

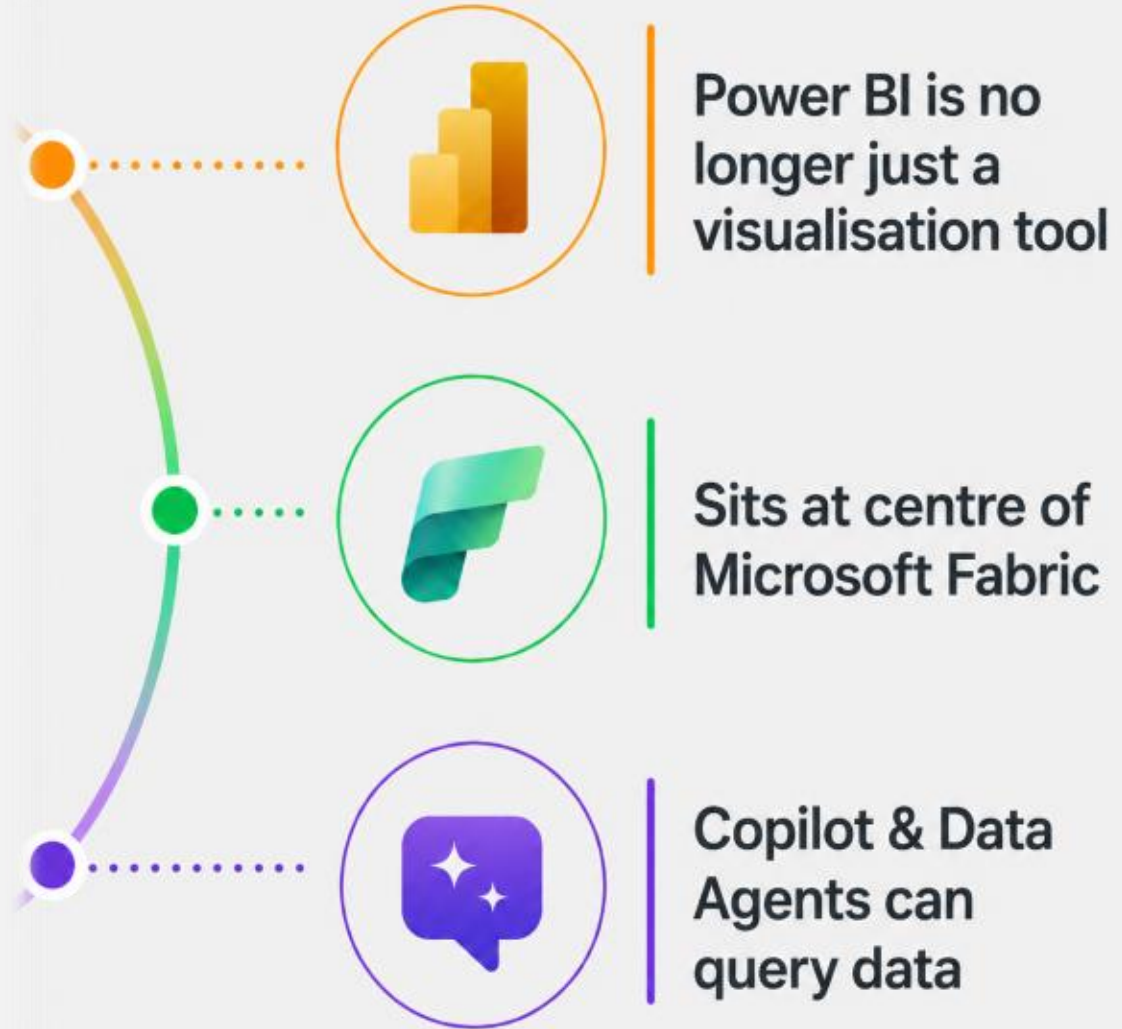
How to Succeed with Power BI

James Hurst

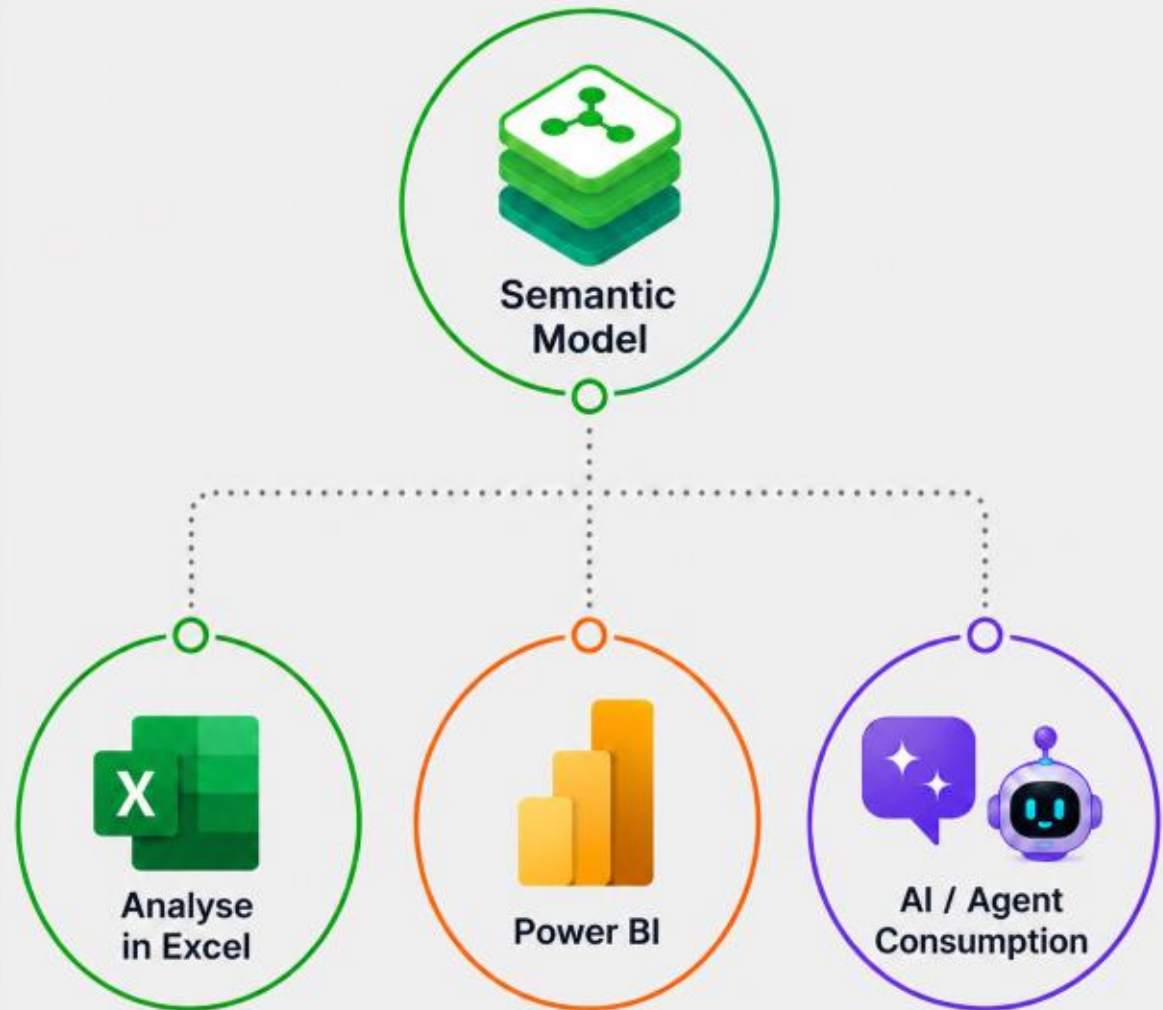
Principal Consultant



Things have changed



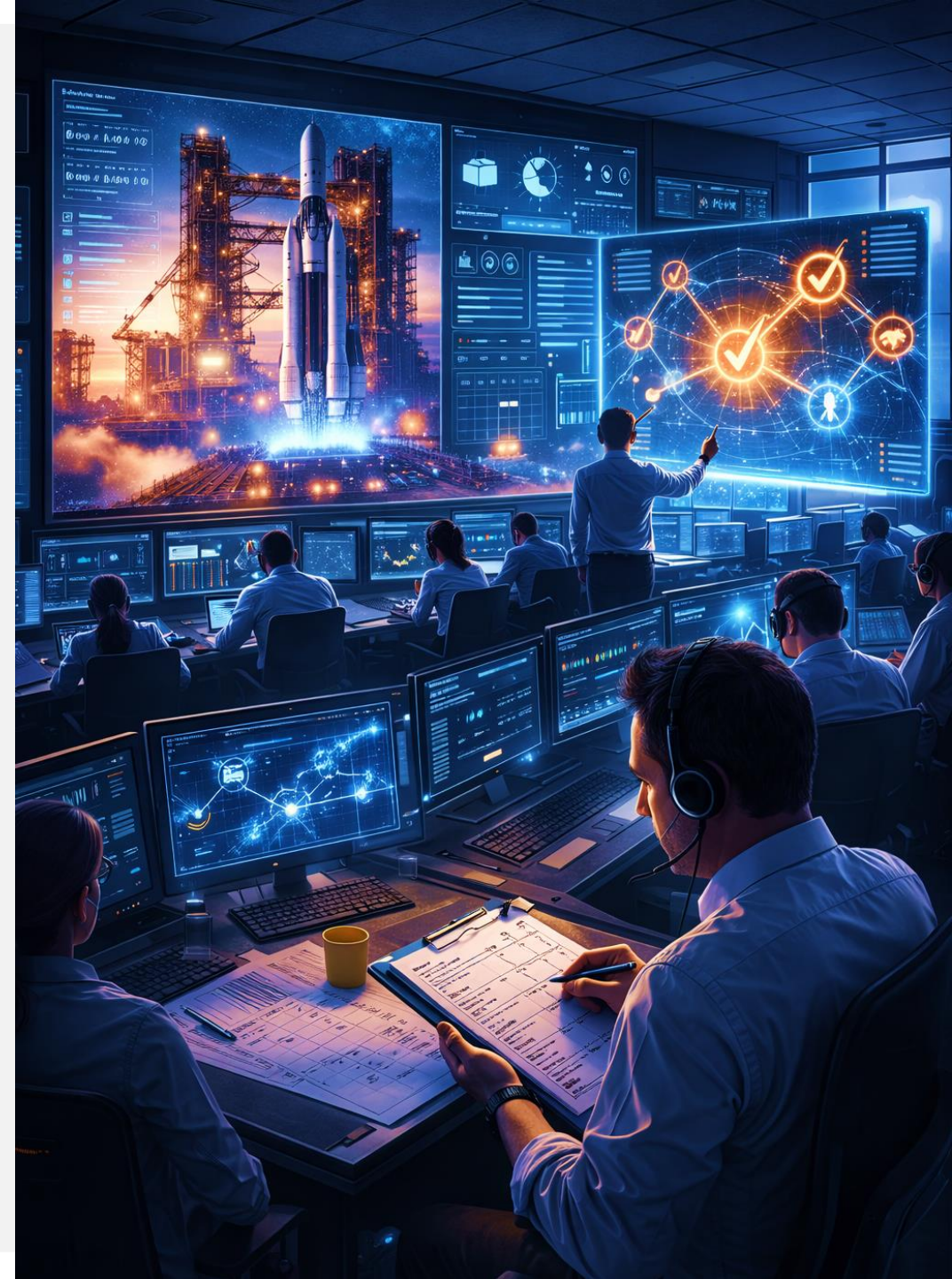
What's different now ?



Pillars of success



**Start with
decisions,
not dashboards**





“

