
The Fabric Fast Track Workbook

*Deploy enterprise analytics
in ninety days.*

01

ASSESS

02

GOVERN

03

LAND

04

BUILD

05

OPERATE

90^d

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FRONT MATTER

How to use this workbook.

Modernization doesn't need to take forever. This workbook is the 90-day playbook – not described, not linked. Right here. Take it. Use it.

This workbook follows the five-phase deployment framework from the session. Each section has:

- A checklist of what to complete
- A named owner for each item
- A go/no-go gate — the hard stop before you proceed

THE GATE RULE

Every item must be checked — not "mostly done," not "in progress." A held gate is not a failure. It's catching a problem before it compounds.

START HERE

1. Complete the self-assessment (next page) to know where you stand today.
2. Fill in the 90-Day Project Plan with your actual start date.
3. Run the Payback Calculator before your Phase 1 gate.
4. Use the phase templates in order — don't jump ahead.

PHASE 1

Assess

Days 1–15

PHASE 2

Govern

Days 15–25

PHASE 3

Land

Days 25–50

PHASE 4

Build

Days 50–75

PHASE 5

Operate

Days 75–90

FRONT MATTER

Contents

Ten sections. Five phases. One pass through, in order.

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SECTION 01

Self-Assessment

Are you on the Org A path?

Org A spent **18 months and \$2.3M** and still isn't in production. Org B deployed in **90 days** on the same platform with less budget.

The difference wasn't resources. It was the *order* they did things.

Answer honestly. One check per row.

Phase 1 – Assess

QUESTION	✓ ORG B PATH	× ORG A PATH	YOUR ANSWER
Named executive sponsor who can resolve blockers within 48 hours?	Named. Accountable.	"Leadership is aligned" / committee	<input type="checkbox"/>
Day 90 success defined as a specific business outcome?	"Finance self-serves the GL report by 8am without an IT ticket"	"Modernize our analytics platform"	<input type="checkbox"/>
Data source inventory completed with quality ratings 1–5?	All sources rated. Quality 1–2 have remediation plans.	"We know our data sources"	<input type="checkbox"/>
Capacity sized and finance-approved before any pipeline work?	Approved. Budget confirmed.	"We'll figure that out later"	<input type="checkbox"/>

Score: of 4

Phase 2 – Govern

QUESTION	✓ ORG B PATH	× ORG A PATH	YOUR ANSWER
Workspace naming convention written and approved before first workspace created?	Documented. IT-signed. No exceptions.	"We'll standardize later"	<input type="checkbox"/>
Service principal provisioned and tested before Phase 3 begins?	SP live in week 2. Tested in dev.	"We'll add it when the refresh needs it"	<input type="checkbox"/>
Security model decided before any item is created?	Matrix complete. Signed.	"We'll lock it down after build"	<input type="checkbox"/>
Deployment pipeline end-to-end before any pipeline is built?	Automated promotion tested.	"We'll set up CI/CD once we have something"	<input type="checkbox"/>

Score: of 4

Phase 3 – Land

QUESTION	✓ ORG B PATH	× ORG A PATH	YOUR ANSWER
Medallion matrix completed for every source before writing a single pipeline?	Matrix done. Pipeline counts known.	"We'll design it as we go"	<input type="checkbox"/>
Bronze is append-only with an error table for failed rows?	Bronze is immutable. Errors are captured.	"We load raw data directly into reporting tables"	<input type="checkbox"/>
Silver has quality gates before promotion to gold?	Row count checks, type validation, quarantine.	Silver = bronze with column renames	<input type="checkbox"/>
Business owner previewed at least one gold table before Phase 4 begins?	Business owner confirmed data is right.	"The developer signed off on data quality"	<input type="checkbox"/>

Score: of 4

Phase 4 – Build

QUESTION	✓ ORG B PATH	× ORG A PATH	YOUR ANSWER
Acceptance criteria written and signed before development starts?	Criteria documented. Test cases with expected values.	"We'll define success when we see the reports"	<input type="checkbox"/>
BPA audit run with zero critical violations before UAT?	BPA clean. Violations resolved.	"We'll clean that up after go-live"	<input type="checkbox"/>
Business owner tested independently — no developer in the room?	Business owner tested solo. Discrepancies in writing.	"We walked through together and it looked good"	<input type="checkbox"/>
RLS tested by someone other than the developer?	IT lead validated with two different profiles.	"The developer confirmed RLS is working"	<input type="checkbox"/>

