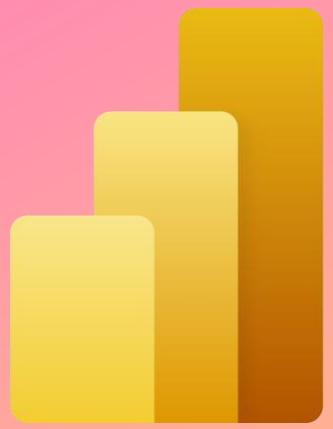

Building your BI Team in a Fabric World

Megan Livadas

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Hello!

- Head of BI – Microsoft at **Dufrain**
- **Power BI Fangirl** since 2018 and recent Fabricator
- Blogging at **livadata.wordpress.com**
- Working across a range of industries but particularly fond of **insurance** and **retail**
- On a mission to help organisations create a Power BI Culture, and drive **adoption through proper governance**

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Livadata

POWER BI MADE SIMPLE

How did we get here?

- Power BI Tenant switched on
- Licenses purchased and assigned
- Developers developing

Job done?
Right?

Thousands of workspaces!

Swimming in duplicates of the same content!

How many Power Query steps?!

No version of the truth!

Users still in Excel!

Capacity Throttled!

"And now we need to learn Fabric too?"

Defining Roles in your Fabric Organisation

Admin Roles

- Fabric Admin
- Capacity Admin
- Domain Admin
- Pipeline Admin

BI Roles

- BI Developer
- BI Analyst

Architecture & Engineering Roles

- Data Architect
- Data Engineer
- BI Engineer

Business Facing Roles

- BI Business Partner
- Business Analyst

Other Roles

- ML Engineer
- Data Scientist
- Data Governance

Business Roles

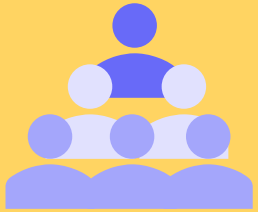
- Power Users
- Data Consumers

Small Organisation

BI Manager
(+Fabric Admin, Capacity Admin, Pipeline Admin, BI Developer, BI Business Partner, Data Governance Specialist)

BI Developer
(+Pipeline Admin, BI Engineer, Business Analyst)

Data Engineer
(+Pipeline Admin, ML Engineer, BI Engineer, BI Developer)



Data Consumers

Large Organisation

Head of BI
(+ Fabric Admin)

Lead BI Developer
(+ Fabric Admin)