Can you replicate this Excel report?”



“

What should this report look like?”



“

What visuals do we need?”

What decisions should this report support?



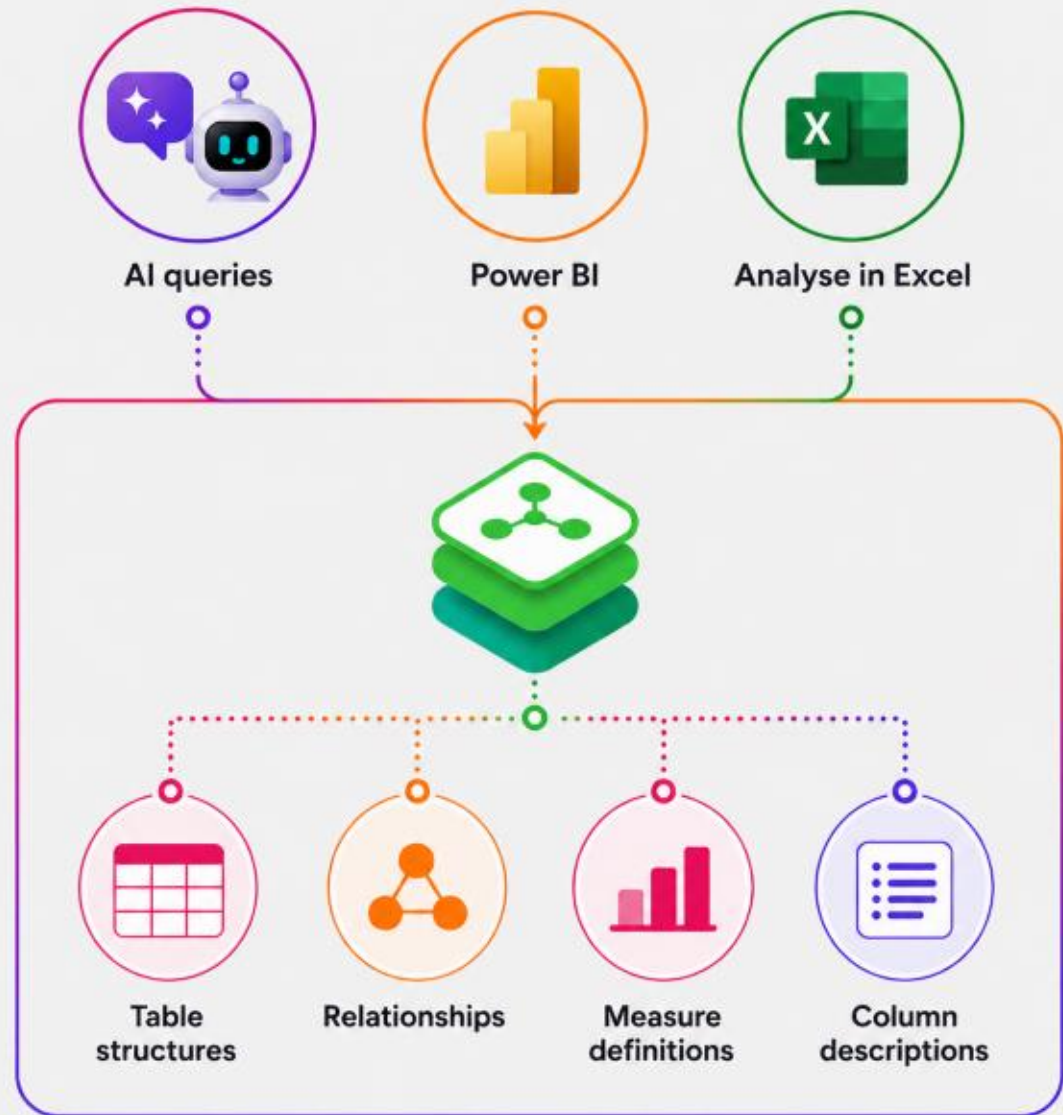
Analytics should drive action



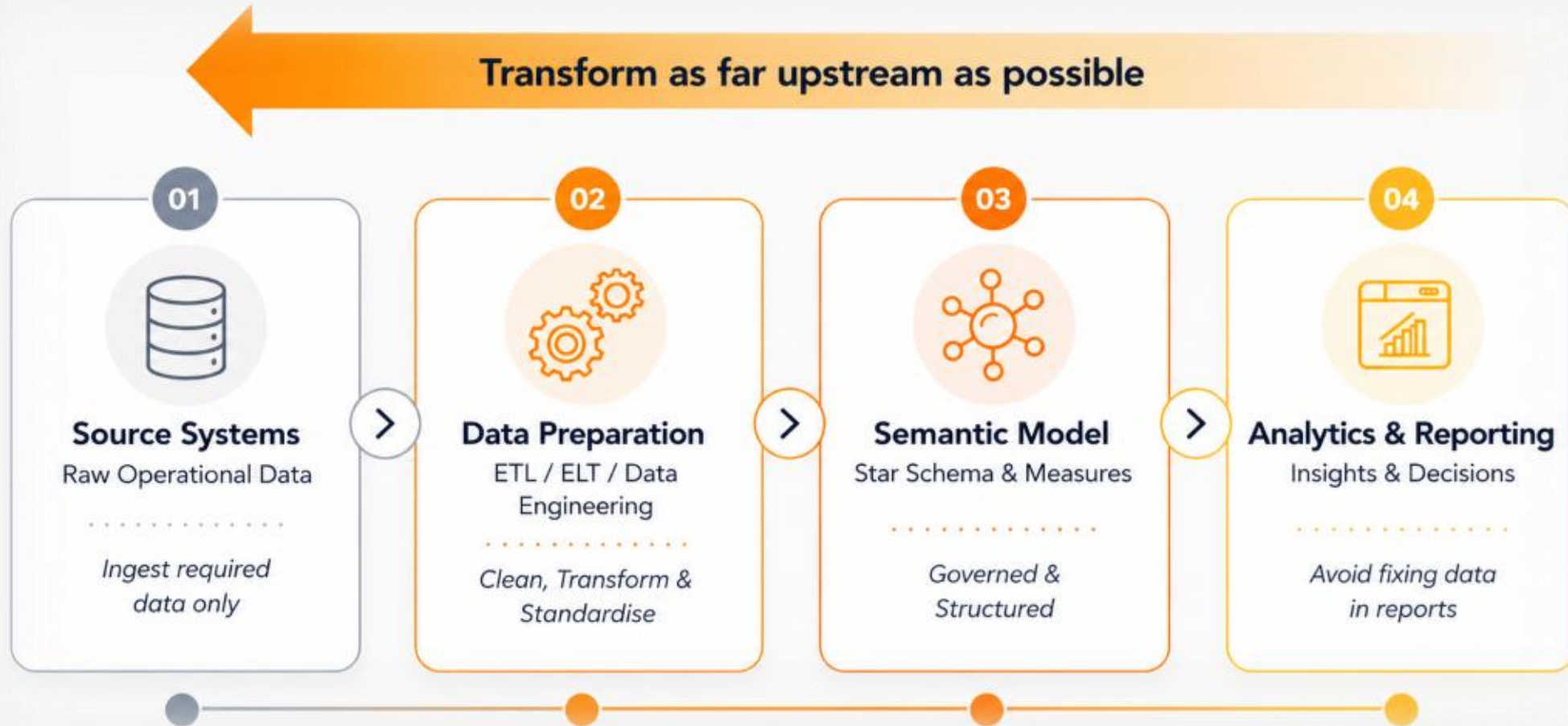
**Strong
foundations
& semantic
discipline**



