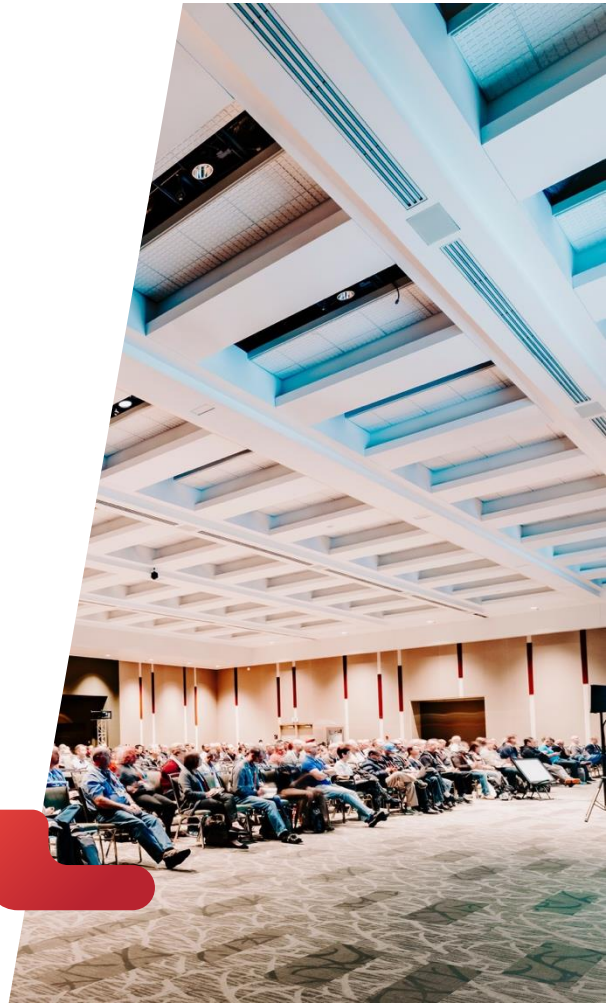
PASS SUMMIT2019

How to Build an Impactful Scorecard

in Power BI

Reid Havens

Founder – Havens Consulting



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Nickname: "**The Viz Wiz**"

Power BI Real-Time Demo Survey

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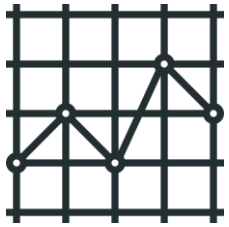
Designing an Impactful KPI Scorecard in Power BI

Presentation Objectives

- Designing a professional scorecard can be challenging
  - There's dozens of visualizations to choose from…
  - Even more ways to organize them in the report!

- Learn about some great custom visuals
- In conjunction with DAX calculations
- Plus a little bit of design wizardry



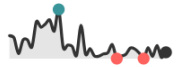
Resulting in an impactful and well-designed report!

Store Scorecard

4/11/2019
Last Refresh Date

Store Name

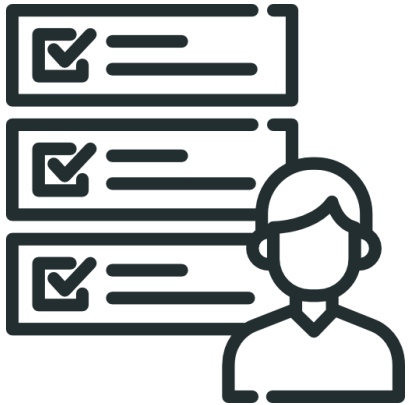
- Albany Store
- Alexandria Store
- Amsterdam Store
- Anchorage Store
- Annapolis Store
- Appleton Store
- Arlington Store
- Ashgabat No.2 Store
- Ashgabat No.1 Store
- Athens Store
- Atlantic City Store

Metric Name	Rank	Total Value	Monthly Avg	Latest Month	KPI	Sparkline
Sales Amount	276 of 299	$5,416,741	$150,465	$83,491		
Return Amount	124 of 299	$76,578	$2,127	$967		
Return % Amount	227 of 299	1.41%	1.29%	1.16%		
Forecast Amount	277 of 299	$5,768,233	$160,229	$74,387		
Forecast Var Amount	66 of 299	$351,491	$9,764	-$9,105		
Forecast Var % Amount	73 of 299	6.09%	3.39%	-12.24%		
Budget Amount	205 of 299	$5,026,533	$139,626	$70,487		
Budget Var Amount	21 of 299	-$390,208	-$10,839	-$13,005		
Budget Var % Amount	16 of 299	-7.76%	3.39%	-12.24%		

Designing an Impactful KPI Scorecard in Power BI

Session Agenda

- **Section One**
  - Leveraging DAX generated tables
  - Designing a scorecard from a Matrix Table
- **Section Two**
  - Creating supporting DAX measures
  - KPI Icons, with additional supporting DAX
- **Section Three**
  - DAX and KPI Conditional Formatting
  - Custom Visual Sparklines
- **Section Four**
  - Design practices, formatting, and final touches



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Thank You

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