



Learnings from Governance Projects

Budapest BI Forum 2022

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Introduction



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Group Manager

Delivery Lead and Trainer

Avanade

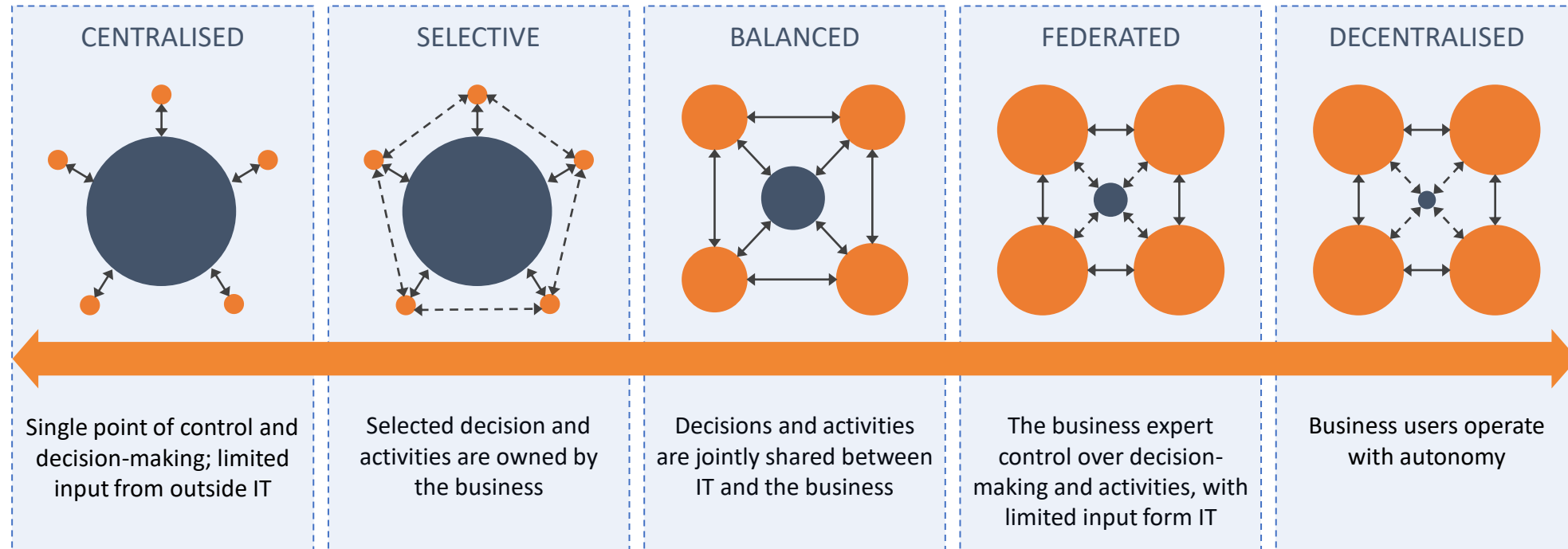
- ✓ 6+ Years of Power BI Experience
- ✓ 5+ Year of Training Experience
- ✓ Microsoft Certified Solution Expert – Data Management and Analytics
- ✓ Microsoft Certified Trainer
- ✓ Azure Enterprise Data Analyst
- ✓ Fasttrack Recognized Solution Architect

! First conference speech



Before your embark on a governance project

- Need to understand the organizations current operating model and culture
 - Current setup
 - Important stakeholders
 - Historic reasons about the current operation model and culture
 - What are the biggest pain points
- Governance recommendations should take into account the current operation model



Client Examples

Multinational Service Provider



- Management led initiative
- Centralized BI solutions
- Self-Service is limited
- 2.000 active users
- Handful of BI analysts
- Using Power BI for 2,5 years

UK Retail Giant



- Business led initiative
- Departmental BI
- Unlimited self-service
- 4.000 active users
- Hundreds of creators
- Using Power BI for 1,5 years

Problems they faced

Multinational Service Provider



- Central team reporting throughput was limited
- Business initiatives\changes took too long
- “Shadow BI” reappeared by exporting data out of Power BI or directly from source
- **Trust in data decreased**
- **Business Users satisfaction decreased**

UK Retail giant



- Vast amounts of reports was created
- Often duplications, different definitions for same metrics
- Support was limited from a Central team
- Resource management and Performance issues
- **Trust in data decreased**
- **Business Users satisfaction decreased**

