

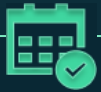


ASTRALFOREST

MicroStrategy to Power BI

Vision for Tool Migration

Topic introduction



Current Situation

- MicroStrategy used as XYZ's BI tool for the past 20 years
- Cloud version of MSTR in use
- Thousands of existing MSTR reports
- 1k+ MSTR users
- XYZ *in process of migrating from SAP HANA to Snowflake for data warehousing*
- Need for a modern BI tool better suited to self-service requirements



Considered Options

- Retain MSTR exclusively
- Use an additional tool (such as Power BI) solely for the self-service component
- Execute a full migration from MSTR to another tool – Power BI

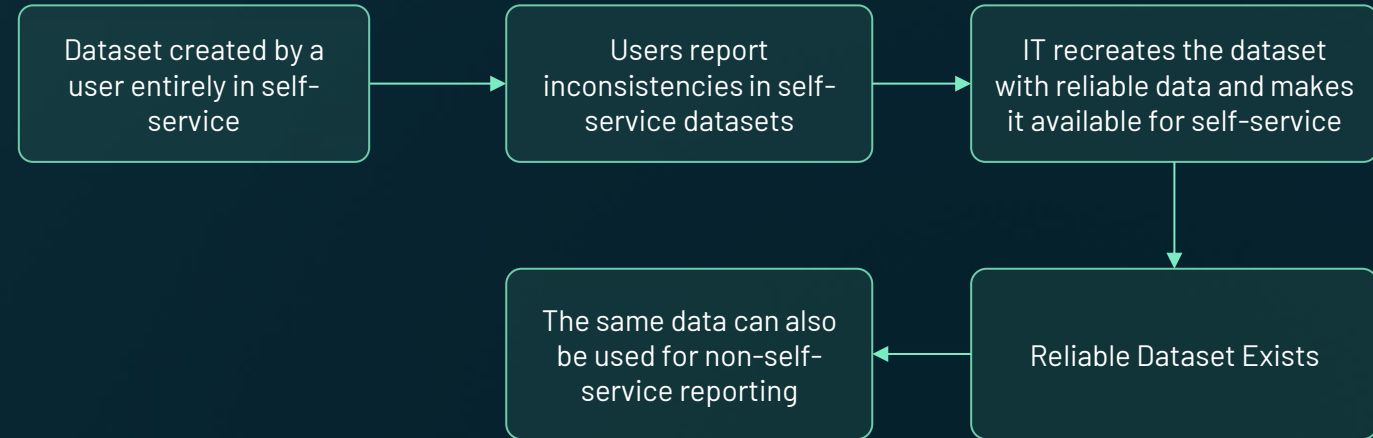
Objective of the Document

- Present the vision for a complete migration from MicroStrategy to Power BI
- Outline the challenges associated with a partial self-service migration



Self-Service Cycle

1. Users can create their own datasets in self-service mode.
2. Challenges related to data reliability emerge with self-service.
3. To resolve these issues, IT prepares reliable datasets for self-service use, ensuring appropriate governance.
4. Once prepared, these datasets are usable not only in self-service mode but also as a foundation for all other corporate reports.



Challenge

1. Maintaining business logic and data structures across two distinct tools (MSTR and Power BI) is costly.
2. It is more economical to reuse reliable objects designed for self-service in corporate reports as well.

PHASE

FRAMEWORK

RESULTS



1. Planning

Workshops with stakeholders, analysis of the current MicroStrategy configuration, and confirmation of XYZ's future needs.

- Initial Project Plan
- Confirmation of Power BI Service Deployment Framework
- Cost Estimation for Power BI/Fabric Infrastructure, Target Solution Architecture



2. In-depth Analysis

Workshops with business units, analysis of report usage statistics; listing of report data sources, and framing of data modeling.

