Top Essential Actions for Governing Power BI

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Slides & recordings: CoatesDS.com/Presentations

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Data architect specializing in Power BI governance & administration

Author of Power BI Adoption Roadmap

Author of Power BI Implementation Planning

Creator of Power BI Deployment & Governance online course

Power BI Deployment & Governance

Comprehensive online course

- Governance
- Adoption & data culture
- Center of Excellence
- Data architecture
- Content management
- Data trustworthiness
- Security & protection
- System oversight

- Comprehensive set of video recordings
- Live group Q&A sessions
- Live hands-on workshops
- Customizable templates
- Recommended actions
- Access for 6 months

Top Essential Actions for Governing Power BI

Agenda

- Power BI adoption roadmap
  Maturity levels
  Prioritizing and iterating on what's important
- Focusing on user empowerment
  Data culture matters
- Factors for deciding the appropriate level of governance
  Supporting the internal community of users
  Roles and responsibilities
- Transparency about system administration decisions
  Using data for adoption, auditing & training

Where Are You At?

I'm assuming that…

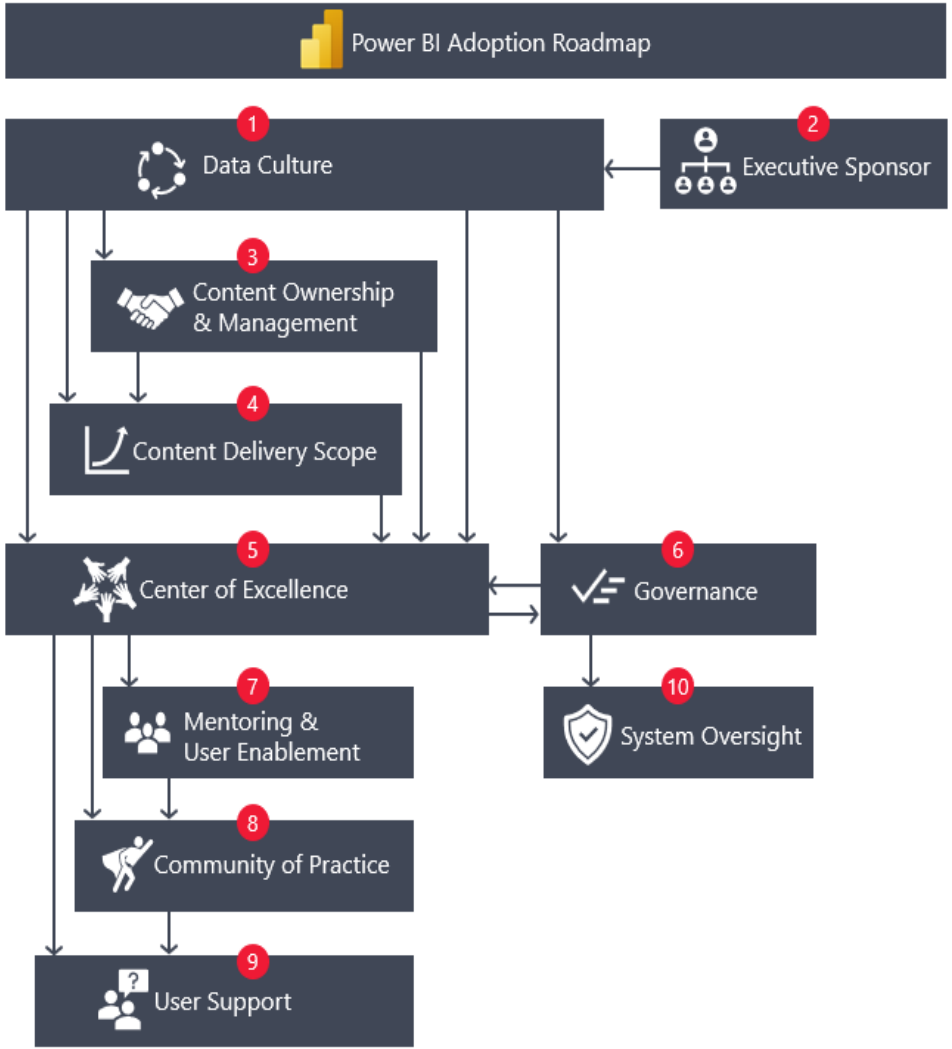
- [x] You are using Power BI currently & have experienced some successes
- [x] You are familiar with the basics of deploying Power BI content
- [x] You are aware there are areas of improvement with how you oversee Power BI

Power BI adoption roadmap

What is the Power BI Adoption Roadmap?

- ✓ Strategic & tactical considerations
- ✓ 10 main areas of focus
- ✓ Emphasis on 'organizational' adoption success factors

https://aka.ms/PowerBIAdoptionRoadmap



Three Types of Adoption

Organizational Adoption

The effectiveness of Power BI **governance** and **data management** practices to support and enable BI efforts