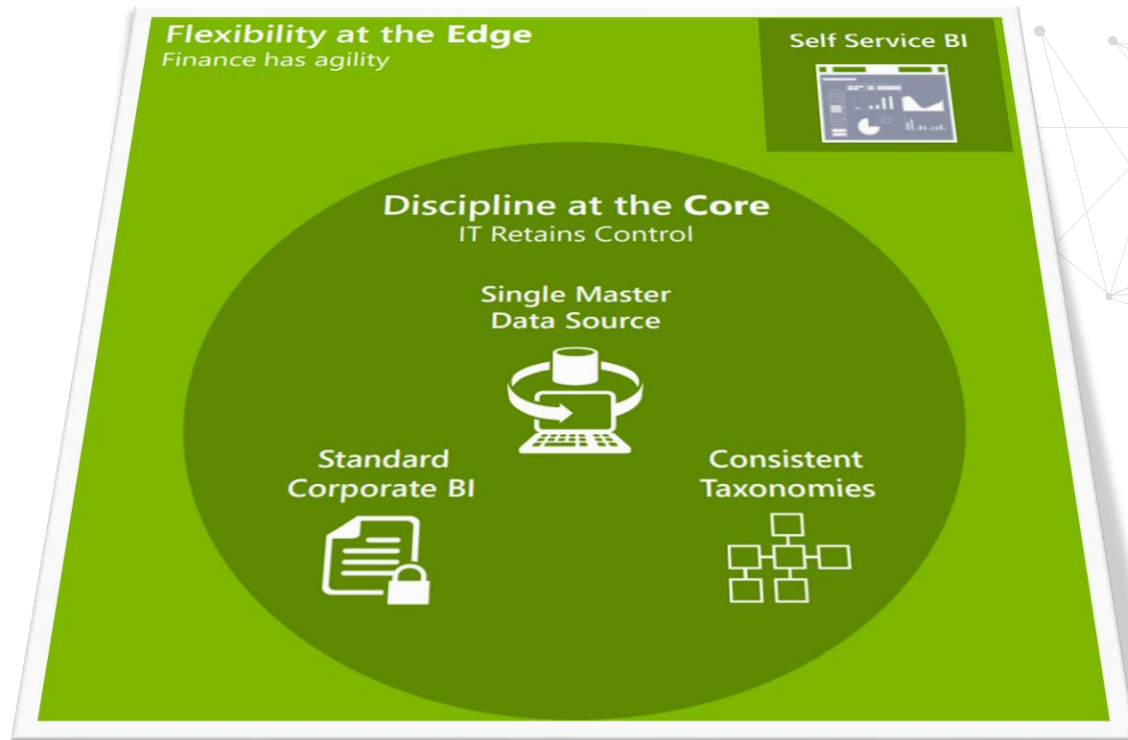
Root cause analysis

- After understanding the current state, we need to understand the **why**.
- Both cases the issue was the **limited resources of the central teams** to create and support analytics.
- Needed to find a way to **cooperate** more effectively **with business** so it can **maximize its efficiency**.



Designed by Freepik

Future Business Intelligence Platform according to Microsoft



“Discipline at the core, flexibility at the edge”

Microsoft's BI Transformation

Why?

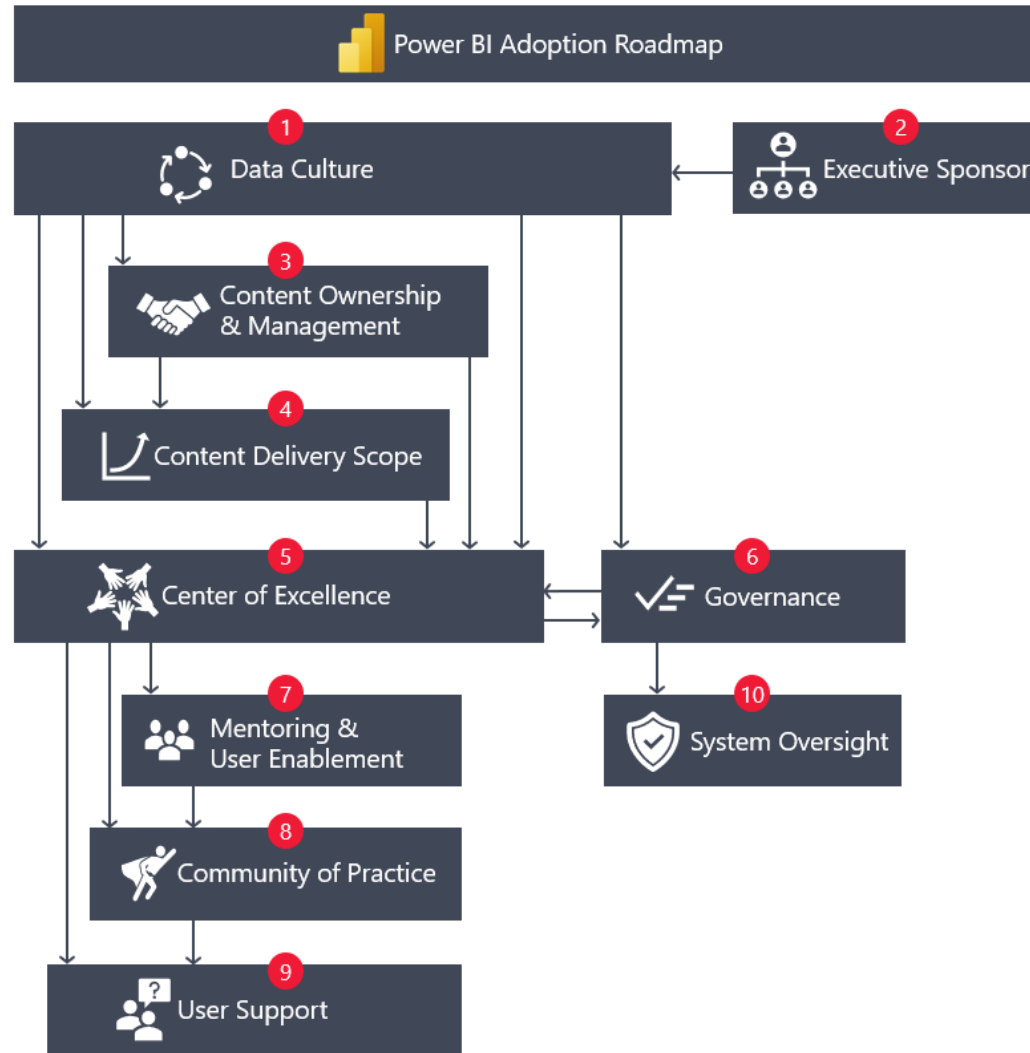
- Inconsistent data definitions, hierarchies, metrics, and Key Performance Indicators (KPIs). For example, each country had their own way of reporting on new revenue. There was no consistency, yet much confusion.
- Analysts spending 75% of time collecting and compiling data.
- 78% of reports being created in "offline environment".
- Over 350 centralized finance tools and systems.
- Approximately \$30 million annual spend on "shadow applications".

