Data adoption roadmap.

Turns your data into wisdom at the right pace

EpicData.

Data adoption roadmap in 5 bullets.

- Scalable training programme
- Lift the data adoption level in your whole organisation
- Suitable for both business & IT
- Continuously measure your success & data adoption grade
- Easy & transparant pricing to lower the entry treshold

The data adoption roadmap.

01

Be inspired by the power of data viz

Introduction **keynote**: “The power of data are graphs” - how to become **data & graph literate?**

02

Assessment of your data adoption level

Via **surveys**, we define your **current level** of data adoption and **discuss** the results with you.

03

Define the needs

Based on the results, with the help of **our experts**, we define your **destination level(s)** and how to get there.

04

Training formats

We provide the **right training format** and **calendar** for your business

05

Re-assessment of your data adoption level

We provide a timely **re-assessment** to define how your team has **grown**.

Let’s build a Data Community

We make sure everyone can learn in a **continuous** way

Define the needs – skillmatrix level example.

03

EXAMPLE

Naam	Visualization best practices	Visualizations in Power BI	DAX	Model (Dimensionaal Modeleren)	Ingest (M-query)	Administration (PowerBi Service)
Level 1 - Beginner	- Understands basic chart categories (e.g. composition, part-to-whole, distribution) - Can create basic visuals according to best practices (e.g. bar, line, pie) - Can read and interpret simple charts	- Can create simple visuals such as tables, bar charts, and line charts - Is familiar with basic formatting options such as colors and fonts - Can create a report page with static values - Understands how to create meaningful groups in the selection pane	- Understands the basic syntax of DAX - Can create simple calculated columns and measures using built-in Power BI functions - DAX basic functions (e.g. SUM, AVERAGE, COUNT, MIN, MAX)	- Understands the basics of data modeling in Power BI (e.g. relationships between tables, measures vs. calculated columns) - Can create simple data models with a few tables and basic relationships - Is familiar with basic data types (e.g. text, [illegible]	- Understand the basic [illegible] Query (e.g. data source co[illegible]nsformation) - Can crea[illegible] queries using the built-in Power [illegible] - Is fam[illegible] with basic transformations (e.g. filtering, [illegible]ting, renaming)	- Understands how to publish a report - Is familiar with navigation in Power BI - Understands how to subscribe users to reports - Is familiar with the several components in Power BI (workspace, app, report, dashboard)
Level 2 - Novice	- Understands the impact of a data visualization (read, interpret, understand) - Understands the importance of choosing appropriate chart types based on the data being visualized - Can create more complex visuals such as stacked charts, scatter plots, and bubble charts - Is familiar with basic design principles such as color theory and typography - Can apply basic data formatting techniques such as sorting and filtering	- Understands how to use basic interactivity options such as tooltips and highlighting - Understands how to use a theme in Power BI - Is familiar with setting up a Calendar dimension - Is familiar with filter context (slicer, filter pane) - Is familiar with Power BI mobile layout	- Can create more complex calculated columns and measures using DAX (implicit vs explicit) - DAX filter functions (e.g. CALCULATE, FILTER, RELATED) - DAX selection functions (e.g. IF, SWITCH,SELECTEDVALUE) - DAX text functions (e.g. LEFT, TRIM, CONCAT) - Understands how to use DAX to create calculated tables	- Is familiar with the diff[illegible] betwe[illegible] and dimension tabl[illegible] - Is famil[illegible] importance of primary k[illegible]s and [illegible] [illegible] se[illegible] basic data model ([illegible] M dim) [illegible]miliar with the conce[illegible] of roleplaying dim[illegible]	- Is fam[illegible]ditional transformations (e.g. pivoting[illegible] grouping) - Understa[illegible] how to merge [illegible] append data from multiple so[illegible] - Is familiar wi[illegible] concepts (reference, duplicate) - Is familiar wit[illegible] connection types (direct [illegible]uery, import, li[illegible], dual)	[illegible] manage a dataset [illegible] manage an app [illegible] Understand the differences in roles of the wo[illegible]ce [illegible]te a dashboard
Level 3 - Intermediate	- Can use visual annotations and layout to guide the viewer's attention - Can identify and remove clutter from a visual (unnecessary or distracting elements) - Is familiar with advanced chart types (e.g. heat maps, sankey diagrams, tree[illegible] marimekko) - Understands the visu[illegible] an end-user and knows how [illegible] this to Power BI	- Is familiar with setting u[illegible]ting - Is familiar with th[illegible]/ through - Underst[illegible] sync slicers [illegible] interactive buttons	- DAX adv[illegible] functions ([illegible] SEL[illegible]MARIZE) - DA[illegible] (e.g. SUMX, [illegible]X) - DA[illegible] tions (e.g. [illegible]TD, PARA[illegible]DLASTY[illegible] - Is fa[illegible] and ret[illegible]ents in DAX - Can c[illegible] incorpo[illegible]le tables - Can us[illegible]ret the Performance Analyser in Power B[illegible]	[illegible] to optimize data models for performance [illegible] techniques, creating efficient [illegible]hips) [illegible]te hi[illegible] and d[illegible] paths for data [illegible]n [illegible] practices for handling large datasets (e.g. data [illegible]on, partitioning) - Can setup and use dis[illegible] (e.g. for measure selection, field pa[illegible]lations)	- Is familiar wit[illegible]ations (e.g. aggregating[illegible]po[illegible]npivoting multiple columns) - Is familiar w[illegible]owing concepts (append, merge) - Is familiar with aggregations and how a table should look like for reporting purposes - Is familiar with using the advanced query editor - Is familiar with parameters	- Understands the difference between pro and premium - Is familiar with report usage metrics - Is familiar with deployment pipelines - Knows how to create a paginated report in the service
Level 4 - Advanced	- Is familiar with best [illegible] visual design and user experience (e[illegible]propriate chart types, designing for a[illegible]sibility, optimizing for performa[illegible] - Is familiar with advanced design pri[illegible]ples such as gestalt principles and d[illegible]k ratios	[illegible]iar with the concept of b[illegible] - Und[illegible] to create a cu[illegible]p - C[illegible]ork with bookmarks to sh[illegible]w/ h[illegible]suals - C[illegible]ports that have a m[illegible] maintenance cost[illegible]ages, # measures, ...)	[illegible]n opti[illegible] data model via extern[illegible] [illegible]tudio, Tabular Editor) [illegible] functions (e.g.[illegible], TREATAS, CROSSFILTER) - Best [illegible] DAX code (e.g. using [illegible]g measures in folders, descriptions, [illegible] tables) [illegible] create and work with (D)RLS roles	- Is familiar with data modeling best practices (e.g. data granularity, handling null values) - Is familiar with the concepts of slowly changing dimensions - Understands how to setup composite models - Is familiar with the setup of incremental refresh	- Can optimize Power Query queries for performance (e.g. using query folding, query dependencies) - Is familiar with best practices for managing Power Query code (e.g. using functions, parameterizing queries) - Is familiar with connection to sources that use a REST API, or a webpage	- Knows about the Premium Capacity management - Is familiar with the admin portal with its tenant settings - Is familiar with auditing and monitoring logs -Understands how to set up a (personal) data gateway
Level 5 - Expert	- Is familiar with best practices fo[illegible] data visualizations for specific indus[illegible] such as finance, healthcare, and social m[illegible] - Can use data visualization to comm[illegible] complex ideas and concepts to non-te[illegible] audiences - Is an ambassador in the organization with regards to communicating data effectively	- Unders[illegible] how to integr[illegible] Visu[illegible] tools (PowerApps, Pyth[illegible] - Is famili[illegible] influencers, [illegible] [illegible] Custom Visuals [illegible] how to upload a custom shape map - Understands how to setup a Power BI Theme in JSON	- DAX window function (WINDOW, OFFSET, INDEX) - Can write DAX directly (without Mr. Google) - Can automate the creation of DAX measures in Tabular Editor - Can use Tabular Editor to debug DAX code - Is familiar with the Vertipaq Engine	- Is familiar with OLS in Tabular Editor - Can connect to the XMLA endpoint (Via Tabular Ediotr, Visual Studio, SSMS) - Can translate an ERD data model towards a starschema and knows what is possible	- Can authorize itself with a REST API token via Power Query - Can create its own connector in Power Query - Can use Power Query to handle complex data structures (e.g. nested JSON, XML)	- Can design and implement a comprehensive Power BI governance framework - Can setup a Power BI tenant - Can troubleshoot performance issues and optimize content for large-scale deployments - Is familiar with industry-specific regulations such as GDPR

