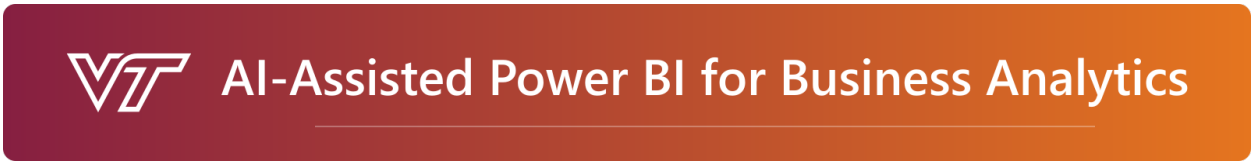

Figure 1: AI-Assisted Power BI for Business Analytics

Case Study 4: Enterprise BI Governance at Scale

Microsoft Internal Power BI Deployment

Module Alignment: Module 6 (Sharing, Collaboration & Governance) **Discussion Time**: 30 minutes **Protagonist**: David Park, Director of Enterprise BI

The Story

Chapter 1: The Question No One Could Answer

The auditor's question was simple: "Can you provide a list of all reports containing customer PII and their access permissions?"

David Park, Director of Enterprise BI at Microsoft, stared at the email for a full minute before responding. His team had built an analytics empire - Power BI adoption across the company had exploded, with thousands of employees creating their own reports, dashboards, and data models.

The problem was, no one knew exactly what they'd built.

"We can get that to you," he typed back. Then he leaned back in his chair and whispered to himself: "Can we?"

It took three weeks to compile an incomplete answer.

Chapter 2: How 15,000 Reports Happen

The growth had felt like success.

Year one: A handful of early adopters built 500 reports. Power BI was new, exciting, and IT encouraged experimentation.

Year two: Word spread. Business units saw what their colleagues had built and wanted their own. 3,000 reports now, 12,000 users.

Year three: Adoption went exponential. Every team had at least one "Power BI person" - someone who could pull data and make charts. 8,000 reports, 45,000 users.

Year four: Chaos.

Year	Reports	Users	Governance
Year 1	500	2,000	None ("Wild West")
Year 2	3,000	12,000	Minimal (workspace guidelines)
Year 3	8,000	45,000	Emerging (some standards)
Year 4	15,247	80,000+	Crisis

```
%%{init: {'theme':'base', 'themeVariables': {'primaryColor': '#e8f4fd', 'secondaryColor': '#e8f6ea', 't
timeline
    title Power BI Governance Maturity
```

```
section Year 1
    Wild West : 500 reports
              : No governance
              : Innovation thrives

section Year 2
    Minimal : 3K reports
            : Workspace guidelines
            : First duplicates

section Year 3
    Emerging : 8K reports
             : Some standards
             : Consistency issues

section Year 4
    Crisis : 15K+ reports
           : 47 "Revenue Dashboard"
           : Audit failure
```

Growth without governance led to chaos. The solution wasn't restriction - it was enablement.

Nobody had planned for this. Nobody had anticipated that empowering users to create their own analytics would lead to… this:

- 47 reports with "Revenue Dashboard" in the title
- 23 reports for the same sales team, built independently
- Semantic models copied an average of 4.2 times each
- "Revenue" calculated 12 different ways across the company
- 40% of reports with no identified owner
- 38% of reports not viewed in 90+ days
- $400K annually in storage costs for content no one used

Chapter 3: Three Perspectives on the Same Problem

David called a meeting with key stakeholders. What he heard was an organization at war with itself.

The Business Users arrived first, defensive before the meeting even started.

> "I love Power BI. I can finally get the data I need without waiting six weeks for IT to build me a report. If you're here to take this away, we'll just go back to Excel - and you won't be able to stop us."

IT Leadership saw the situation differently.

> "We have 15,000 reports and no idea if they're accurate, secure, or compliant. Anyone can connect to any data source. We found Excel files from personal OneDrive accounts feeding enterprise dashboards. This is a governance nightmare waiting to become a headline."

Finance had their own grievance.

> "I found 17 different 'revenue dashboards' last week. Three of them showed different numbers for the same metric. I asked each team where their number came from - and got three different answers. Which one do I trust? None of them, apparently."

Legal/Compliance delivered the ultimatum.

> "Are we sure no PII is being exposed? Who approved these data connections? We cannot answer auditors' questions. If we get this wrong, it's not a process problem - it's a legal liability."

David listened. Each perspective was valid. Each stakeholder was right. And their interests seemed completely irreconcilable.