Governed Self-Service BI

- Create an effective framework to maximize value from data
 - Define roles and responsibilities – not to limit, but for improved efficiency
 - Support adoption – to increase impact
 - Create guardrails to make it clear how to use the data as intended
 - Increase trust in data and insights
 - Empower users at each level of self service.

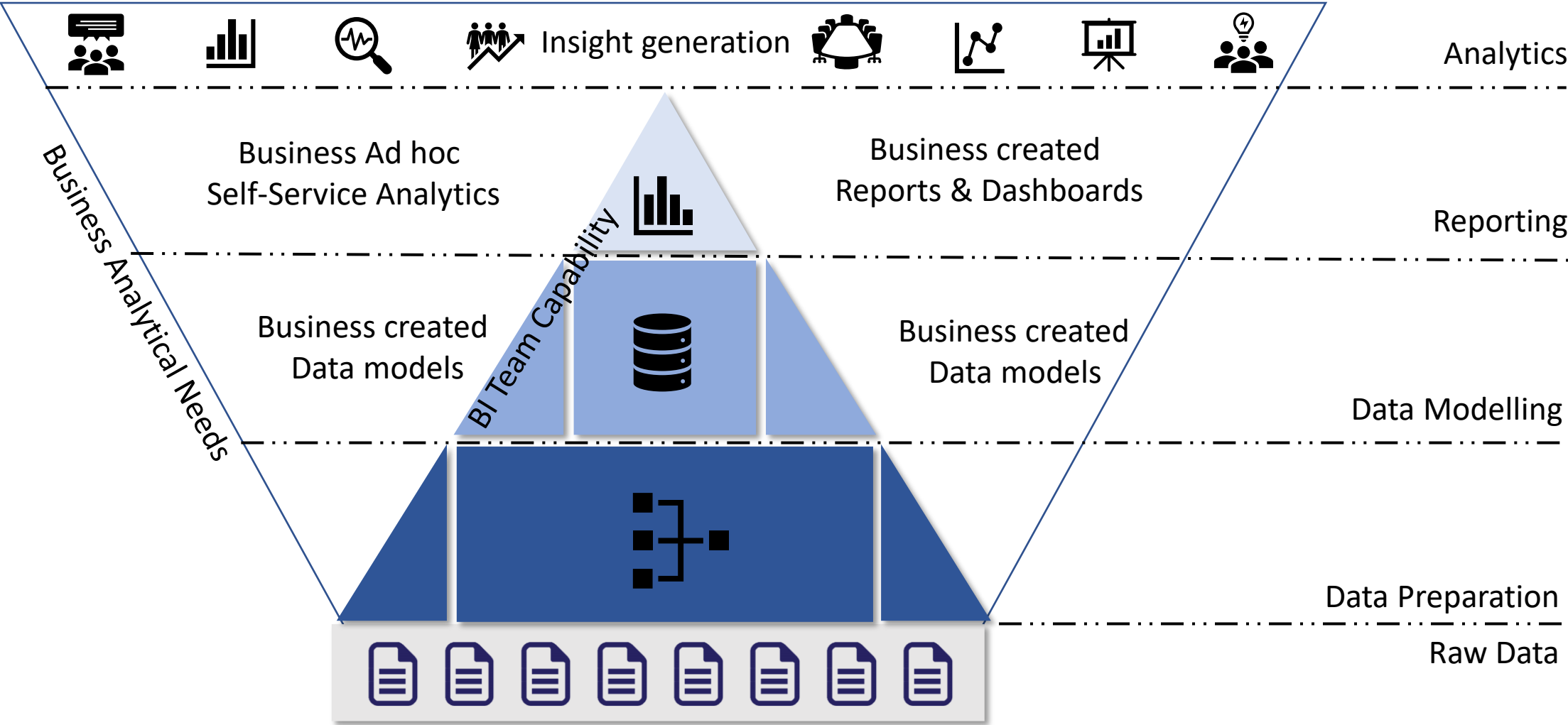


Microsoft Power BI Adoption Roadmap

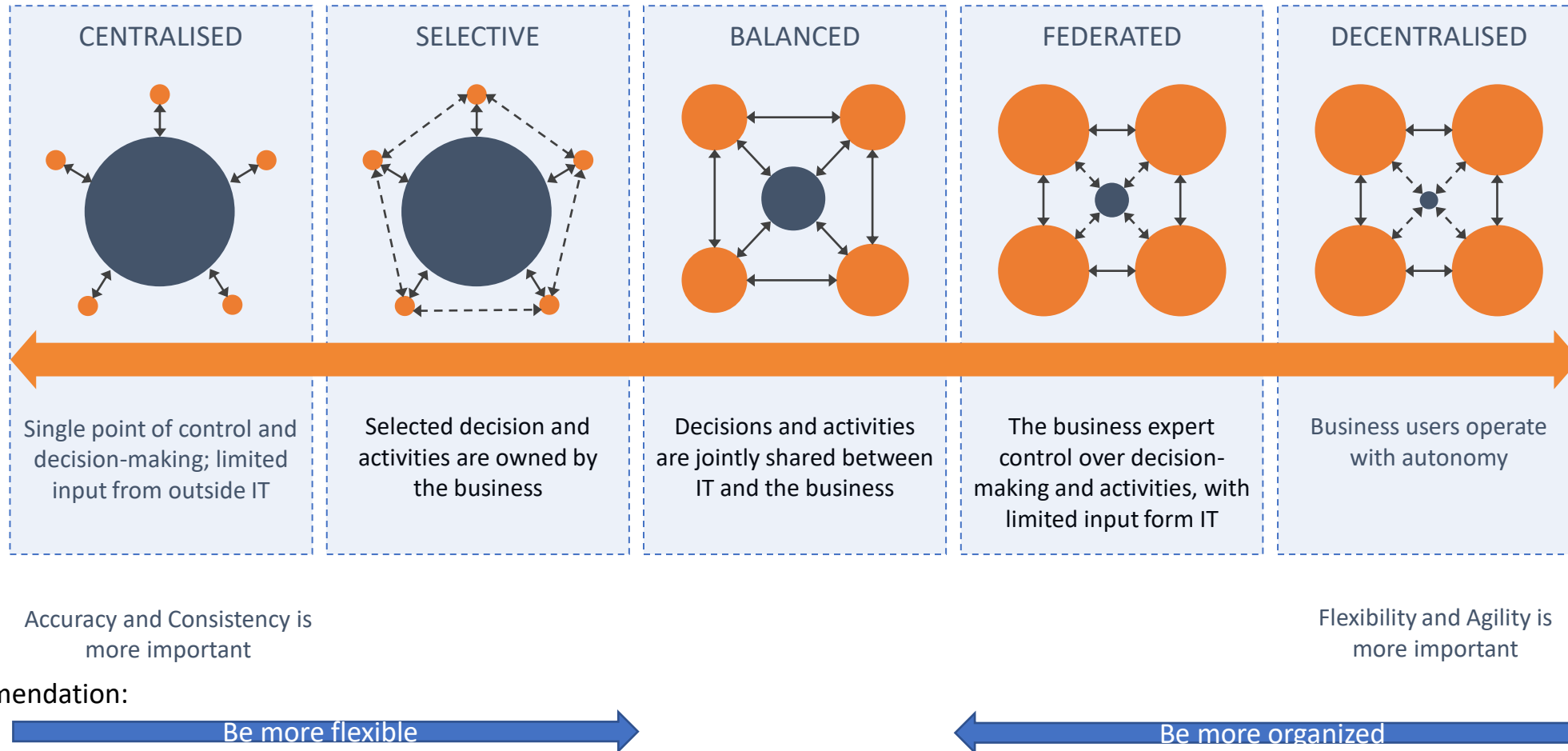


<https://learn.microsoft.com/en-us/power-bi/guidance/powerbi-adoption-roadmap-overview>

