



# AI-Assisted Power BI for Business Analytics

Figure 1: AI-Assisted Power BI for Business Analytics

## Project Audit & Starbucks Case Decision

**Date:** February 11, 2026 **Purpose:** Evaluate project structure and decide on Starbucks case incorporation

### Executive Summary

The VT\_AIPOWERBI project is well-structured with clear module-lab-case-dataset alignment. The proposed Starbucks case represents a **pedagogical departure** - a Harvard-style decision case rather than a Microsoft teaching case with full solutions.

**Options:** - **Conservative (A):** Add Starbucks as CASE-05 for Module 3 supplementary discussion - **Bold (E/E2):** Make Starbucks the signature multi-session case, keep only one intro Microsoft case

### Current State Audit

#### Case Portfolio

Case	Module	Type	Protagonist	Focus	Dataset
CASE-01	1-2	Teaching	Sarah Chen, VP Cloud Sales Ops	Self-service, natural language	CloudRevenue
CASE-02	5	Teaching	Amara Okafor, VP Demand Gen	Dashboard design, multiple versions	M365Marketing
CASE-03	3	Teaching	Priya Sharma, VP Support Ops	AI visuals, root cause	SupportInsights
CASE-04	6	Teaching	David Park, Dir Enterprise BI	Governance, scale, security	N/A (conceptual)

**Case Type:** All four are **teaching cases** - they show the complete solution journey from problem to resolution using Microsoft examples.

#### Lab Alignment

Lab	Module	Dataset	Duration	Focus
Lab 1	1	CloudRevenue	35 min	First Copilot interactions
Lab 2	2	CloudRevenue	35 min	Report generation
Lab 3	3	SupportInsights	35 min	AI visuals
Lab 4	4	CloudRevenue	35 min	Metadata for AI
Lab 5	5	M365Marketing	35 min	Dashboard design
Lab 6	6	Any	35 min	Publishing

## Dataset Coverage

Dataset	Modules Using	Case Support
CloudRevenue	1, 2, 4	CASE-01
SupportInsights	3	CASE-03
M365Marketing	5	CASE-02

## Module-Case Alignment (Syllabus v3)

Module	Syllabus Case Discussion	Current Case File
1	“The Data-Driven Executive”	CASE-01
2	“Cloud Revenue Analysis”	CASE-01
3	“Customer Satisfaction Investigation”	CASE-03
4	“The Messy Data Problem”	(no dedicated case)
5	“Dashboard Critique”	CASE-02
6	“Scaling Self-Service BI”	CASE-04
7	Capstone Presentations	(no case)

**Gap Identified:** Module 4 (“Data Foundations”) lacks a dedicated case file.

## Starbucks Case Analysis

### What Makes It Different

Dimension	Existing Cases	Starbucks Case
<b>Type</b>	Teaching (shows solution)	Harvard (ends at decision)
<b>Company</b>	Microsoft (internal)	Starbucks (external, real crisis)
<b>Outcome</b>	Success story	Failure analysis
<b>Student Task</b>	Learn from solution	Propose solution
<b>Data</b>	Synthetic datasets	Real SEC data + synthetic exhibits

### Core Thesis

“Starbucks collected 2M customer feedback signals per month, had world-class AI infrastructure, and still failed to predict a crisis that customers were warning about 18-24 months in advance - because the data sat in organizational silos.”

**The Iceberg:** Those 2M signals represented only the customers who actually complained. Research shows only 4% of dissatisfied customers speak up - the other 96% silently defect to competitors.

### Key Teaching Points

1. **VoC as Leading Indicator** - Customer sentiment predicts business outcomes 18-24 months ahead
2. **Data-Action Gap** - Having data using data
3. **Organizational Silos** - Marketing owns NPS, Operations owns wait times, HR owns satisfaction
4. **AI for Whom?** - AI built for customers, not frontline workers

## Incorporation Options

### Option A: Add as CASE-05 (Recommended)

**Implementation:** - Create CASE-05-VoC-Analytics.md from current plan - Add to Module 3 (“Discovering Insights with AI Visuals”) as supplementary discussion - Theme: “What if AI visuals had existed for store managers?”

