skills Maturity
- Self-Service Content and Data Availability
- Best Practices and Guidance
- BONUS! Fabric & AI Capabilities

If you would like to learn more about our full Power BI adoption framework and how it can be tailored for your organization, please reach out to us.



Copyright © 2022 Smartbridge, LLC. All rights reserved.

Power BI Skills Maturity

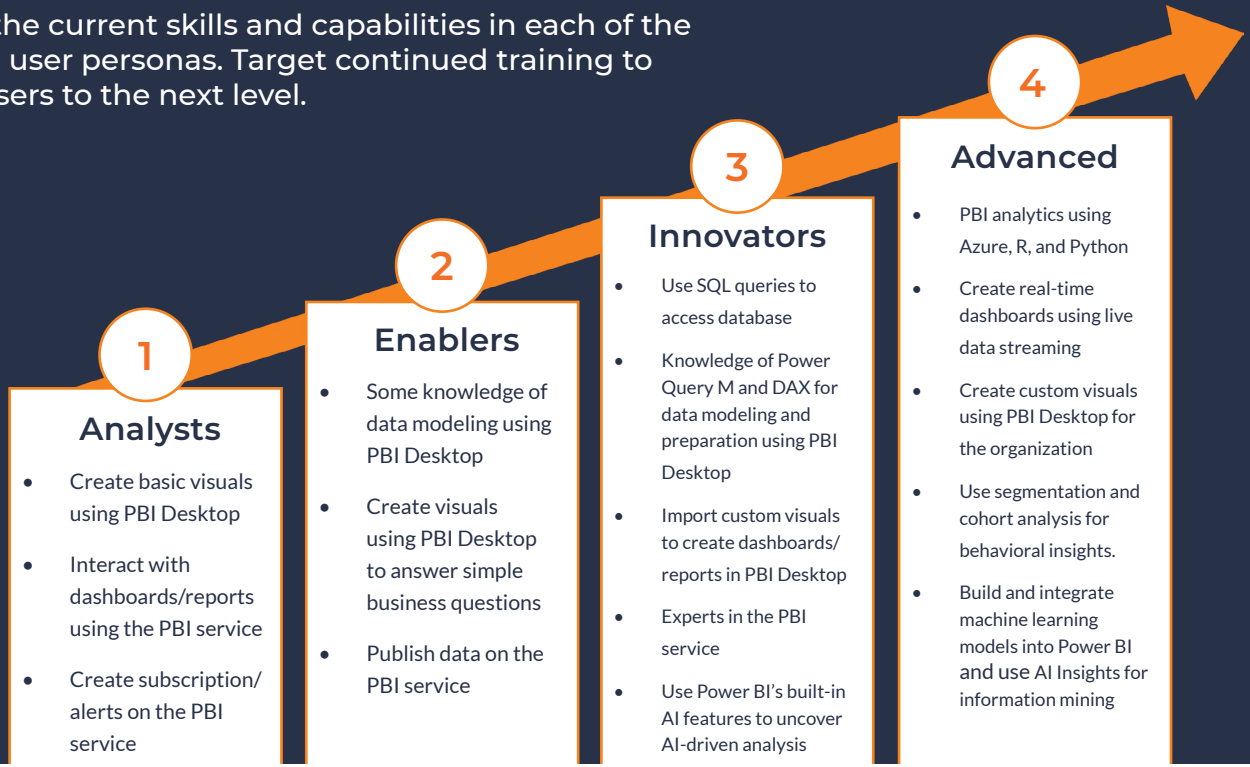
Identify the target users and personas by level of interaction with Power BI and create formal training to improve their Power BI skill sets.

Power BI is a business intelligence tool that anyone and everyone can use. Because of this, it's important to understand where your end-users are at in their skill levels and what training is needed. Identify your target users and personas by their level of interaction with Power BI to better recognize their proficiency, level of support, and training needs.

