High10.com.au
AUSTRALIAN DIGITAL AGENCY

WEBSITES | APPS | AI | AUTOMATION

CHECKLIST FOR AUSTRALIAN BUSINESSES

Migrating to Power BI?
Ten steps to plan it.

Migrate the questions, not the reports. Use this to plan a move from spreadsheets, Crystal Reports, SSRS, Tableau or Qlik. Tick each step as it is done.

- [ ] **01** **Every existing report listed** — Inventory
  Who opens it and how often. Many reports turn out to be unused or duplicates.
- [ ] **02** **The questions behind the reports identified** — Migrate questions
  Usually around ten questions sit behind dozens of reports.
- [ ] **03** **Number definitions agreed** — Definitions
  Settle disagreements before building, not after.
- [ ] **04** **Data sources mapped** — Sources
  Every source the old reports draw on, and how it will connect.
- [ ] **05** **Workspaces, roles and licences planned** — Deployment plan
  Who builds, who reads, and the licences each needs.
- [ ] **06** **Tenant region confirmed** — Data location
  Your Microsoft 365 tenant's home region checked, ideally Australia.
- [ ] **07** **Proof of concept on one key report** — Prove it first
  Rebuilt on the new model and checked number for number.
- [ ] **08** **Model built, then reports in order of value** — Build
  A single model, with the most important reports first.
- [ ] **09** **Old and new run in parallel** — Safe switch
  Users compare results for a period before switching.
- [ ] **10** **Old reports retired** — Clean finish
  Kept read-only for a few months, then switched off.

The most common mistake

Rebuilding every old report faithfully. It reproduces the mess at greater cost. Rebuild the questions people use, and retire the rest.

After migration

Once the model exists, new questions become quick to answer. Plan a short list of new reports to build once the migration is stable.

Full guide: high10.com.au/blog/how-to-migrate-to-power-bi

0406 996 050 | team@high10.com.au

Book a scoping call