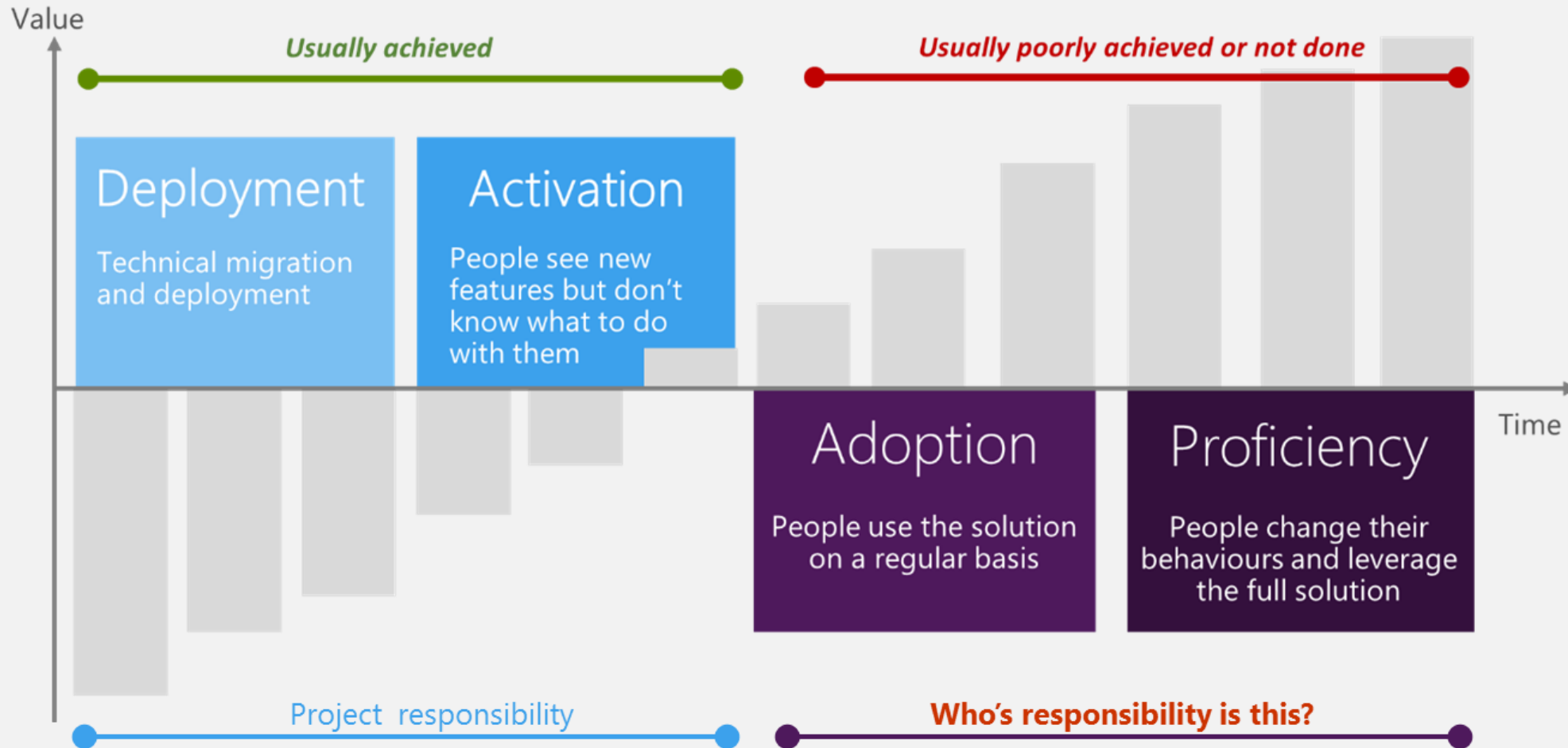


**BI**

# Adoption RoadMap

Empower every decision maker

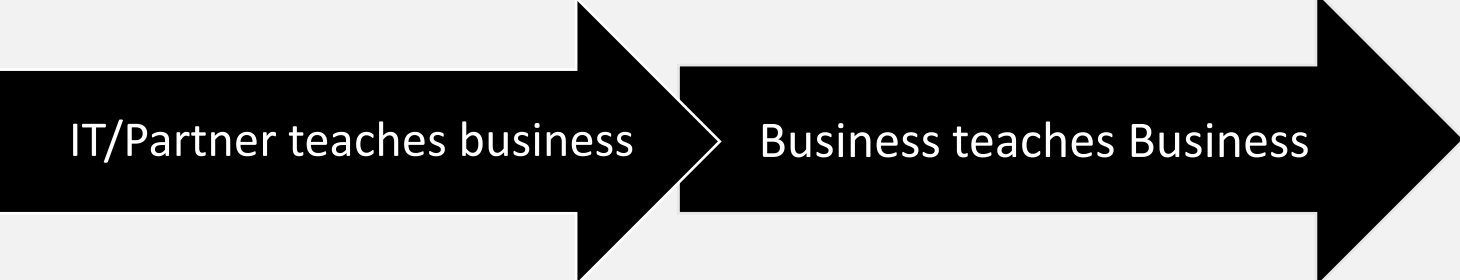
# IT transformation is dependent on behaviour change...