People	Processes	Technology	Information
			
1. Identify user personas 2. Assess skills maturity and proficiency regularly and measure progress	1. Formal training 2. Centralized knowledge base 3. Culture of analytics	1. Plan/roadmap of advanced Power BI capabilities (DAX, models, AI) 2. Plan/roadmap for partner tools to enhance Power BI (R/ Python, Azure ML)	1. Power BI training content 2. Internal content team/community

Copyright © 2023 Smartbridge, LLC. All rights reserved.

Assess the current skills and capabilities in each of the defined user personas. Target continued training to move users to the next level.



Adoption and engagement will increase as each department/group begins to have Enablers and Innovators that push for new and improved reporting and content within Power BI.

Copyright © 2022 Smartbridge, LLC. All rights reserved.

Self-Service Content and Data Availability

In order to have an effective self-service BI program, you first need to make sure your users have access to the data they need and that a strong governance strategy is established.



People

1. Define & assign data/ content
2. Define & assign data stewards

Processes

1. Form committee, roles, training, standards, and then certify
2. Define & standardize data source certification (Data Warehouse , Database, BI Models)
3. Define & standardize BI dashboard/report certification

Technology

1. **Near term** - follow framework to establish Power BI as a consistent reliable & manageable BI platform
2. **Long term** - expand framework to broader data environment and separate virtual data layer (if needed)

Information

1. Include verified and approved enterprise-wide data sets and KPIs
2. Do not publish test, ad hoc, or experimental analytics to the enterprise
3. Do not include data that is too large, too complex nor highly sensitive data

Copyright © 2022 Smartbridge, LLC. All rights reserved.



Data Governance Focus

- Identify the critical data domains required (based on your roadmap)
- Establish data owners from the business
- Establish data stewards for a Center of Excellence (CoE)
- Establish data quality for selected data domains, including cleaning and enriching if needed
- Establish data quality control processes and workflows
- Do not govern all data in the same manner

Data Domains

Data has various purposes and uses, therefore one set of policies might not apply to all of your data. That is why you should create data domains or groups of data based on their subject area.

A pragmatic approach should be used to establish a lean data governance function by starting with just a few data domains.

It's recommended your data domains should be organized by subject areas, such as Sales, Costs, Financial, Customer, People, and not by lines of business or system. Each data domain will consist of 2 roles: **Data Owner and Data Stewards**.

Copyright © 2023 Smartbridge, LLC. All rights reserved.

Data Owners and Data Stewards

A key step to enable self service is clearly defining and understanding the roles the business and IT play as part of the program. Each department and/or data domain should have a primary and back-up data owner assigned. The data owners participate in the steering committee, own the data and content from within their area, and publish it to the business. The data stewards are responsible for maintaining data quality, processing quality requests from the business for their data domains, and providing technical expertise/issue resolution.



Copyright © 2023 Smartbridge, LLC. All rights reserved.

Best Practices and Guidance

As with any technology, there are some best practices you can follow for a successful adoption. Here we will cover a few to help your organization successfully adopt Power BI.

People



1. Implement the key pillars for user adoption and quality UI/UX
2. Leverage advanced delivery capabilities such as Power BI embedded analytics, Fabric, and AI to get content to the most users and locations

Processes



1. Encourage data exploration by developers with new data in personal or department workspaces
2. Leverage data source sharing once certified and proper security/groups
3. Update new insights via communication channels, apps, and Power BI embedded analytics to familiar dashboards

Technology



1. Data Modeling
   - Keep data sets and models concise
   - Avoid complex queries
   - Keep as many calculations in the data set as possible
2. Reports/Dashboards
   - Develop & follow standards
   - Keep dashboards simple
   - Avoid live feed for better performance

Information



1. Regular communications to BI community regarding content and Power BI updates
2. Regularly monitor usage of datasets, reports, dashboards, and user engagement

Copyright © 2023 Smartbridge, LLC. All rights reserved.

Key Pillars for Adoption and Quality UI/UX

Address and ensure you have each of these pillars in place to effectively enable enterprise adoption, user engagement, and experience before attempting a roll out to a large scale user group.