Different levels of Self-Service



Organizational Operating Model & Culture



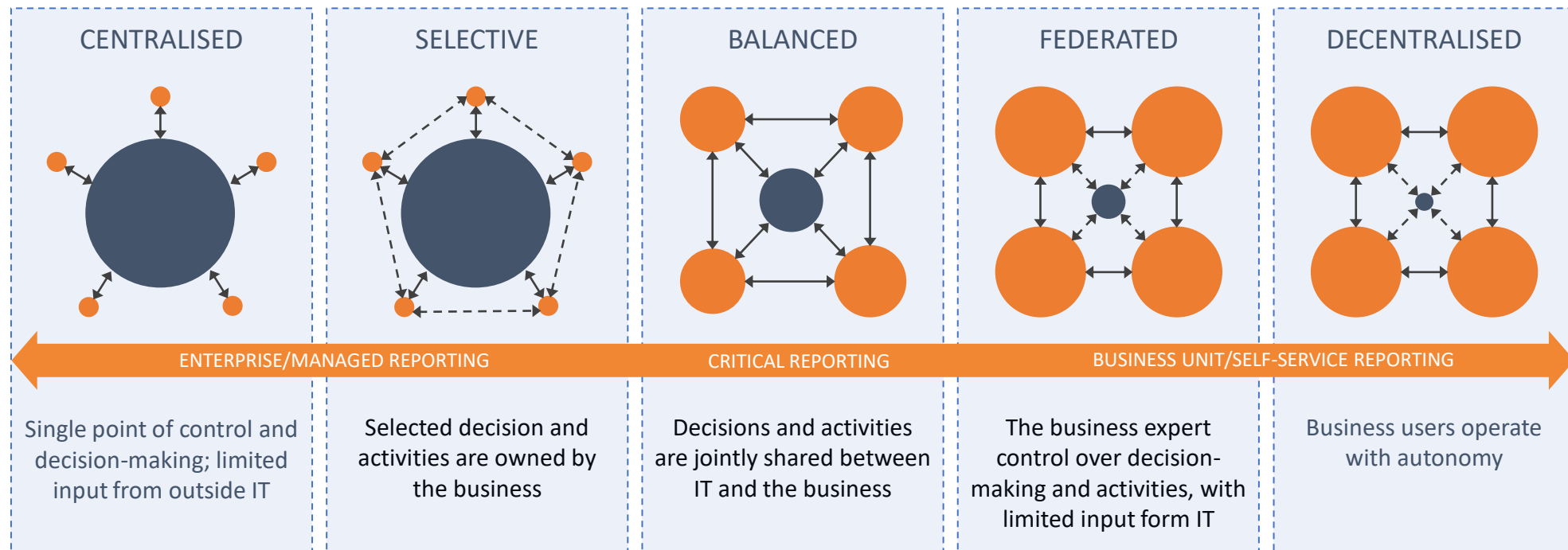
Our recommendation:

Things to consider:

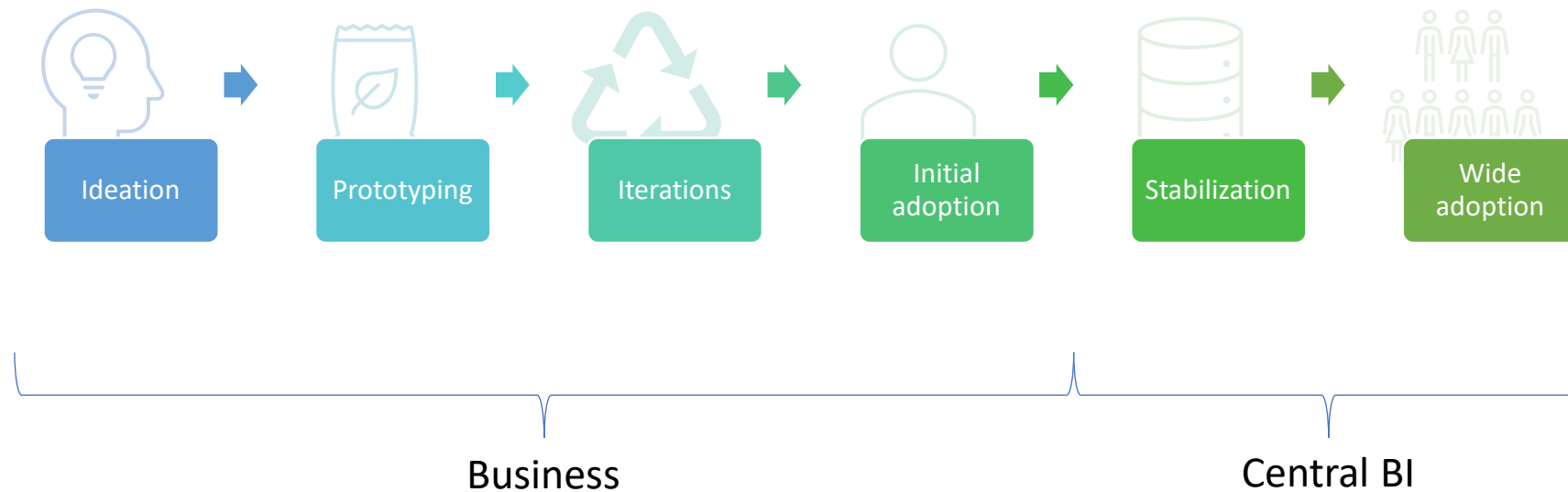
- Reporting operating models essentially differ in how much centralised responsibility is assumed, versus local business unit autonomy
- Change management is a challenge in an operating model change, big risk of organizational resistance.
- Change have to be gradual.