BI Business Partner

BI Engineers & Developers

Business Analysts

Data Engineers & Architects

Data Scientists

Data Governance

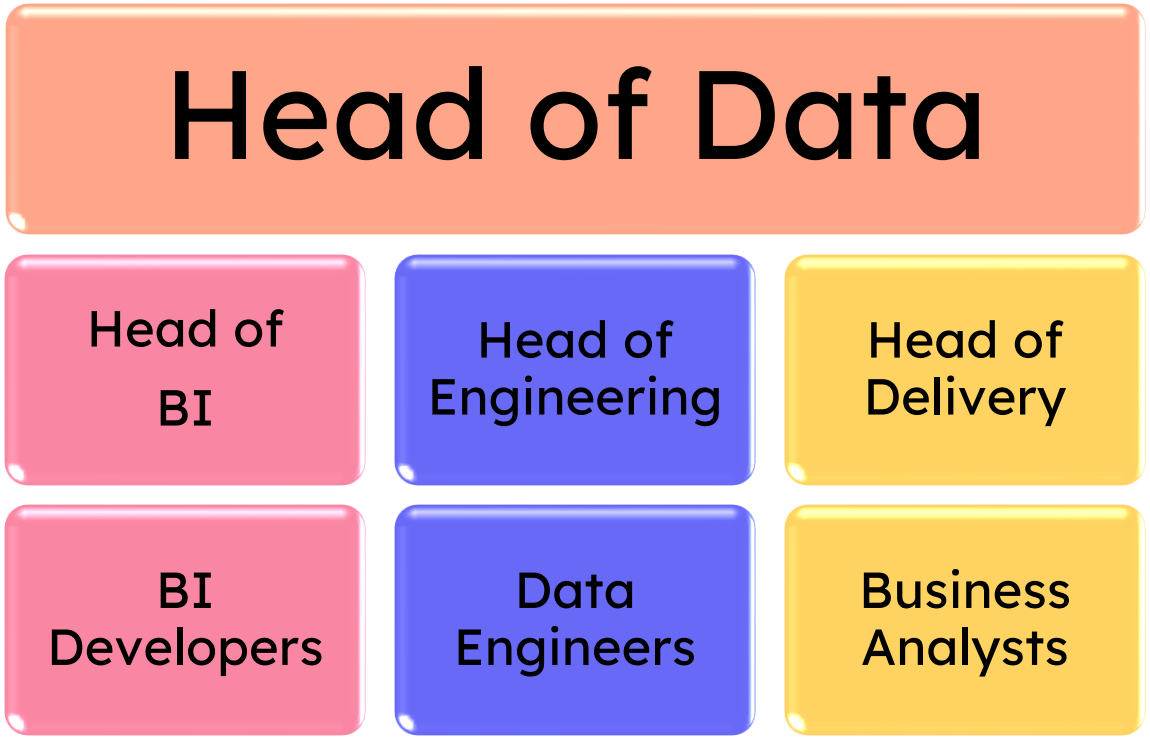
BI Developer – APAC
(+ Capacity Admin)

Power Users
(+ Domain Admins?)

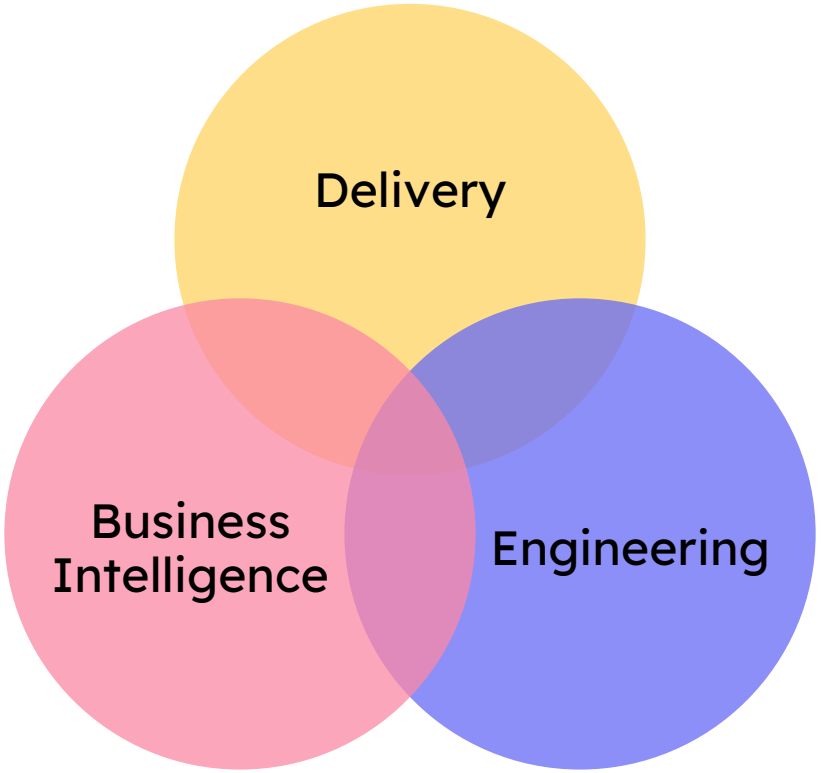
Data Consumers

Organisational Culture

Teams who silo BI from Engineering may struggle to adopt Fabric as the lines between **analytics** and **engineering** have become all the more blurred.