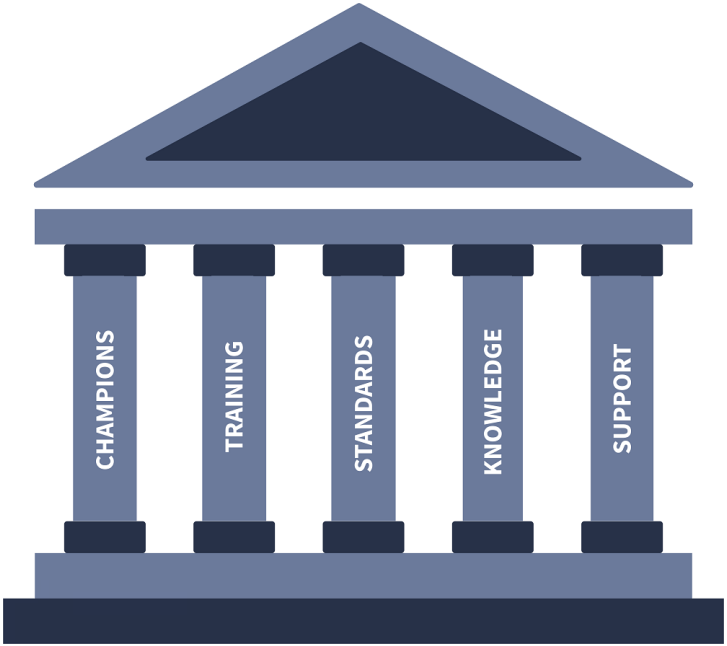
Champions - The department champions should promote enterprise BI and foster BI development projects or competitions to encourage adoption.

Training - Have regularly planned and varying training formats available for users over the course of the adoption.

Standards - BI standards should be shared and regularly reviewed with users so they are as clear as possible on the content they are using. This includes BI templates.

Knowledge Sharing - A user community will support increased knowledge sharing and adoption.

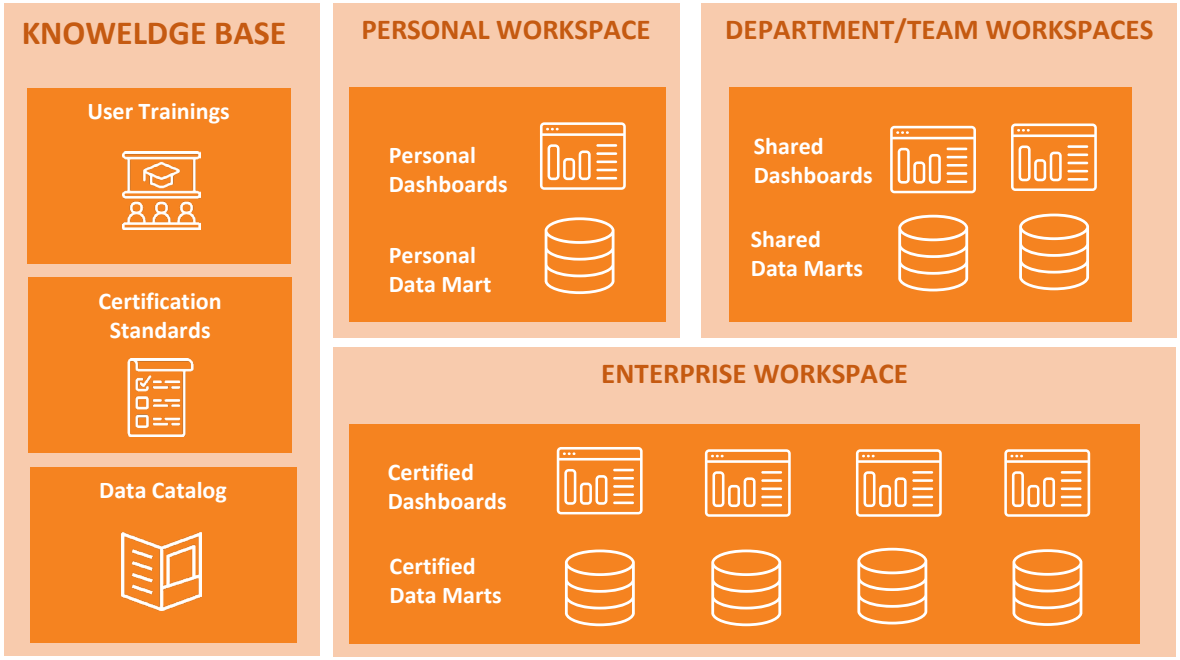
Support - Multi-channel support is key for users to get quick help and not overwhelm the IT support team.



