

# Tableau to Power BI Migration POC



## Overview:

As data becomes increasingly critical to success, organizations are confronted with rising costs with their reporting technologies that are often rigid and expensive and challenging to maintain. **Microsoft's Power BI (PBI) offers a solution by allowing organizations to capitalize on their existing M365 licensing while providing seamless integration with current Microsoft technology investments.**

At Rockhop, we recognize that migrating to a new reporting platform can be daunting. That's why we have developed a comprehensive yet straightforward methodology that enables organizations to swiftly assess their existing environment, create a detailed migration roadmap, and validate findings through a proof-of-concept migration.

## Challenges:

**Rising Costs:** Increasing licensing expenses associated with maintaining outdated reporting systems.

**Aging Technologies:** Reliance on legacy reporting systems that hinder flexibility and efficiency.

**Seamless Integration:** The need for smooth compatibility with existing Microsoft productivity tools and infrastructure.

**Self-Service Capabilities:** Enabling users to independently create reports and analyze data eliminating administrative burden on IT.

## What's Inside:

### Assessment

#### Identify Modernization Opportunities:

Evaluate data set consolidation and opportunities for Power BI modernization.

**Transform .tbw Files:** Assess each Tableau .tbw file to identify the effort required for future state rebuilding.

**Document Transformations:** Record data transformation processes and the associated data model.

**Measure Mapping:** Determine future state measures for all visualizations and estimate the effort required to recreate them in Power BI.

**Define Security Model:** Establish a robust security model to ensure data protection and compliance aligned with organizational standards.

### Migration Planning

**Prioritized Backlog:** Develop a prioritized backlog for report development to streamline the migration process.

**Effort and Resource Estimation:** Assess the workload and gather a resource plan for migration tasks.

**Agile Roadmap:** Create a flexible roadmap and timeline for agile report migration that allows for iterative improvements and adaptability.

### Proof-of-Concept Migration

#### Medium to High Complexity Report Migration:

Perform a migration of one medium to high complexity report to demonstrate the potential of Power BI and validate the findings from the assessment stage.

**Refine Migration Plan:** Utilize insights gained during the proof-of-concept to optimize and refine the overall migration strategy.

## Conclusion

Rockhop's structured approach to migrating from Tableau to Power BI provides organizations with the expertise and support needed to navigate the complexities of data transition quickly but methodically. **With our agile methodology and thorough assessment process, your organization can successfully harness the power of a marketing leading visualization tool such as Power BI while overcoming prevalent challenges in data management.**