Collaborative working will be key to success in Fabric, as no one team will be masters of it all!



Where do we Start?

1

Pick your first use case
Think business value over tech! As techy's "doing Fabric" can feel exciting enough to justify the work but to secure your budget, always tie it into the "Why" for your organisation.

2

Time to unpick that Power BI Tech Debt…
Identify key metrics and attributes for your use case, which sources they come from and necessary transformations.

3

Design your Fabric Architecture.
Consider the skills in your team and work with what you have initially. Dataflows or Notebooks? Copilot aided development?

4

Augment your use case with full Fabric capability
Data Activator, Azure AI Foundry, Purview, Real Time Analytics, Translytical Features

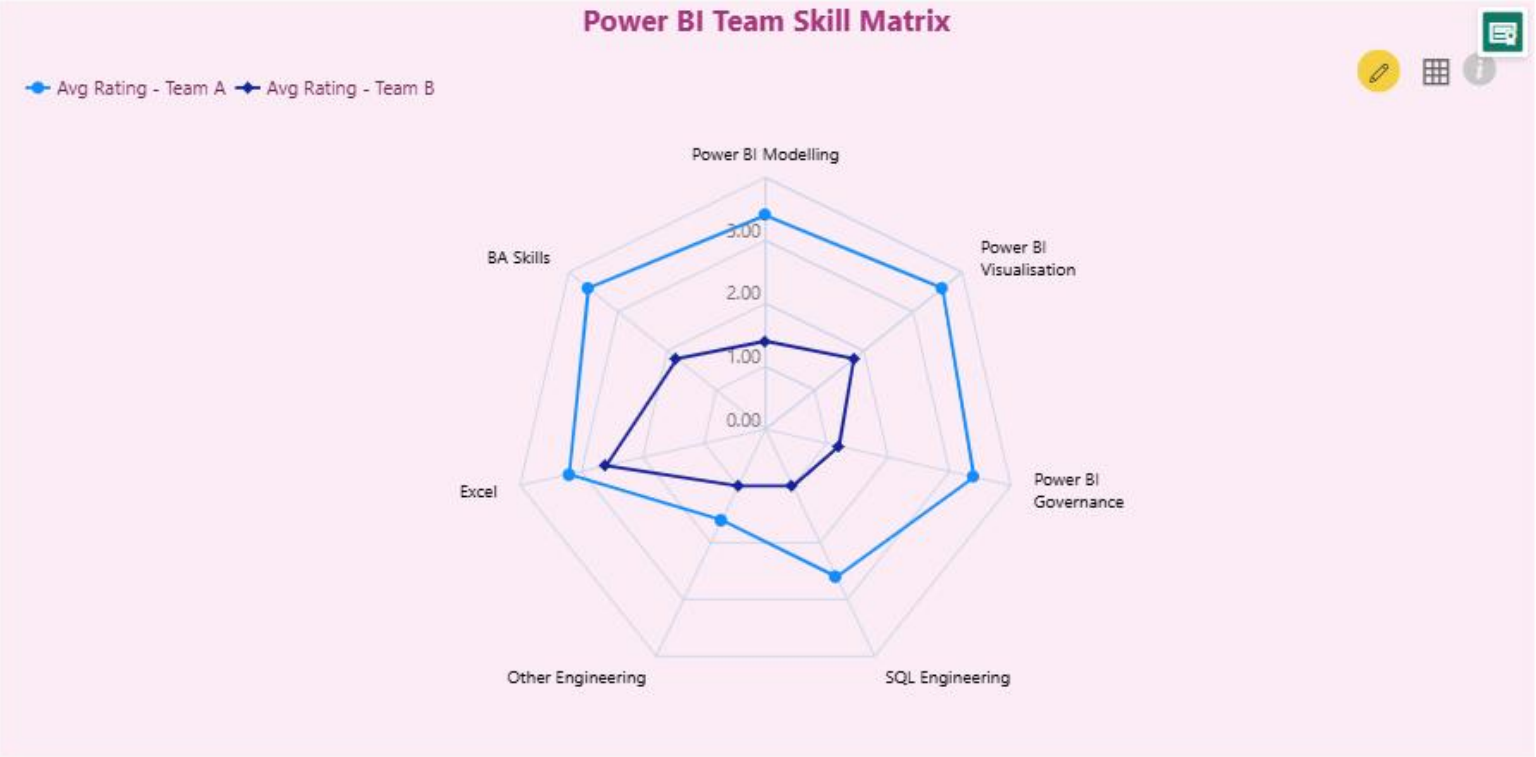
Get Certified
Augment your hands on experience with Microsoft's DP600 Learning Path