Model matters most



Roche's Maxim

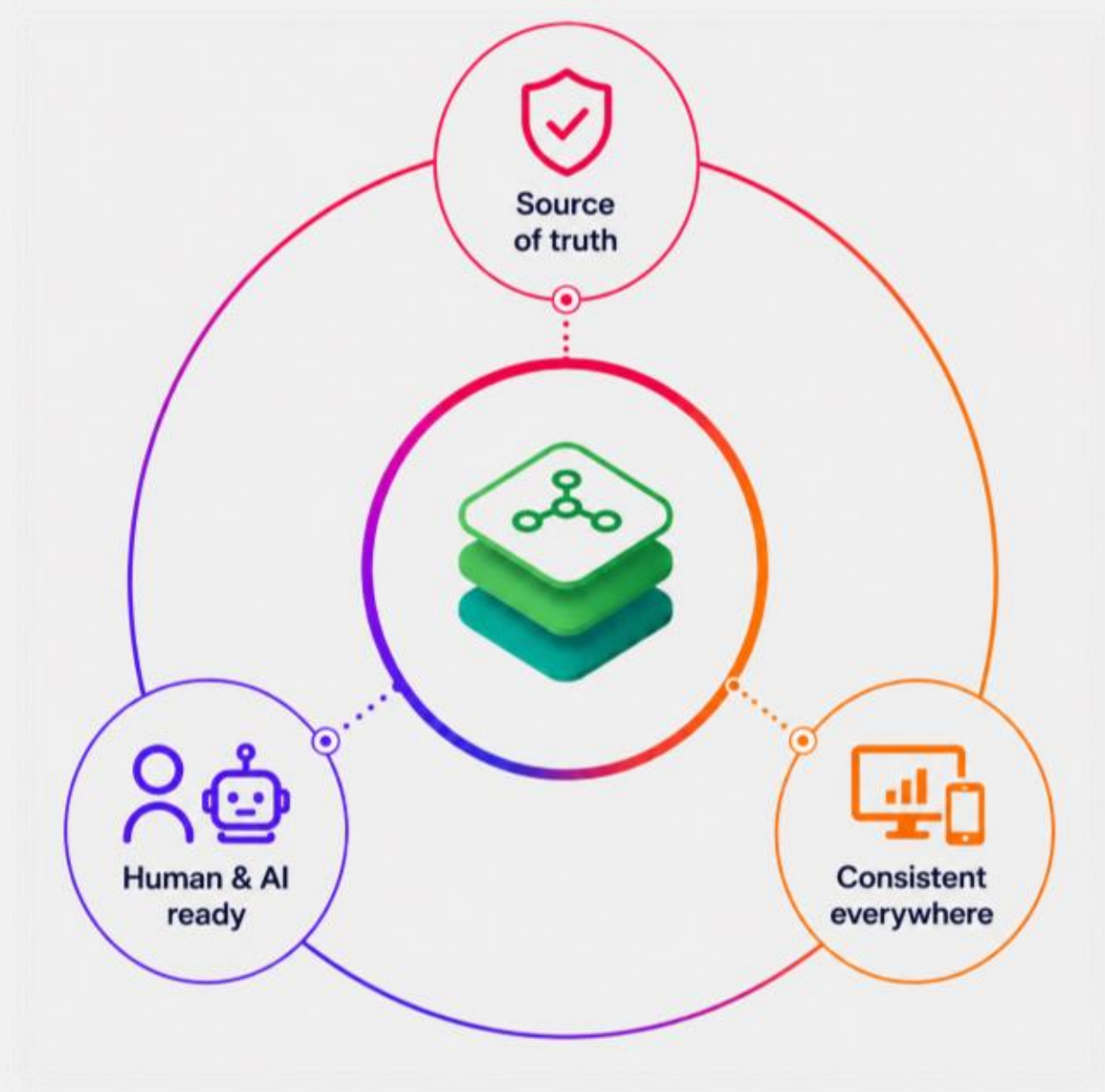


Star schema wins

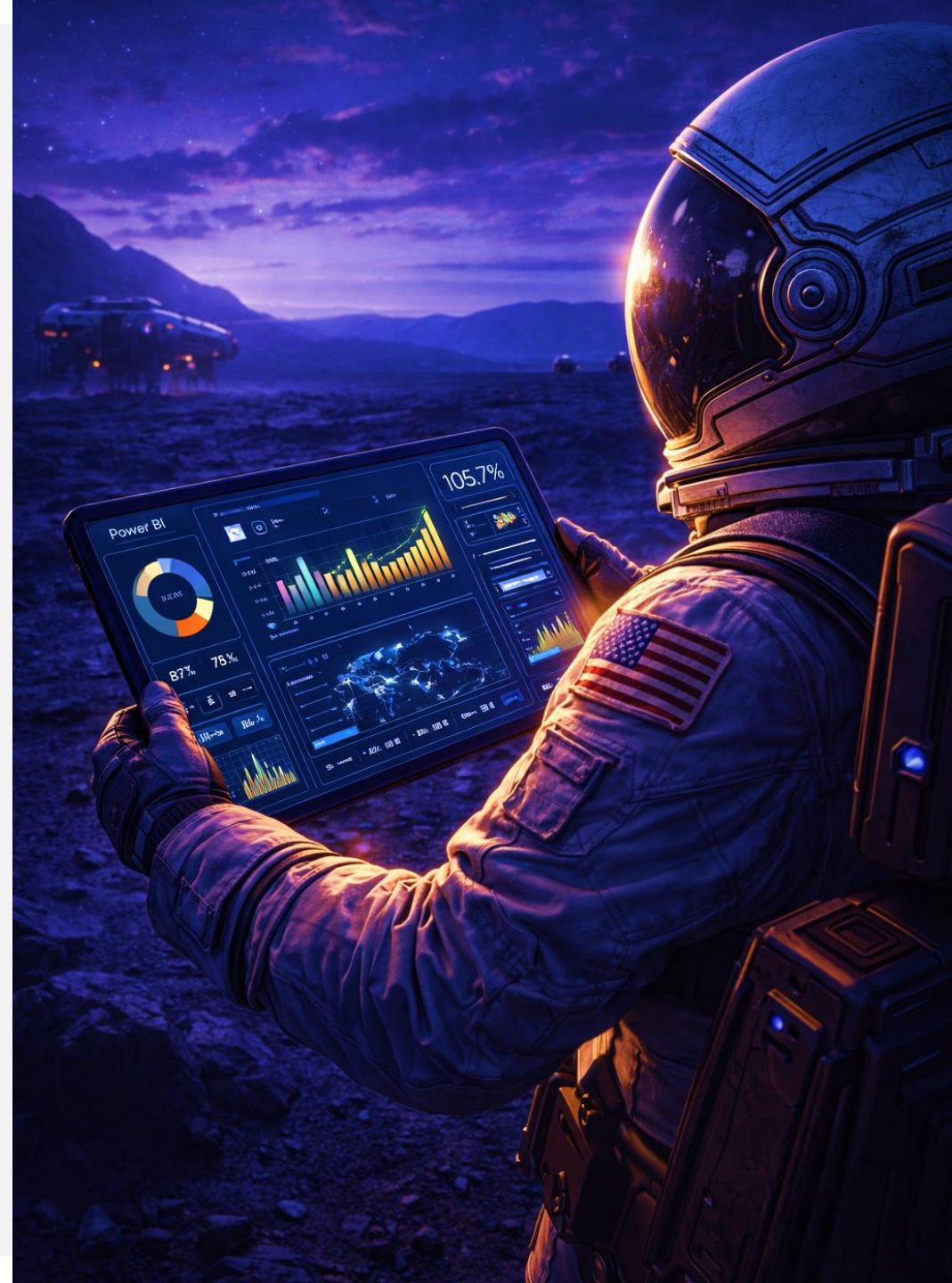


Built for scale. Power BI engine is optimised for star schema and ensures performance at scale.

