

# Using Power BI for better business management

Vanessa Martin

# Opening karakia

Tūtawa mai i runga,  
Tūtawa mai i raro,  
Tūtawa mai i waho,  
Tūtawa mai i roto,  
Kia tau ai te mauri tū,  
Te mauri ora, ki te katoa  
Hāumi e, hui e, taiki e

*I summon from above, below, from the  
outside environment, from within;*

*To calm and settle the vital inner  
essence,*

*The well-being of everyone.*

*Be joined, together, united*



# Objectives of this session

To understand the power of data to inform planning and decision making

- Data: purpose, considerations
- Power BI: features, scenario discussion
- Support: access, use, business development
- Future additions

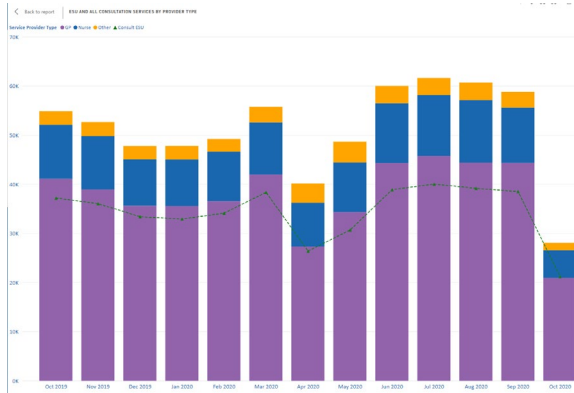
“...Turn information into knowledge, and knowledge into wisdom”



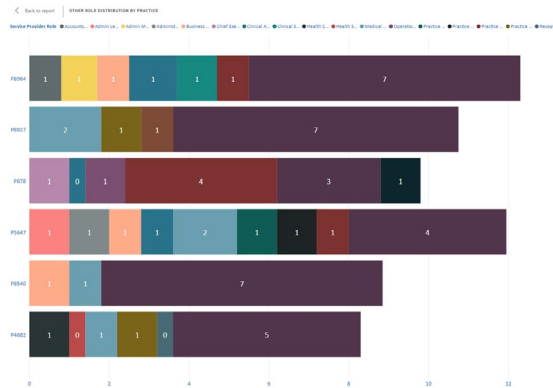
About me

Question: How would you use data to inform management of the practice?

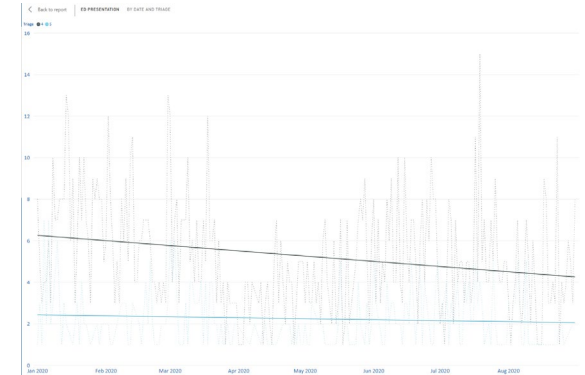
# Data driven practice management



Utilisation – Trends, Variations, Forecasting



Practice Comparison - Roles



Monitoring/Review of Effect of Targeted Activity/Practice Plan

“Effective leaders and managers lead by fact, not opinion”

# Data considerations

- Security - keeping information safe
- Privacy and confidentiality – mitigating risks of inappropriate use, disclosure, identification
- Quality
- Information Systems Knowledge
- Obligations
- Compliance

# Power BI

Business intelligence tool enabling data driven decision making

- Part of the Microsoft suite of products
- Incorporates data from multiple sources e.g. NES and the quarterly CPI extract
- Accessible via an internet browser, or mobile device app
- Provides data visualisations in various formats
- Integrated with Microsoft Excel
- 'Up to date' data sets\*\*



Scenario: Should my practice invest  
in telehealth?

# Outcome

- Data outlines the actual state of utilisation (or lack thereof)
- Shows spikes, drops based on actual events e.g. lockdown
- Prompt further investigation
- *Why did the data reflect x? What factors influenced that – internal and external?*
- *What do our staff and patients want?*
- *How could this work, how would it align with our business plan?*
- *What do other practices do?*

# Support

- Power BI access available to Pinnacle practices
- Resources
- Use/Technical issues
- Business Planning/Development
- Clinical Activity

Question: What kind of data would you like access to?

# Closing karakia

Kia tau tō Rangimārie  
Ki runga i ngā iwi o te ao

*Let your peace reign  
On all the people of the  
world*