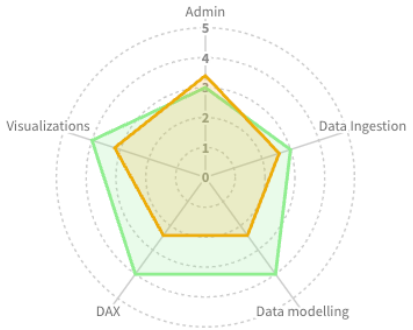
Define the needs – skillmatrix department report example.

03

Data adoption report.

Coverage: 78%

Team details



Name	Admin	Data Ingestion	Data modelling	DAX	Visualizations
Anita	1	0	2	2	4
Luc	3	4	2	3	3
Michael	4	3	4	4	5
Jeffrey	5	4	2	3	4
Lisa	3	1	2	1	1
Team Average	3	2	**2,4**	**2,6**	**3,4**
Team Target		**3**	**4**	**4**	**4**

EXAMPLE

Action planning

Based on your overall coverage:

Focus area: Data Ingestion & Data modelling

Your organisation is relatively mature but can improve primarily on data ingestion and data modelling skills. Data ingestion is a necessary skill for your organisation, as the setup of Power BI is based on various Excel files that need to be ingested and transformed, respectively. Some employees do have the necessary skills to perform advanced actions, however from discussions with the manager, the full team needs to be able to do these kind of tasks. Next to the ingestion of the data, the team also needs to focus on data modelling techniques, which are necessary to create sustainable Power BI reports. Based on the current situation, we suggest to assign Michael as a 'data steward' within this department.

EpicData.

Build a Data Community.

DATA COMMUNITY

Ongoing support for continuous learning.

That's what a data community is all about.

WHAT WE BRING

- Workshops to help your organization with your data journey
- Technical guidance for your organization's users to keep them up-to-date
- Make sure your organization can work with data with minimal intervention of a third party

GOALS AND ACTIONS

- Identify stakeholders and ambassadors
- Prepare the workshop days according to the agreed dates
- Setup the right communication channels to facilitate collaboration and communication within the data organisation