Copyright © 2023 Smartbridge, LLC. All rights reserved.

Create a Structure

In order to scale self-service BI, a model should be established and implemented in Power BI to enable personal, departmental, and enterprise content.



Copyright © 2023 Smartbridge, LLC. All rights reserved.



Personal Workspace - Business analysts will have a personal workspace where they can perform ad-hoc analysis on relevant data and create prototypes of new dashboards/datasets.

Department and Enterprise Workspaces- Users will have access to collaborative workspaces that are managed by their departments and the Steering Committee.

- Certified Dashboards: Dashboards built by different business users and approved by the committee will be ready for members across the organization to interact with to quickly gain insights.

- Certified Datasets: Users will be able to access data through the semantic layer, which will have data that's accurate and ready to use. This will help centralize the access point for data coming from disparate systems and provide a single source of truth.

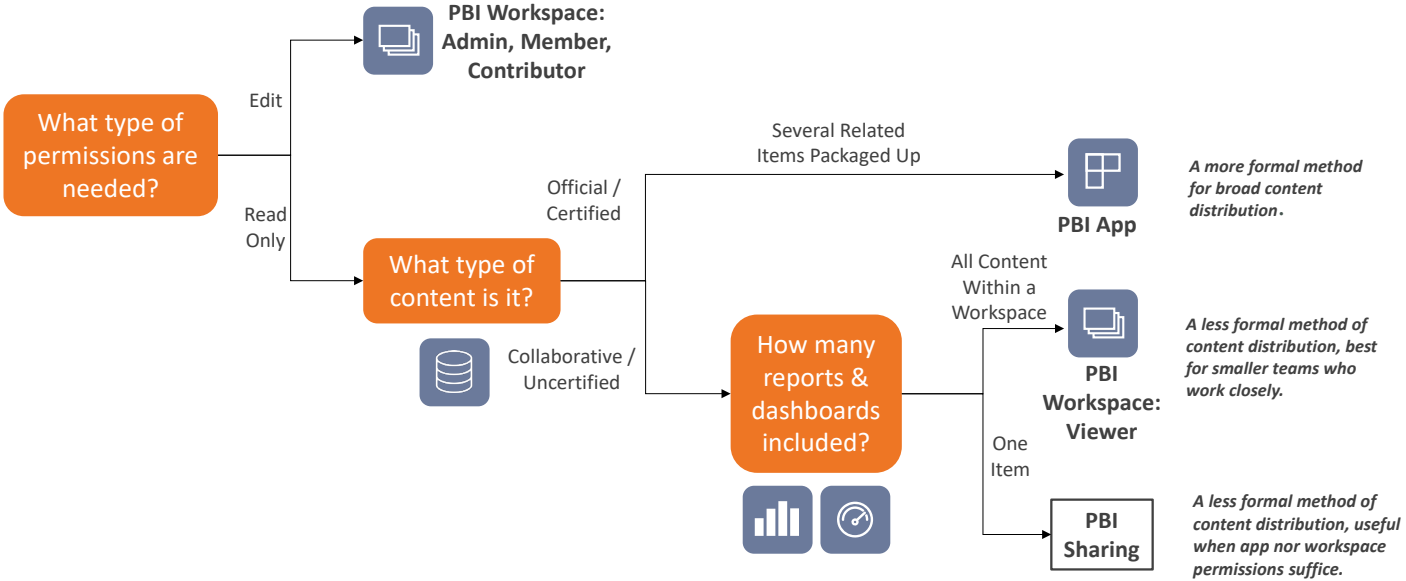
Certification Standards - Business analysts and data stewards will have access to materials that define standards to enable them to produce excellent, certified content.