Varying operating models for different type of reporting

- The balance between central and local responsibility can vary across the types of Reporting:
 - Enterprise Reporting should be owned by a central function, also same rule are applied to those reports where the business want to transition the ownership to the central team
 - Business owned Critical Reporting needs tighter governance and additional support from the central teams
 - No critical team and Self-serve reporting can be fully decentralised, central function just provides guidance and basic support when needed



Recommendation 1 - Increase throughput by sharing tasks between IT and Business



Recommendation 2 – Understand and Train the Business

User Segmentation for Business Analysts Community



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Define Roles & Responsibilities



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Training Structure for Business Analysts Community

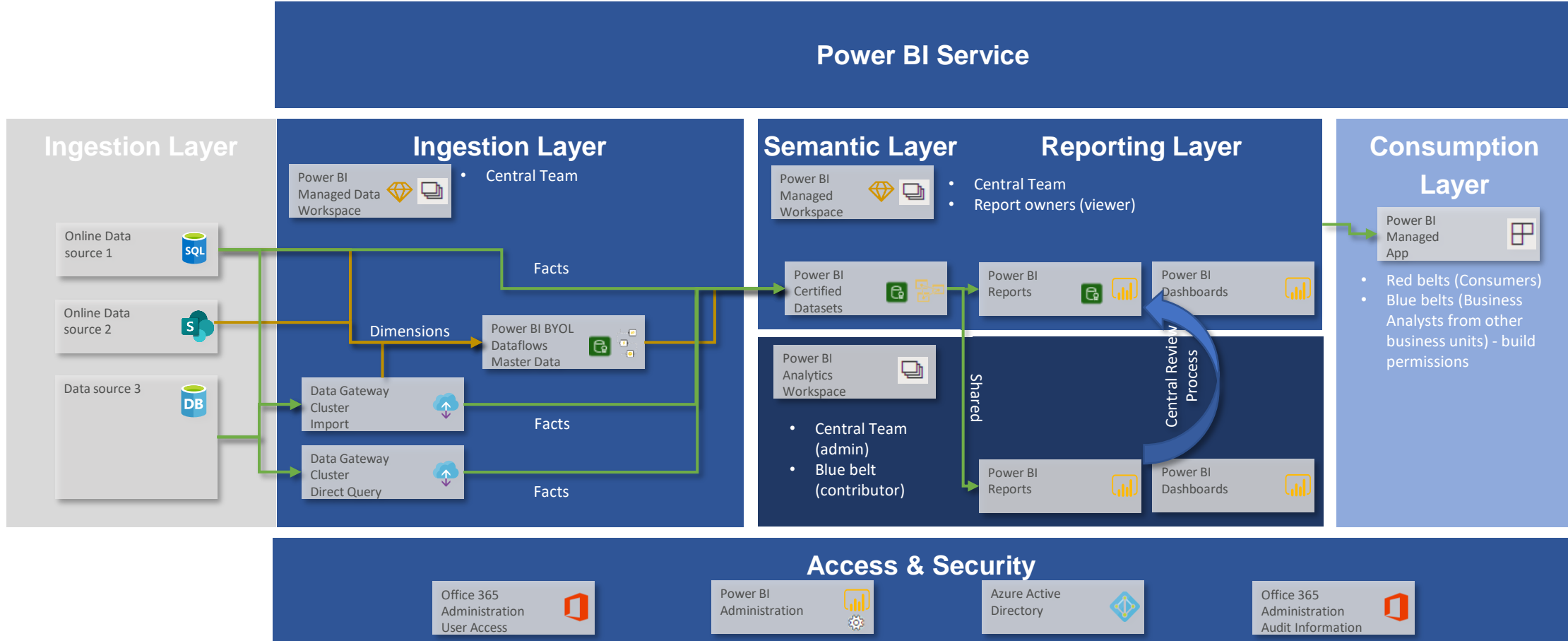


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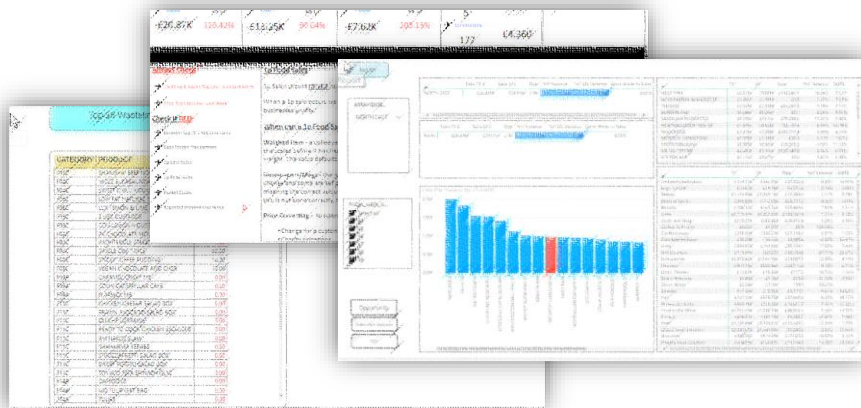
Recommendation 3 – Setup proper access management policies



