



ENTERPRISE CAPABILITY OVERVIEW

Power BI delivery for decisions that need defensible numbers

Governed semantic models, executive and operational reporting, migration, gateways, and production handover for mid-size and large organizations.

Since 2012

Custom software and automation background

Fixed-scope first release

Dependencies and assumptions written down

NDA-ready handling

Least-privilege access and approved data paths

Business + IT handover

Definitions, refresh, ownership, and runbook

START A CONTROLLED FIRST CONVERSATION

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<https://www.powerbi-analytics.com/book-a-call>

Executive overview

A concise view of our delivery model, the controls used to protect reporting credibility, and the working boundaries expected from business and IT owners.

DOCUMENT MAP

03

Capabilities

Services, deliverables, and production scope

04

Architecture

Source-to-decision model and query-mode choices

05

Delivery model

Rhythm, controls, governance, and ownership

06

Working together

Technology, stakeholder fit, and next step

DELIVERY PRINCIPLES

Decision first

Scope begins with the meeting, decision, owner, and threshold the report must support. Visuals follow the operating question.

Governed definitions

Measures are explicit, reviewed against source totals, and documented so finance, operations, and IT use the same calculation.

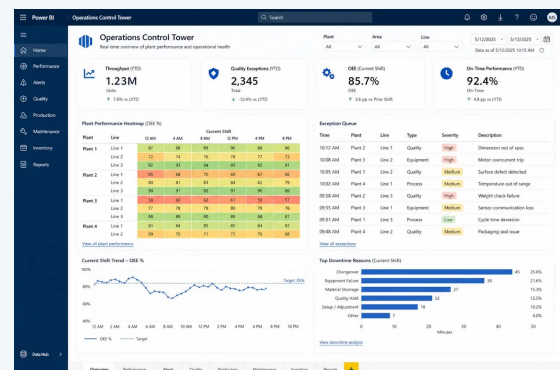
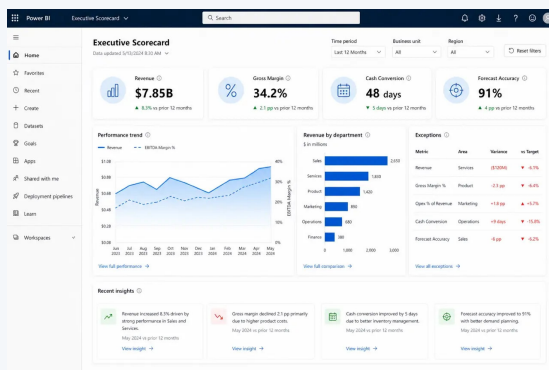
Production ownership

Access, refresh, security, deployment, and support paths are designed before go-live rather than added after a failed refresh.

Maintainable handover

The delivery leaves measure notes, lineage, refresh procedures, workspace ownership, and a prioritized enhancement backlog.

ILLUSTRATIVE OPERATING VIEW



Illustrative interface only. Delivery visuals are designed around approved definitions, thresholds, owners, and source-system constraints.

What we deliver

Engagements are scoped around the reporting decision, the systems that feed it, and the operating controls required after launch.

01

Power BI consulting & semantic models

Star schemas, measure dictionaries, Import vs DirectQuery decisions, workspace ownership.

Source and grain assessment | Star-schema model design
DAX measure dictionary | Performance and security review

02

Dashboard development

Executive and operational pages with owners, thresholds, and drill-through.

Executive scorecards | Operational exception queues
Drill-through and mobile layouts | Usability review with decision owners

03

Excel to Power BI migration

Staging queries, keyed dimensions, refresh that fails loudly — not workbook paste.

Workbook and dependency inventory | Power Query staging
Reconciliation controls | Scheduled refresh and ownership

04

Reporting automation & gateways

On-premises data gateway design, credential rotation, concurrent refresh planning.

Gateway topology | Refresh-window planning
Credential ownership | Failure routing and runbook

05

ERP / CRM / finance connectivity

SQL views, Dynamics/Salesforce extracts, REST where connectors are weak; thin staging preferred.

Connector and API assessment | Incremental extraction strategy
Typed staging layer | Source-to-report lineage

How reporting is engineered

The report is the visible layer. Credibility depends on a traceable path from source systems through preparation, model definitions, security, and refresh ownership.