Data Catalog - Data stewards will provide documentation to assist business users and analysts to understand the data they're working with.

Want to dive deeper into Power BI Best Practices? View our article >>

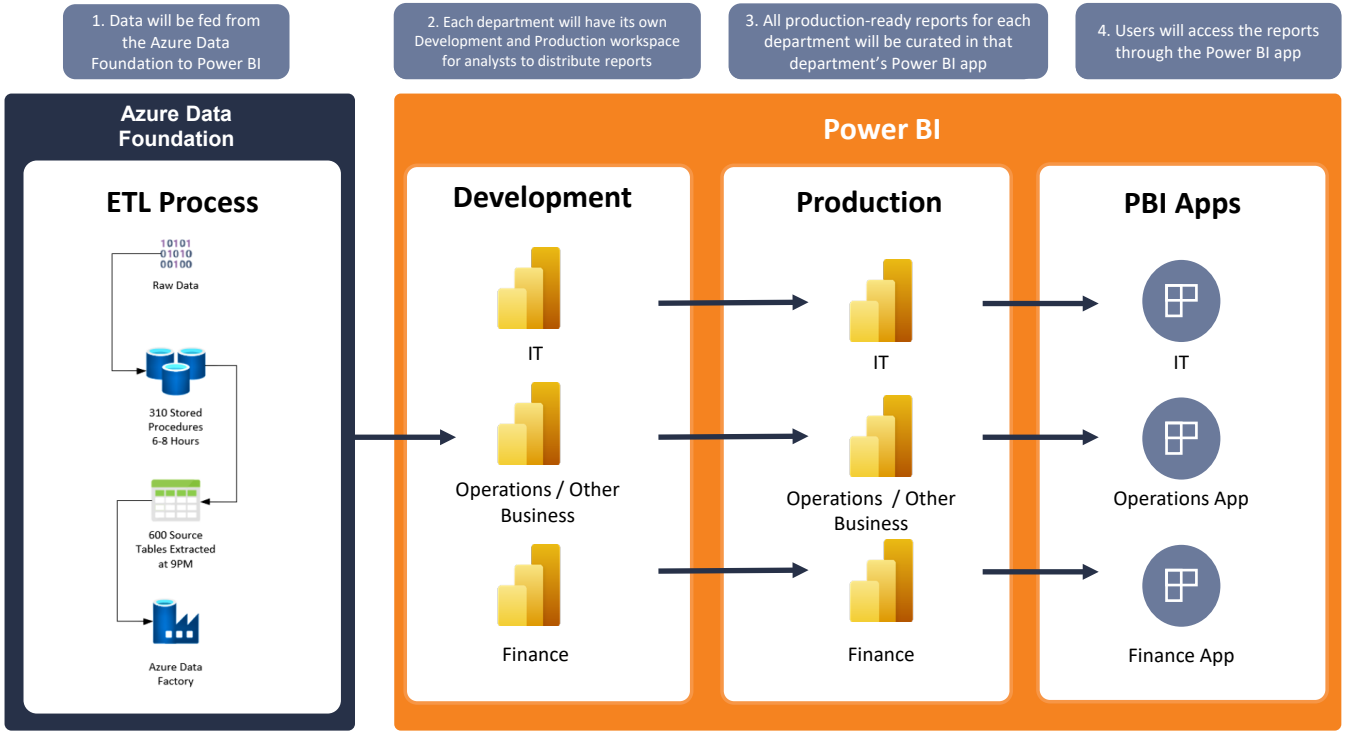
Copyright © 2023 Smartbridge, LLC. All rights reserved.

