

Power BI's Role in the BI Lifecycle: A Complete Guide to Implementation, Development, And Maintenance

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Abstract - Power BI has established itself as a versatile and comprehensive platform for the business intelligence (BI) lifecycle, supporting data integration, development, visualization, collaboration, and ongoing maintenance. This review article examines Power BI's capabilities in consolidating heterogeneous data sources, performing robust ETL transformations, and delivering interactive dashboards that provide actionable insights for enterprise decision-making. The discussion explores key aspects of implementation, including agile development methodologies, data governance, role-based access controls, and performance optimization techniques. Case studies across healthcare, retail, and finance demonstrate the platform's practical impact, highlighting efficiency gains, improved reporting accuracy, real-time analytics, and enhanced regulatory compliance. Additionally, the article addresses common challenges such as integration complexity, technical skill requirements, and governance concerns, providing recommendations for mitigation. Emerging trends such as AI-driven analytics, predictive modeling, real-time streaming data, and cloud-native architectures are analyzed, illustrating the evolving role of Power BI in enabling intelligent decision-support systems. The review emphasizes the strategic advantages of Power BI, including democratization of analytics, scalability, and adaptability to diverse organizational requirements. By synthesizing current practices, technological capabilities, and future innovations, this article provides a roadmap for leveraging Power BI effectively to drive operational efficiency, data-driven decision-making, and organizational agility in dynamic business environments.

Keywords - Power BI, Business Intelligence, Data Integration, ETL, Dashboard Development, Visualization, Data Governance, Role-Based Access, Real-Time Analytics, AI-Driven Insights, Cloud BI, Agile Development, Predictive Analytics, Enterprise Decision-Making

INTRODUCTION

The Growing Importance of Business Intelligence

In today's fast-paced business environment, organizations are inundated with vast amounts of data originating from operational systems, customer interactions, and external market sources. The ability to interpret and act upon this data has become critical for maintaining competitiveness and achieving strategic objectives. Business Intelligence (BI) tools provide organizations with the capability to transform raw data into meaningful insights, supporting decision-making across all levels of management. Modern BI platforms offer interactive dashboards, real-time analytics, and predictive modeling, allowing stakeholders to monitor key performance indicators, identify trends, and respond proactively to changes. By streamlining data analysis processes, BI tools reduce manual reporting overhead, enhance operational efficiency, and facilitate a culture of evidence-based decision-making. The rise of cloud-based and self-service BI solutions has further democratized access to analytics, empowering business users without extensive technical expertise to interact with data directly. Consequently, BI is no longer a back-office function; it is a strategic asset that drives growth, operational excellence,

and innovation across industries. This evolving landscape underscores the need to evaluate BI platforms comprehensively, considering not only visualization capabilities but also their role within the broader data lifecycle, from integration and transformation to reporting, governance, and continuous improvement.

Overview of Power BI in the Enterprise Context

Power BI, developed by Microsoft, has emerged as one of the leading BI platforms due to its seamless integration with Microsoft 365 applications, Azure cloud services, and wide range of data connectors. It offers a unified environment for data modeling, reporting, and dashboard creation, supporting both individual analysts and enterprise-scale deployments. Power BI Desktop enables developers to create complex data models, utilize DAX for advanced calculations, and design highly interactive visualizations, while Power BI Service provides cloud-based collaboration, sharing, and automated refresh capabilities. Mobile and embedded BI features further extend access to insights across devices and business applications, ensuring that actionable intelligence is available wherever and whenever needed. Its adoption across industries—including finance, healthcare, retail, and manufacturing—demonstrates its versatility in meeting diverse

business requirements. By combining intuitive visual analytics with robust data governance and security controls, Power BI offers organizations the ability to implement scalable and sustainable BI workflows that align with operational objectives and strategic goals.