...but behavior change is **DISCRETIONARY**

# Engagement Model

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50%  
Business

50%  
IT/Partner

Enablement

75%  
Business

25%  
IT/Partner

Support

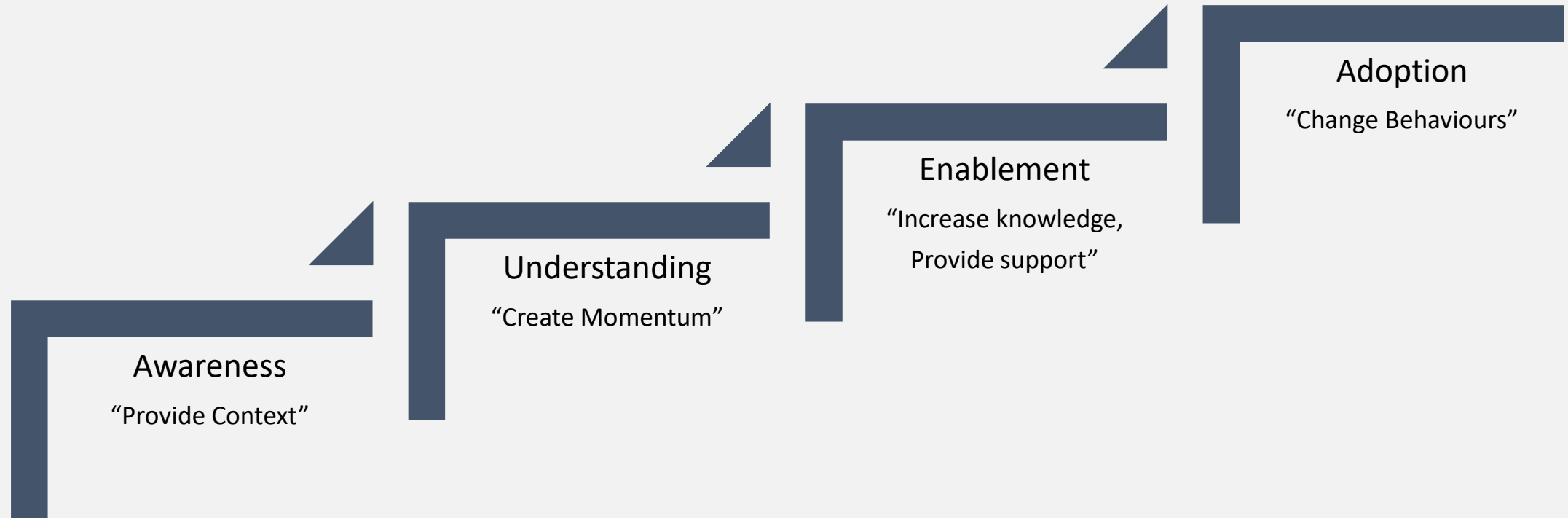
90%  
Business

10%  
IT/Partner

Guidance

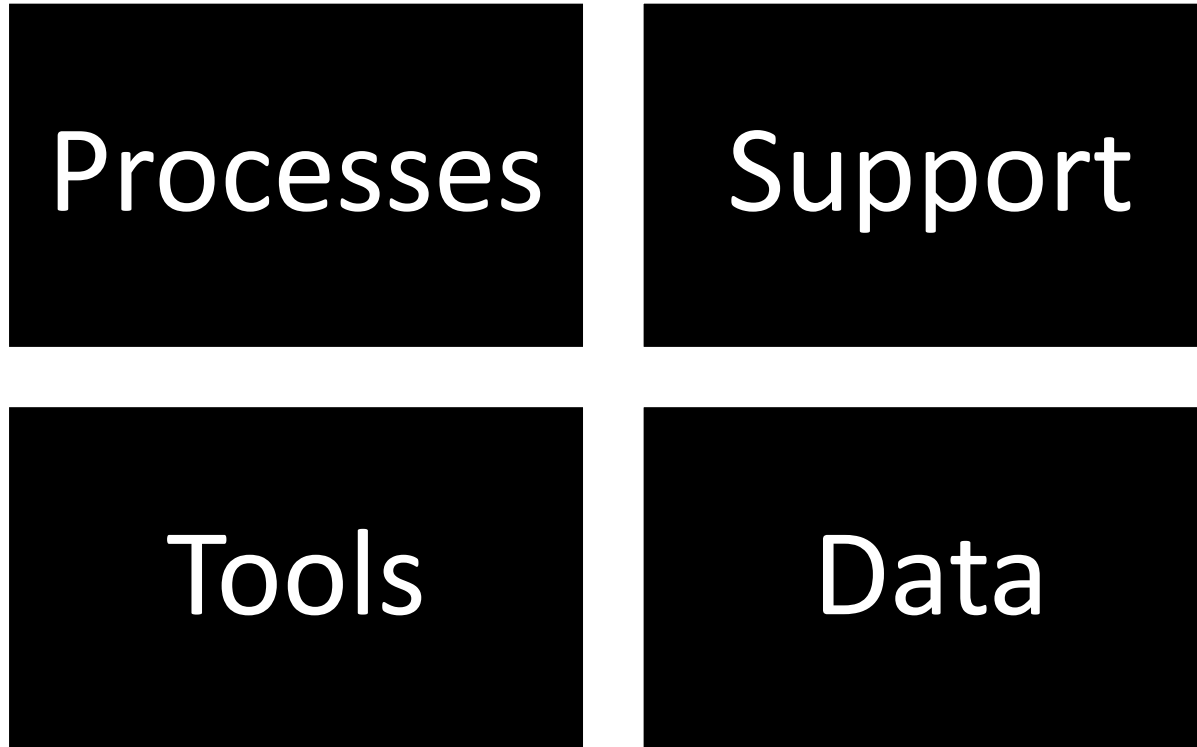
# Stages of Technology Adoption

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# BI Adoption ingredients

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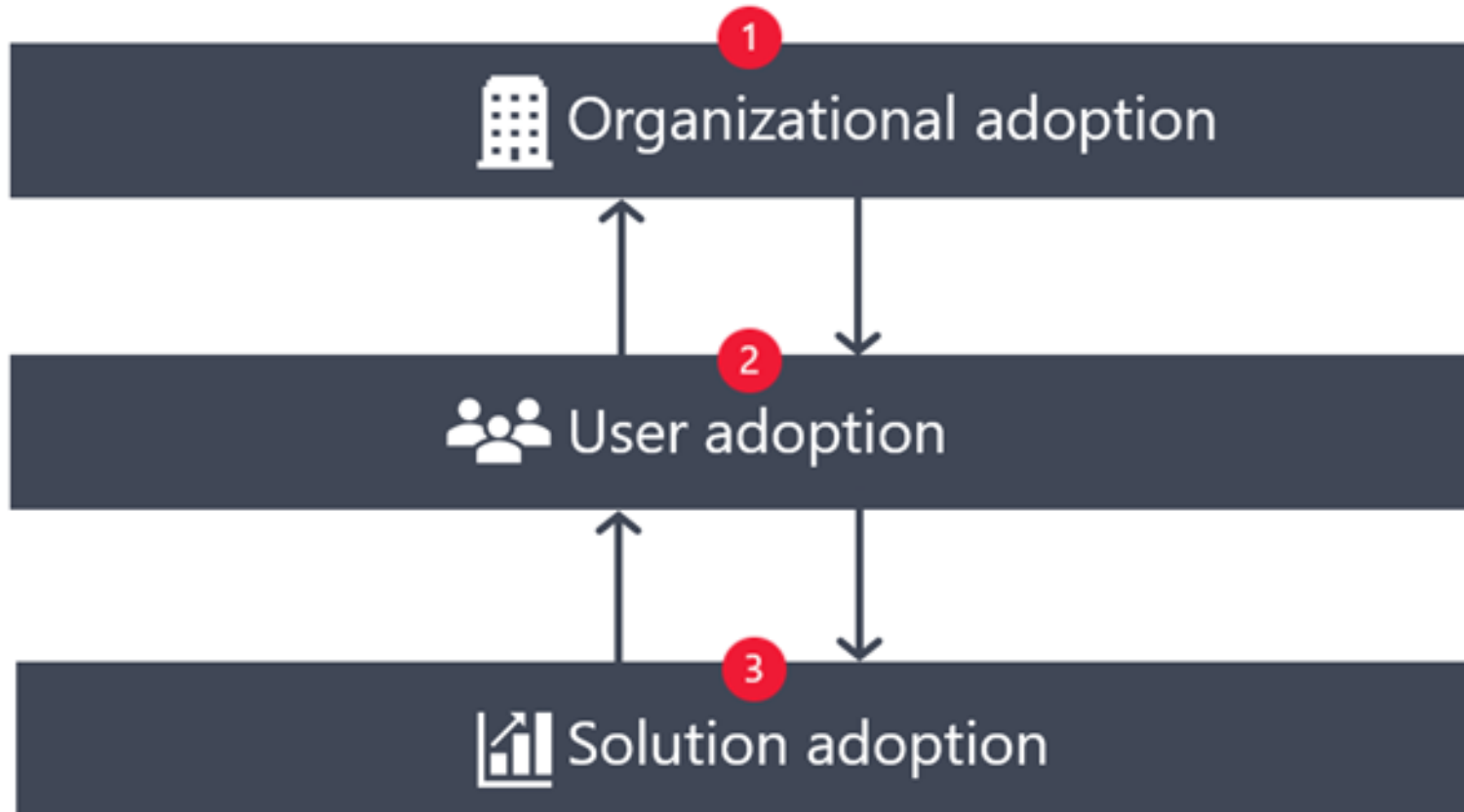


Successful Power BI adoption involves making effective processes, support, tools, and data available and integrated into regular ongoing patterns of usage for content creators, consumers, and stakeholders in the organization.



# BI Adoption Levels

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# Organizational Adoption

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## Goals:

- Effectively support the community.
- Enable and empower users.
- Oversee information delivery via enterprise BI and self-service BI with continuous improvement cycles.

Level	State of data culture
<b>100: Initial</b>	Level 100 is referred to as initial or performed. It is the starting point for new data-related investments that are new, undocumented, and without any process discipline.
<b>200: Repeatable</b>	Level 200 is referred to as <i>repeatable</i> or <i>managed</i> . At this point on the maturity curve, data management is planned and executed. Data management is based on defined processes, though these processes may not apply uniformly throughout the organization.
<b>300: Defined</b>	Level 300 is referred to as <i>defined</i> . At this point on the maturity curve, a set of standardized data management processes are established and consistently applied across organizational boundaries.
<b>400: Capable</b>	Level 400 is known as <i>capable</i> or <i>measured</i> . At this point on the maturity curve, data is well-managed across its entire lifecycle.
<b>500: Efficient</b>	Level 500 is known as <i>efficient</i> or <i>optimizing</i> because at this point on the maturity curve, the emphasis is now on automation and continuous improvement.



