

Twelve checks that decide whether anyone trusts your reports.

Run these on your own Power BI estate in an afternoon. Score each check **0** (no, or nobody knows), **1** (partly, or only one person knows) or **2** (yes, and it's checked rather than assumed). Add them up over the page.

● Data model & measures

AREA 1 OF 6

- ☐ **1. One measure, one answer**
Good looks like: the same measure gives the same number on every page and in every report. No "Revenue" here disagreeing with "Revenue" there.
- ☐ **2. Lookup tables split from data tables**
Good looks like: facts (transactions) and dimensions (customers, products, dates) are separate tables with clean one-to-many joins, not one giant flat table.

● Traceability

AREA 2 OF 6

- ☐ **3. Any headline number can be traced to source**
Good looks like: pick a number off the front page and someone can walk it back: visual, measure, column, source system. In minutes, not days.
- ☐ **4. A reconciliation check exists**
Good looks like: report totals are tied back to the source system somewhere visible. For finance data, a trial balance that nets to zero. If nothing reconciles, nothing is proven.

● Accuracy hygiene

AREA 3 OF 6

- ☐ **5. Date logic checked at the boundaries**
Good looks like: month, quarter and year-to-date figures have been tested on the first and last day of a period, across a year end, and against the source.
- ☐ **6. Every blank has an explanation**
Good looks like: blanks, zeros and duplicates are understood and deliberate. "Why is March empty?" has an answer that isn't a shrug.

● Performance & refresh

AREA 4 OF 6

- ☐ **7. Key pages load in seconds**
Good looks like: the pages leadership uses render in under five seconds. Slow reports quietly train people to stop opening them.
- ☐ **8. Refresh failures have an owner and an alert**
Good looks like: when a refresh fails, a named person finds out before the report's users do. Stale data presented as current is how trust dies fastest.

● Security & access

AREA 5 OF 6

☐

9. Row-level security tested with a real account

Good looks like: someone has signed in as a restricted user and confirmed what they can and can't see. Tested, not assumed.

0

1

2

☐

10. The access list has been reviewed this quarter

Good looks like: leavers removed, viewers and editors are the right way round, and workspace access matches who should see the numbers today.

0

1

2

● Design & adoption

AREA 6 OF 6

☐

11. Every page answers a named question

Good looks like: each page exists to support a decision someone owns ("Are we hitting margin this month?"), not to show every field the system happens to have.

0

1

2

☐

12. You know who opened it last month

Good looks like: usage is checked. Reports nobody opens get fixed or retired. A dashboard nobody opens is just an expensive screenshot.

0

1

2

Your score, out of 24

0 to 9

Fix the foundations

Stop building new reports. The model, reconciliation and refresh basics need attention before anything on top can be trusted.

10 to 17

Solid but leaking trust

The estate works, but the gaps are exactly where month-end debates and "whose number is right?" arguments come from.

18 to 24

Strong estate

Rare and worth protecting. Keep the checks quarterly so drift never gets a foothold.

Where to start, in payback order

1. **Any zero on checks 4 or 8 comes first.** Reconciliation and refresh alerts are cheap to fix and they stop trust bleeding today.
2. **Then check 1.** Measures that disagree are the single biggest source of "we don't believe the dashboard".
3. **Then checks 11 and 12.** Fixing design and retiring dead pages wins back the audience the estate already lost.
4. **Everything else follows.** Model shape, date logic and security land faster once the numbers reconcile and people are looking again.

The professional version of this afternoon

The fixed-price **Power BI Health Check** runs these twelve checks and more across your estate, scores everything, and hands you a prioritised roadmap with a walkthrough call. £550 for one day, £1,100 for two. Results within five working days.

duncanboyne.co.uk/power-bi-health-check · Duncan@duncanboyne.co.uk

And the standard behind all of it: if it doesn't reconcile, it doesn't ship.