Score: of 4

Phase 5 – Operate

QUESTION	✓ ORG B PATH	× ORG A PATH	YOUR ANSWER
Monitoring alerts for pipeline failure, refresh failure, AND self-monitoring failure?	All three live before go-live.	"We'll set up monitoring after we see problems"	<input type="checkbox"/>
Runbook has escalation path, capacity baseline, and step-by-step incident response?	Complete. First on-call has read it.	"The developer knows how to fix things"	<input type="checkbox"/>
Business owner demonstrated self-service without any IT help?	Observed. Documented.	"We showed them how to use it"	<input type="checkbox"/>
Go-live requires signatures from sponsor, IT lead, AND business owner?	Three signatures. Formal sign-off.	"IT declared it done and sent an email"	<input type="checkbox"/>

Score: of 4

Diagnosis

TOTAL	WHAT IT MEANS
18–20	Org B path. Protect the gates.
14–17	Specific gaps. Identify low-scoring phases — those are your risk areas.
10–13	Real risk of Org A outcomes. Phase 1–2 gaps are the most expensive to fix later.
< 10	Stop. Don't open the Fabric admin portal yet. Fix Phase 1 first.

DATE COMPLETED

TOTAL SCORE

___ / 20

PHASE ONE

01

Assess

DAYS 1-15

GOAL

Know what you have, who cares, and what success looks like.

OWNER: HEAD OF DATA + IT LEAD

PHASE 1 TEMPLATE 1A **Assessment Checklist**

Data Source Inventory

For each data source in scope, complete one row.

SOURCE NAME	SYSTEM TYPE	OWNER	ROW VOLUME	QUALITY 1-5	CONNECTION	NOTES

QUALITY RATING SCALE

- 5** — Clean, well-documented, schema stable
- 4** — Minor issues, known and documented
- 3** — Moderate issues, some undocumented fields

- 2** — Significant problems, transformation work expected
- 1** — Unknown or unreliable — needs full profiling before pipeline design

WATCH OUT

Any source rated 1 or 2 doubles your Phase 3 estimate. Find these in week 1, not week 4.

Executive Sponsorship

- Executive sponsor named: _____
- Sponsor can approve budget and resolve cross-team blockers within 48 hours
- Sponsor briefed: 90-day timeline, phase gates, sign-off requirements
- Sponsor's availability confirmed for Phase 1 gate review

Use Case Definition

- Primary use case: _____
- Day 90 measurable outcome: _____

Example: "Finance generates weekly variance report without IT involvement"

Example: "Operations dashboard refresh latency under 2 hours"

- Success is a business outcome — not "platform is deployed"
- Secondary use cases: _____

Capacity Sizing

- Current Fabric capacity identified (or trial confirmed)
- Estimated CU consumption for initial workload calculated
- Sizing reviewed by IT and finance
- Approval to proceed (or upgrade plan documented)

Phase 1 – Go/No-Go Gate

● PHASE 1 GATE · ALL THREE MUST PASS	DAYS 1-15
Executive sponsor named and attended at least one project meeting	<input type="checkbox"/> Pass <input type="checkbox"/> Hold
Use case has a written, measurable Day 90 outcome	<input type="checkbox"/> Pass <input type="checkbox"/> Hold
Capacity sizing approved by IT and finance	<input type="checkbox"/> Pass <input type="checkbox"/> Hold
GATE SIGNED BY _____	DATE _____

IF ANY ITEM FAILS, DO NOT PROCEED

The cost of a failed gate at Phase 1 is days. At Phase 3 it is weeks.

PHASE 1 TEMPLATE 1B **Stakeholder Map**

Core Deployment Team

ROLE	NAME	EMAIL	HRS/WK	RESPONSIBILITY
Data Team Lead	Architecture, pipeline design, Phase 3-4 execution
IT Lead	Infrastructure, security, capacity, Phase 2 gate
Business Unit Owner	Use case definition, UAT sign-off, Phase 4-5 gate
Executive Sponsor	Escalation authority, Phase gate sign-offs
Finance Contact	Budget approval, payback tracking

Escalation Path

1. Data Team Lead → attempts resolution within 24 hours
2. If unresolved → IT Lead (technical) or Business Unit Owner (scope)
3. If unresolved within 48 hours → Executive Sponsor for decision

ESCALATION LOG

DATE	ISSUE	ESCALATED TO	RESOLUTION	DAYS LOST

Communication Plan

AUDIENCE	WHAT THEY RECEIVE	FREQUENCY	OWNER
Executive Sponsor	Phase gate status (pass/fail + next phase start)	At each gate	Data Team Lead
Business Unit Owner	Progress update + preview of next phase deliverables	Weekly	Data Team Lead
IT Lead	Technical dependencies + upcoming infrastructure asks	Weekly	Data Team Lead
Finance Contact	Budget status + payback projection update	Monthly	Executive Sponsor

PHASE TWO

02

Govern

DAYS 15-25

GOAL

Define the rules before anything is built.