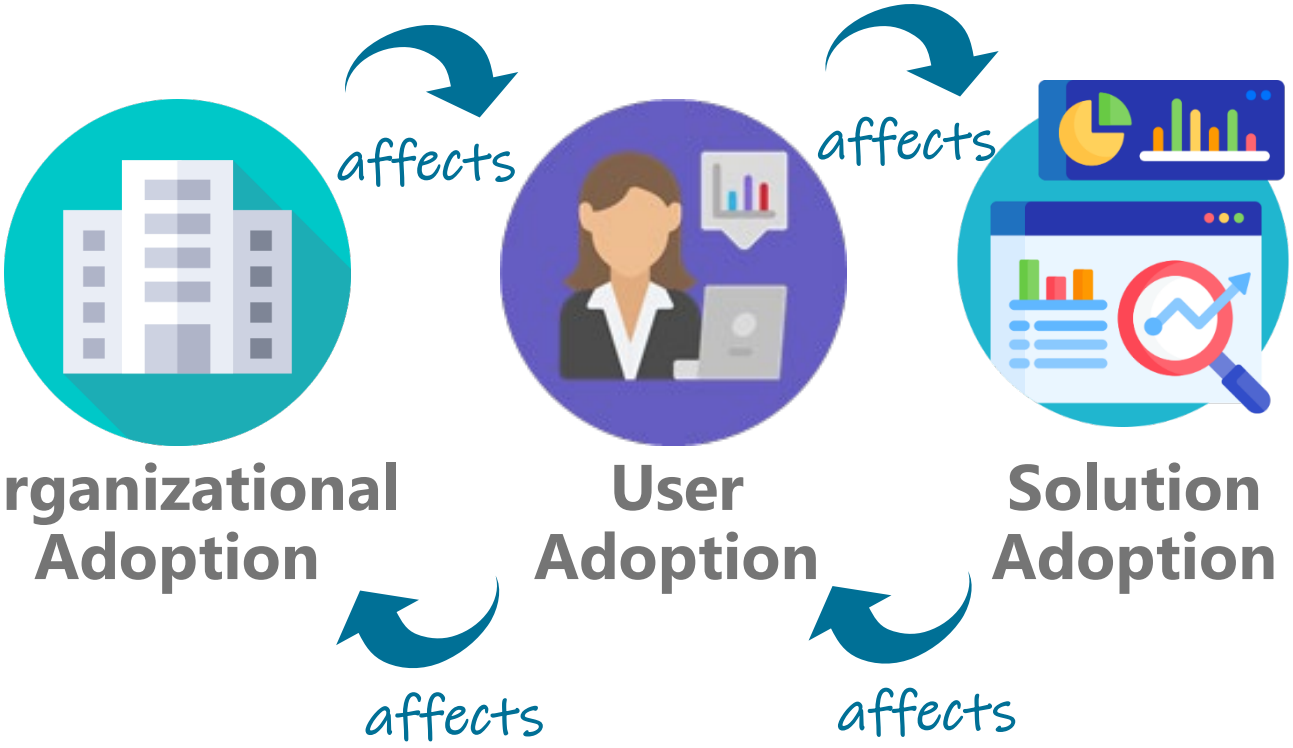
User Adoption

The extent to which users continually **increase their knowledge** to **actively use** Power BI in an **effective way**

Solution Adoption

The **impact** and **business value** achieved for individual requirements & solutions

Adoption Is All Inter-Related



Adoption is About More than Just Usage

Adoption ≠ Activity/Usage/Consumption
(only)

More usage stats is *not* always positive

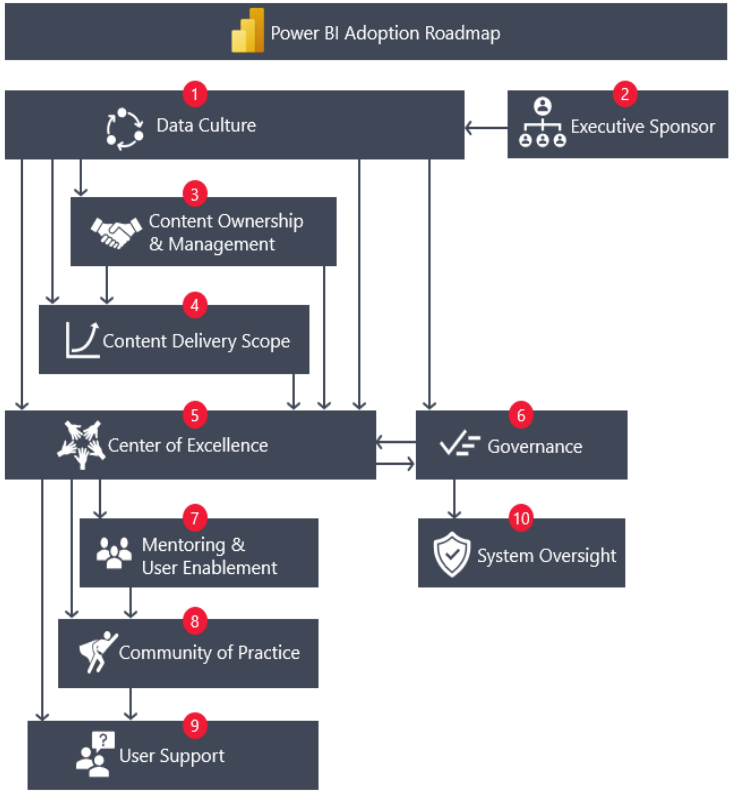
Examples:
Large # of duplicate data models
Significant downloads & exports

Actions

Review the Power BI Adoption Roadmap end-to-end

Identify your current state for each area

https://aka.ms/PowerBIAdoptionRoadmap

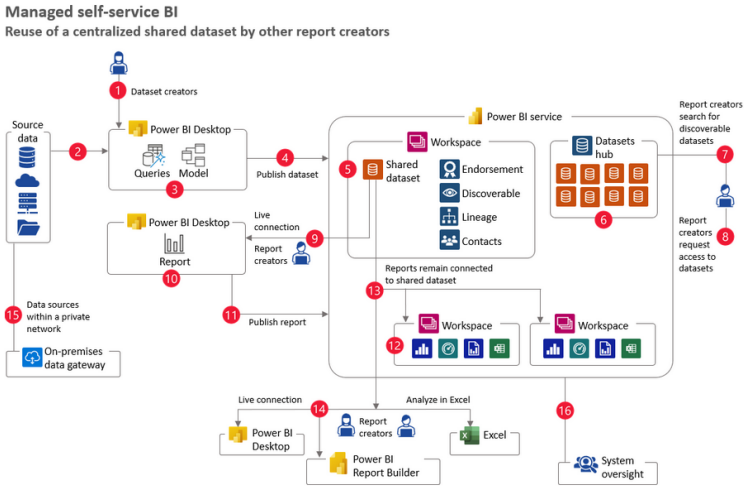


Actions

Review the Power BI Implementation Planning guidance

Understand how Power BI is being used (or should be used)