Purpose and Scope of the Review

This review aims to provide a comprehensive examination of Power BI's role in the Business Intelligence lifecycle, spanning implementation, development, deployment, and ongoing maintenance. It focuses on key capabilities such as data integration, visualization, advanced analytics, collaboration, governance, and performance optimization. The review also addresses real-world challenges, case studies across industries, and emerging trends such as AI integration, streaming analytics, and embedded BI. By systematically analyzing Power BI within the context of the full BI lifecycle, this article provides practitioners, analysts, and decision-makers with a structured framework for maximizing the platform's value, ensuring effective adoption, and enabling data-driven transformation across enterprise environments.

II. CORE COMPONENTS OF POWER BI

Power BI Desktop

Power BI Desktop serves as the foundational development environment for creating reports, dashboards, and data models. It allows analysts to connect to a wide variety of data sources, including relational databases, cloud-based storage, spreadsheets, and web APIs. Within Power BI Desktop, users can perform data transformation and cleaning using Power Query, as well as define complex calculations and aggregations with DAX (Data Analysis Expressions). The platform supports interactive visualizations, enabling dynamic exploration of trends, patterns, and anomalies. By combining multiple visual types—charts, maps, tables, and custom visuals—analysts can craft dashboards that are both informative and intuitive. Power BI Desktop also facilitates the creation of hierarchical models, calculated measures, and key performance indicators (KPIs), providing a robust environment for data-driven storytelling. Its local development model ensures that users can prototype, test, and refine dashboards before deployment to the cloud or organizational workspaces, reducing errors and supporting iterative improvement cycles.

Power BI Service

The Power BI Service is a cloud-based platform that extends Desktop functionality to support collaboration, sharing, and automated data refreshes. Organizations can publish dashboards, reports, and datasets to secure workspaces,

allowing stakeholders to access insights in real time. Features such as scheduled refresh, data alerts, and subscription emails enhance the usability of dashboards for operational and strategic purposes. The service also supports app workspaces, enabling teams to collaborate on content development while managing permissions at a granular level. By hosting reports centrally, the Power BI Service ensures version control, reduces duplication, and fosters a culture of data governance across the enterprise. Additionally, integration with Microsoft Teams and SharePoint enhances cross-departmental communication and decision-making.

Power BI Mobile and Gateway

Power BI Mobile ensures accessibility for executives, field teams, and remote users, providing interactive dashboards, push notifications, and on-the-go insights. Concurrently, Power BI Gateway facilitates secure connectivity to on-premises databases and enterprise systems, bridging cloud and local environments. It enables live data queries or scheduled refreshes, ensuring that reports remain current without compromising security. Together, these components support seamless, real-time access to actionable insights, making Power BI a comprehensive platform for enterprise BI.

III. DATA INTEGRATION AND ETL IN POWER BI

Connecting to Diverse Data Sources

A critical strength of Power BI lies in its ability to integrate data from a vast range of sources, supporting comprehensive analysis across organizational systems. Users can connect to structured databases, such as SQL Server, Oracle, or PostgreSQL, as well as cloud-based storage platforms like Azure Data Lake, SharePoint Online, and Salesforce. Additionally, Power BI accommodates semi-structured and unstructured data from CSV files, JSON, Excel, and web APIs, allowing organizations to consolidate operational, financial, and external data streams. By establishing direct connections or importing datasets into Power BI, analysts gain a unified view of their information landscape. This flexibility enables cross-functional reporting, blending multiple datasets, and creating a single source of truth for decision-making. Connector libraries and pre-built integrations reduce technical overhead while maintaining robust performance and reliability. The ability to refresh these connections regularly ensures that dashboards reflect the most current data, which is essential for timely and accurate insights.

Data Cleaning and Transformation

Power BI provides robust ETL (Extract, Transform, Load) capabilities primarily through Power Query, enabling users to clean, transform, and shape datasets before analysis. Tasks such as filtering records, merging tables, removing duplicates, and converting data types can be performed with minimal coding knowledge, while advanced transformations use the M language. Power Query's intuitive interface allows iterative adjustments, fostering a smooth workflow for data preparation. Proper ETL practices are crucial for maintaining data integrity, accuracy, and consistency, especially when combining heterogeneous sources. Structured transformations not only enhance dashboard reliability but also improve performance by minimizing data redundancy and optimizing storage.