Chapter 4: The False Choice

The obvious solution was a lockdown. Restrict Power BI access. Require IT approval for every report. Centralize all development.

David had seen this movie before. Companies that chose restriction didn't eliminate self-service - they just pushed it underground. Users went back to Excel. Data went into email attachments. Shadow IT flourished in the spaces governance refused to reach.

The real question wasn't *control vs. chaos*. It was: **How do you enable scale without sacrificing quality?**

He spent two weeks interviewing power users, governance teams, and compliance officers across the company. The pattern that emerged surprised him.

The problem wasn't that people were building reports. The problem was that: 1. No one knew which reports to trust 2. Duplicative effort wasted time 3. Sensitive data lacked protection 4. Success had no amplification mechanism

If these four problems could be solved, governance wouldn't feel like restriction - it would feel like enablement.

Chapter 5: The Center of Excellence

David proposed a new model: a **BI Center of Excellence (CoE)** that would govern through guidance, not gates.

The core principles:

Principle	Implementation
Democratize, don't restrict	Let people create, but guide them to best practices
Certify, don't centralize	Mark trusted content instead of controlling all content
Monitor, don't block	Track usage patterns to identify issues
Educate, not punish	Training over enforcement

The CoE structure took shape:

```
%%{init: {'theme': 'base', 'themeVariables': { 'edgeLabelBackground':'#ffffff'}}}%%
flowchart TB
    subgraph coe["  BI CENTER OF EXCELLENCE"]
        direction TB

        subgraph teams["Core Teams"]
            direction LR
            standards["  Standards Team<br/>• Naming conventions<br/>• Metric definitions<br/>• Security
            support["  Support Team<br/>• Help desk<br/>• Office hours<br/>• Report reviews"]
            enablement["  Enablement Team<br/>• Training programs<br/>• Documentation<br/>• Champions ne
        end

        subgraph certified["  Certified Content Program"]
            models["Verified Semantic Models"]
            reports["Endorsed Reports"]
            kpis["Official KPI Definitions"]
        end
```

```
        teams --> certified
    end

    style coe fill:#f0f7ff,stroke:#c7d8ed
    style certified fill:#edf6ee,stroke:#c2dbc8
    style standards fill:#fefcf0,stroke:#e8dbb8
    style support fill:#fef3f7,stroke:#f0d0dc
    style enablement fill:#f5f0ff,stroke:#d4c8e8
```

Chapter 6: The Badge Everyone Wanted

The Certified Content Program changed the game.

Instead of restricting what people could build, the CoE created a designation that elevated trusted content. Reports and semantic models could earn "Certified" status by meeting a checklist:

- Documented owner and steward
- Passes data quality validation
- Uses approved data sources only
- Implements Row-Level Security (if sensitive data)
- Follows naming conventions
- Quarterly review scheduled

Certified content received privileges: - **Search priority**: Appeared first in discovery - **Visual badge**: Clear indication of trust - **Copilot eligible**: Only certified models could power AI-generated answers - **Portal promotion**: Featured on the company BI hub

The psychology was intentional. Certification wasn't a requirement - it was an aspiration. Teams that had certification displayed it proudly. Teams that didn't felt motivated to earn it.

Within six months, something unexpected happened: teams began competing for certification. The Finance team that had complained about 17 revenue dashboards? They consolidated to three certified versions - and actively promoted them across the company. Duplication dropped not because it was forbidden, but because certified alternatives existed.

Chapter 7: The Cleanup That Wasn't a Purge

The hardest part of governance is dealing with legacy content. 15,000 reports couldn't all become certified overnight. But they couldn't all stay either.

David implemented automated lifecycle management:

```
%%{init: {'theme': 'base', 'themeVariables': { 'edgeLabelBackground':'#ffffff'}}}%%
flowchart LR
    A[" Report Created"]
    B{"Viewed in<br/>90 days?"}
    C[" Owner Notification<br/>'Still needed?'"]
    D{"Viewed in<br/>180 days?"}
    E[" Archive Warning<br/>'Will be archived'"]
    F{"Viewed in<br/>365 days?"}
    G[" Auto-Archived<br/>Storage reclaimed"]
    H[" Report Active<br/>Continue monitoring"]

    A --> B
    B -->|No| C
    B -->|Yes| H
    C --> D
```

```
D -->|No| E
D -->|Yes| H
E --> F
F -->|No| G
F -->|Yes| H
H -->|Monthly| B

style A fill:#f0f7ff,stroke:#c7d8ed
style H fill:#edf6ee,stroke:#c2dbc8
style C fill:#fefcf0,stroke:#e8dbb8
style E fill:#fef3f7,stroke:#f0d0dc
style G fill:#f5f0ff,stroke:#d4c8e8
```

Pattern	Action	Frequency
Report not viewed (90 days)	Owner notification	Monthly
Report not viewed (180 days)	Archive warning	Quarterly
Report not viewed (365 days)	Auto-archive	Annual
Duplicate report detected	Consolidation suggestion	Weekly
Uncertified report with 100+ users	Certification prompt	Monthly

The system was transparent: owners received friendly notifications, not mandates. "Your report hasn't been viewed in 90 days. Would you like to archive it, or should we keep it active?" Most people archived willingly - they'd forgotten the report existed.