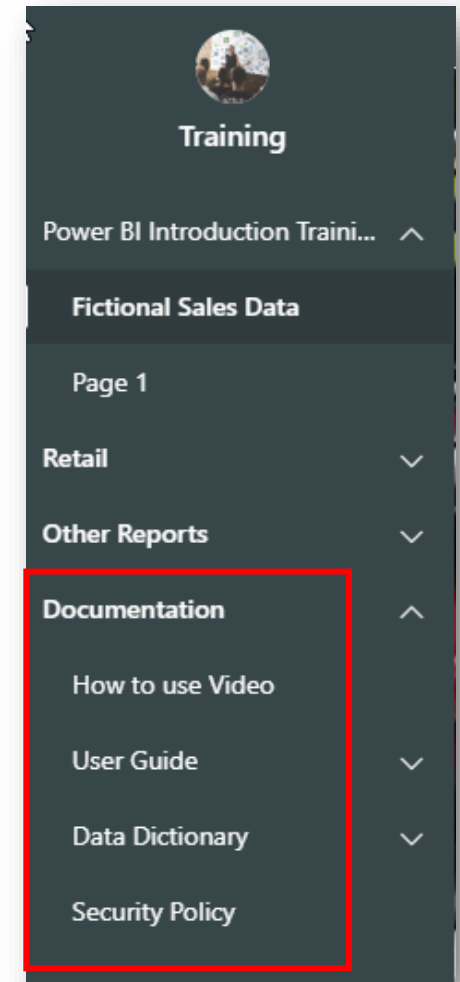
- Blue belts will be given built permissions on the datasets they need to be able to use
- Wider distribution of reports is only allowed from the managed workspaces and after the Central Team review process has been passed.

Recommendation 4 – Unified Experience for Consumers

- Published Report Packages (Apps) provides all the necessary information to the consumers that they can extract all the value
- Common design approach to lessen the learning curve for consumers
- Common design resources (images, backgrounds, color schemes)



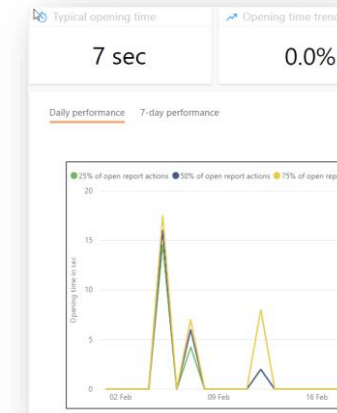
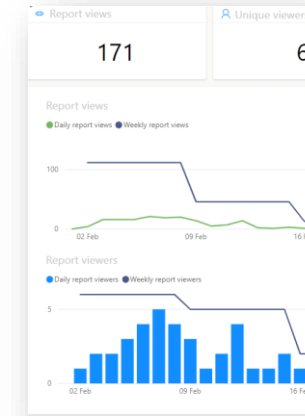
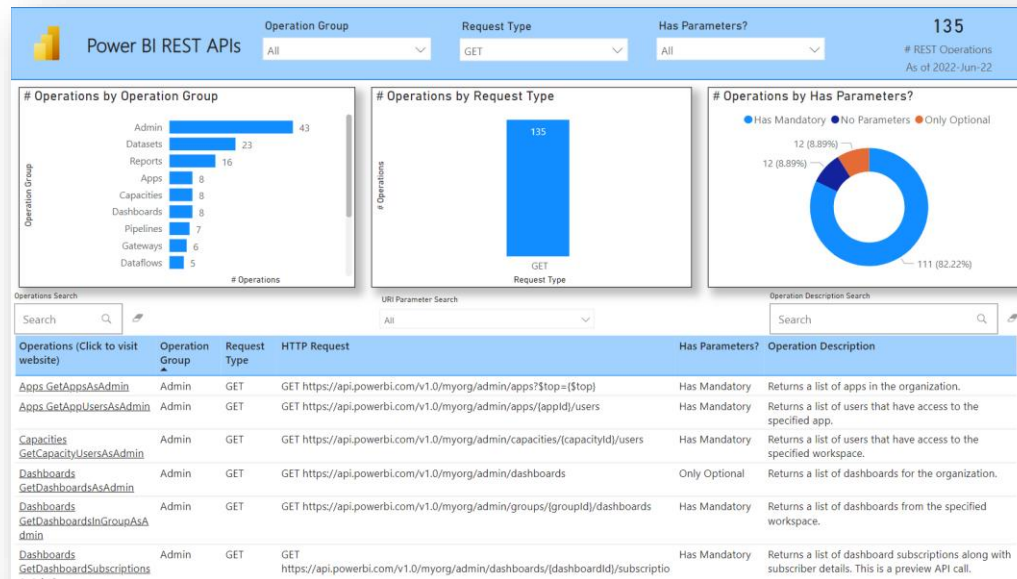
Different report designs create confusion and disengagement