# User Adoption

User adoption measures the extent to which content consumers and self-service content creators are actively using Power BI effectively.

Level	State of data culture
<b>stage 1 – Awareness</b>	<p>An individual has heard of, or been initially exposed to, Power BI in some way.</p> <p>An individual may have access to Power BI but is not yet actively using it.</p>
<b>stage 2 – Understanding</b>	<p>An individual develops understanding of the benefits of Power BI to deliver analytical value and support decision-making.</p> <p>An individual shows interest and starts to use Power BI.</p>
<b>stage 3 – Momentum</b>	<p>An individual actively gains Power BI skills by attending formal training, self-directed learning, or experimentation.</p> <p>An individual gains basic competency with the aspects of Power BI relevant to their role.</p>
<b>stage 4 – Proficiency</b>	<p>An individual actively uses Power BI on a regular basis.</p> <p>An individual understands how to use Power BI in the way in which it was intended, as relevant for their role.</p> <p>An individual modifies their behavior and activities to align with organizational governance processes.</p> <p>An individual's willingness to support organizational processes and change efforts is growing over time, and they become an advocate for Power BI in the organization.</p> <p>An individual makes the effort to continually improve their skills and stay current with new product capabilities and features.</p>





# Solution Adoption

Solution adoption is concerned with measuring the impact of individual Power BI solutions. It is also concerned with the level of value solutions provide.

Level	State of data culture
phase 1 – Exploration	<p>Exploration and experimentation are the main approaches to testing out new ideas. Exploration of new ideas can occur through informal self-service BI, or through a formal proof of concept (POC), which is purposely narrow in scope. The goal is to confirm requirements, validate assumptions, address unknowns, and mitigate risks.</p> <p>A small group of users test the proof of concept solution and provide useful feedback.</p> <p>All exploration—and initial feedback—could occur within Power BI Desktop or Excel. Use of the Power BI service is limited.</p>
phase 2 – Functional	<p>The solution is functional and meets the basic set of user requirements. There are likely plans to iterate on improvements and enhancements.</p> <p>The solution is deployed to the Power BI service.</p> <p>All necessary supporting components are in place, such as gateways to support scheduled refresh.</p> <p>Users are aware of the solution and show interest in using it. Potentially, it may be a limited preview release, and may not yet be ready to promote to a production <a href="#">workspace</a>.</p>
phase 3 – Valuable	<p>Target users find the solution is valuable and experience tangible benefits. Solution documentation is generated to support the needs of information consumers (such as data sources used or how metrics are calculated), and help future creators (such as documenting any future maintenance or planned enhancements). Report branding and theming are in place, and they are inline with governance guidelines.</p>
phase 4 – Essential	<p>Target users actively and routinely use the solution, and it's considered essential for decision-making purposes. A subset of users regularly provide feedback to ensure the solution continues to meet requirements. Expectations for the success of the solution are clear and are measured. Expectations for support of the solution are clear, especially if there are service level agreements.</p> <p>Formal user acceptance testing for new changes may occur, particularly for IT-managed content.</p>



# Data culture

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It encourages a culture that regularly employs informed data decision-making:

- By more stakeholders throughout more areas of the organization.
- Based on analytics, not opinion.
- In an effective, efficient way that's based on best practices endorsed by the [Center of Excellence \(COE\)](#).
- Based on trusted data.
- That reduces reliance on undocumented tribal knowledge.
- That reduces reliance on hunches and gut decisions.

Data vision

Data discovery

Data  
democratization

Data literacy

# Data culture

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## Data vision

This vision of a healthy data culture should:

- Originate from the executive level.
- Align with organizational objectives.
- Directly influence your adoption strategy.
- Serve as the high-level guiding principles for

## Data democratization

Data democratization refers to putting data into the hands of more users who are responsible for solving business problems. It's about enabling them to make decisions with the data.