Year 1 Results: - 4,200 reports archived (28% of total) - 180TB storage reclaimed - $280K annual cost savings

Nobody felt punished. The organization felt lighter.

Chapter 8: The Security Transformation

The auditor's question - "What reports contain PII?" - had started this journey. Row-Level Security (RLS) would ensure it never caused another three-week scramble.

Before the CoE, only 12% of reports used RLS. Sensitive data was exposed to anyone with workspace access. The governance team implemented a simple rule: **no certification without RLS for sensitive data**.

Example configuration for sales data:

```
Role: Region_NorthAmerica
Filter: [Region] = "North America"

Role: Region_EMEA
Filter: [Region] = "EMEA"

Role: Manager_All
Filter: NONE (full access)
```

Dynamic RLS allowed user-specific filtering:

```
[Manager_Email] = USERPRINCIPALNAME()
```

The impact was immediate:

Metric	Before RLS Mandate	After RLS Mandate
Reports with RLS	12%	78%

Metric	Before RLS Mandate	After RLS Mandate
Security incidents	3/quarter	0/quarter
Audit findings	14	0

When the next audit came, David's team answered the PII question in five minutes. The auditor actually seemed disappointed.

Chapter 9: The Champions Network

Governance couldn't be a top-down mandate. It had to be a movement.

The CoE recruited "Champions" - power users in every department who became local ambassadors for best practices. They weren't IT enforcers; they were peers who happened to know the right way to do things.

Champions received: - Early access to new features - Direct line to CoE support - Recognition in company communications - A career development track (BI Champion became a legitimate role)

In return, they: - Triaged support requests in their teams - Reviewed reports before certification - Advocated for governance during department meetings - Provided feedback to the CoE on what was working (and what wasn't)

By year two, 340 Champions operated across the company. Governance had gone from feeling like an IT initiative to feeling like a community standard.

Epilogue: What They Said Afterward

Eighteen months later, David surveyed the landscape:

```
%%{init: {'theme': 'base', 'themeVariables': { 'edgeLabelBackground':'#ffffff'}}}%%
flowchart LR
    subgraph before["  BEFORE: Chaos"]
        B1["15,247 reports<br/>40% orphaned"]
        B2["12% with RLS<br/>14 audit findings"]
        B3["47 'Revenue<br/>Dashboard' variants"]
    end

    subgraph after["  AFTER: Governed"]
        A1["9,800 reports<br/>All owned"]
        A2["78% with RLS<br/>0 audit findings"]
        A3["3 certified<br/>revenue reports"]
    end

    before -->|"18 months<br/>CoE transformation"| after

    style before fill:#fef3f7,stroke:#f0d0dc
    style after fill:#edf6ee,stroke:#c2dbc8
```

Metric	Before	After	Change
Total reports	15,247	9,800	-36% (cleanup)
Certified reports	0	1,240	New program
Reports with RLS	1,830	7,644	+318%
Average report views/month	23	67	+191%
Duplicate report ratio	4.2x	1.4x	-67%
Support tickets	450/mo	180/mo	-60%
Audit findings	14	0	-100%

But the numbers only told part of the story. The culture had shifted.

The Finance Manager who had complained about 17 revenue dashboards: > "Before the CoE, I spent an hour every week searching for the 'right' revenue report. Now I look for the certified badge. My trust in our data has never been higher."

The Marketing Analyst who had feared governance would kill self-service: > "I was terrified governance would take away my Power BI access. Instead, it made self-service better. I start from certified models now - I don't have to rebuild from raw data every time."

The Compliance Officer who had delivered the original ultimatum: > "When auditors ask about data access, I pull a report in five minutes. Used to take weeks. Governance saved us, not slowed us."

David still received the occasional complaint. Someone would argue that certification was too hard, or that the naming conventions were too strict. But the conversation had fundamentally changed. People weren't asking "Why do we need governance?" They were asking "How do I get my content certified?"

That was the real transformation: governance had become aspiration.