https://aka.ms/PowerBIImplementationPlanning

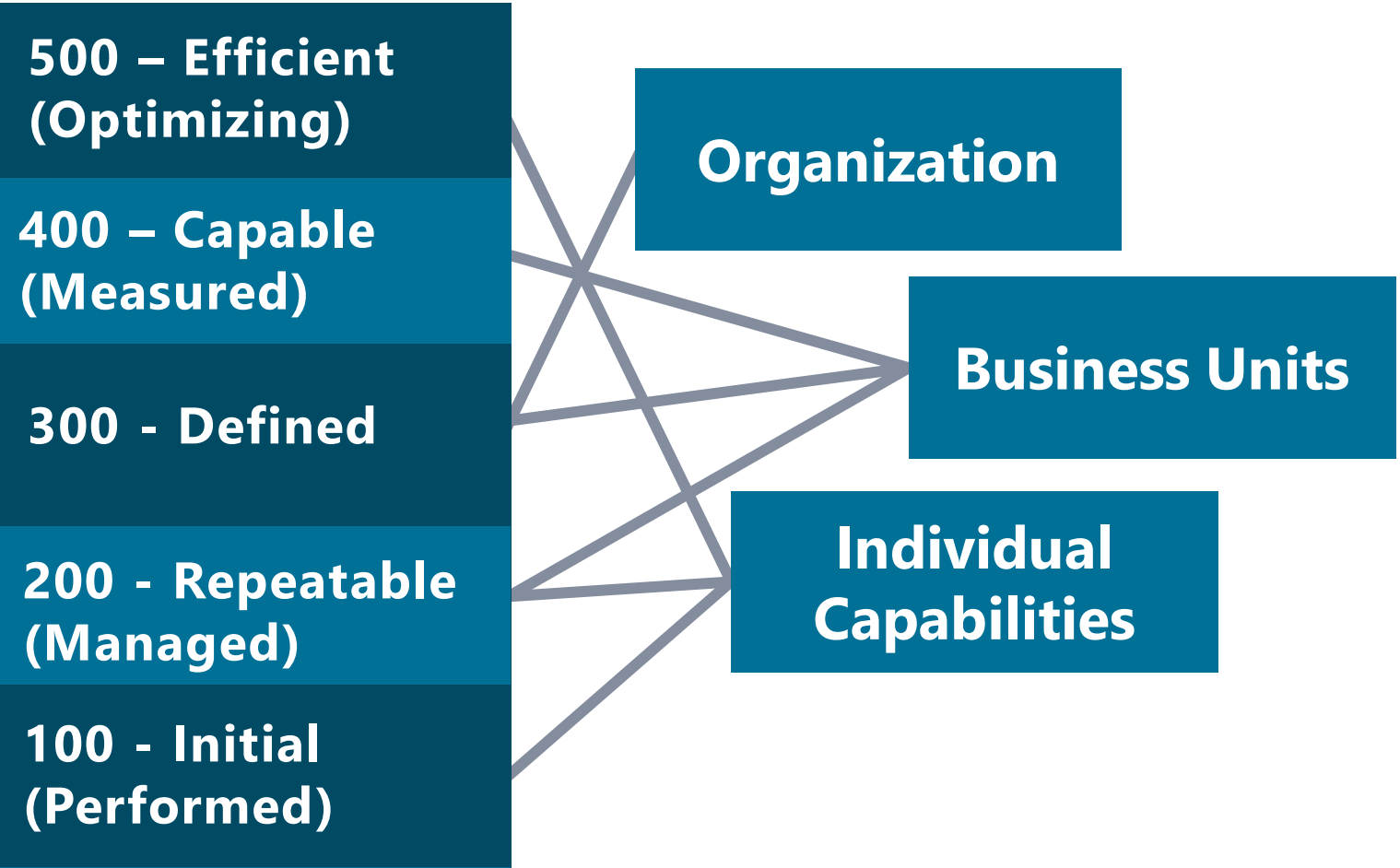


Maturity levels

Maturity Levels in the Adoption Roadmap

500 – Efficient (Optimizing)	Data is managed efficiently with an emphasis on automation & continuous improvement
400 – Capable (Measured)	Data is well-managed across its entire lifecycle
300 - Defined	Data management is standardized & consistently applied across organizational boundaries
200 - Repeatable (Managed)	Data management is planned & executed, though not uniformly
100 - Initial (Performed)	New, undocumented, processes with no process discipline

Maturity Levels Can Vary

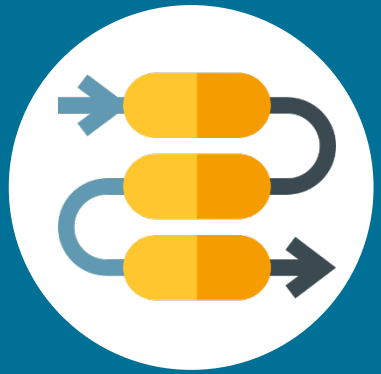


Actions

For each area most important to you:

- ☐ Assess what your existing maturity level is
- ☐ Customize the maturity levels
- ☐ Realistically decide what the goal maturity level should be

Prioritize based on your data culture…
Don’t strive for a 500 level on everything!



Prioritizing and iterating on what's most important

Prioritization

If you have $100 to spend, how would you allocate it?

1

Data protection

Security, privacy, compliance & risk avoidance

2

Data trustworthiness

Accuracy & lineage

3

Data democratization

More people use data to gain value

4

Data discovery

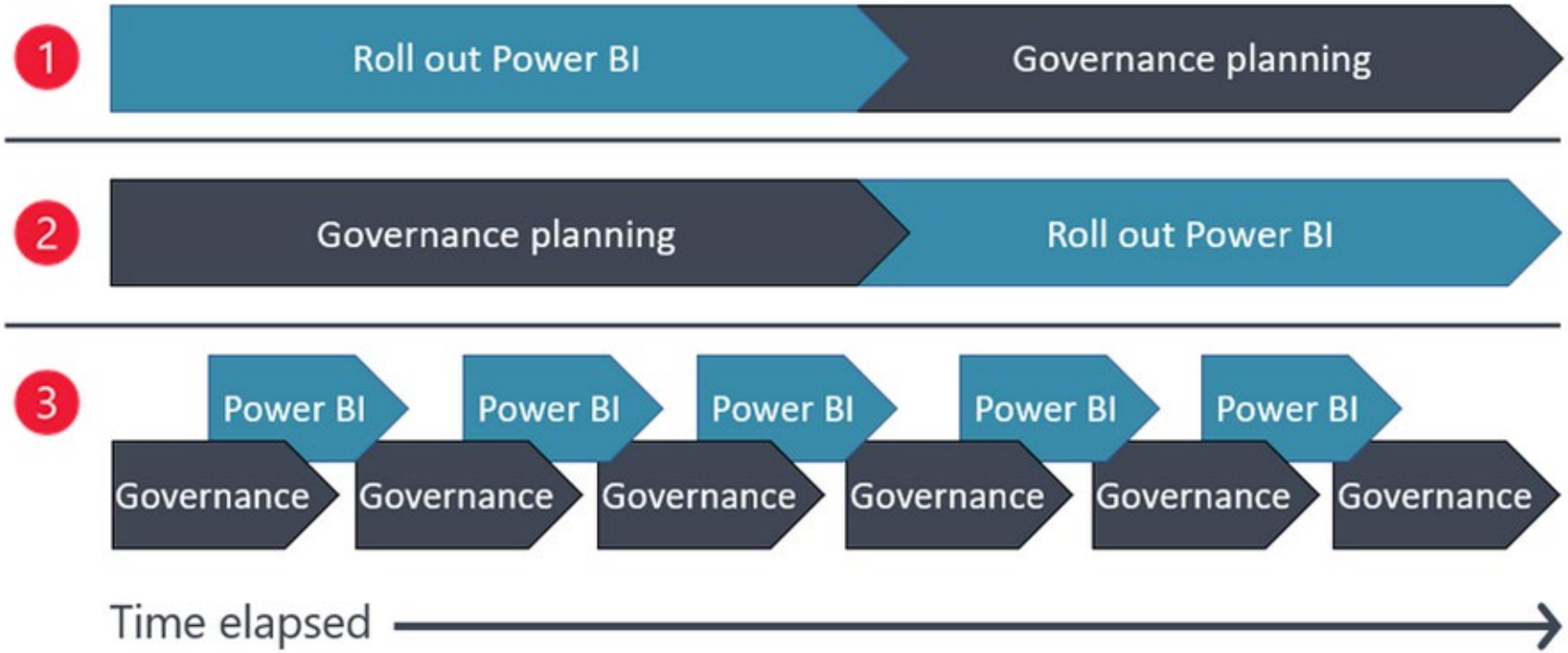
Visibility that data exists

5

Data literacy

Interpret & communicate

When Does Data Governance Come In?