## Data literacy

Data literacy refers to the ability to interpret, create, and communicate data accurately and effectively. Technology skills are important to producing high-quality solutions, but it's also important to consider how to purposely advance data literacy throughout the organization. You can focus on these activities related to data literacy:

- Interpreting charts and graphs
- Assessing the validity of data
- Performing root cause analysis
- Discerning correlation from causation
- Understanding how context and outliers affect how results are presented
- Using storytelling to help consumers quickly understand and act

# Data culture

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## Data discovery

A successful data culture depends on users working with the right data in their day-to-day activities. To achieve this goal, users need to find and access data sources, reports, and other items.

Level	State of data culture
100: Initial	<p>BI initiatives are taking place—with some successes—in various areas of the organization. These activities are occurring in a somewhat chaotic manner, with few formal processes and no strategic plan.</p> <p>A significant backlog of requests might exist for the enterprise BI team.</p> <p>There's a lack of oversight and visibility into self-service BI operations. The successes or failures of BI solutions are not well understood.</p>
200: Repeatable	<p>Multiple teams have had measurable successes with self-service BI solutions.</p> <p>Investments are made to identify the ideal balance of enterprise BI and self-service BI.</p>
300: Defined	<p>Specific goals are established for advancing the data culture, and these goals are implemented incrementally.</p> <p>Effective self-service BI practices are incrementally—and purposely—replicated throughout more areas of the organization.</p>
400: Capable	<p>The data culture goals to employ informed decision-making are aligned with organizational objectives. They're actively supported by the executive sponsor, and they have a direct impact on adoption strategies.</p> <p>A healthy and productive partnership exists between the COE, business units, and IT.</p> <p>Individuals who take initiative in building valuable BI solutions are recognized and rewarded.</p>
500: Efficient	<p>Regular review of key performance indicators validates that data culture results are aligned with intentions.</p> <p>The business value of BI solutions is regularly evaluated and measured. Feedback loops encourage ongoing improvements.</p> <p>Continual improvement of organizational adoption, user adoption, and solution adoption is a top priority. Learnings are incrementally adapted throughout the organization.</p>

# Executive Sponsorship

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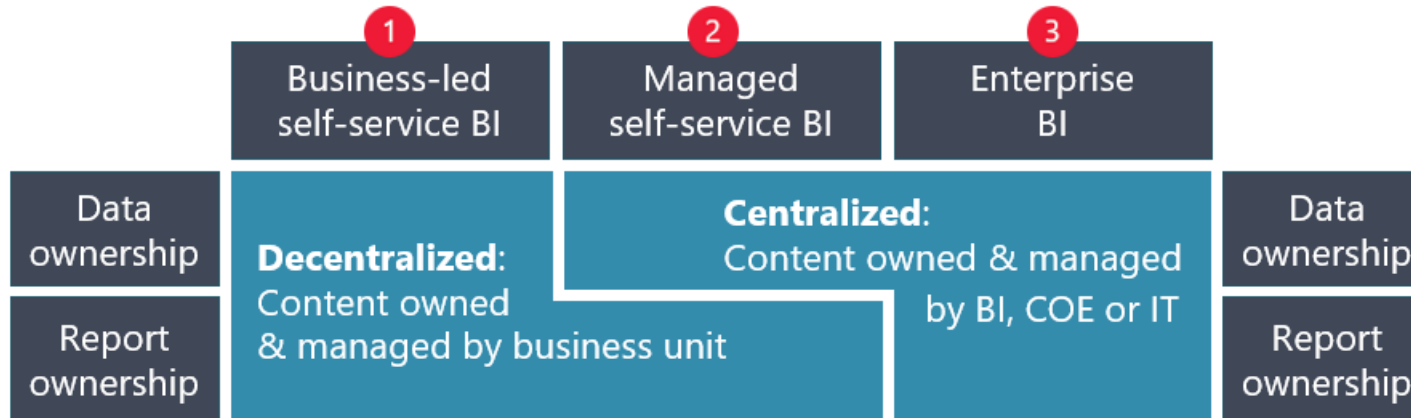
Although some successes can be achieved by a few determined individual contributors, the organization is in a significantly better position when a senior leader is engaged, supportive, informed, and available to assist with activities such as:

- Formulating a strategic vision and priorities for BI and analytics.
- Leading by example by actively using Power BI in a way that's consistent with data culture and adoption goals.
- Allocating staffing and prioritizing resources.
- Approving funding (for example, Power BI licenses).
- Communicating announcements that are of critical importance.
- Decision-making, particularly for strategic-level governance decisions.
- Dispute resolution (for escalated issues that cannot be resolved by operational or tactical personnel).
- Supporting organizational changes (for example, creating or expanding the [Center of Excellence](#)).