Recommendations and Scenarios for Content Sharing in Power BI



Copyright © 2023 Smartbridge, LLC. All rights reserved.

An Overview of a Workspace Architecture



Copyright © 2023 Smartbridge, LLC. All rights reserved.

Example of Workspace Access

	Workspace Access			App Access
	Admin	**Member**	**Contributor**	**Viewer**
Purpose	Users who will have the highest level of access in Power BI. It should be reserved only for IT.	Users who will be responsible for updating the Workspace App, as well as managing the content in the workspace	Users who will engage in self-service analytics	All users that will interact with published reports
Abilities	• Create/Shutdown workspaces • Add other admins	• Update the app • Designate other users as Members • Manage access to datasets/content in the app	• Publish reports and datasets	• Only view reports and dashboards which have been included in the workspace app
User Groups	• IT Admin • Smartbridge	• Department analytics curators	• Power BI developers in the department, as well as others who would need access to that department's workspace	• All users

Copyright © 2023 Smartbridge, LLC. All rights reserved.

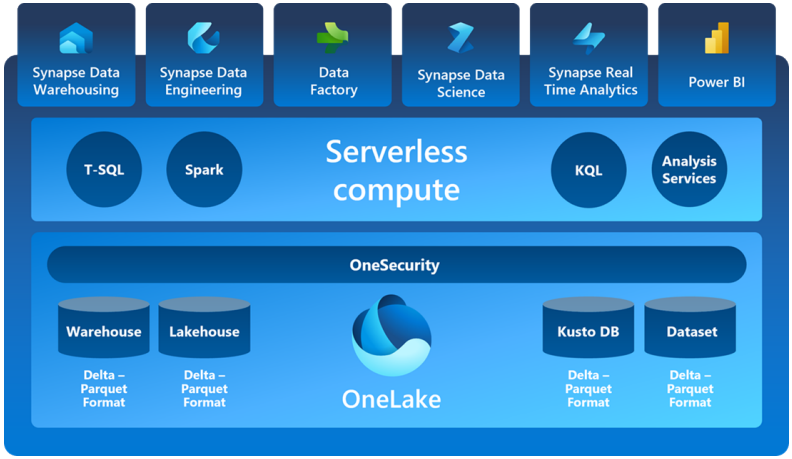
Microsoft Fabric

Smartbridge's full Power BI Adoption Framework always takes major product enhancements into consideration when guiding organizations on best practices for optimized usage. Starting in 2023, Microsoft has invested heavily in the Power Platform by bringing artificial intelligence, automation and advanced data engineering features and integrations into the fold. While every version release requires re-tooling of your skills and processes, nothing has been more momentous in the history of the Power Platform than this infusion of AI-led capabilities. Here's an overview of these features that you should factor into your Adoption Framework ASAP.

What is Fabric?

Said simply: Fabric is a SaaS product aimed at unifying data silos across your enterprise. It's a high-performance unified analytics platform for all data professionals and business users. Users store, create, edit, explore, build with, and collaborate on data projects and products.

Microsoft took all the necessary data tools for data engineering, warehousing, monitoring, science, visualization, and analytics and unified them in a lakehouse architecture. On top of this, Fabric integrates nicely with outside sources through so your business can keep using previous infrastructure.



Copyright © 2023 Smartbridge, LLC. All rights reserved.

Fabric with Power BI



For Power BI Premium users, Fabric can be turned on in the admin portal. With Fabric enabled, you will be able to take advantage of a few exciting features:

Microsoft Copilot

Copilot is a large language model to help you get more done with your data. In Power BI, you can use Copilot to:

- Quickly generate reports with data you've pulled. Type your desired report description into Copilot's chat and it will create some options based on your input. This reduces a lot of clicking around and searching for the right settings!
- Generate and edit DAX calculations. Let Copilot do the heavy lifting.
- Create narrative summaries. You can ask Copilot about your data just like a chatbot and get instant answers to help you make decisions faster.