Model is the product



Designing reports
people actually
use



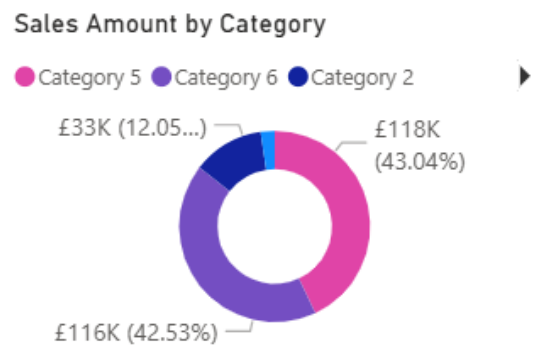
Sales Report

Transactions in the report are **Net Invoiced Sales** and do not include outstanding or cancelled orders

Location	No of Transactions	No of Transactions LY	No of Transactions LY Var %	Sales Qty	Sales Amount	Sales Amount LY Var	Sales Amount LY Var %	Margin	Margin LY Var	Margin LY Var %	Margin %	Margin % LY	Margin % LY Var
Location 1	676	691	▲ -2.2%	2,327	£15,374	£947	● 6.6%	£7,988	£366	● 4.8%	52.0%	52.8%	◆ -0.9%
Location 2	709	671	● 5.7%	2,376	£15,325	£1,725	● 12.7%	£8,043	£824	● 11.4%	52.5%	53.1%	▲ -0.6%
Location 3	710	643	● 10.4%	2,363	£14,973	£1,005	● 7.2%	£7,753	£307	● 4.1%	51.8%	53.3%	◆ -1.5%
Location 4	698	698	▲ 0.0%	2,335	£14,328	-£885	▲ -5.8%	£7,587	-£492	▲ -6.1%	53.0%	53.1%	▲ -0.2%
Location 5	734	688	● 6.7%	2,388	£15,144	£696	● 4.8%	£7,802	£206	● 2.7%	51.5%	52.6%	◆ -1.1%
Location 6	675	652	▲ 3.5%	2,215	£14,001	£249	▲ 1.8%	£7,369	£155	● 2.2%	52.6%	52.5%	▲ 0.2%
Location 7	628	698	◆ -10.0%	2,037	£12,474	-£2,903	◆ -18.9%	£6,547	-£1,512	◆ -18.8%	52.5%	52.4%	▲ 0.1%
Location 8	677	723	◆ -6.4%	2,298	£14,484	-£1,098	▲ -7.0%	£7,627	-£441	▲ -5.5%	52.7%	51.8%	● 0.9%
Location 9	663	708	◆ -6.4%	2,203	£14,001	-£592	▲ -4.1%	£7,270	-£373	▲ -4.9%	51.9%	52.4%	▲ -0.5%
Location 10	680	686	▲ -0.9%	2,353	£14,442	-£129	▲ -0.9%	£7,607	-£108	▲ -1.4%	52.7%	52.9%	▲ -0.3%
Total	12,922	12,968	-0.4%	43,250	£273,305	-£1,007	-0.4%	£143,211	-£788	-0.5%	52.4%	52.5%	-0.1%

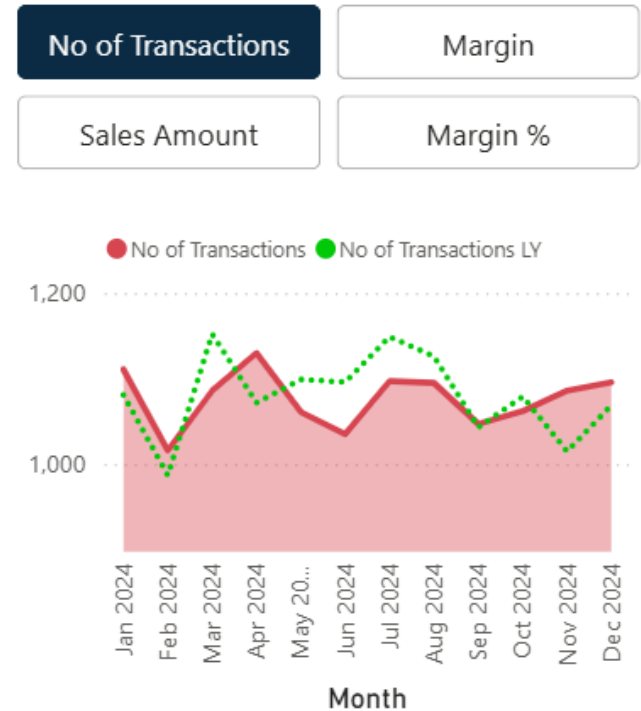
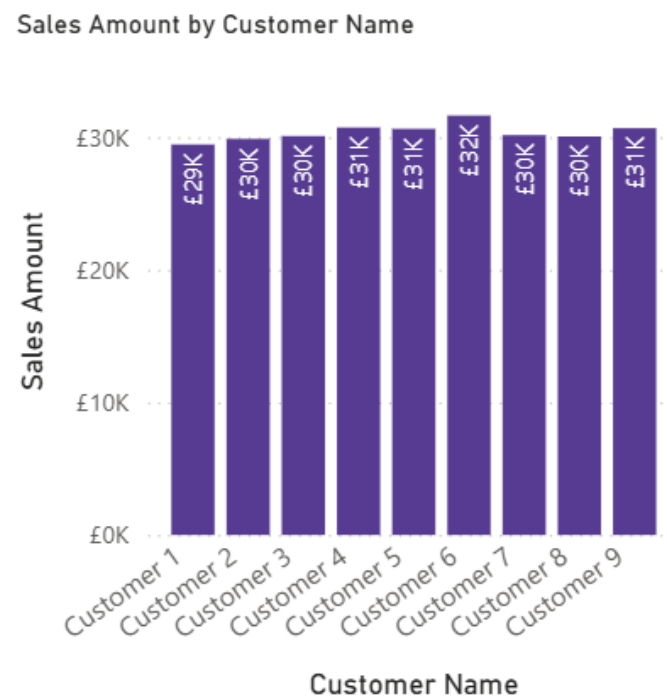
Sub Category

- Sub Category 11
- Sub Category 12
- Sub Category 13
- Sub Category 21
- Sub Category 22
- Sub Category 23



Sub Category

Sub Category	Sales Amount
Sub Category 63	£74,812
Item 197	£3,011
Item 191	£2,839
Item 155	£2,781
Item 178	£2,737
Item 170	£2,716
Item 175	£2,697
Item 172	£2,674
Item 195	£2,618
Item 158	£2,590
Item 179	£2,576
Item 154	£2,562
Item 151	£2,545
Item 190	£2,521
Item 196	£2,511
Total	£273,305