Managing Data Volumes and Performance

Handling large datasets efficiently is another challenge addressed through Power BI's features, such as incremental refresh, aggregations, and query folding. Incremental refresh reduces processing time by updating only new or changed data, while aggregations optimize query performance for high-volume data sources. Query folding ensures that transformations are executed at the source database, minimizing resource consumption on the local environment. Together, these strategies allow Power BI to deliver high-speed analytics and maintain responsive dashboards even in enterprise-scale implementations, ensuring users can access timely insights without compromise.

IV. DEVELOPMENT AND VISUALIZATION

Building Reports and Dashboards

The development of reports and dashboards in Power BI is a core function that transforms raw data into actionable insights. Analysts utilize Power BI Desktop to design interactive visualizations, combining multiple chart types, tables, and maps to create comprehensive, intuitive dashboards. The platform allows dynamic filtering, slicers, and drill-through capabilities, enabling users to explore underlying data and uncover trends or anomalies. Design considerations focus on clarity, relevance, and usability, ensuring that stakeholders can interpret insights quickly and accurately. Visual storytelling is emphasized, where dashboards convey complex information in a digestible format, supporting data-driven decision-making. Best practices include consistent color schemes, logical grouping of visuals, and highlighting KPIs to guide user attention effectively.

Advanced Analytics with DAX

Data Analysis Expressions (DAX) is a powerful formula language that enables advanced analytics within Power BI. Analysts can define calculated columns, measures, and time intelligence functions to extract deeper insights from datasets. DAX supports complex calculations such as year-over-year growth, moving averages, and cumulative totals, allowing for sophisticated reporting without external tools. By combining DAX with interactive dashboards, organizations can provide users with customized metrics tailored to operational and strategic needs. The use of calculated fields also improves the flexibility of dashboards, making them adaptable to evolving business requirements.

Integration with AI and Machine Learning

Power BI extends beyond visualization by integrating AI and machine learning capabilities. Features like automated insights, cognitive services, and anomaly detection enable predictive and prescriptive analytics directly within dashboards. Users can embed Python or R scripts for statistical modeling or leverage Azure Machine Learning models for real-time forecasts. This integration transforms dashboards into intelligent decision-support systems, where insights are not merely descriptive but also predictive and actionable. Consequently, Power BI becomes a central platform for both reporting and advanced analytics, enhancing its strategic value across enterprise operations.

Collaboration, Sharing, and Governance

Role-Based Access and Security

Effective collaboration in Power BI requires robust security and access controls to protect sensitive organizational data. Role-based access enables administrators to assign permissions according to user responsibilities, ensuring that individuals can only view or interact with data relevant to their role. Row-level security (RLS) further refines access by filtering data at the row level based on user identity, which is particularly critical in multi-department or multi-region deployments. These controls help maintain compliance with regulatory standards, such as GDPR, HIPAA, or SOC2, and reduce the risk of unauthorized data exposure. By enforcing structured security policies, organizations can safely extend access to dashboards and reports across teams while protecting critical business information.

Workspace Management and Version Control

Power BI workspaces provide collaborative environments for teams to create, share, and manage reports and dashboards. Workspaces allow administrators to organize content systematically, control access permissions, and manage publication workflows. Version control ensures that updates to

reports or datasets are tracked, reducing errors and enabling rollback if needed. By centralizing report development within workspaces, organizations foster collaboration among analysts, business users, and developers. This structure also facilitates iterative improvement, where feedback can be incorporated efficiently, improving both the quality and usability of dashboards.

