



## TIP SHEET

# 5 Ways to Transform Productivity using Power BI Metrics

Metric and goal setting is paramount when formulating business operations. That's why Microsoft Metrics (previously known as 'Goals') make it possible to keep every member of a team striving toward a singular, unified key objective and ensures a higher probability of positive outcomes. In fact, a study regarding goal setting and optimism, it is shown that the goal setting process assists individual workers to improve their performance and enhances optimism for business success. So, how can productivity metrics and business objectives be met while also integrating the latest and greatest data analysis technology available? We'll show you how with these quick tips!

- 1 Using Metrics in Power BI**

Metrics in Power BI allow businesses to look inside the data when further analysis is required. Organizations can connect metric targets to data in an existing Power BI report or, if manually entering metrics is right for your business, the ability to manually enter target values is still available. With Metrics, businesses have the capability to track progress, check metric status, leave notes and comments, and even provide a platform for sharing updates among teammates.
- 2 Creating and Sharing Metrics**

By implementing a shared capacity to create metrics within a workspace or organization environment, that organization as an entity provides their workers with an area where they can freely collaborate and build shared visions towards success criteria. Within the Metrics tab, current and target metric values can be connected to data within a report for dynamic tracking. This tracking data can help highlight which areas of business need improvement by monitoring the specific goals that are being attained and those that may be at risk of falling behind schedule.
- 3 Metrics and Details Pane**

The purpose of the Metrics and Details pane is to give the users an overview of the metric history alongside check-ins, status rules, notes, and settings. Power BI automatically gives users access to the Details pane whenever a metric name is selected. The Metric Details pane shows progress over time to motivate users to use their metrics. It also makes it easier to view the history of check-ins and status updates for greater visibility.
- 4 Status Rules**

Status updates can be automatically triggered based on rules surrounding metrics or submetrics. Scorecard authors can define when metrics are off-track or falling behind. By setting status rules, it will be more feasible to keep track of progress and if adjustments need to be made. There is even a new capability to customize statuses in your Power BI scorecard if users would like to edit their status to reflect company terminology and formatting.
- 5 Utilizing Submetrics**

Submetrics are created under an existing metric and serve as a method to deepen, specify, and further organize the main original metric. Submetrics serve to give more clarity on these objectives and provide specifics of how the main goal will be met.