Skill Assessments

Skill Level	Description	Power BI Modelling	Power BI Visualisation	Power BI Governance	SQL Engineering	Other Engineering	Excel	BA Skills
1 - Novice	Little to no experience, struggles with basic concepts.	Limited understanding of Power BI data modeling. Struggles with relationships and does not use DAX.	Can create basic charts but lacks design skills. Struggles with selecting the right visuals.	No understanding of governance, security, or data access policies specific to Power BI.	Struggles with basic SELECT queries. No experience with JOINS, GROUP BY, or WHERE clauses.	No experience with engineering beyond Power BI.	Basic knowledge of Excel (SUM, AVERAGE). No experience with PivotTables or advanced formulas.	Struggles to understand business requirements or how data can drive decisions.
2 - Beginner	Some knowledge, but struggles with intermediate tasks.	Can create basic data models but lacks efficiency. Uses simple relationships and basic calculated columns but struggles with performance optimisation.	Knows basic Power BI visuals but lacks interactivity (e.g., drill-through, slicers). Limited formatting skills.	Knows basic Power BI Service concepts (publishing reports, setting up refresh schedules).	Can write basic queries but struggles with JOINs, aggregations, and subqueries.	Basic knowledge of scripting (Python, PowerShell) or APIs but cannot integrate them with Power BI.	Can use PivotTables, simple functions (VLOOKUP, IF), and basic data cleaning.	Can document basic requirements but struggles with translating them into actionable insights.
3 - Intermediate	Can work independently on most tasks but has gaps in advanced areas.	Can design well-structured models using star schema, manage relationships effectively, and write basic DAX measures. Aware of performance issues but limited troubleshooting skills.	Builds functional and interactive reports with slicers, bookmarks, and drill-through. Some awareness of best practices in UI/UX.	Can manage workspaces, share reports securely, and implement basic RLS (Row-Level Security).	Comfortable with JOINs, CTEs, subqueries, and case statements. Can write optimised queries but struggles with indexing and performance tuning.	Can write scripts to automate Power BI refreshes, API calls, or basic Power Automate flows.	Comfortable with INDEX/MATCH, Power Query, and data visualization tools in Excel.	Understands business needs, can translate them into Power BI requirements, and communicates findings effectively.
4 - Advanced	Proficient in most aspects, can handle complex scenarios, and optimize workflows.	Proficient in DAX measures, row/filter context, and optimisation. Can handle complex relationships and performance tuning (query folding, reducing cardinality).	Designs professional dashboards with cohesive themes, effective layouts, and KPIs. Uses advanced interactivity features (dynamic visuals, custom tooltips).	Proficient in workspace governance, version control and deployment and monitoring user activity.	Proficient in writing efficient queries, performance tuning (indexing, partitioning), and stored procedures.	Proficient in using APIs, cloud services (Azure, AWS), Power Automate, and integrating Power BI with other systems.	Proficient in Power Query (Get & Transform), complex formulas, automation with VBA, and integration with Power BI.	Proficient in gathering requirements, engaging stakeholders, and directing impactful insights through Power BI.
5 - Expert	Deep expertise, can mentor others, implement best practices, and optimize systems.	Master of data modeling best practices, highly optimised models, advanced DAX expressions, and performance tuning techniques. Can mentor others in best practices.	Master of data storytelling and UI/UX best practices. Creates highly interactive and visually appealing dashboards. Can train others on advanced visualisation techniques.	Deep understanding of Power BI architecture, tenant settings, governance policies, licensing and capacity management, compliance (GDPR, etc.), and enterprise-level security.	Deep expertise in query optimisation, indexing strategies, database design, and ETL workflows. Can troubleshoot performance issues and mentor others.	Deep expertise in automating data pipelines, cloud integrations, custom connectors, and advanced engineering workflows.	Master of Excel automation, Power Query, VBA, Power Pivot, and enterprise-level data analysis workflows.	Strong communicator, understands the business context deeply, and can lead data-driven decision-making processes.