Unified data foundation with Direct Lake mode and OneLake

Fabric is all about unifying analytics and data. That's why you can count on it to make data management in Power BI just that much easier. Direct Lake mode in Power BI enables users to load and analyze datasets all while keeping the data within OneLake and eliminating the need for manual refreshes.

Data governance

Fabric makes it easy for data teams to manage everything that comes along with running a data & analytics program. With Power BI, Synapse, and Data Factory all in one place, data teams can work in a single workspace using the same data with centralized governance and compliance tools.

Copyright © 2023 Smartbridge, LLC. All rights reserved.

What's Next?

While we dug deep into a few topics for a successful Power BI adoption, we can dig even deeper still! Contact us to learn about our full framework and how we can customize it for your organization.

Curious as to what Smartbridge does to help you deploy this framework? Here's a quick overview:

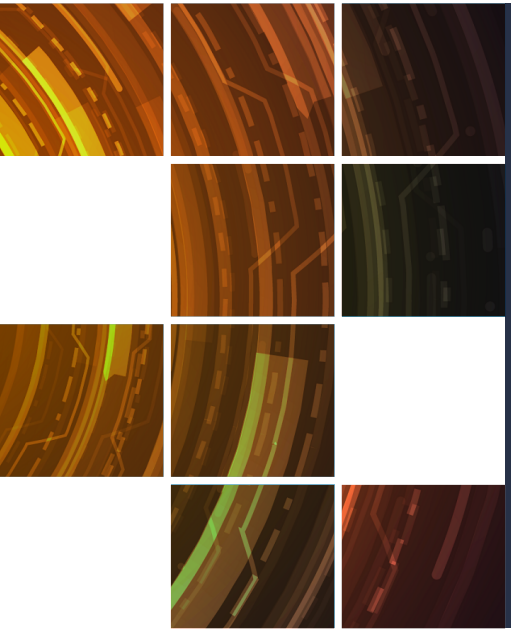
- Define the right roles, responsibilities, and level of engagement for the steering committee to provide direction, mentorship, and support.
- Evaluate current architectural design and setting strategies for scaling up.
- Establish governance and workspace management for data storage and consumption at the department level (Sales & Marketing, HR, Finance, Operations, CRM, etc.).
- Assess skills and setting up skill support plan with training and workshops at all levels. Plan for continued education on latest changes such as Fabric and Copilot AI features.
- Establish the right security levels and permissions by roles.
- Develop standard dataflows, reports/templates, defining multi-channel content distribution process.
- Optimize reports for a seamless mobile user experience
- Establish and measure near and long-term goals and KPIs by the deployment phase.

Copyright © 2023 Smartbridge, LLC. All rights reserved.

Partner with Us

Microsoft Solutions Partner
Data & AI
Azure

Microsoft Solutions Partner
Digital & App Innovation
Azure



Smartbridge focuses on simplifying business transformation. We apply thought leadership and innovation to bring our customer's digital agenda to reality.

Smartbridge has been providing business intelligence and data management services for 20 years, and in the course of our vast project experience, we have seen the use of Power BI soar. We partner with customers in their journey from vision to adoption, and with an empathetic approach, we work to understand their challenges and pain points to provide a solution fit for them. Smartbridge is committed to fueling your innovation with Power BI.

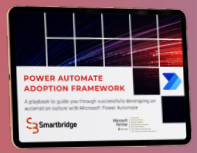
CONTACT US

877-627-8274
innovations@smartbridge.com
smartbridge.com/data/contact

Copyright © 2023 Smartbridge, LLC. All rights reserved.

Want More Power?

Download our other Power Platform eBooks!



Power Automate
Adoption Framework

GRAB THE EBOOK



Power Apps
Adoption Framework

GRAB THE EBOOK



Power Platform
Adoption Framework

GRAB THE EBOOK

Copyright © 2023 Smartbridge, LLC. All rights reserved.