Reduce cognitive load



Focus on clarity



Clarity first



Less, not more

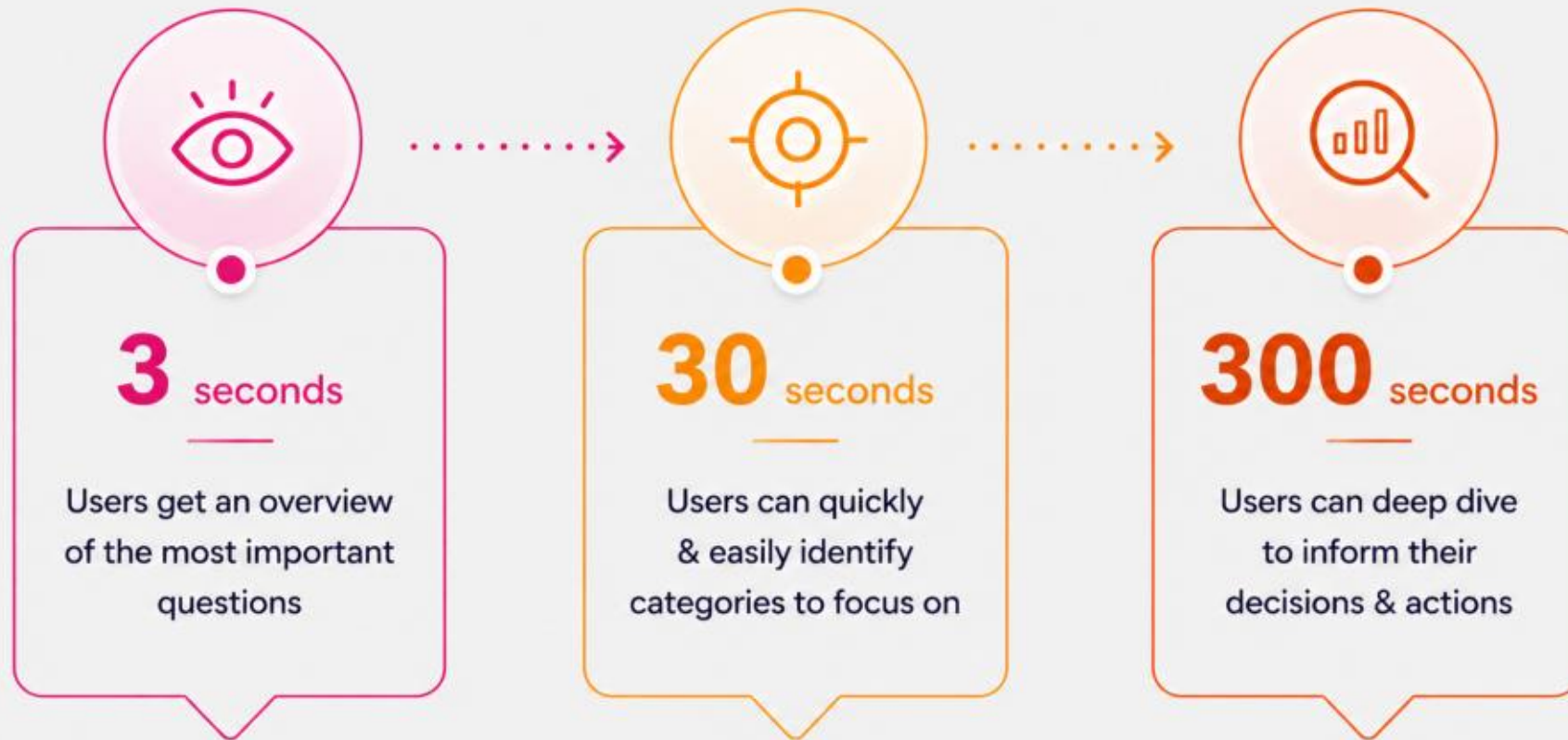


Understand fast



Explore if needed

The 3-30-300 Rule



Sales Amount
£468,807

Var **-£2,845 ▼**
Var % **-0.6% ▼**

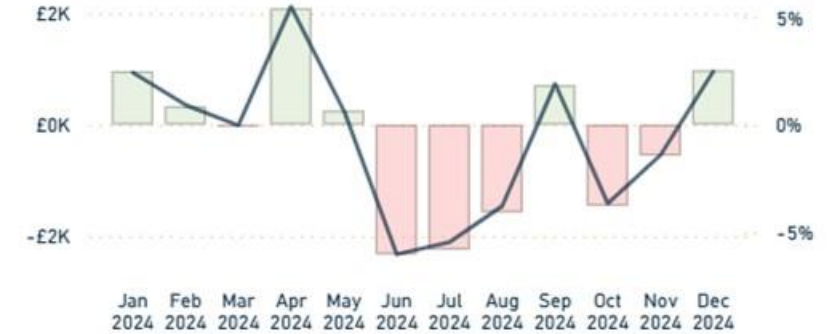
Margin
£245,995

Var **-£1,256 ▼**
Var % **-0.5% ▼**

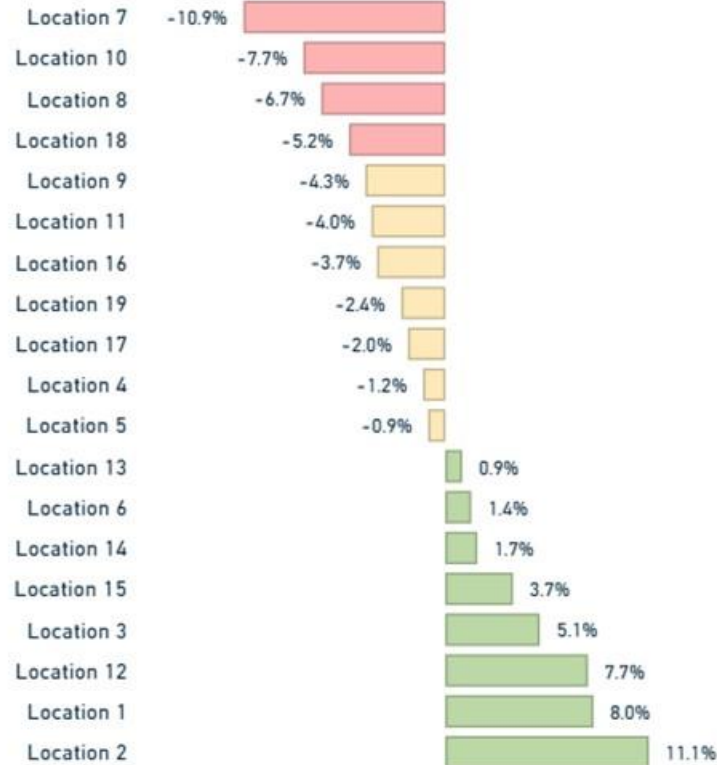
Margin %
52.5%

LY **52.4%**
Var **0.1% ▲**

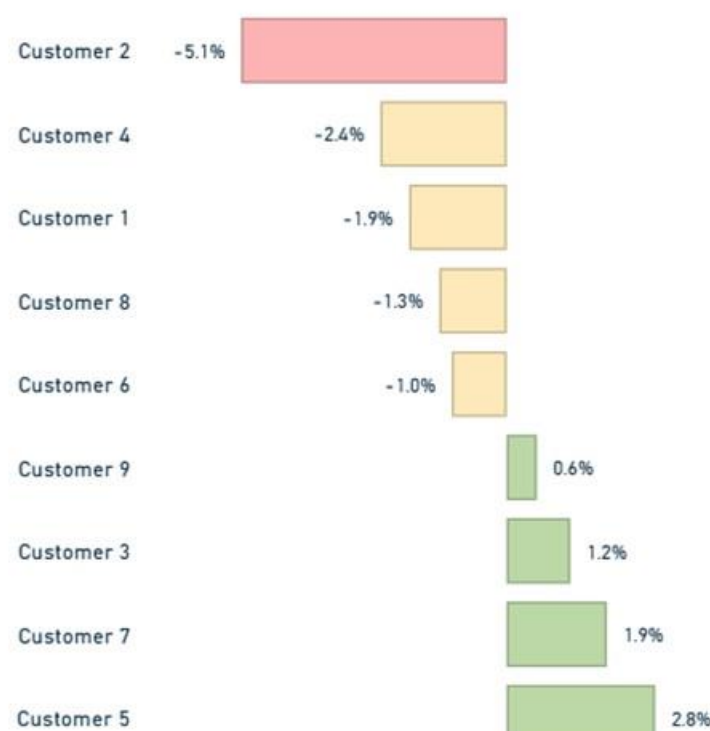
Sales Trend vs Last Year



Location
Impact on Sales Change



Customer
Impact on Sales Change



Item Breakdown	Sales Amount	LY Var %	Trend by Month
Category 1	£47,046	-3.4% ▼	
Sub Category 11	£6,494	-18.4% ▼	
Sub Category 12	£13,440	-8.4% ▼	
Sub Category 13	£27,113	4.0% ▲	
Category 2	£46,689	-5.1% ▼	
Sub Category 21	£7,292	-5.2% ▼	
Sub Category 22	£13,756	-0.1% ▼	
Sub Category 23	£25,640	-7.6% ▼	
Category 3	£97,241	3.8% ▲	
Sub Category 31	£14,516	2.1% ▲	
Sub Category 32	£31,434	12.5% ▲	
Sub Category 33	£51,291	-0.4% ▼	
Total	£468,807	-0.6% ▼	

