COBIT SOLUTIONS

CHECKLIST -
25 DOs AND DON'Ts
OF SUCCESSFUL BI PROJECT IMPLEMENTATION

Before you will start the Power BI project implementation here are the main preparatory items guidelines for the process.
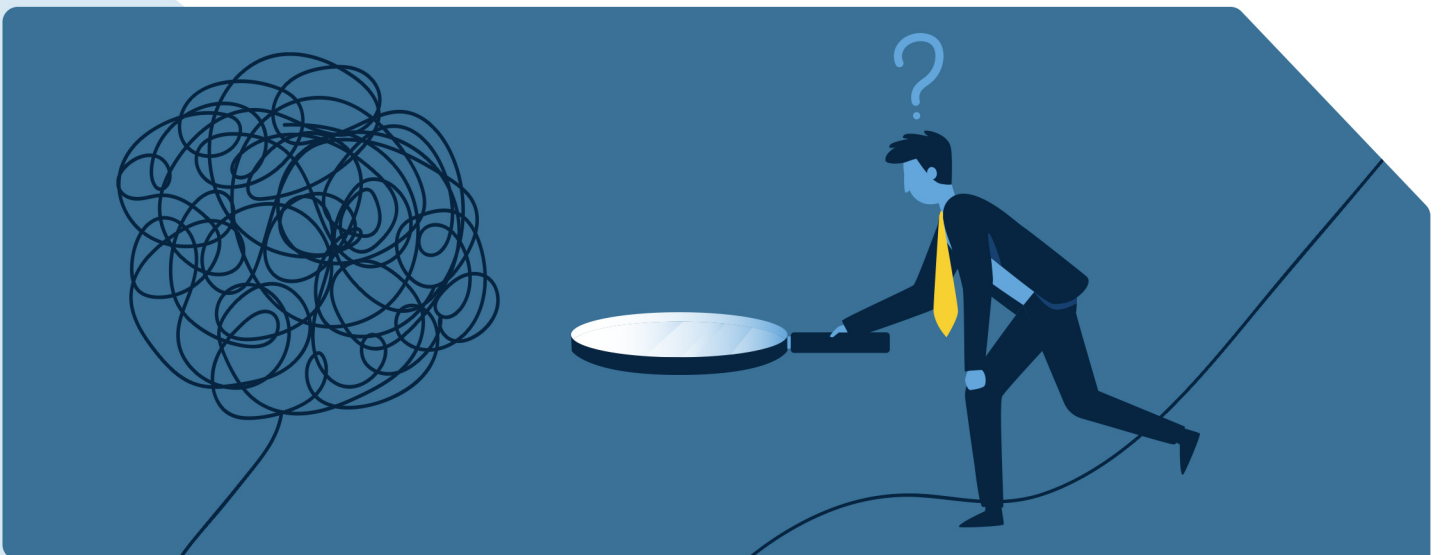
Based on 150+ of BI projects our company has delivered we recommend you use this list for a safe and effective implementation.

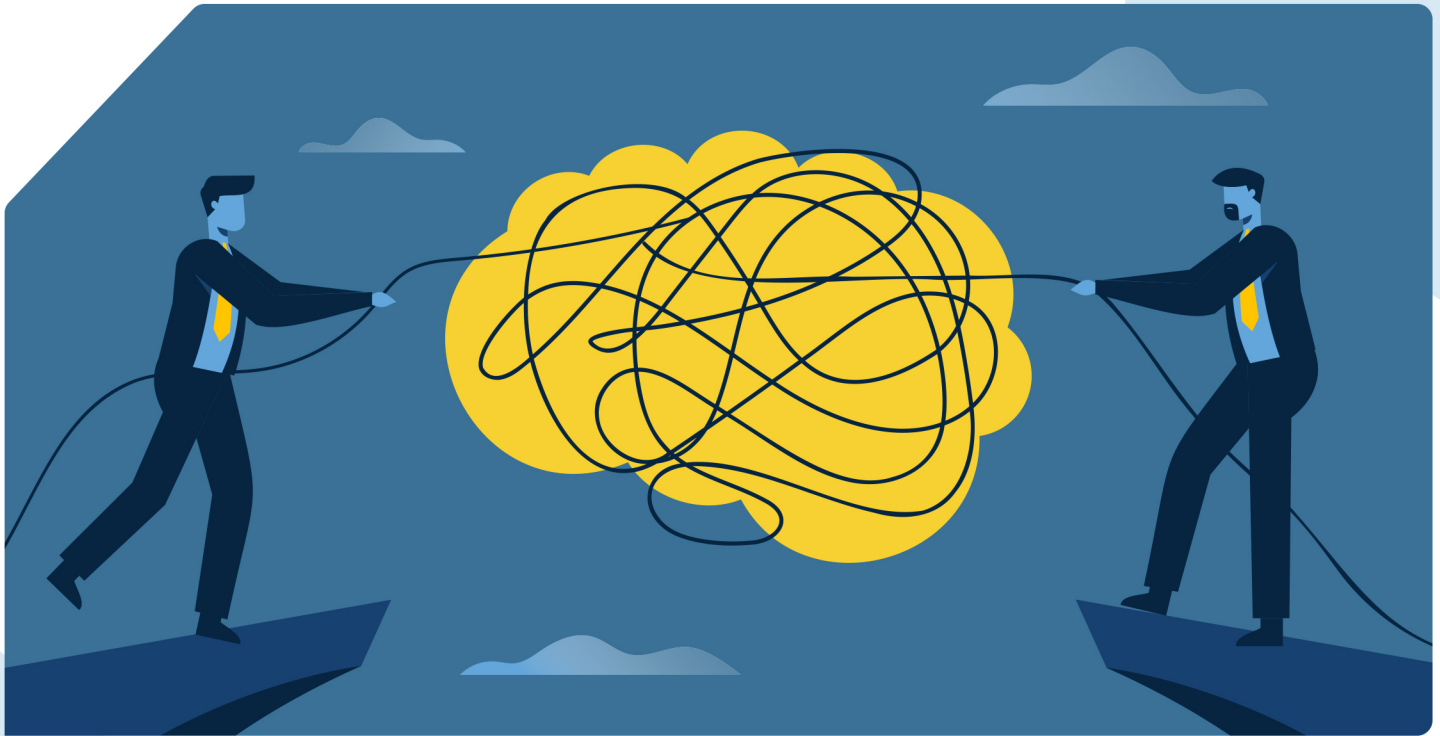# WHAT DO YOU NEED FROM TECHNICAL SIDE FOR POWER BI PROJECT IMPLEMENTATION:

01 Data - prepared and structured in any system ex, ERP, CRM, etc.

02 PC with Windows for the Power BI Desktop editor to work.

03 Access to data with read-only rights.

04 Server for Power BI Gateway - 8 GB RAM, 100 GB HDD, 2 vCPU.

05 Licenses Power BI Pro / Power BI Premium per User as part of Office365.

WHAT IS DESIRABLE TO HAVE FOR POWER BI PROJECT IMPLEMENTATION:

06 2 factor authentication to save your data - do not save on license.

07 Separate accesses to the data sources for analysts and service update

08 Make separate licenses Power BI for administrator, developer, financial analyst, and user (do normal access separation)

09 Synchronization of Active Directory and Azure AD

WHAT YOU DON'T NEED TO DO IN MOST CASES:

10 Until you are not a huge company (when you need an architecture of project) you don't need to build a Data Warehouse (DWH).

11 Load data copy into a separate base/server. Just work with a production database.

12 Do not immediately integrate into the project all and everything you have (all the Excels and all other sources).

13 Don't try to implement the global analytical system of a company from the first jump. Instead do it step by step and gradually with agile approach. Move from the functional dashboards to CEO dashboards. The plans can even change on the way.

14 Don't give the ERP programmers to do Power BI. ERP doesn't give reporting, visualization and graphs, so most developers simply don't know BI functionality.

15 Dashboards from the bunch of editable Excels and GoogleSheets are not livable and updated. They will not function properly and will be lagging when new columns are added.

TYPICAL OBJECTIONS - TO START BI PROJECT WE NEED TO:

16 Implement CRM/ERP, finish, migrate ... (don't wait for the ERP). It doesn't change the reporting for the processes plus there are the ways to implement and use BI while changes.

17 Determine the metrics - it is important but mostly is not done until you start the process of Power BI developing.

18 Approve great BI project with the owner, board, shareholders. Surely BI development demands the time and cost for realization but you can start with minimal spendings to show the results later to owners and others.

TYPICAL OBJECTIONS - "FIRSTLY BEFORE STARTING BI PROJECT WE NEED TO ..." :

19 Consolidate everything in one system - it doesn't work because of "What is all? How to consolidate?" However Power BI does consolidation directly from different source systems.

20 Structure the data, clean the data, make the order - it is the case with the messy garage which you can clean by help of Power BI.

21 Write the technical task - don't write it because it is difficult for you and for the dashboards you need the metrics, logic and do the drafts of dashboards.

GO THROUGH THE STAGES OF BI PROJECT IMPLEMENTATION:

22 Sign a contract with an experienced company. Cobit Solutions has successfully delivered projects within 22 industries.

23 Development of Power BI architecture. Make the drafts of dashboards how you see them to facilitate the process.

24 Import of data into Power BI - here you need to check how many Excels work, how do they look plus the CRM, ERP, SQL, API and others. On this stage data reconciliation is made and reconciliation dashboards are used.

25 Dashboards & calculation logic development. Here you decorate dashboards and find additional options you want/need. Thus the process can be longer because of the adding and redoing options, metrics, logic up to clients wishes.