Source: https://docs.microsoft.com/en-us/power-bi/guidance/powerbi-adoption-roadmap-governance

Two Paths

Building out the governance groundwork

Handling the most pressing analytical needs

Focus on continual, iterative, progress on both paths

Actions

Make sure you are *very* clear on what's most important → you can't do it all!

Prioritize action items + a backlog:

- Immediate
- Short-term
- Medium-term
- Longer-term

Track continual, incremental progress

Focusing on user empowerment

Why Do Users Care About Data Governance?

Is the data I want available?

Can I trust this data that I am using?

Who owns this data?

What is the system of record for this data?

Am I in compliance for what I want to do?

Main Goals for Governing Self-Service BI

1. **User Enablement**
   Empower the internal user community to be productive & efficient

2. **Internal Requirements**
   Adhere to internal requirements for the proper use of data

3. **Regulations**
   Comply with industry, governmental & contractual regulations

Defining Data Governance

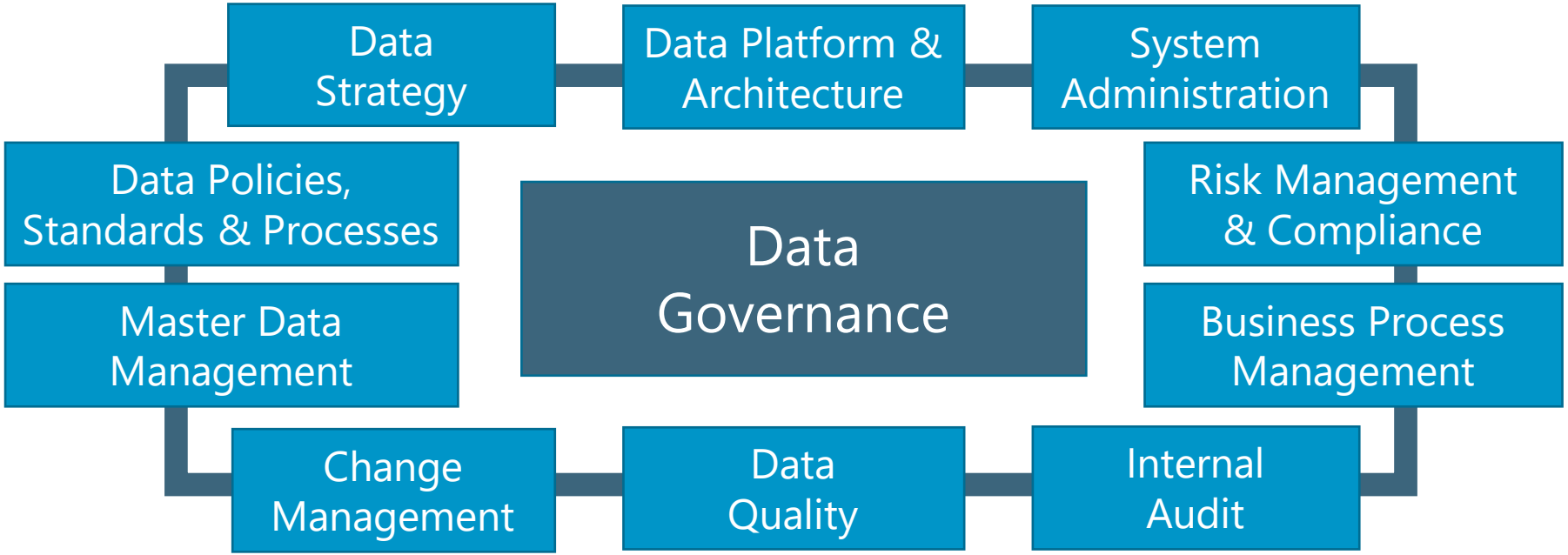
> A system of decision rights and accountabilities for information-related processes, executed according to agreed-upon models which describe who can take what actions with what information, and when, under what circumstances, using what methods.
>
> *Data Governance Institute*

Data Governance is a Misnomer

Primary focus:

- NOT the data itself
- What people DO with the data

Data Governance Can Mean Different Things



Databases | Data Integration | Business Intelligence | Data Lakes | Data Warehouse | Applications

Data Governance Can Mean Different Things

- Accountabilities or responsibilities
- A group of people in the organization
- Specific policies, standards, business rules
- Enforcement methods or auditing

Actions

Make sure you're clear on what governance means, and its goals.

Create and actively promote policies, processes, guidelines, that encourage the proper balance of:

- -User enablement
- -Internal requirements
- -Regulations

Data culture matters

“A data culture promotes and encourages data-driven decisions by more stakeholders in more parts of the organization”

Matthew Roche – Data Culture Series on SSBIPolar.com

Interrelated Aspects of a Data Culture

Data discovery

Find the data

Data literacy

Understand the data

Data democratization

Use the data

Promoting Use of the Data

Data discovery

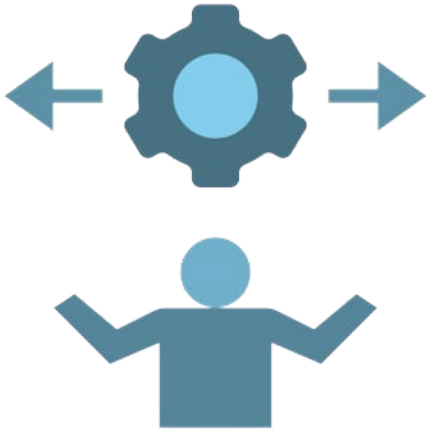
Data literacy

Data democratization

Promote usage of the data

The Constant Struggle

Protect the data



Promote usage of the data

Credit:
Laura Madsen | Disrupting Data Governance

Goals of a Data Culture

Increased:

1. Active and consistent reliance on data for informed decision-making
2. Effective use of data by more stakeholders
3. Use of methods & best practices endorsed by the Center of Excellence
4. Usage of trusted data
5. Willingness to continually adapt & learn

Goals of a Data Culture

Reduced:

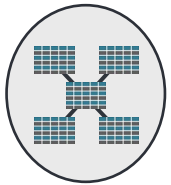
1. Reliance on undocumented (tribal) knowledge
2. Hunches, opinions & gut decisions
3. Hero mentalities
4. Use of rigid governance approaches that overemphasizes ‘command and control’ governance over data democratization

Actions

Make sure you know what's *really* going on in your data culture. Use it to make realistic decisions about what you can accomplish.