Sales Amount
£468,807

Var **-£2,845 ▼**
Var % **-0.6% ▼**

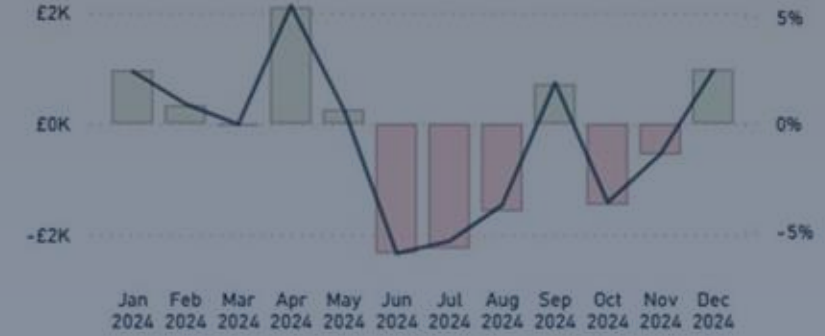
Margin
£245,995

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Var % **-0.5% ▼**

Margin %
52.5%

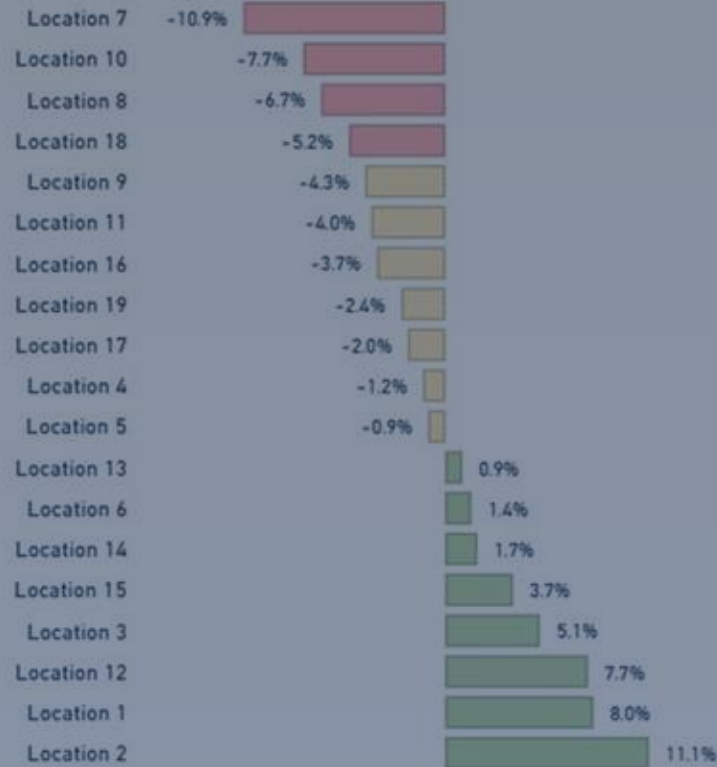
LY **52.4%**
Var **0.1% ▲**

Sales Trend vs Last Year



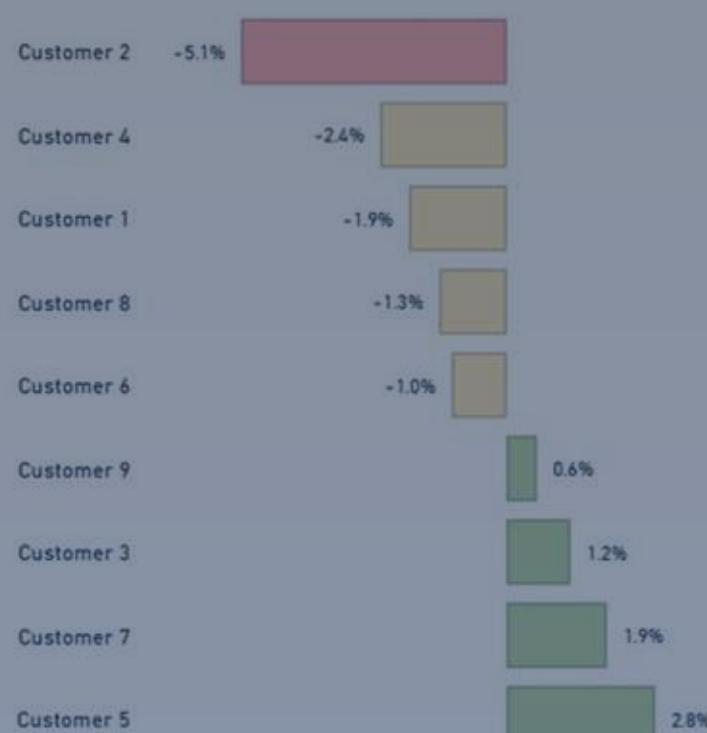
Location

Impact on Sales Change



Customer

Impact on Sales Change



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Sales Amount
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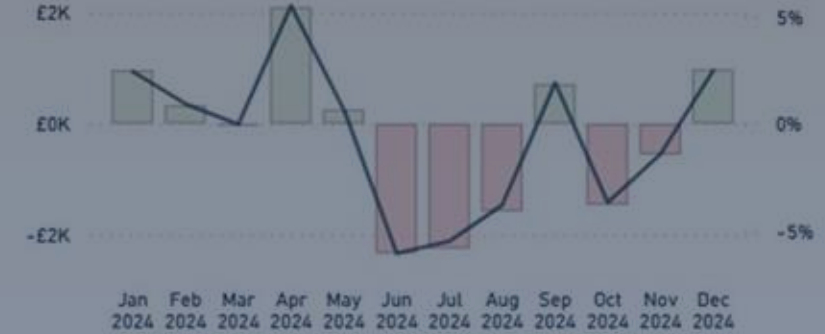
Margin
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Var % **-0.5%** ▼

Margin %
52.5%

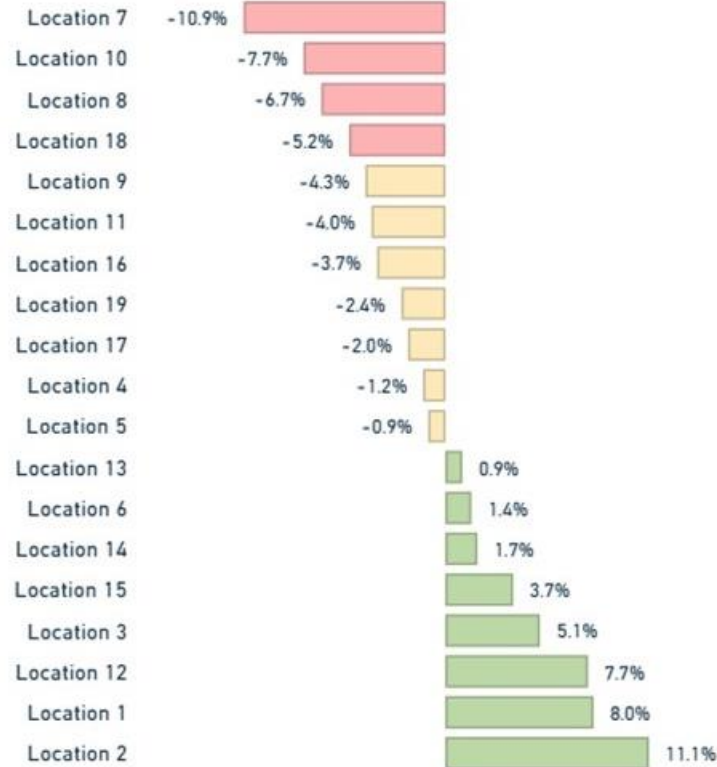
LY **52.4%**
Var **0.1%** ▲

Sales Trend vs Last Year



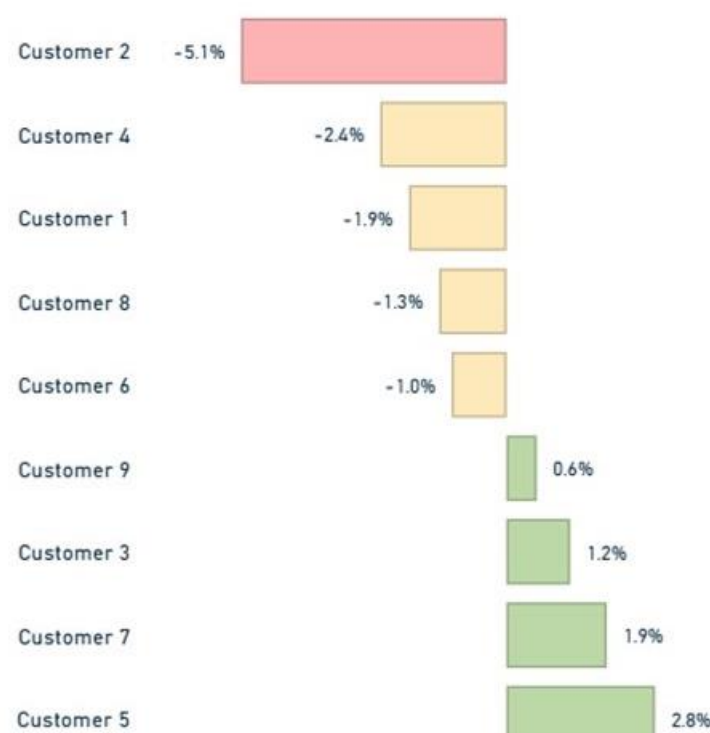
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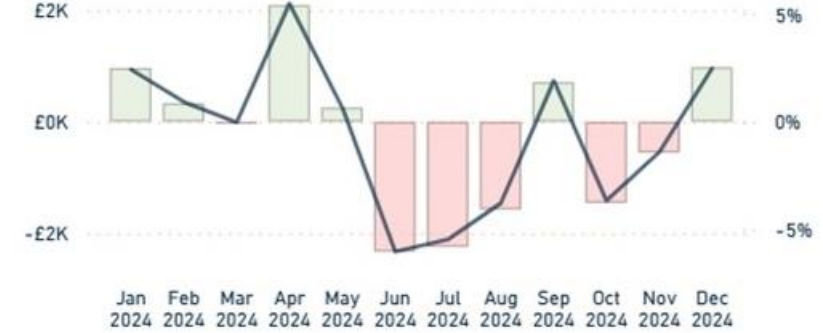
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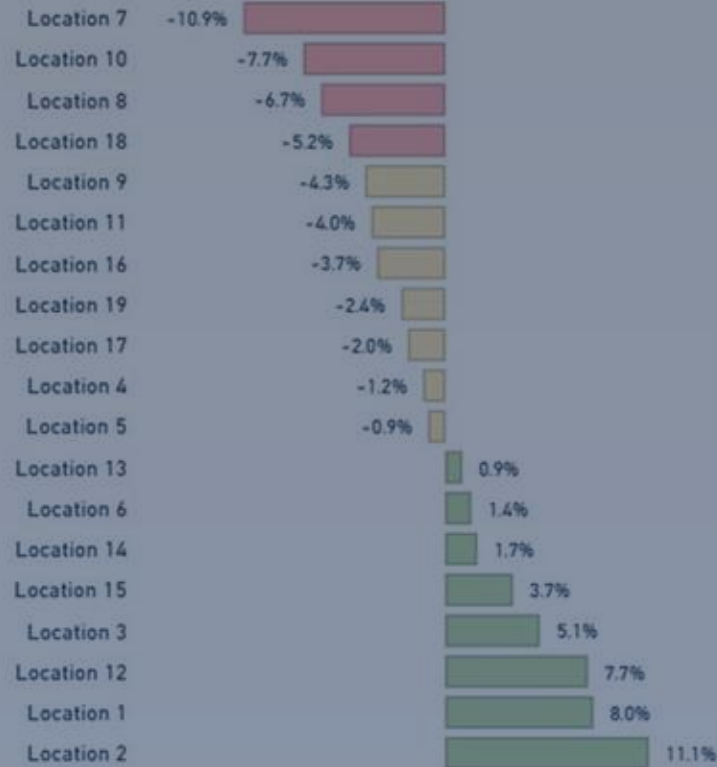
LY **52.4%**
Var **0.1%** ▲