Data Governance and Quality Assurance

Maintaining data integrity and consistency is essential for reliable analytics. Power BI supports data governance by providing centralized metadata management, auditing capabilities, and lineage tracking, which document the origin and transformation of datasets. Quality assurance practices, including validation checks, automated refresh monitoring, and anomaly detection, ensure that dashboards deliver accurate, timely, and actionable insights. By embedding governance into collaboration processes, organizations enhance trust in their BI platform, enabling confident decision-making across all organizational levels.

Implementation Best Practices

Planning and Requirements Gathering

Successful Power BI implementation begins with comprehensive planning and requirements gathering. Organizations must identify key stakeholders, define objectives, and determine critical business metrics to ensure that dashboards align with strategic and operational goals. Engaging business users early in the process helps capture relevant KPIs, reporting needs, and preferred visualization formats. Data sources, their quality, frequency of updates, and integration requirements should be assessed to anticipate potential challenges during ETL and modeling. Clear documentation of requirements minimizes misalignment between IT teams and business units, reduces rework, and establishes a roadmap for development. A well-defined planning phase lays the foundation for scalable, maintainable, and impactful BI solutions.

Agile Development Methodologies

Applying agile methodologies to Power BI development enhances flexibility and responsiveness to evolving business needs. Iterative sprints allow teams to build, review, and refine dashboards incrementally, incorporating user feedback continuously. This approach reduces the risk of delivering dashboards that do not meet expectations and encourages active engagement from stakeholders. Frequent demonstrations of prototype reports help validate assumptions, ensure usability, and align analytics with business workflows. Agile practices also enable rapid adaptation to changes in data sources,

organizational priorities, or regulatory requirements, which is crucial in dynamic enterprise environments.

Deployment Strategies

Power BI deployment strategies vary based on organizational size, regulatory requirements, and infrastructure preferences. On-premises deployments may be preferred for organizations with strict data security or compliance mandates, while cloud or hybrid models offer scalability, remote access, and reduced maintenance overhead. Structured deployment pipelines, including workspace management, version control, and scheduled refresh processes, ensure smooth rollouts and reliable dashboard performance. Proper planning of deployment, including user onboarding, training, and support processes, is essential for maximizing adoption and realizing the full value of Power BI across the enterprise.

Maintenance and Monitoring

Performance Optimization

Maintaining high performance in Power BI dashboards is crucial for delivering timely and actionable insights. Performance monitoring involves tracking refresh durations, query execution times, and responsiveness of visualizations, especially when dealing with large datasets or complex calculations. Techniques such as aggregations, incremental data refresh, and query folding help optimize resource utilization and minimize processing delays. Additionally, optimizing DAX formulas, reducing unnecessary visual elements, and using appropriate data types can enhance overall system efficiency. Performance dashboards within Power BI Service allow administrators to monitor usage metrics, identify bottlenecks, and adjust data models to maintain smooth operation. Proactive performance management ensures that dashboards remain reliable and responsive, supporting real-time decision-making.

Continuous Updates and Enhancements

Power BI dashboards require ongoing updates to accommodate evolving business requirements, new data sources, and changing user needs. Regular review cycles allow analysts to refine visualizations, add new metrics, or adjust layout and interactivity for better user experience. Enhancements may include integrating AI insights, predictive analytics, or embedding additional datasets. By implementing structured update processes, organizations can maintain dashboard relevance while minimizing disruption. Scheduled refreshes and automated alerts ensure that reports consistently reflect the most current data, preventing stale insights from affecting decisions.

Troubleshooting and Support

Effective maintenance also involves timely troubleshooting of technical issues such as failed data refreshes, broken connections, or visualization errors. Power BI provides monitoring tools, diagnostic logs, and error notifications to identify and resolve problems efficiently. Establishing a dedicated support framework, including documentation, standard operating procedures, and helpdesk access, enables rapid resolution and continuity of BI services. Structured support processes enhance user confidence, promote adoption, and ensure that dashboards consistently provide reliable insights across the organization.