When building your BI function, consider key skills and assess competency of your people. Your skill matrix can guide where you need to invest in training, and how to shape your recruitment or use of data partners. You can also self-assess for your own personal development.

Skill Assessments



The skill assessment is not a performance management initiative – it's about having a clear picture of your current maturity, upskilling areas to focus on, and supports with mapping teams to target role structures.

Key Principles of Power BI Governance

It's easy to get lost in a sea of blogs and best-practice guides, but the truth is—what works best will always depend on your organisation. Set your core principles as a team and stay true to them.

Prevent Data Breaches

Implementing security measures to protect sensitive data from unauthorised access or leaks, safeguarding the privacy and integrity of the information.

One Version of the Truth

Ensuring that everyone in the organisation has access to the same accurate and up-to-date data, eliminating conflicting information.

Reduce Overhead

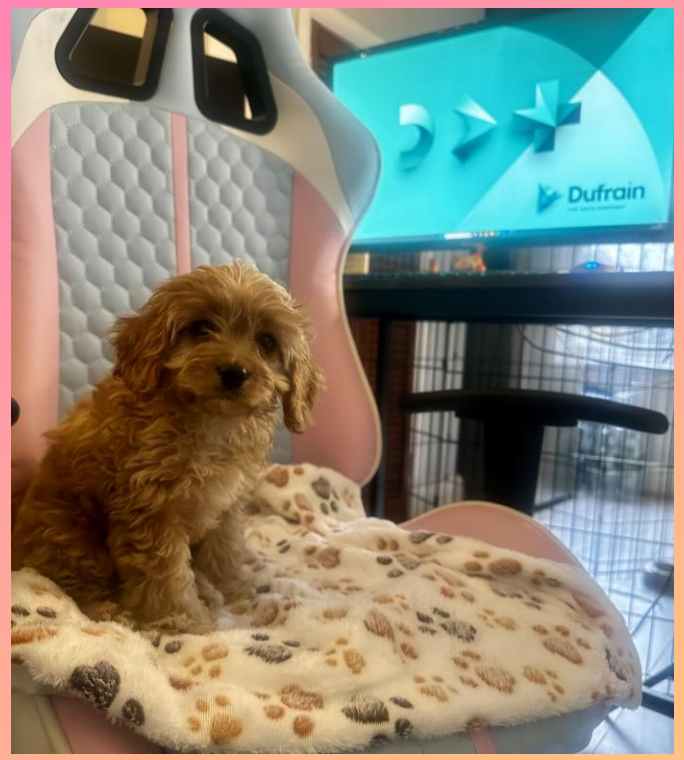
Future-proofing work to prevent as much development rework in future as possible.
Streamlining administrative tasks and processes, making it easier to manage and maintain the Power BI environment.
Save your team time and effort.

Engage your Users

Empowering users to explore and analyse data independently, providing them with the tools and resources to make data-driven and informed decisions and drive business success.

Thank You!

and happy Fabric’ing



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