The Framework Behind the Story

Workspace Tiers

```
%%{init: {'theme': 'base', 'themeVariables': { 'edgeLabelBackground':'#ffffff'}}}%%
flowchart LR
    subgraph tiers["  WORKSPACE TIERS"]
        direction LR

        subgraph personal["Personal"]
            P1["  Creator Only"]
            P2["  Auto-delete 90d"]
            P3["  Minimal governance"]
        end

        subgraph team["Team"]
            T1["  Team + Viewers"]
            T2["  Naming required"]
            T3["  Standard governance"]
        end

        subgraph certified["Certified"]
            C1["  Controlled access"]
            C2["  RLS required"]
            C3["  Full governance"]
        end

        personal -->|"Collaboration<br/>need"| team
        team -->|"Enterprise<br/>consumption"| certified
    end

    style personal fill:#fefcf0,stroke:#e8dbb8
    style team fill:#f0f7ff,stroke:#c7d8ed
    style certified fill:#edf6ee,stroke:#c2dbc8
```

Tier	Purpose	Permissions	Governance
Personal	Individual exploration	Creator only	Minimal (auto-delete after 90 days inactive)
Team	Departmental collaboration	Team + viewers	Standard (naming conventions required)
Certified	Enterprise-wide consumption	Controlled access	Full (quarterly reviews, RLS required)

AI Governance (Copilot-Specific)

With Copilot enabled across the organization, new governance mechanisms emerged:

Control	Purpose	Implementation
Verified Answers	Ensure Copilot accuracy	Only certified models enable Copilot
AI Instructions	Guide Copilot behavior	Standardized instructions per domain
Prompt Logging	Track what users ask	90-day retention for compliance
Feedback Loop	Improve accuracy	Users flag incorrect answers

Training & Enablement

Program	Audience	Format	Attendance
Power BI Fundamentals	All employees	Self-paced online	12,000
Report Design Best Practices	Report creators	Live workshop	3,400
Governance & Security	Workspace admins	Certification course	850
Copilot Effective Prompting	All users	Lunch & learn	6,200
Champions Network	Power users	Monthly community	340 active

Key Learnings

Governance Principles That Worked

Principle	Why It Worked
Enable, don't restrict	Users felt empowered, not controlled
Certification is aspirational	People wanted the badge, competed for it
Automation over enforcement	Systems caught issues, not compliance police
Community over hierarchy	Champions drove adoption peer-to-peer
Transparency builds trust	Usage dashboards visible to all

What Was Hard

1. **Cultural shift**: Some teams resisted "giving up" their reports
2. **Metric alignment**: Agreeing on standard definitions took 6 months
3. **Executive buy-in**: Required showing risk (audit findings) before investment
4. **Ongoing maintenance**: Governance isn't a project - it's a program

Discussion Questions

For Class Discussion

1. **Democratization vs. Governance**: How do you balance "let anyone create" with "ensure quality"? What's the risk of too much governance? Too little?
2. **Certification Program**: Would you want to be a report creator in this environment? How do you motivate teams to pursue certification?
3. **Row-Level Security**: What data in your organization would require RLS? What happens when RLS is too restrictive? Too permissive?
4. **AI Governance**: Should Copilot be enabled for all reports or only certified ones? How do you govern AI-generated answers?
5. **Your Organization**: Does your organization have a "report sprawl" problem? What governance would you prioritize first?

Reflection Prompts

- What's the governance maturity of your organization's BI tools?
- What risks exist from ungoverned reports?
- How would you sell governance without seeming like "the IT police"?

Governance Assessment Template

Use this template to assess governance needs in your organization:

Dimension	Score (1-5)	Evidence
Content management		
Data quality		
Security/RLS		
Usage tracking		
Training/enablement		
AI governance		

Priority Actions: 1. Highest risk area: _____ 2. Quick win opportunity: _____ 3. Long-term investment: _____

Connection to Course Labs

Lab	Connection
Lab 6	You'll create workspaces and understand permission models
Lab 6	You'll observe Row-Level Security demonstration
Lab 6	You'll create an app for curated content distribution
Lab 6	You'll reflect on governance considerations

Note: The EnterpriseGovernance BRD outlines the questions a BI Center of Excellence must answer: content health, adoption metrics, security compliance, and certification program tracking. Your Lab 6 governance reflection connects directly to these enterprise concerns.

Additional Resources

- Power BI Governance Documentation
- Row-Level Security Guide
- Power BI Center of Excellence
- Microsoft BI Transformation Story

Case materials based on real Microsoft implementations. Details modified for educational purposes.