Case Studies and Industry Applications

Healthcare and Clinical BI

Power BI has been widely adopted in healthcare organizations to enhance patient care, operational efficiency, and regulatory compliance. Dashboards track key metrics such as patient outcomes, appointment utilization, and resource allocation across departments. Hospitals use Power BI to monitor real-time bed occupancy, staffing levels, and equipment availability, enabling rapid decision-making during high-demand periods. Integration with electronic health records (EHRs) and laboratory information systems ensures that clinical and administrative data are combined to provide a holistic view of hospital operations. Predictive analytics and trend reporting assist in identifying potential bottlenecks or risks, such as patient readmission likelihood, optimizing workflows and improving service delivery. Case studies show that institutions leveraging Power BI for healthcare BI achieve reduced administrative workload, enhanced reporting accuracy, and improved patient satisfaction.

Retail and Sales Analytics

In the retail sector, Power BI enables organizations to analyze sales performance, inventory levels, and customer behavior efficiently. Dashboards provide real-time insights into product sales, regional performance, and seasonal trends, empowering managers to make informed decisions on inventory replenishment, promotions, and pricing strategies. Integration with point-of-sale systems, e-commerce platforms, and CRM databases allows seamless consolidation of multi-channel data. Advanced analytics capabilities, including forecasting and clustering, help retailers anticipate demand fluctuations and personalize marketing campaigns. Case studies reveal that companies using Power BI achieve increased revenue, optimized inventory, and more targeted customer engagement through actionable dashboards.

Finance and Risk Management

Financial institutions leverage Power BI for portfolio tracking, regulatory reporting, and risk assessment. Dashboards consolidate transactional data, account performance, and market trends to support compliance with regulatory frameworks such as Basel III or SOX. Predictive models identify anomalies, detect fraud patterns, and assess credit risk, providing timely alerts for intervention. Integration with ERP systems, accounting software, and market data feeds ensures accurate and comprehensive reporting. Case studies indicate that organizations implementing Power BI in finance gain enhanced transparency, improved reporting efficiency, and better-informed strategic decisions, highlighting the platform's critical role in risk management and operational oversight.

Challenges and Limitations

Data Complexity and Integration Issues

While Power BI offers extensive connectivity, integrating heterogeneous data sources can present significant challenges. Organizations often deal with disparate systems, including legacy databases, cloud applications, and unstructured files, which may differ in format, schema, and refresh frequency. Aligning and transforming these datasets into a unified model requires careful ETL design, testing, and validation. Complex transformations or poorly optimized queries can lead to performance bottlenecks and delayed refreshes, impacting dashboard reliability. Additionally, changes in source systems, such as updated APIs or schema modifications, may break existing connections, requiring ongoing maintenance and monitoring. These integration challenges highlight the need for robust data governance and proactive management practices.

User Adoption and Technical Skills

Another limitation lies in user adoption and technical proficiency. While Power BI is designed for self-service analytics, non-technical business users may face a learning curve when creating or interacting with advanced dashboards, particularly those involving complex DAX formulas or custom visualizations. Insufficient training and support can result in underutilization of the platform, reduced engagement, or incorrect interpretation of insights. Organizations must invest in structured onboarding, continuous education, and user support mechanisms to ensure effective adoption and consistent use of BI assets across teams.

Governance, Security, and Compliance Risks

Power BI's cloud-based nature and collaborative features introduce governance and security challenges. Improper access controls, inconsistent row-level security, or uncontrolled dataset sharing can expose sensitive business or regulatory data. Maintaining compliance with standards such as GDPR,

HIPAA, or industry-specific mandates requires rigorous governance frameworks, auditing, and regular monitoring. Furthermore, scaling Power BI to enterprise-level deployments increases complexity in managing permissions, data lineage, and content organization. Addressing these challenges is critical to safeguard data integrity and ensure that BI initiatives remain both secure and compliant.