Level	State of Power BI executive support
100: Initial	There is awareness from at least one executive about the strategic importance of how Power BI can play a part in advancing the organization's data culture goals. However, neither a Power BI sponsor nor an executive-level decision-maker is identified.
200: Repeatable	Executive support exists for Power BI through informal channels and relationships.
300: Defined	A formal arrangement exists for C-level Power BI sponsorship and support, with well-understood expectations for the role.
400: Capable	Senior-level support is in place to grow and sustain the investment in Power BI by someone with sufficient authority across organizational boundaries.
500: Efficient	Executive support is a driver for advancing the data culture vision. The executive sponsor is involved with ongoing organizational adoption improvements, and measurable goals are in place.

# Content ownership and management

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## Managed self-service BI

*discipline at the core and flexibility at the edge.*

# Center of Excellence

## Goals for a COE

Goals for a COE include:

- Evangelizing a data-driven culture.
- Promoting the adoption of Power BI.
- Nurturing, mentoring, guiding, and educating internal users to increase their skills and level of self-reliance.
- Coordinating efforts and disseminating knowledge across organizational boundaries.
- Creating consistency and transparency for the user community, which reduces friction and pain points related to finding relevant data and analytics content.
- Maximizing the benefits of self-service BI, while reducing the risks.
- Reducing technical debt by helping make good decisions that increase consistency and result in fewer inefficiencies.

**Centralized  
COE**

**Unified COE**

**Federated  
COE**

**Decentralized  
COE**

Level	State of Power BI Center of Excellence
100: Initial	<p>One or more COEs exist, or the activities are performed within the BI team or IT. There's no clarity on the specific goals nor expectations for responsibilities.</p> <p>Requests for assistance from the COE are handled in an unplanned manner.</p>
200: Repeatable	<p>The COE is in place with a specific charter to mentor, guide, and educate self-service users. The COE seeks to maximize benefits of self-service BI while reducing the risks.</p> <p>Goals, scope, staffing, structure, and funding are established for the COE.</p>
300: Defined	<p>The COE operates with active involvement from all business units in a unified or federated mode.</p>
400: Capable	<p>The goals of the COE align with organizational goals, and they are reassessed regularly.</p> <p>The COE is well-known throughout the organization, and consistently proves its value to the internal user community.</p>
500: Efficient	<p>Regular reviews of key performance indicators evaluate COE effectiveness.</p> <p>Agility and implementing continual improvements from lessons learned are top priorities for the COE.</p>

# Mentoring and user enablement

- **Skills mentoring**
  - Office hours
  - Co-development projects
  - Best practices reviews
  - Extended support
- **Centralized portal**
- **Training**
- **Documentation**

Level	State of Power BI mentoring and user enablement
100: Initial	<p>Some documentation and resources exist, though they are siloed and inconsistent.</p> <p>Few users are aware of, or take advantage of, available resources.</p>
200: Repeatable	<p>A centralized portal exists with a library of training, documentation, and resources.</p> <p>Office hours are held on a regular basis.</p>
300: Defined	<p>The centralized portal is the primary hub for community members to locate information.</p> <p>The COE's skills mentoring program is in place to assist users in the community in various ways.</p>
400: Capable	<p>Resources in the centralized portal are commonly referenced by champions and community members when supporting and learning from each other.</p> <p>Business units regularly engage with the COE and take advantage of its skills mentoring program. Tangible business value is gained from the program.</p>
500: Efficient	<p>Documentation and resources are continually updated and improved by the COE, based on lessons learned.</p>