**Pros:** - Preserves existing structure - Adds Harvard-style pedagogical variety - Connects to SupportInsights (customer satisfaction theme)

**Cons:** - Module 3 now has two case discussions - No dedicated dataset (would use synthetic exhibits)

**Module 3 Discussion Flow:** 1. CASE-03 (Teaching): How Microsoft Support used AI visuals to find root cause 2. CASE-05 (Harvard): Starbucks - What would you have built to prevent the crisis?

### Option B: Replace CASE-03

**Implementation:** - Rename Starbucks to CASE-03 - Adjust SupportInsights dataset to include VoC dimensions - Archive current CASE-03

**Pros:** - Clean 1:1 case-module mapping - Thematically aligned (both about customer feedback/satisfaction)

**Cons:** - Loses Microsoft internal perspective - Requires significant dataset modification - Harvard-style may be jarring (only non-teaching case)

**Not Recommended** - Breaks the “all Microsoft, all success” teaching case pattern.

### Option C: Module 7 Capstone Primer

**Implementation:** - Use Starbucks as pre-capstone discussion (no case file number) - Theme: “Before you present your capstone, consider what Starbucks missed” - Discussion questions focus on analytics adoption barriers

**Pros:** - Natural capstone lead-in - Doesn’t disrupt module structure - Reinforces “insights matter more than reports” theme

**Cons:** - Case not connected to hands-on lab - May feel disconnected from capstone projects

### Option D: Keep as Optional/Future Module

**Implementation:** - Keep as CASE-PLAN-Starbucks-Operations.md (planning document) - Develop into full case for future offering - Consider creating Starbucks-themed dataset

**Pros:** - No immediate changes needed - Allows time for Dr. Venkatesh feedback - Could become signature case for advanced offering

### Option E: Multi-Session Signature Case (Starbucks-Centric)

**Implementation:** - Use **one intro case** (CASE-01: Cloud Revenue) to establish Power BI + Copilot context - Make Starbucks the **signature case** spanning multiple sessions - Break Starbucks into progressive chapters aligned to course modules

#### Proposed Structure:

Session	Starbucks Chapter	Module Alignment	Student Activity
1	<i>Intro</i> - CASE-01 Cloud Revenue	Module 1-2	Learn Power BI + Copilot basics
2	Chapter 1: “The Warning Signs”	Module 3	Use AI visuals to analyze VoC data

Session	Starbucks Chapter	Module Alignment	Student Activity
3	Chapter 2: “The Data That Existed”	Module 4	Explore metadata & data quality gaps
4	Chapter 3: “The Dashboard That Should Have Been”	Module 5	Design store manager dashboard
5	Chapter 4: “The Decision Point”	Module 6	Discuss governance & deployment
6	<i>Resolution</i> - Student Recommendations	Module 7	Present proposed solutions

