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AUSTRALIAN DIGITAL AGENCY

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CHECKLIST FOR AUSTRALIAN BUSINESSES

Power BI implementation: ten steps to get right.

Use this to plan a Power BI project or check one in progress. Tick each step as it is done. Most projects that stall skip step one or step four.

- [ ] **01** **Five to ten questions agreed** — Stage 1
  The people who read the reports say what they need to know, in their own words.
- [ ] **02** **Every number has a written definition** — Stage 1
  Revenue, margin and hours mean the same thing to sales and finance.
- [ ] **03** **Data sources listed and connected** — Stage 2
  Xero, MYOB, CRM, SQL, SharePoint or Excel. A gateway for anything on a local server.
- [ ] **04** **Only the fields that matter are cleaned** — Stage 2
  Fix structural problems at the source rather than patching them in reports.
- [ ] **05** **A single data model built** — Stage 3
  Tables, relationships, calculations and date logic, so every report agrees.
- [ ] **06** **The trusted report rebuilt first** — Stage 4
  The existing monthly report reproduced and checked number for number.
- [ ] **07** **One page per question** — Stage 4
  The key number top left, five or six visuals, few filters.
- [ ] **08** **Row-level security set up** — Stage 5
  Each person sees only the data they should, such as their own region or clinic.
- [ ] **09** **Data region confirmed** — Stage 5
  Your Microsoft 365 tenant's home region, ideally Australia, checked before you start.
- [ ] **10** **Training, documentation and refresh** — Stage 6
  Scheduled refresh tested, documentation written and the team trained to own it.

Where projects stall

Skipping the definitions, connecting messy data without cleaning it, building a report for every request, and leaving security until the end.

Before you start

Know who owns each question, who will maintain the reports after launch, and which licences your readers will need.

Full guide: high10.com.au/blog/how-does-power-bi-implementation-work

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