Power BI Portfolio – Master Checklist & Templates

This pack includes:

- ■ Portfolio inventory page structure (Notion/website)
- ■ Project write-up template (Problem → Approach → Insights → Business Impact)
- ■ GitHub README template
- ■ Recommended folder structure
- ■ Publish & QA checklist
- ■ Review rubric (what hiring managers look for)

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1) Portfolio Inventory Page (Notion / Website)

Create a table with the following columns:

- **Project Title**
- **Business Problem**
- **Domain** (Sales / HR / Churn / Finance / Marketing / Supply Chain)
- **Data Source** (Kaggle / Gov portal / Mock)
- **Tech Used** (Power BI / DAX / Power Query / Python optional)
- **Key KPIs**
- **Link to Dashboard**
- **Link to GitHub**
- **Status** (Draft / In Review / Published)

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2) Project Write-up Template

Project Title:

Domain: Sales / HR / Marketing / Finance / Supply Chain

Duration: (e.g., 1 week)

Links: [Dashboard] | [GitHub]

Problem

What is the real business problem? (e.g., "Revenue dropped 8% QoQ in West region.")

Data & Method

- Data sources + cleaning steps (Power Query)

- Model design (star schema, relationships)
- Key DAX measures

Analysis & Insights

- What did you find? (2–4 punchy insights)
- Visuals that support each insight

Business Impact

- What should the business do? (actionable recommendations)
- Optional: revenue / cost / churn impact estimates

Notes

- Limitations, assumptions, privacy considerations

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3) GitHub README Template (Markdown)

{Project Title}

Domain: {Sales/HR/Finance/...}

Tools: Power BI, DAX, Power Query, (optional: Python)

Live Demo: [Power BI Service Link]

Dataset: [Source + License]

Overview

Short summary of the business problem and what the dashboard answers.

Files

- `/Reports/` — PBIX or PBIX screenshots
- `/Data/` — cleaned sample data (no PII)
- `/Writeups/` — project write-up (PDF/Markdown)

Key Measures (DAX)

- `Total Sales = SUM(Sales[Amount])`
- `YoY Growth = DIVIDE([Sales]-[Sales LY],[Sales LY])`

Screenshots

Insert 1–2 images or GIFs here.

Results / Impact

Bullet the top 2–3 business takeaways.

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4) Recommended Folder Structure

```
/{project-slug}/
  /Reports/
  /Data/
  /Writeups/
  README.md
```

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5) Publish & QA Checklist

- [ ] Dummy/anonymised data only
- [ ] Slicers, drillthrough, bookmarks work
- [ ] KPIs and DAX measures verified
- [ ] Executive summary view present
- [ ] README includes screenshots & links
- [ ] Links to GitHub + Live dashboard added

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6) Review Rubric (Hiring Manager View)

Clarity: Problem is specific, visuals are focused, insights are obvious.

Relevance: Project matches real business scenarios.

Technical Depth: DAX/Modeling used appropriately (not gratuitously).

Storytelling: Clear narrative from problem → insight → action.

Impact: Recommendations tied to business value.

Professionalism: README, folder structure, and privacy hygiene.