Future Trends and Innovations

AI and Embedded Analytics

The integration of artificial intelligence (AI) and machine learning into Power BI is reshaping the BI lifecycle. Features such as automated insights, anomaly detection, and natural language query (Q&A) capabilities allow users to uncover patterns and trends without deep analytical expertise. Organizations are increasingly embedding predictive and prescriptive analytics directly into dashboards, enabling proactive decision-making. For example, AI-driven recommendations can identify underperforming sales regions, forecast resource demands, or highlight operational inefficiencies. The convergence of AI with BI platforms ensures that dashboards evolve from descriptive reporting tools into intelligent decision-support systems, enhancing organizational agility and responsiveness.

Real-Time and Streaming Data Analytics

The demand for real-time insights is driving innovations in streaming analytics. Power BI's integration with streaming data sources, including IoT devices, sensor feeds, and event-based systems, allows stakeholders to monitor live operations, detect anomalies, and respond immediately. Real-time dashboards enable businesses to optimize supply chains, monitor patient health metrics, or track financial transactions continuously. Future enhancements are likely to focus on reducing latency, improving scalability, and supporting dynamic data transformations in real time, further solidifying Power BI as a platform capable of handling operational and strategic analytics simultaneously.

Cloud-Native and Hybrid Architectures

Cloud adoption and hybrid deployments are accelerating the scalability and accessibility of Power BI. Multi-tenant cloud models, integration with Azure Synapse Analytics, and containerized deployment options allow organizations to scale their BI solutions efficiently while maintaining security and compliance. Future developments may focus on serverless architectures, edge computing integration, and enhanced API connectivity, enabling seamless analytics across distributed environments. These innovations will empower organizations to deploy flexible, resilient, and highly available BI infrastructures while reducing operational overhead.

Democratization of Analytics and Citizen BI

Finally, the trend toward democratizing analytics continues to expand, empowering non-technical users to create insights independently. Tools such as natural language querying, guided report creation, and template libraries enable business users to explore data without deep technical knowledge. Coupled with governance frameworks, these innovations ensure that organizations can scale BI adoption while maintaining data integrity and compliance. The future of Power BI emphasizes inclusivity, real-time intelligence, and AI-enhanced analytics, positioning it as a central hub for enterprise decision-making in a rapidly evolving business landscape.

V. CONCLUSION

Power BI has emerged as a comprehensive platform that supports the entire business intelligence lifecycle, from data integration and ETL to development, visualization, collaboration, and ongoing maintenance. Its capabilities enable organizations to consolidate disparate data sources, perform advanced analytics, and deliver interactive dashboards that support both operational and strategic decision-making. By providing flexible deployment options, including cloud, on-premises, and hybrid environments, Power BI accommodates diverse organizational needs while maintaining performance, security, and governance standards. Its integration with AI, predictive analytics, and real-time streaming data transforms traditional reporting into proactive, data-driven decision-support systems.

The platform's strengths extend beyond technical functionality. Power BI enhances collaboration through role-based access, workspace management, and version control, fostering a culture of data literacy and democratized analytics. The implementation of best practices, including agile development, robust governance frameworks, and ongoing maintenance strategies, ensures that dashboards remain relevant, accurate, and actionable. Case studies across healthcare, retail, and finance demonstrate measurable benefits, including improved operational efficiency, optimized resource allocation, enhanced compliance, and more informed strategic decisions. Looking ahead, Power BI is positioned to incorporate advanced AI, cloud-native architectures, and citizen-driven analytics, further expanding its value across enterprises. Organizations aiming to maximize BI impact should prioritize scalable architecture, user training, data governance, and iterative enhancement processes. By leveraging Power BI strategically, businesses can not only streamline reporting and analytics but also foster a culture of continuous improvement, agility, and data-driven innovation. In conclusion, Power BI represents both a

technological and strategic enabler, empowering organizations to transform raw data into actionable insights and sustainable business growth.

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