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AUSTRALIAN DIGITAL AGENCY

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CHECKLIST FOR AUSTRALIAN BUSINESSES

Is your business ready for Power BI?

Tick each statement that is true for your business. Six or more ticks usually means Power BI will save real time and improve decisions.

- [ ] 01 **Someone spends days each month building reports** — Time to save
  Copying numbers from systems into spreadsheets by hand.
- [ ] 02 **Different people quote different numbers** — One version of truth
  Sales and finance disagree on revenue or margin.
- [ ] 03 **Your data lives in systems Power BI can read** — Connectable
  Xero, MYOB, Dynamics, SQL, SharePoint, Excel or similar.
- [ ] 04 **Managers wait until month end for numbers** — Timeliness
  They would act sooner with figures refreshed daily or weekly.
- [ ] 05 **You can name five to ten questions you need answered** — Clear scope
  Clear questions make a focused first version.
- [ ] 06 **You use Microsoft 365** — Good fit
  Power BI fits naturally with your existing licences and accounts.
- [ ] 07 **Someone will own the reports after launch** — Ownership
  A person trained to keep them current.
- [ ] 08 **Data quality is roughly right** — Data quality
  Customers and jobs entered consistently, or willing to fix it.
- [ ] 09 **Different people need different views** — Security
  Row-level security can show each manager their own area.
- [ ] 10 **You want to answer new questions quickly** — Flexibility
  A good model makes new reports fast to build.

Where projects fail

Building reports before agreeing definitions, connecting messy data without cleaning it, and launching without anyone to own the reports.

Start small

Reproduce the monthly report people already trust, then add the two or three questions nobody can currently answer.

Full guide: high10.com.au/blog/how-can-power-bi-improve-business-reporting

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