Factors for deciding the appropriate level of governance

4 Factors to Define the Level of Governance

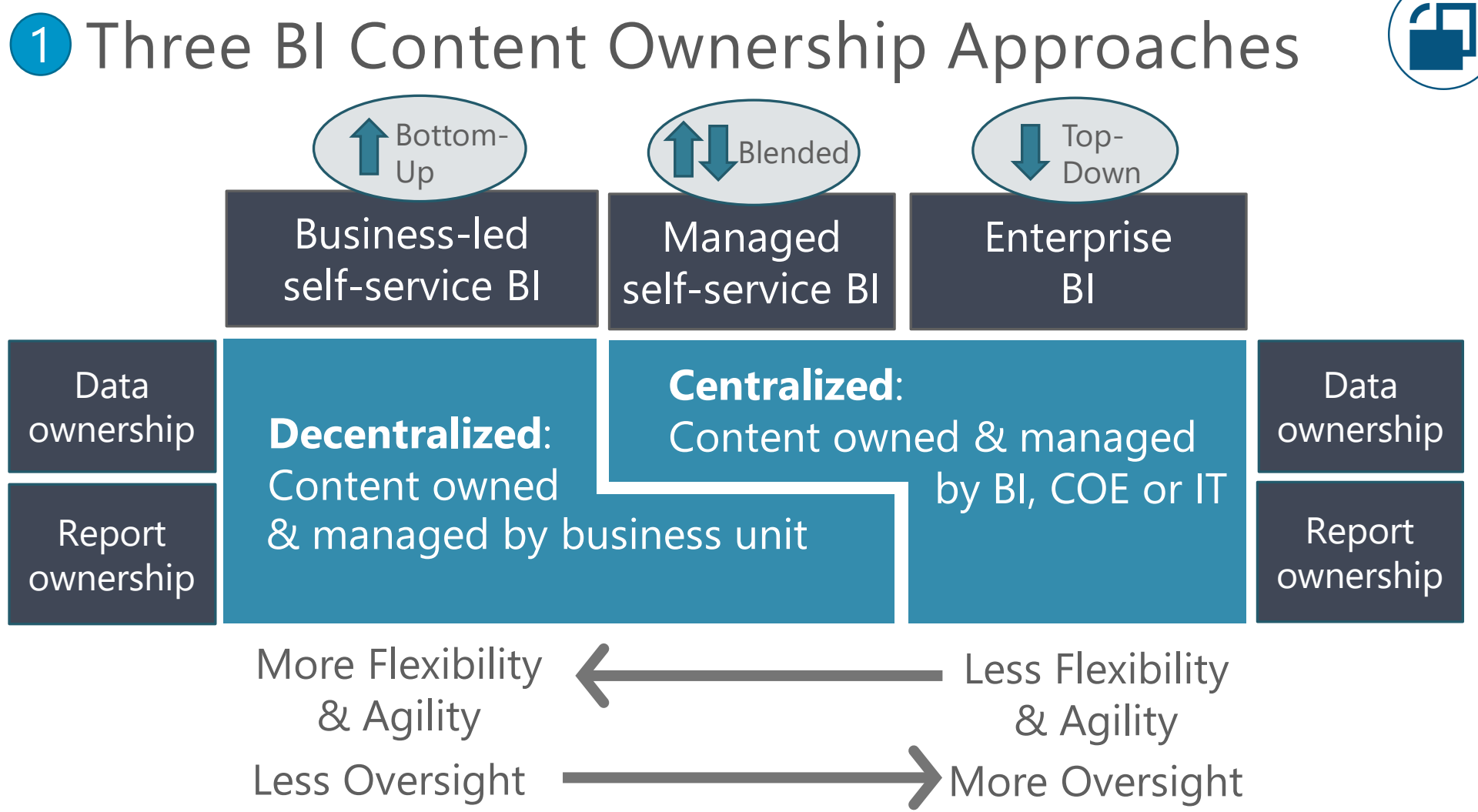


Data + **Reports** = **Governance**

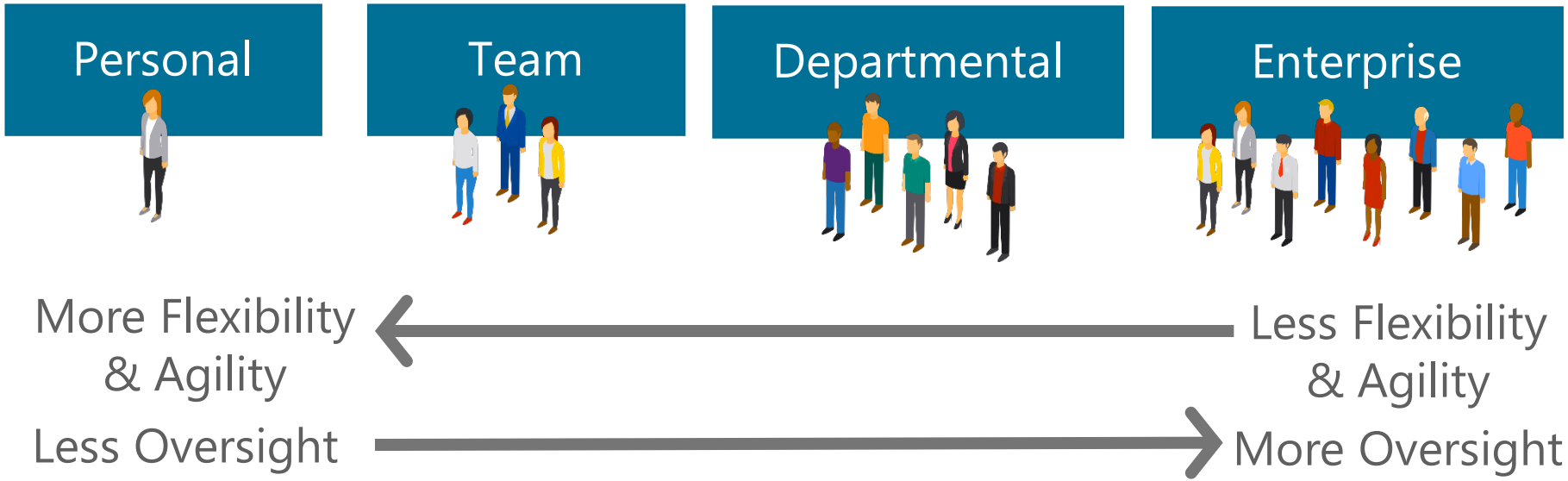
1. Who owns & manages the content
2. Scope of content delivery
3. Subject area
4. Importance / criticality level