- Detailed Project Plan
- Identification of Business Owners for Report Groups
- List of Reports to be Recreated / Business Needs to Address
- List of Data Sources Required for Reports
- List of Potential Issues During Migration



3a. Development and Acceptance

- Collaboration with business units
- Collaboration with DWH/DLH Data Engineers to deliver the necessary schemas and transformations
- Configuration of Power BI/Fabric Tenant

- Administration and Governance - Implementation and configuration of roles and workspaces in Power BI
- Establishment of DevOps Processes for Power BI Objects
- Delivery of Semantic Models (Datasets) in Power BI
- Delivery of Power BI Reports



3b. Change Management

- Empowerment of End Users
- Collaboration with IT and knowledge transfer on Power BI
- User Training
- Integration of Workflows with Power BI
- Change Management Monitoring

- Implementation of a Power BI Adoption Tracking Tool
- Establishment of a Power BI Administration Tool
- User Training Program



Planification

Project Plan

1. Confirm the project scope
2. Estimate the project duration and effort
3. Confirm the working methodology
4. Identify key stakeholders and team responsibilities for the migration
5. Confirm the communication strategy for the project
6. List project risks
7. Confirm the level of parallelism for the migration

Power BI Deployment Framework

1. Outline and describe the recommended framework for the deployment of Power BI
2. Confirm roles and responsibilities in the project and post-migration
3. Prepare the list of processes to be managed during and after the migration related to Power BI

Cost Estimation

1. Confirm the communication approach for the project
2. Recommend the capacity purchasing option – reserved or pay-as-you-go
3. Estimate project costs using the available information

Target Architecture

1. Confirm the data sources for Power BI and their connection methods
2. Estimate the number of semantic models post-migration and their sizes
3. Validate the need for additional tools to work with Power BI (e.g., custom visuals, Power Apps, Tabular Editor, etc.)

STEPS

1. Identification of Business Stakeholders

1. Determine the owners of reports essential to the migration.

2. Selection of Reports to Migrate

1. Exclude unused, obsolete reports, or those deemed unnecessary by business stakeholders.
2. Improve and streamline reports during the migration to reduce their quantity.

3. Identification of Challenges and Dependencies

1. Examine the interdependencies of reports, data flows to other applications, and interactions with 3rd parties.

4. Define Data Sources to Migrate and Establish a "GOLD" Data Layer.

5. Detailed Project Planning

1. Choose between a parallel or linear migration.
2. Estimate project duration and costs with the new information.
3. Test Drive: Migrate a small group of reports to adjust the process to the XYZ's context.
4. Big Bang: Migrate the most frequently used reports to demonstrate progress and inevitability of the migration.

Reduction of Complexity in One of Our Migrations

61% reduction in the number of initial reports.

According to statistics, in the last 12 months, of the existing reports, only 39% were used by anyone. Nevertheless, the fact that they are technically used doesn't mean that they're needed..

30% reduction in the number of reports in need to migration

After conducting deeper technical investigation and business discussion, we decided to merge some reports together reducing even more the number of the reports to migrate.



49% reduction in the number of used reports.

According to a series of interviews conducted with the business owners and the process of discussing each report on a case-by-case basis, it was established that only 51% of the used reports require migration.

