MetisBI

WHITE PAPER · POWER BI REPORTING

Building High Value Power BI Reports

Why most Power BI reports go unused, how to make the next one pay back, and why AI makes it matter more than ever.

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Requirements first, then the dashboard.



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FOREWORD

A note before we start

Before Metis BI, I built and led the Power BI practice at one of the UK's top Data & AI consultancies. The pattern I kept seeing was always the same: technically sound reports, delivered on time, that hardly anyone used.

The methodology in this paper was built to fix that, and it has since been applied across hundreds of client engagements.

This is not a Power BI tutorial.

It is written for the leaders who decide a reporting project is needed and sign off the investment, often because they have had enough. Enough of dashboard after dashboard being built and never used. Enough of teams using different definitions and nobody trusting the numbers.

It will help you ask better questions of your team. Putting it into practice, with your people and your data, is where we come in.

Laz

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Lots of reports. Little value. Now add AI.

Wherever I walk in, there are hundreds of reports, often thousands, and many look great. Only a handful are actually used. Now AI is about to multiply the pile.



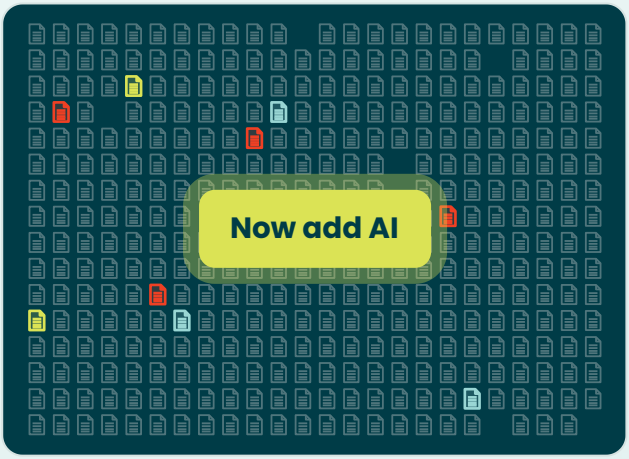
1 They look professional, they are full of charts and they are interactive. On the surface, they look the part.



2 But looking good is not the same as real value. Only a few get used. The rest collect dust and are forgotten.



3 Even the useful few fade without an owner. Nobody updates or champions them, so they get used less and less.



4 AI lets almost anyone build a report in an afternoon. Without the right requirements, that is not progress. It is **faster waste**.

AI alone will not fix your reporting problem. It will multiply it.

The real cost of an unused report

The build is the only cost you see. It is rarely the biggest one.



The invoice shows the tip. Your organisation pays for the rest.

How we build high value reports.

From the first conversation to a report people actually use.

1	2	3	4	5	6
Audience	**Questions**	**Purpose**	**Definitions**	**Wireframe**	**Adoption**
Who will use it every day?	Get past the first answer.	Where are we trying to go?	Agree what the numbers mean.	See it before it is built.	Stay until it is being used.

We've tried and tested this approach on hundreds of projects.

Requirements first, then the dashboard.

Identify and involve the audience

Hundreds of engagements. The same pattern every time. Still ignored.

IN THE ROOM



Sponsor, senior manager and developer

OUTSIDE THE ROOM



The people who will use it every day

Most Power BI reports fail for one simple reason: the people who use them were never in the room.

WHAT HAPPENS WHEN THE USERS ARE LEFT OUT

01

The report is built on assumptions

Someone else's view of the job, often outdated or just plain wrong.

02

The real problems are missed

The users' daily challenges and ambitions never make it in.

03

It kills morale early, and adoption later

Left out at the start, then told to use it at the end.

04

You end up paying twice

The gaps surface at go-live, and the rework lands on your budget.

> **Leave the users out, and you are paying to build a report they will never use.**

Ask the right questions

"What do you want?" has always been the wrong question. AI just asks it faster.

THE OLD HABIT

"So, what do you want in the report?"

"Something like the old one" · "All our KPIs" · "Can it export to Excel?"

THE SAME HABIT, NOW WITH AI

"Build me a sales dashboard"

A good-looking dashboard in minutes, **built on the same guesswork.**

BI is not about building reports. It is about improving decisions.

THE METIS BI WAY

01

Gets the room talking

Users are experts in their business, not in reporting. We help them say what they actually need.

02

Gets past the first answer

Silence and vague answers are normal. The real need sits underneath, and that is where we thrive.

03

Ties every request to the business

Everything links back to a business objective or challenge. If it will not help someone make a better decision, it does not belong.

04

Knows when not to build

Sometimes the right answer is no report at all. It saves the budget and everyone's time, and we are not afraid to say it.

> **We don't take orders. We draw out what you need, and sometimes that is nothing at all.**

Start with purpose

3

If a report is not moving a business objective or solving a business challenge, why invest any time, energy or money in it?

01 · PURPOSE

Where are we trying to go?

The business objective to achieve, or the business challenge to overcome.

Without a clear purpose, you can never measure the return on your investment.

For years I have asked the same questions first: what is this report trying to achieve, and what is it worth to the business? If nobody can answer, we stop. There is no point building it.