Proper documentation
improve adoption

Recommendation 5 – Collecting audit and activity information

- All available audit and activity information are continuously collected and analysed
- Make information available to all the stakeholders to enable self-governance

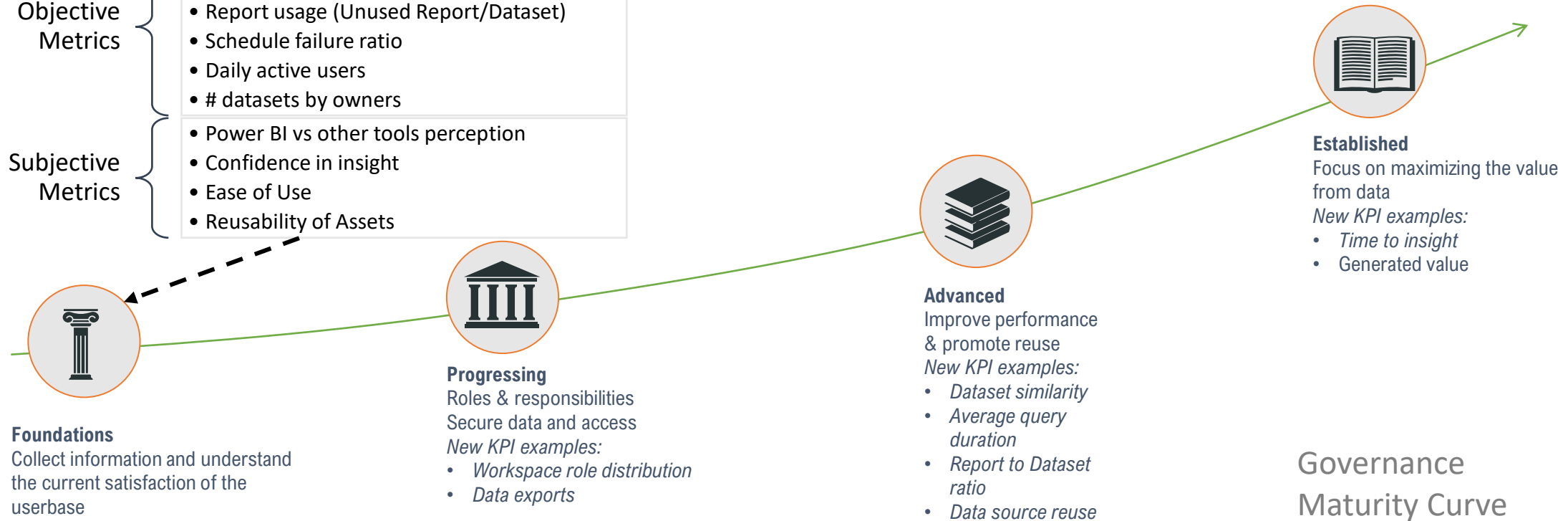
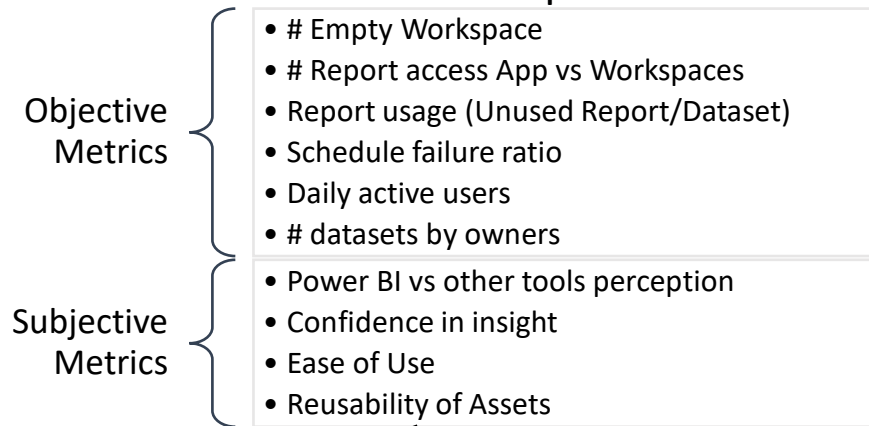


<https://selfservicebi.co.uk/power-bi-features/>

Governance implementation is a gradual process

- Continuous measurement of progress is necessary
- Clear KPIs are a key to ensure that we are heading in the right direction.
- The KPIs will change as the organization matures

Recommended initial KPI examples:





Thank you for your participation!