1. Recommended Approach

1. Use a Waterfall methodology for planning and analysis.
2. Opt for iterative delivery of reports and datasets.

2. Team Composition

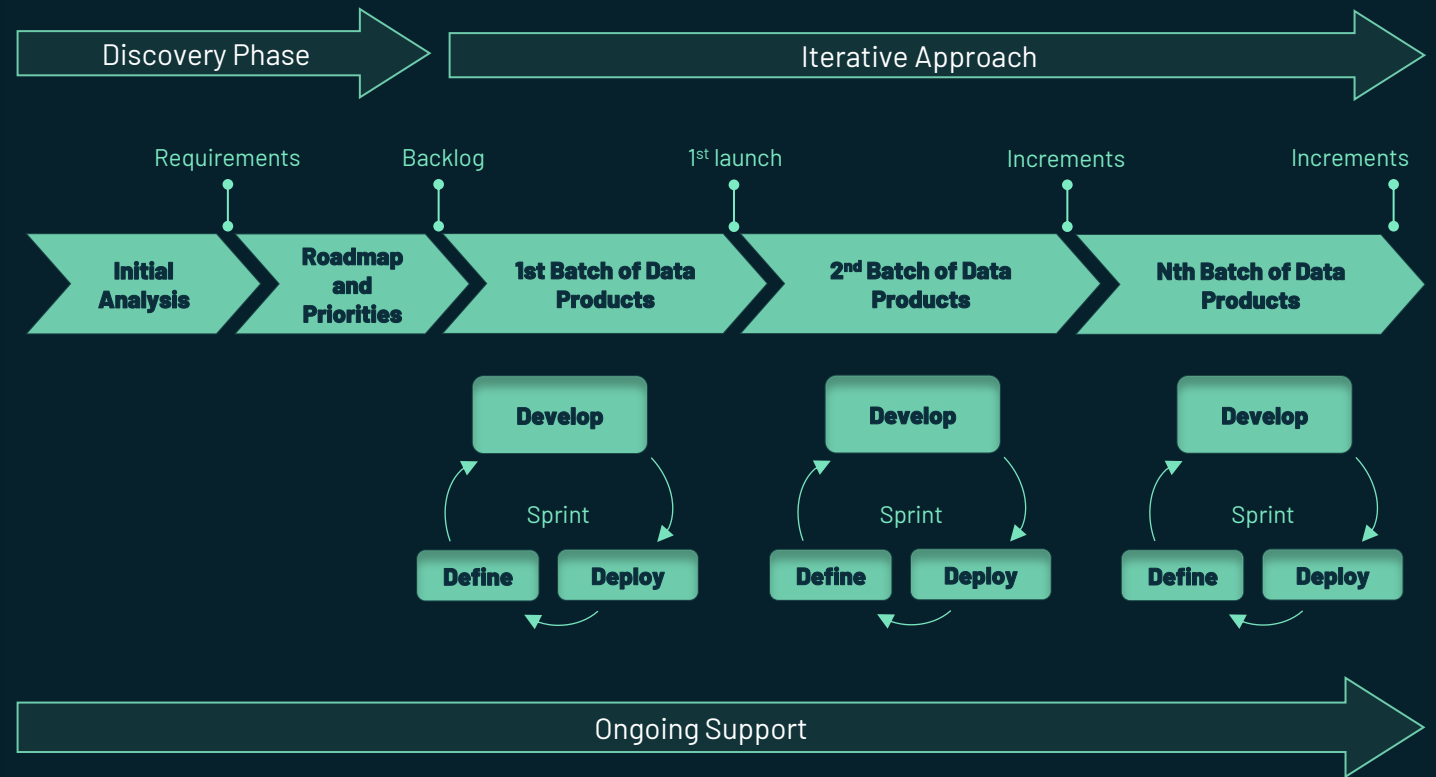
1. Build a team by domain, including a business leader and a PM/Power BI lead analyst.
2. PBI Admin/Architect are cross-functional roles.

3. Task Distribution

1. The PM/lead analyst organizes the work among Power BI developers and data engineers, aligning priorities with business needs.

4. Benefits of This Approach

1. Adaptability to changing business requirements and adjustment of priorities as needed.
2. Enhanced mutual understanding between business teams and data teams.



Change Management 1/2



Key Objectives

- Smooth transition from MicroStrategy to Power BI
- Minimize operational disruptions
- Maximize user adoption and engagement



Stakeholders

- Executive Management: Strategic alignment and decision-making.
- Project Team: Collaboration between IT teams (Architecture, Admin, Power BI, DWH/DLH, MicroStrategy) and business units.
- End Users: Ensure that user needs are addressed throughout the transition.



Tools and Frameworks for Success

- PBI Adoption Monitoring: Track Power BI user activities and adoption metrics to meet objectives and identify additional training needs.
- PBI Governance Assistant: Ensure adherence to best governance practices, reduce risks, and streamline the administration of the Power BI environment.
- PBI Deployment Framework: A customized framework for managing a smooth transition, including best practices for deployment, security, and scalability.

Change Management 2/2



Phased Approach

- Discovery and Planning: Identify reports and Business Owners, communicate the plan.
- Development and Testing: Set up the Power BI environment with governance tools and the deployment framework. Migrate the reports.
- Training and Deployment: Utilize insights from the user tracking tool to tailor training.
- Post-Go-Live Support: Continuous monitoring of user adoption and governance, along with regular feedback.



Communication Strategy

- Regular updates through established communication channels.
- FAQ and dedicated support to continuously address stakeholder questions.
- Comprehensive training programs and learning platforms for self-service functionality.
- Power BI champions in each department for hands-on support.



Risk Mitigation Plan

- Proactive identification and communication regarding risks.
- Utilization of the Power BI deployment framework and established working methods.
- Employ governance tools to ensure compliance and reduce risks.
- Manage user resistance through clear communication of benefits and ongoing support.



We Know Both Worlds:
MicroStrategy and
Power BI

01



3 founders have
experience with both
MicroStrategy and
Microsoft Stack.

02



You Know Us

03



We Have Experience in
Migrations

04



We Are a Human-Sized
Company

05



ASTRALFOREST

Contact Us

Michał Dębski,

Michal.debski@astralforest.com

<https://astralforest.com/>

Mobile: +48 786 11 36 16