01

Systems of record

ERP, CRM, MES, finance workbooks, SQL databases, APIs, and operational extracts—with ownership and refresh expectations recorded before build.

SAP · Dynamics 365 · NetSuite · Salesforce · SQL · Excel

02

Controlled preparation

Gateway paths, Power Query staging, typed keys, reconciliation checks, and query-folding review before transformations reach the model.

Gateway · Power Query · Dataflows · quality checks

03

Governed semantic model

Star schema, conformed dimensions, explicit DAX measures, row-level security, and one documented definition for each decision KPI.

Import / DirectQuery · DAX · RLS · measure dictionary

04

Decision-ready reporting

Executive and operating pages organized around thresholds, owners, exceptions, and drill-through—not a wall of disconnected charts.

Scorecards · exception queues · drill-through · mobile

IMPORT OR DIRECTQUERY IS AN OPERATING DECISION

Import

Preferred for stable executive and operating packs: predictable performance, controlled refresh windows, and lower pressure on source systems.

DirectQuery

Used when latency genuinely requires it and the source can absorb interactive query load. Aggregations, visual cost, and concurrency must be tested.

VALIDATION BEFORE RELEASE

- Reconcile source totals at agreed grain and cut-off.
- Exercise refresh failure, ownership, and escalation.
- Test RLS with named personas and export paths.
- Record measure logic, lineage, and acceptance evidence.

Delivery, governance, and ownership

ENGAGEMENT RHYTHM

01 Discovery | 3–5 working days

Decision owners, source systems, KPI definitions, and access path. Fixed-scope proposal with assumptions written down — not a vague SOW.

02 Build | 2–6 weeks typical first release

Staging queries, semantic model, RLS where needed, gateway/refresh design (Import vs DirectQuery chosen per latency and source load), and validated reports.

03 Handover | 3–5 working days

Measure documentation, refresh runbook, workspace ownership, and a short enhancement backlog. Support after go-live is scoped separately.

PRODUCTION CONTROLS

Security and access

Least-privilege source access, workspace roles, RLS validation, and a clear separation between builders, consumers, and administrators.

Refresh resilience

Gateway ownership, credential rotation, refresh-window design, failure routing, and runbooks for the morning when an upstream extract arrives late.

Performance choices

Import by default for predictable executive reporting; DirectQuery only when latency justifies the source load. Model size, folding, and visual query cost are reviewed together.

Handover and ownership

Measure definitions, lineage notes, deployment steps, refresh support, and an enhancement backlog that business and IT can operate after release.

RESPONSIBILITY SPLIT

Power BI Analytics

Discovery facilitation, model and report design, build, validation support, documentation, and handover.

Business owners

KPI definitions, decision thresholds, validation examples, review attendance, and acceptance of the operating view.

Client IT / data owners

Approved access, gateway or network path, source expertise, security review, deployment permissions, and production ownership.

Technology, engagement fit, and next step

TECHNOLOGY COVERAGE

Microsoft analytics

- Power BI Desktop and Service
- Power Query / M
- DAX and semantic models
- Fabric / Azure when justified

Data platforms

- SQL Server and Azure SQL
- Dataflows and lakehouse staging
- REST and controlled file ingestion
- On-premises data gateway

Business systems

- Dynamics 365 and Salesforce
- SAP / Oracle / NetSuite extracts
- Excel and SharePoint
- Operational, finance, and ecommerce sources

WHO THE DELIVERY MUST SERVE

Finance and executive teams

One governed view of margin, cash, forecast, and variance—with commentary tied to owners rather than another reconciliation meeting.

Operations leaders

Earlier exceptions across plants, service teams, inventory, quality, or delivery so the review starts with action instead of spreadsheet preparation.

IT and analytics owners

A supportable model, explicit access paths, controlled deployment, and documentation that does not leave production knowledge with one consultant.

WHAT THE FIRST CALL COVERS

- The decision or meeting the reporting must improve
- Current reports, preparation steps, and known failure points
- Source systems, data owners, and refresh expectations
- Security, access, licensing, and deployment constraints
- A practical first-release boundary and next-step decision

A practical next step, not a sales presentation

Bring the reporting decision, current process, and known source systems. We will discuss constraints, a controlled first-release boundary, and whether there is a sensible fit.

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