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Excel to Power BI Readiness Checklist

A practical, decision-ready guide for turning manual spreadsheets into governed, refreshable and trusted business intelligence.

Use this checklist before design begins to reduce rework, protect metric accuracy and create a realistic delivery plan.

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SECTION 01

Business purpose and ownership

Start with the decision the report must improve. A dashboard without clear ownership and action paths usually becomes another reporting layer rather than a better operating system.

Business outcome

- ☐ The business questions and decisions are written in plain language.
- ☐ The primary audience and executive sponsor are named.
- ☐ Each KPI has an owner who can approve its definition.
- ☐ The current reporting pain points, delays and manual steps are measured.
- ☐ Success criteria are specific, such as hours saved, errors reduced or faster decisions.

Scope and operating cadence

- ☐ Reports included in phase one are separated from future enhancements.
- ☐ Daily, weekly, monthly, MBR and QBR reporting needs are documented.
- ☐ Required filters, drill-downs, exports and alerts are listed.
- ☐ The target refresh schedule and reporting cutoff times are agreed.
- ☐ A change-control owner is assigned for new fields and metric requests.

Readiness signal: every visual can be tied to a named decision, owner and action.

SECTION 02

Source data and quality

Power BI cannot compensate for uncontrolled source files or ambiguous definitions. Confirm the data path, structure and quality rules before modeling begins.

Source inventory

- ☐ Every workbook, CSV, database, API and SharePoint source is listed.
- ☐ File owners, locations, refresh times and retention periods are recorded.
- ☐ Manual copy-paste and email-based handoffs are identified for removal.
- ☐ Historical files use consistent columns, data types and naming conventions.
- ☐ Credentials, privacy restrictions and third-party access needs are known.

Data quality controls

- ☐ Required fields and acceptable blank values are defined.
- ☐ Duplicate, invalid, late and outlier records have documented handling rules.
- ☐ Dates, currencies, time zones and identifiers follow consistent formats.
- ☐ Control totals are available for row counts, amounts and key measures.
- ☐ Exceptions have an owner, resolution process and audit trail.

SECTION 03

Model, metrics and security

A strong semantic model creates one reusable version of the truth. It also makes refreshes faster, measures easier to audit and security easier to maintain.

Data model and measures

- ☐ Fact tables, dimensions, grain and relationships are defined.
- ☐ A trusted date table and fiscal calendar are available.
- ☐ KPI formulas, inclusions, exclusions and targets are approved.
- ☐ Calculated measures are separated from source transformations.
- ☐ Actuals, targets, forecasts and prior-period comparisons reconcile.

Access and governance

- ☐ Viewer, contributor, owner and administrator responsibilities are defined.
- ☐ Row-level security requirements are mapped to users or groups.
- ☐ Personally identifiable and commercially sensitive fields are classified.
- ☐ Workspace, app, sharing and export permissions follow policy.
- ☐ Dataset certification, documentation and support ownership are planned.

SECTION 04

Refresh, testing and adoption

Treat deployment as an operational change, not the end of development. The report needs a reliable refresh, repeatable validation and clear support after launch.

Technical readiness

- ☐ Power BI licensing, capacity and workspace strategy are confirmed.
- ☐ Gateway location, service account and credential ownership are agreed.
- ☐ Expected data volume, history and growth have been tested.
- ☐ Refresh failure alerts and support escalation paths are configured.
- ☐ Development, test and production promotion steps are documented.

Validation and adoption

- ☐ Sample results reconcile to the approved Excel baseline.
- ☐ Edge cases, filters, totals, security roles and refreshes are tested.
- ☐ Business acceptance criteria and approvers are named.
- ☐ Users receive a short guide, training and metric definitions.
- ☐ Usage, feedback, incidents and enhancement requests will be reviewed.

SECTION 05

Score your readiness

Score each area: 0 = not started, 1 = partly ready, 2 = confirmed. Add the ten scores for a maximum of 20.

Readiness area	Evidence to confirm	0	1	2
Data ownership	Named owners and controlled source locations	■	■	■
Data quality	Documented checks for missing, duplicate and invalid records	■	■	■
Metric definitions	Approved formulas, filters and business rules	■	■	■
Data model	Clear fact/dimension structure and relationships	■	■	■
Refresh	Reliable schedule, credentials and gateway plan	■	■	■
Security	Audience, access roles and sensitive fields defined	■	■	■
Performance	Volume, history and expected response time understood	■	■	■
Testing	Reconciliation and business acceptance process agreed	■	■	■
Deployment	Workspace, promotion and ownership model confirmed	■	■	■
Adoption	Training, support and usage review planned	■	■	■

0-8	Discovery required	Stabilize sources, owners and definitions before dashboard development.
9-15	Pilot ready	Begin a controlled proof of concept while closing the remaining gaps.
16-20	Delivery ready	Proceed with an agreed scope, validation plan and deployment controls.

Recommended next step

Run a 60-90 minute readiness workshop with the report owner, data owner and delivery lead. Convert every unchecked item into an owner, due date and acceptance criterion.

Need help turning manual reporting into governed Power BI? Visit wavanite.com to discuss your analytics, reporting automation or mortgage operations use case.