Policies
Processes
Standards

1 Three BI Content Ownership Approaches



2 What is the Scope of Content Delivery?



2 Aligning Ownership & Content Delivery

Ownership & Management

Bottom-Up

Business-Led Self-Service BI (Decentralized)

Blended

Managed Self-Service BI

Top-Down

Enterprise BI (Centralized)

Scope of Content Delivery

Personal

Team

Departmental

Enterprise

3 What is the Subject Area of the Content?

Sensitive data (ex: financial data)

Data subject to regulations (ex: personal data)

Confidential data (ex: closely guarded internal info)

4 What is the Importance/Criticality Level?

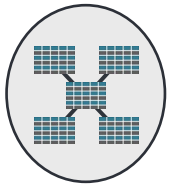
Critical for making timely & accurate decisions

Vital to business operations & org performance

Customer-facing data

Significant number of downstream dependencies

4 Factors to Define the Level of Governance



Data + **Reports** = **Governance**

1. Who owns & manages the content
2. Scope of content delivery
3. Subject area
4. Importance / criticality level

Policies
Processes
Standards

Actions

Determine what your specific criteria is for defining governance policies, such as:

1-Who owns & manages the content

2-Scope of content delivery

3-Subject area

4-Importance / criticality level

Actions

Determine which groups can (and should) manange their own content.

What exactly does that look like?

What changes when multiple teams are involved (ex: data vs. reports) or when there are co-ownership situations?

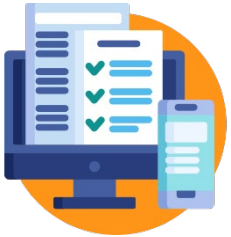
Supporting the internal community of users

Internal Power BI Community

One of the biggest success factors is nurturing the internal Power BI community with:

Support & Mentoring

Knowledge Sharing



Resources

Training

Documentation

Communication

One of the best ways to decrease risk is to increase knowledge

Actions

Determine if you need a Center of Excellence.

Who will **nurture** the internal Power BI community and advance the data culture on an ongoing basis?

Who will **mentor** & build your network of Power BI champions & experts?

Who will define & manage the **governance model**?

Who will have a **cross-departmental view** into what's happening across the organization?

Actions

Set up an internal Power BI “hub” for documentation, links, resources, training info & announcements.

Choose a convenient location where users frequently work.

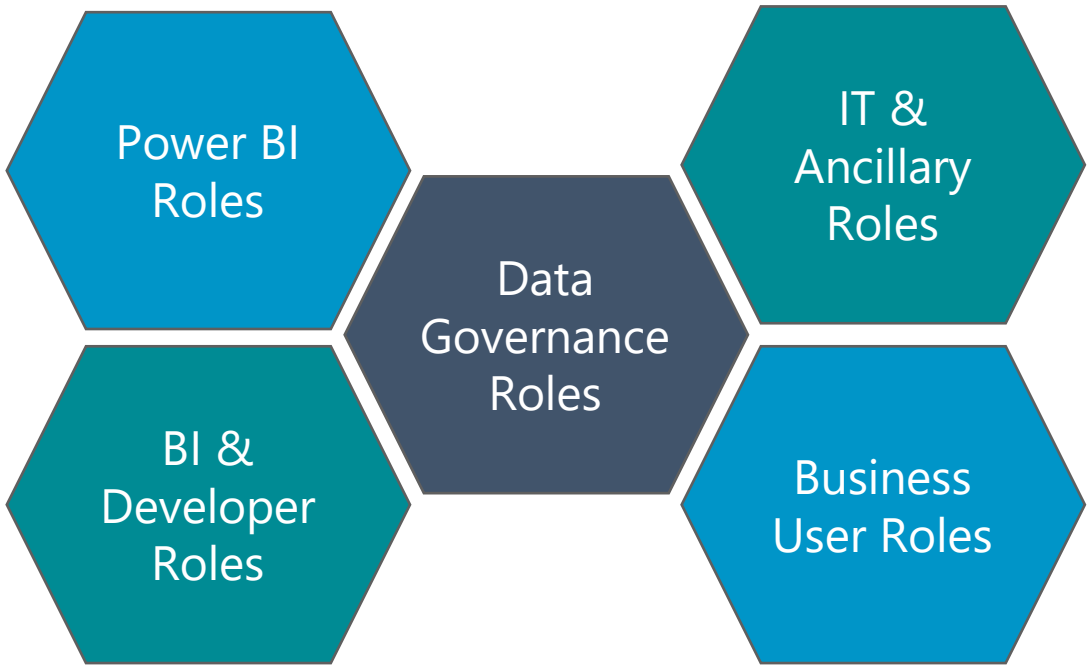
Actions

Make sure you have a strong user support model, including helping users with how they obtain training.

Consider offering office hours (which are usually VERY popular).

Roles & Responsibilities

Roles & Responsibilities



Does everyone understand:

- What are normal expectations?
- What is required?
- What is prohibited?
- Where is flexibility allowed?

Accountability Checks & Balances

Strategic: Executive level

Authority and empowerment across the organization

Tactical: Across Business Units

Operational: Business Unit-Specific

The foundation of a well-governed system

Content owners & subject matter experts in the business units form the foundation of a well-governed system

Actions

Get clarity on who your Power BI executive sponsor is.

How much authority does this person (or committee) have to help make decisions and implement consistent policies throughout the organization?