### Case Progression:

```

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    S1[" Session 1<br/><b>CASE-01: Cloud Revenue</b><br/><i>What is Power BI? What is Copilot?</i>"]
    S2[" Session 2<br/><b>Starbucks Ch. 1</b><br/><i>2M customer voices - what did they say?</i>"]
    S3[" Session 3<br/><b>Starbucks Ch. 2</b><br/><i>The data existed - was it AI-ready?</i>"]
    S4[" Session 4<br/><b>Starbucks Ch. 3</b><br/><i>Design Maya's 2022 dashboard</i>"]
    S5[" Session 5<br/><b>Starbucks Ch. 4</b><br/><i>Governance without silos</i>"]
    S6[" Session 6<br/><b>Resolution</b><br/><i>Present to the new CEO</i>"]

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    S2 --> S3
    S3 --> S4
    S4 --> S5
    S5 --> S6

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```

**Dataset Option:** - Create **StarbucksVoC** synthetic dataset (stores, NPS, wait times, employee sentiment) - Use alongside CloudRevenue (intro) and retain SupportInsights/M365Marketing for variety - Alternatively: Adapt existing datasets to Starbucks narrative (rename dimensions)

**Pros:** - **Deep learning** - One rich case vs. four shallow ones - **Harvard authenticity** - Real company, real crisis, student-driven resolution - **Narrative continuity** - Students follow Maya’s journey across 6 weeks - **Capstone integration** - Module 7 presentations ARE the case resolution - **Differentiation** - Unique course structure (most courses do scattered cases)

**Cons:** - Significant restructuring of syllabus - Requires new Starbucks dataset (or narrative overlay) - Loses Microsoft internal perspective (CASE-02, 03, 04 retired) - Higher risk if Starbucks case doesn’t resonate

**Hybrid Variant (E2):** Keep CASE-01 (intro) + CASE-04 (governance) for Microsoft perspective, use Starbucks for Modules 3-5 only:

Module	Case	Type
1-2	CASE-01: Cloud Revenue	Teaching (Microsoft)
3	Starbucks Ch. 1: Warning Signs	Harvard
4	Starbucks Ch. 2: Data Quality	Harvard
5	Starbucks Ch. 3: Dashboard Design	Harvard

Module	Case	Type
6	CASE-04: Governance	Teaching (Microsoft)
7	Starbucks Resolution	Student presentations

## Recommendation

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flowchart TD
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```
Q["How significant<br/>should Starbucks<br/>case be?"]
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```
A["<b>Option A</b><br/>Add as CASE-05<br/><i>Low risk, quick win</i>"]
```

```
E["<b>Option E/E2</b><br/>Multi-session signature<br/><i>High impact, high effort</i>"]
```

```
A1[" Module 3 supplement<br/> Harvard/teaching contrast<br/> No restructuring"]
```

```
E1[" Deep narrative engagement<br/> Unique positioning<br/> Capstone = case resolution"]
```

```
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```

```
Q -->|Bold| E
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A --> A1
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E --> E1
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```

**Conservative: Option A** - Add as CASE-05 for Module 3

**Rationale:** 1. Module 3 is naturally aligned (AI visuals for customer insights) 2. Creates Harvard/teaching contrast (students see both approaches) 3. Starbucks thesis (“missed opportunity”) reinforces AI visuals’ value 4. No structural disruption

**Bold: Option E (or E2)** - Multi-session signature case

**Rationale:** 1. Deep engagement with one rich case beats surface coverage of many 2. Aligns with Dr. Venkatesh’s Harvard case expertise 3. Creates unique course positioning (narrative-driven analytics education) 4. Module 7 capstone becomes case resolution - authentic assessment

**Decision Matrix:**

Option	Risk	Effort	Pedagogical Impact	Uniqueness
A	Low	Low	Medium	Low
B	Medium	Medium	Low	Low
C	Low	Low	Low	Low
D	None	None	None (future)	N/A
<b>E</b>	High	High	<b>High</b>	<b>High</b>
<b>E2</b>	Medium	Medium	High	High

**Recommendation for Dr. Venkatesh Discussion:** Present Options A vs. E2 as the key decision point.

## Required Documentation Updates

Regardless of decision:

1. **cases/README.md** - Add Starbucks case to overview table
2. **syllabus/AI-Assisted-PowerBI-Syllabus-v3.md** - Update Module 3 or 7 discussion
3. **README.md** (root) - Update case count in project overview

## Next Steps

1. **Dr. Venkatesh Review** - Get approval on case thesis and approach
2. **Decision Checkpoint** - Fabio + Venkatesh choose: A (add case) vs. E2 (signature case)
3. **If Option A:** Convert CASE-PLAN to CASE-05, update Module 3
4. **If Option E/E2:**
  - Break Starbucks into chapter structure
  - Design StarbucksVoC dataset (or narrative overlay)
  - Restructure syllabus case discussions
5. **Documentation Update** - Apply changes per this audit

*Audit completed February 11, 2026 - Alex Meditation Session*