Sales Trend vs Last Year



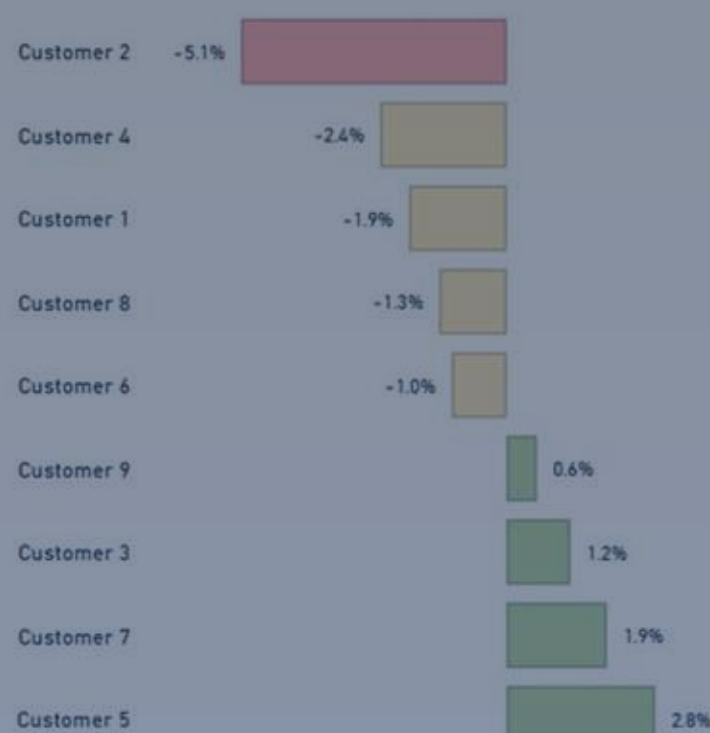
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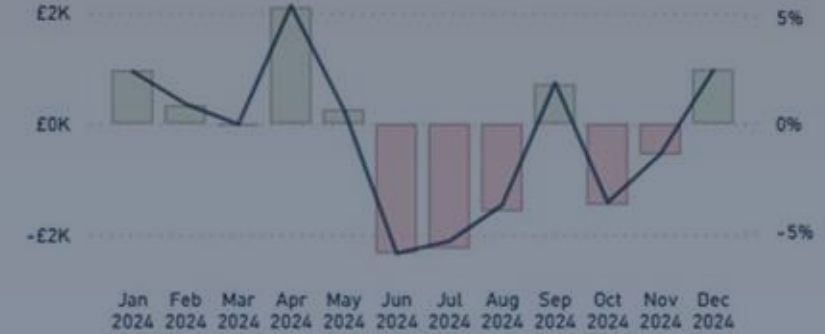
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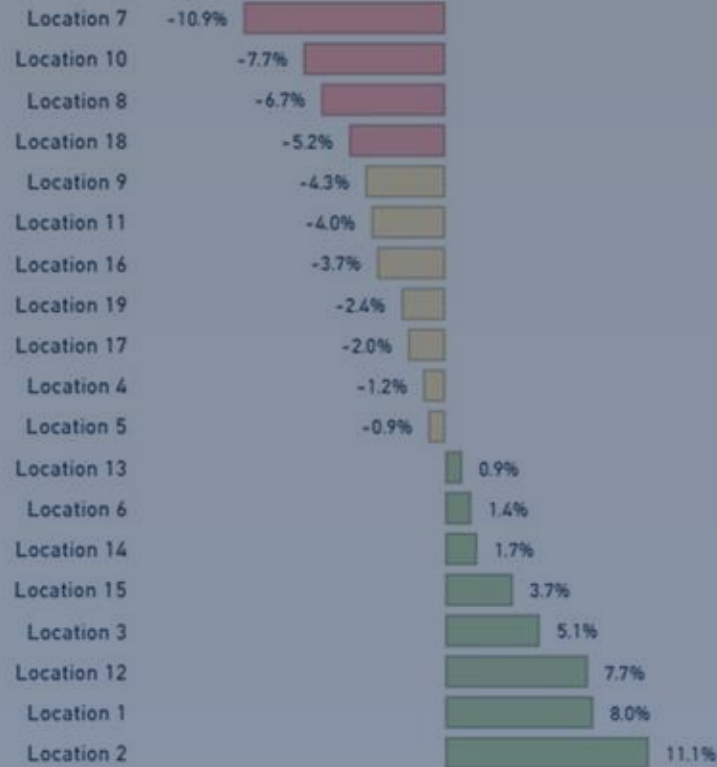
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Sales Trend vs Last Year



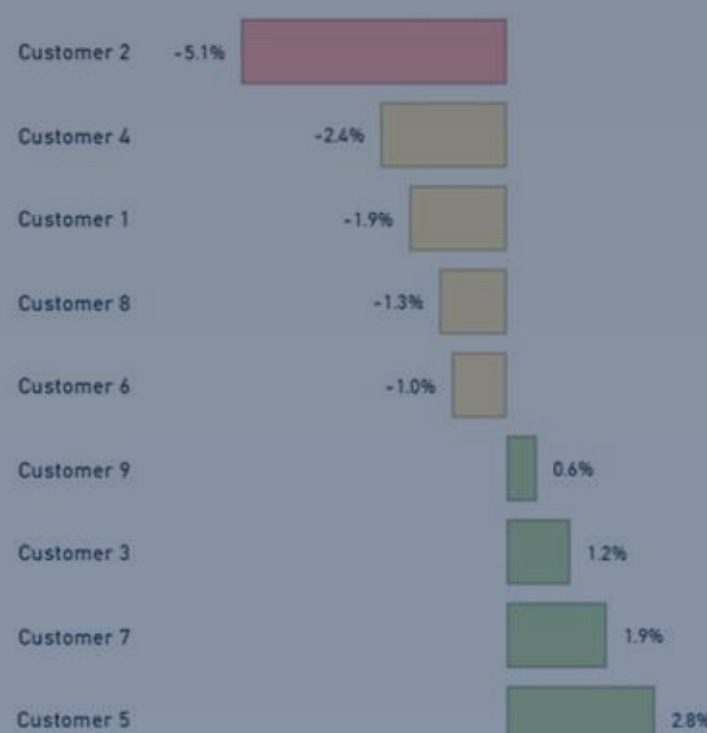
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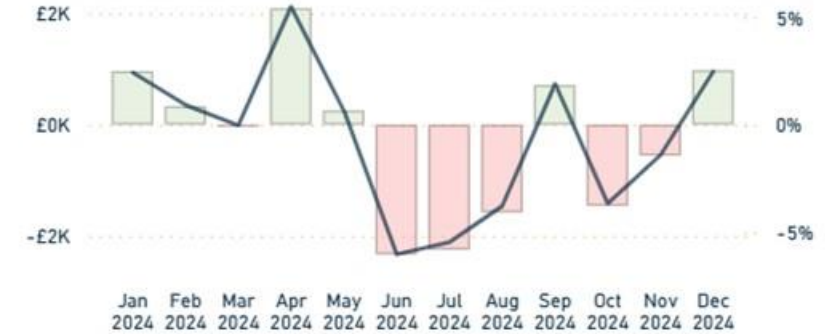
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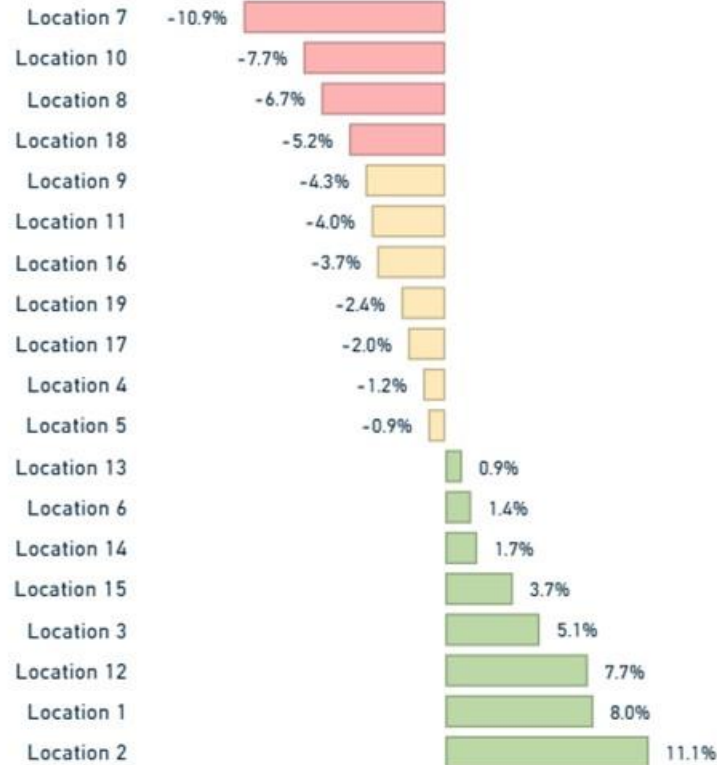
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Sales Trend vs Last Year