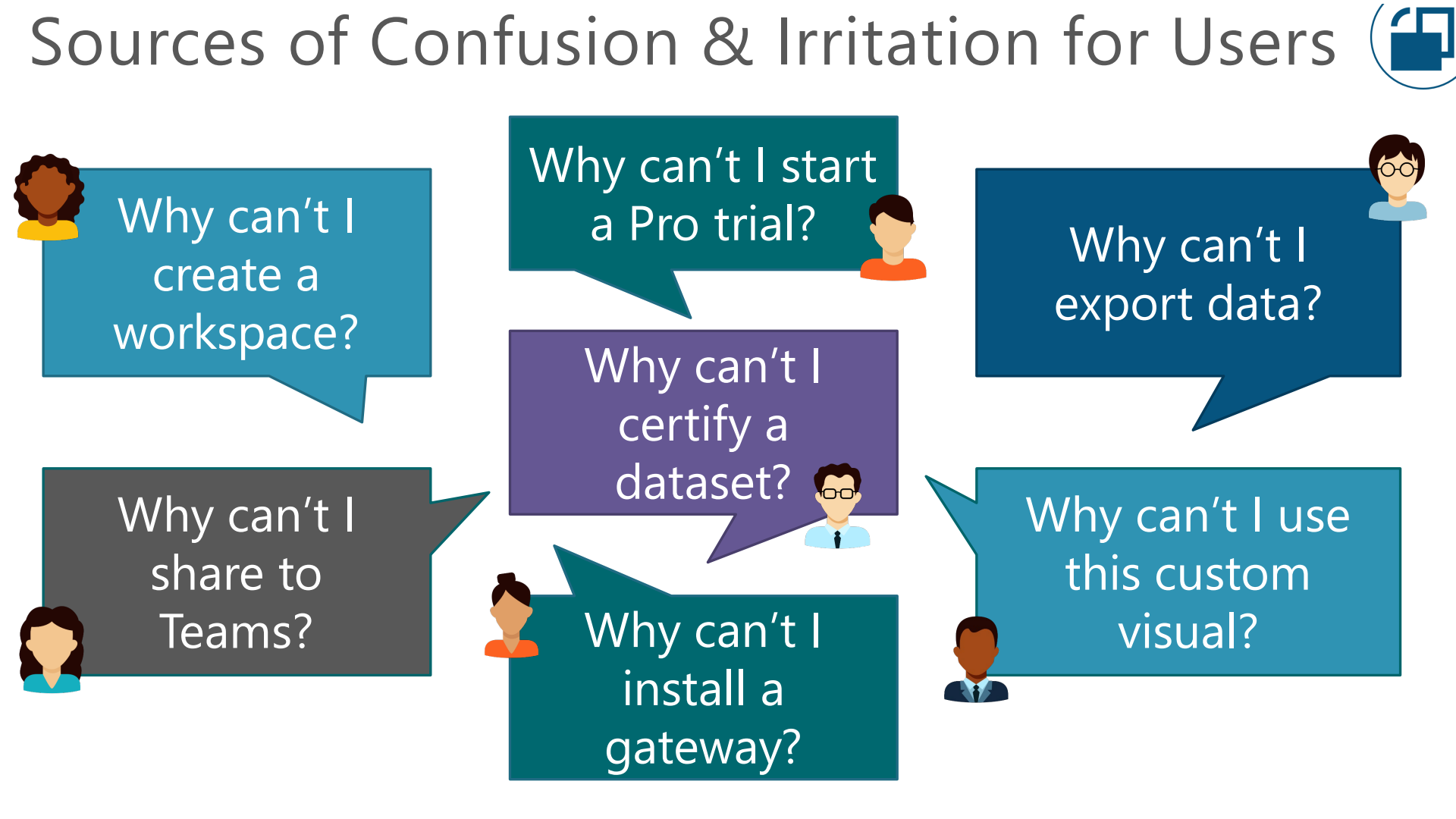
Actions

Define your relevant roles & responsibilities so people are clear on expectations.

Include them within formal HR job descriptions whenever practical (or necessary).

Transparency about system administration decisions

Sources of Confusion & Irritation for Users



What we want to avoid is a Power BI administrator deciding *solely on their own* what should & shouldn't be allowed

Actions

Review each tenant setting to ensure it is purposeful for:

- Behaviors you want to encourage
- What you need to deny
- Correct groups assigned

Re-review settings on a regular basis (ex: once a quarter).

Actions

Document settings for the broader internal Power BI community, including which group applies to each setting.

This documentation should be easily located in your internal Power BI community “hub.”

Actions

Review who is a Power BI administrator (or Power Platform administrator). Make sure this is a conscious decision since it's a high-privilege role.

Reduce the number of permanent administrators if you have more than a few.

Using data for adoption monitoring & auditing

Why Activity Analysis is Critical

Critical content

What content is most frequently used?
Is it adequately supported?

Change tracking

What changes occur, when, and by whom?

Internal and external auditing

Are you able to satisfy requests from auditors?

Why Activity Analysis is Critical

Monitoring adoption efforts

Can we analyze not only usage stats, but that the system is being used consistently and optimally/as it was intended?

Data trustworthiness levels

How many certified vs. non-certified datasets? How many datasets support > 1 report?

License usage

Who is (and is not) using Power BI, at what frequency?

Why Activity Analysis is Critical

Understanding usage patterns

How are users *really* using Power BI?

Finding training opportunities

Is training actively made available to new users, or to encourage specific behaviors?

Suspicious usage patterns

Are any concerning activities occurring?

Actions

Begin retrieving all of the raw data from the Power BI Activity Log if you haven't already. Store it even if you aren't using it yet.

Spend time learning from the Activity Log how Power BI is *really* being used by the user population -- and take action accordingly.

Actions

Slowly add in other data from the various Power BI APIs (ex: scanner APIs to get workspace inventory & roles at a point in time).

Wrap-Up,
Q&A,
Links to More Info

A Well-Governed Power BI Environment

1. Clarity on adoption & governance **current state** and **future state**
2. Actively **prioritizing & iterating** on what's most important
3. An **equal focus** on user empowerment and data protection
4. Clarity on **data culture** & implications on policies, guidelines, processes
5. Clear decision points on the **appropriate level of governance**
6. Support for the **internal community** of users is a priority
7. Defined **roles & responsibilities**
8. Transparency about **system administration decisions**
9. Usage of data for **adoption monitoring and auditing**

Q&A

More Information from Melissa Coates

Slides:
CoatesDS.com/Presentations

Diagrams:
CoatesDS.com/Diagrams

Power BI Governance Training:
CoatesDS.com/Training

Blog:
CoatesDS.com/Blog-Posts

YouTube:
YouTube.com/CoatesDataStrategies

Twitter:
@SQLChick | @CoatesDS

Additional Resources

Additional Resources

Governance and Adoption:

Power BI Adoption Roadmap
https://aka.ms/PowerBIAdoptionRoadmap

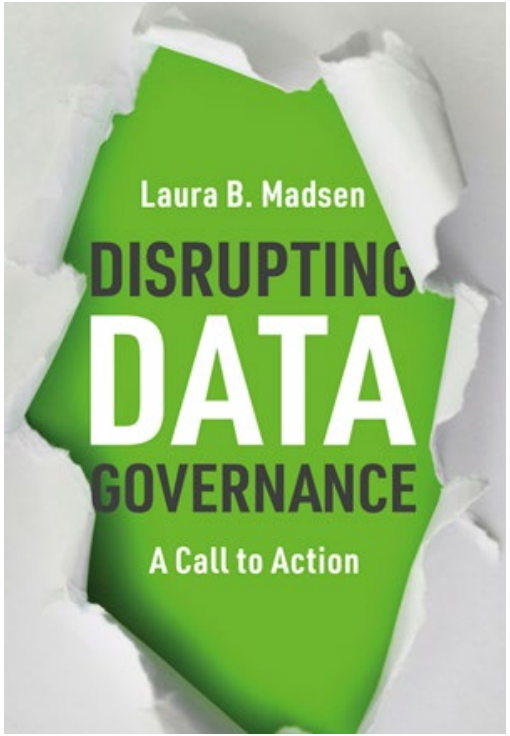
Power Platform adoption framework
https://github.com/PowerPlatformAF/PowerPlatformAF