THE VALUE WE MEASURE IT AGAINST

REVENUE	RISK	COST	EFFICIENCY
Is it generating more revenue?	**Is it reducing risk, or keeping us compliant?**	**Is it reducing costs and expenses?**	**Is it driving up efficiency?**

THEN, IN THE ROOM WITH YOUR USERS

02 · KPIS	03 · CAUSES	04 · DECISIONS
Are we moving towards it?	**If a KPI is red, what is causing it?**	**What can we do to turn it around?**

> A report's value is not its view count. It is the revenue, risk, cost or efficiency it moves.

Agree what your numbers mean

Nobody is wrong. Nobody agreed what the word meant in the first place.

FINANCE'S "REVENUE"

After refunds

SALES' "REVENUE"

Before refunds

Same word, two numbers, and an argument in the meeting.

A data dictionary is not a technical exercise. It is an agreement.

Sales and revenue mean different things to different people in the same organisation. We find it all the time. Until the definitions are agreed, every report starts an argument.

HOW WE GET THERE

01

Started early, in our workshops

Definitions surface while we learn your business. Clients single it out in their feedback, every time.

02

Every definition has an owner

A named person in the business owns it and keeps it current. Finance owns revenue.

03

In place before self-service

So everyone who builds a report builds on the same meaning.

04

In place before AI

AI does not fix a vague model. It amplifies it.

> **If you don't know your own definitions, AI certainly won't.**

Wireframe before you build

5

Before any development starts, we put a wireframe in front of the users. Fast.

WITHOUT A WIREFRAME

Requirements → Build → Go-live

"That's not what we meant" → Rebuild

WITH A WIREFRAME

Requirements → Wireframe → Build → Go-live

Gaps caught here. Changes? Back to the wireframe, then round again.

Some call it a waste of time and money. In our experience, it saves both.

And once it is signed off, the wireframe becomes the blueprint we hand to AI. The build is faster, and it sticks to what the users agreed.

WHY IT PAYS FOR ITSELF

01

Users see it before it is built

A quick, clear view of what is coming, before a penny goes into development.

02

Misunderstandings surface early

Anything lost while gathering requirements shows up while it is still cheap to fix.

03

People react to what they can see

Many users cannot describe what they need until it is in front of them. We see it all the time.

04

Better feedback, better odds

Specific feedback on something real raises the chances of building something that succeeds.

> **Changing a wireframe costs hours. Changing a finished report costs weeks.**

08 · THE METIS BI METHOD

Drive adoption

6

A report is not a technology outcome. We treat it as a product.

WHAT WE OFTEN SEE

Build → Publish

"Job done. On to the next build."

WHAT WE DO

Build → Publish → Launch → Support → Grow

Publishing a report is not the finish line. It is the starting line.

Too many teams click publish and move on. Every product needs an owner, a launch and someone pushing it forward. We have been doing this for years.

HOW WE DRIVE ADOPTION

01

Launch it

- Go-live sessions with the people who shaped it
- Short familiarisation videos
- Training built for this report, not Power BI in general

02

Support it

- Drop-in clinics and lunch and learns
- On-screen guides inside the report
- A homepage of tips and helpful information

03

Grow it

- A named product owner
- Champions, found and upskilled
- Internal communities and Power BI hubs

We don't publish and move on. We stay until it is being used.

09 · AI

AI is moving fast. Use it the right way.

Our methodology predates generative AI. It hasn't changed because of AI. The speed has. We still do the hard thinking. AI now turns it into prototypes, models and documentation much faster.

HOW WE USE IT

- **Wireframes and prototypes**
- **Designing data models**
- **Documentation**
- **Faster, checked builds**

THE BOARD SAYS

"We want everyone using AI."

Before you unleash it, make sure your people know how to use it well.

01

Show them where it helps

Practical uses for their own role and reports, not generic demos.

02

Teach them to build their own

Reusable AI skills shaped around your data, your standards and your way of working.

03

Keep it safe and secure

What data can go where, and how to check what AI produces before anyone relies on it.

AI makes building reports easier. It does not make knowing what to build easier.

That's why requirements matter more now, not less.

Before you approve the build

If any answer is no, don't approve development yet.

1. **Do we know exactly who will use it?**
   Audience · see page 7
   ☐ YES ☐ NO

2. **Have we spent time with the people who will use it?**
   Audience · see page 7
   ☐ YES ☐ NO

3. **Do we know which decisions it will help them make?**
   Questions · see page 8
   ☐ YES ☐ NO

4. **Can we name the business outcome it should move?**
   Purpose · see page 9
   ☐ YES ☐ NO

5. **Are the key definitions agreed, with named owners?**
   Definitions · see page 10
   ☐ YES ☐ NO

6. **Have the users signed off a wireframe?**
   Wireframe · see page 11
   ☐ YES ☐ NO

7. **Is someone accountable for adoption after go-live?**
   Adoption · see page 12
   ☐ YES ☐ NO

Any "no" is where to start. Not the build.

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WORK WITH METIS BI

Ready to build reports people actually use?

FREE PRE-BUILD REVIEW

Before you approve your next Power BI project, let us pressure-test it.

Bring us the brief, an existing report or just the idea. We'll challenge its audience, purpose, decisions, definitions and adoption. **If we don't think you need a report, we'll tell you.**

Book your pre-build review ›

Free call, no commitment.

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"Thanks to Metis BI's work, we're now fully able to move our business forward. All of our data flows have improved."

Director of Quality · Linkage Community Trust

★★★★★ Verified review on Clutch

"Metis BI's professional approach, great knowledge, and overall support during the project were impressive."

COO · AnyTech365

★★★★★ Verified review on Clutch

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