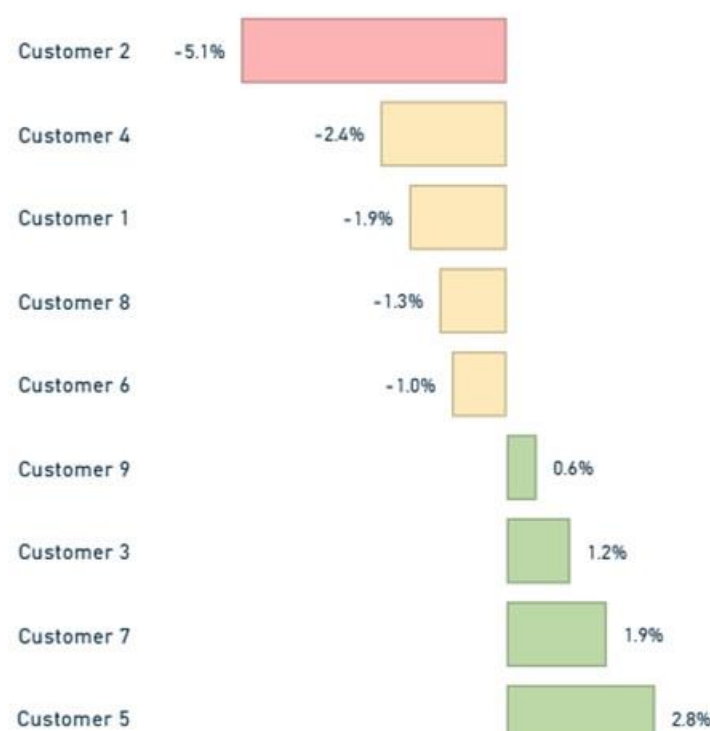
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**Design principles that
make it easy**

Reduce cognitive load



Fewer visuals &
data points



Space for visuals
to “breathe”



YTD Sales Performance

Go Back

NODE4

Sales Amount
£468,807

Var **-£2,845 ▼** Var % **-0.6% ▼**

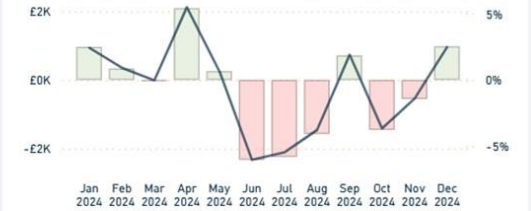
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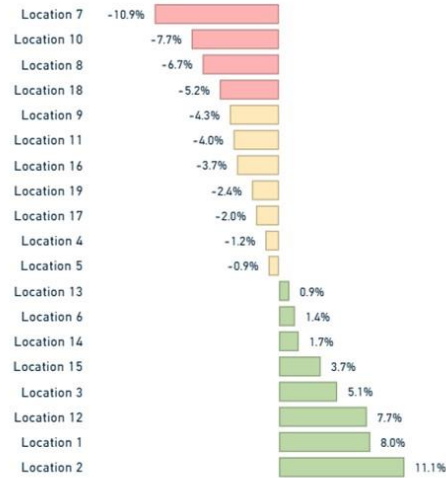
LY **52.4%** Var **0.1% ▲**

Sales Trend vs Last Year



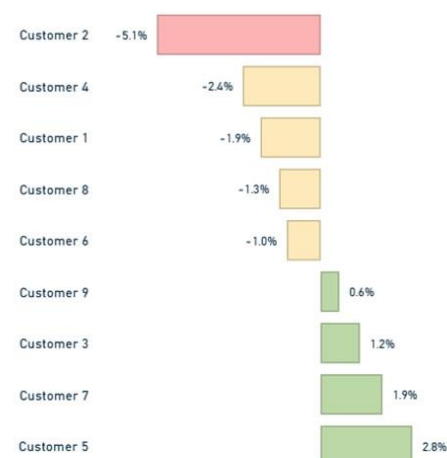
Location

Impact on Sales Change



Customer

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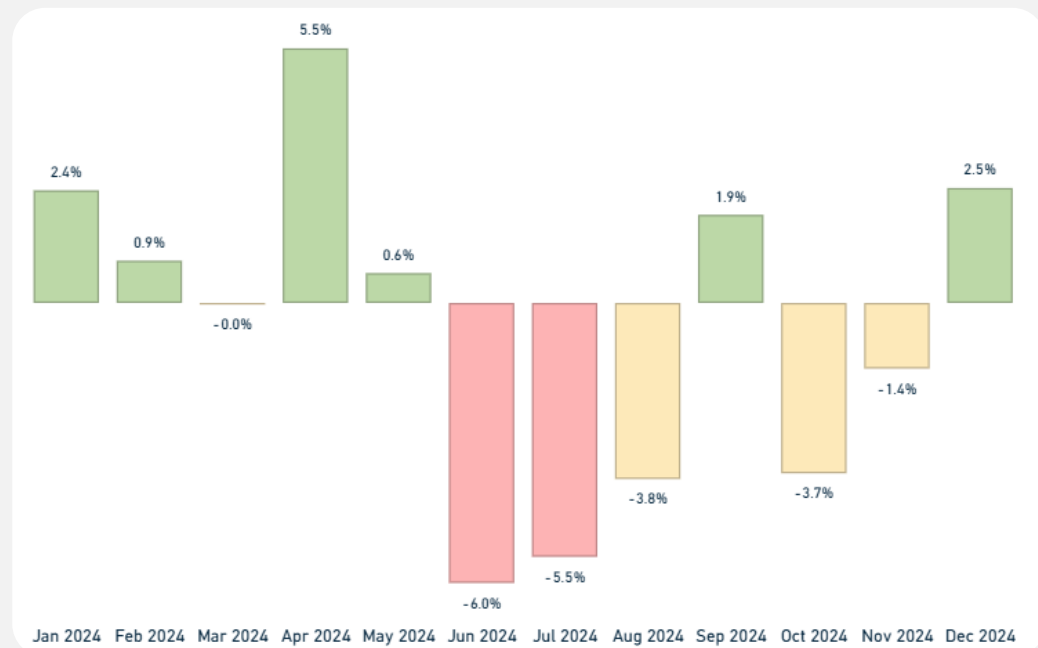
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Use of colour & icons

Margin %
52.5%

LY
52.4%

Var
0.1% ▲



Easy for users



**Make things intuitive
and consistent**



**Common page layouts
and visual styles**

Use Power BI Themes & Templates









Customize theme

- Name and colors
- Text
- Visuals
- Page
- Filter pane




Name and colors (Advanced)

Name: Node4 POC Theme

Theme colors

Color 1	Color 2	Color 3
		
Color 4	Color 5	Color 6
		
Color 7	Color 8	
		

Sentiment colors

Negative	Positive	Neutral
		

Apply Cancel

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}
```

**Every visual must
justify its existence**

The bottom line



The discipline behind the power



Thank You.



Loved it? Learned something? Had opinions?

Head to the app and share your thoughts - stars and honesty encouraged