Microsoft 365 Adoption Guide
https://365trainingportal.com/user-adoption/

Additional Resources

Data Governance:

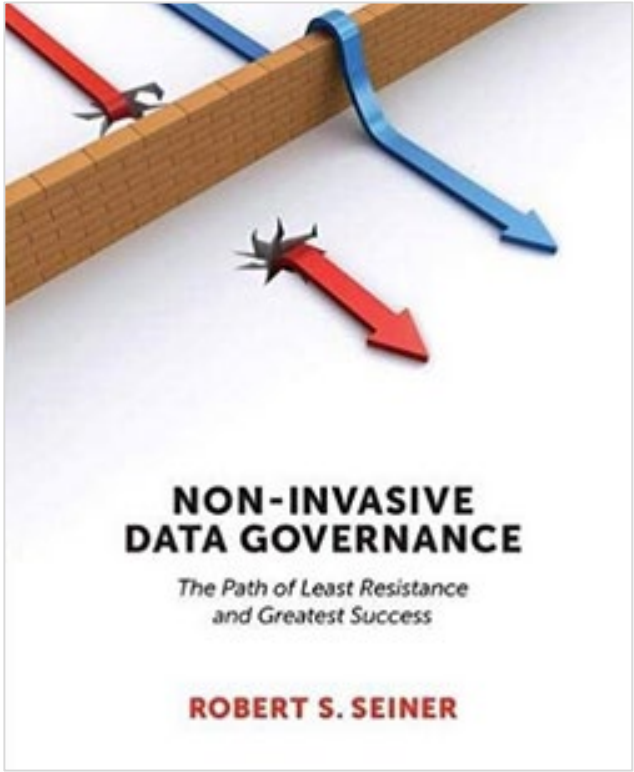
Book: Disrupting Data Governance
Author: Laura Madsen
https://www.amazon.com/Disrupting-Data-Governance-Call-Action-ebook/dp/B082FR154M



Additional Resources

Data Governance:

Book: Non-Invasive Data Governance
Author: Robert Seiner
https://www.amazon.com/Non-Invasive-Data-Governance-Robert-Seiner/dp/1935504851



Additional Resources

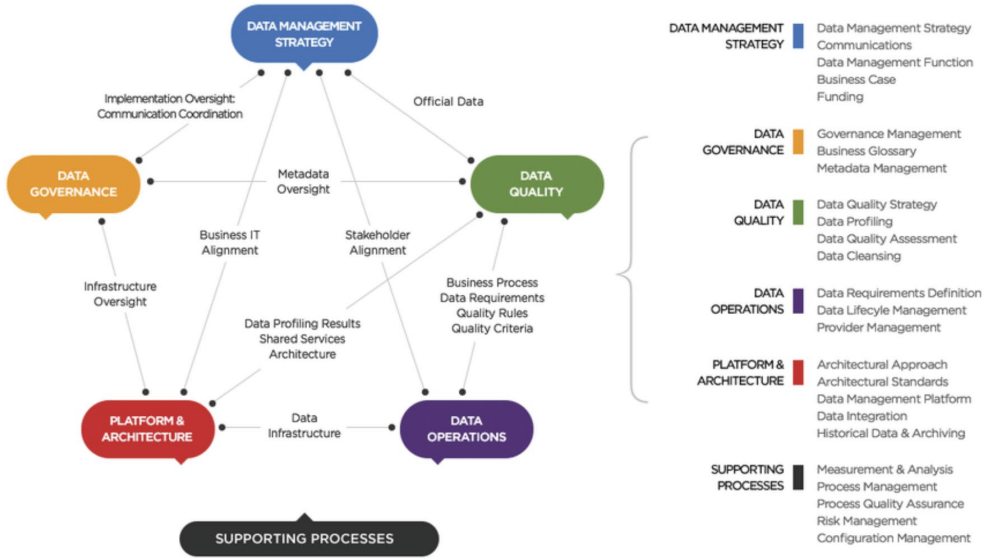
Data Management:

Data Management Maturity (DMM) Model

https://cmmiinstitute.com/data-management-maturity

Cost: $100

228 pages of checklist items



Additional Resources

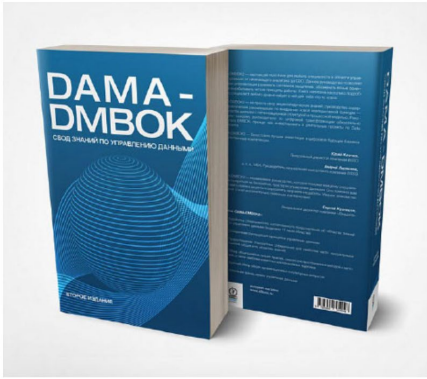
Data Management:

Data Management Book of Knowledge (DMBOK)

https://www.dama.org/cpages/body-of-knowledge

Cost for full guide: $60

Cost for executive overview: $25



DATA MANAGEMENT BODY OF KNOWLEDGE

DMBOK2

DMBOK2 has been in the making for nearly 30 years. The contributors are all experienced practitioners and many of whom you see as contributors have recognizable names. This is not a theoretical book, although it has authoritative theoretical substance. It is primarily a book of practice, experience, expression of what actually works by the very best practitioners in the industry today.

Additional Resources

Data Culture:

Matthew Roche's Data Culture Series

Blog series: https://ssbipolar.com/building-a-data-culture/

Video: https://www.youtube.com/watch?v=7e5bFxzq_Z8

Additional Resources

Center of Excellence:

Building a Center of Excellence
Author: Alex Garcia
Part 1: https://smartpowerbi.co.uk/2020/10/10/power-bi-centre-of-excellence-what-and-why-part-1-of-pbi-coe-series/

Part 2: https://smartpowerbi.co.uk/2020/10/10/building-the-business-case-for-a-power-bi-centre-of-excellence/

Part 3: https://smartpowerbi.co.uk/2020/10/22/scoping-a-power-bi-centre-of-excellence-part-3-of-pbi-coe-series/

Additional Resources

Center of Excellence:

Building a Center of Excellence
Interview by Kasper de Jonge with Alex Garcia
https://www.kasperonbi.com/building-a-power-bi-center-of-excellence-with-alex-garcia/

Building a World-Class Center of Excellence
From Chris Wagner
https://www.youtube.com/watch?v=WlC_TQIrUUc

https://www.youtube.com/watch?v=Qm73y1ce7tc