OWNER: PLATFORM ADMIN + SECURITY TEAM

PHASE 2

TEMPLATE 2A

Workspace Naming Convention

Naming Pattern

```
[env]-[domain]-[workload]-[tier]
```

SEGMENT	VALUES	DESCRIPTION
env	dev , test , prod	Environment — maps to deployment pipeline stage
domain	finance , ops , hr , sales , shared	Business domain
workload	short slug, hyphenated	What this workspace does
tier	raw , curated , serve (optional)	Medallion layer

Examples

WORKSPACE NAME	MEANING
prod-finance-reporting	Production Finance reporting
dev-ops-logistics-raw	Dev Operations logistics — bronze layer
test-shared-platform	Test Shared platform services
prod-sales-forecasting-serve	Production Sales — gold/serve layer

Rules

- All lowercase, hyphens only — no underscores, no spaces
- Maximum 60 characters total
- `prod-` prefix is protected — only the deployment pipeline creates prod workspaces
- `shared-` domain is for cross-domain infrastructure
- No dates in workspace names

Item Naming

ITEM TYPE	PATTERN	EXAMPLE
Lakehouse	[domain]_[subject]_lh	finance_gl_lh
Warehouse	[domain]_[subject]_wh	sales_orders_wh
Pipeline	[source]_to_[target]_[layer]	erp_to_finance_gl_lh_bronze
Semantic Model	[domain]_[subject]_sm	finance_reporting_sm
Report	[subject] – [audience]	GL Variance — Finance Team
Notebook	[verb]_[subject]_nb	transform_gl_transactions_nb

Approval Sign-Off

APPROVER	ROLE	SIGNATURE	DATE
.....	IT Lead	.....	.....
.....	Data Team Lead	.....	.....
.....	Executive Sponsor	.....	.....

WHY THIS MATTERS

A naming convention you can read out loud and explain in 30 seconds will save you a quarter of retrofitting work in month three. Get it signed before anything is created.

PHASE 2

TEMPLATE 2B

Security Model Decision Matrix

Domain-Level Permissions

DOMAIN	DOMAIN ADMIN	WHO CAN CREATE WORKSPACES
Finance		IT Lead (prod), Data Team Lead (dev/test)
Operations		
Shared		IT Lead only

Workspace Role Assignments

WORKSPACE	ADMIN	MEMBER	CONTRIBUTOR	VIEWER
prod-[domain]-[workload]				
test-[domain]-[workload]				
dev-[domain]-[workload]				

ROLE DEFINITIONS

Admin: Manage workspace, add/remove members, delete workspace

Member: Publish content, manage datasets, create reports

Contributor: Create and edit content — cannot publish to prod

Viewer: Read-only access to published reports

Row-Level Security Planning

MODEL NAME	RLS ROLE	FILTER LOGIC	USER MAPPING
		e.g., [Region] = USERPRINCIPALNAME()	AAD group

Service Principal Inventory

SP DISPLAY NAME	APP ID	USED BY	SECRET EXPIRY	OWNER
fabric-pipeline-sp		All data pipelines		IT Lead

Provisioning script: see `govern-sp-provisioning.ps1` (included in workbook download)

Security Gate

GATE ITEM	STATUS	APPROVER	DATE
Domain-level permissions documented	<input type="checkbox"/>
Workspace roles defined for all prod workspaces	<input type="checkbox"/>
RLS requirements identified for all semantic models	<input type="checkbox"/>
Service principal provisioned and tested	<input type="checkbox"/>

Phase 2 – Go/No-Go Gate

◆ PHASE 2 GATE · ALL THREE MUST PASS		DAYS 15–25
Workspace naming convention documented and IT-approved	<input type="checkbox"/> Pass <input type="checkbox"/> Hold	
Security model approved — roles mapped before any item created	<input type="checkbox"/> Pass <input type="checkbox"/> Hold	
Deployment pipeline (dev → test → prod) runs end-to-end, no manual steps	<input type="checkbox"/> Pass <input type="checkbox"/> Hold	
GATE SIGNED BY	DATE	
_____	_____	

ORDER MATTERS

Naming + security + deployment pipeline come *before* the first workspace is created. Retrofitting any of these costs ten times more than getting them right up front.

PHASE THREE

03

Land

DAYS 25-50

GOAL

Get clean, structured data flowing reliably.

OWNER: DATA ENGINEERING TEAM

PHASE 3

TEMPLATE 3A

Medallion Architecture Decision Matrix

What Is the Medallion Pattern?



Bronze

Exact copy of source. No transformations. Immutable after landing.

Silver

Validated, cleaned, deduplicated. Business rules applied. Joins allowed.

Gold

Aggregated, modeled, reporting-ready. Semantic model reads from here only.

Per-Source Decision Matrix

Complete this for every source before writing any pipeline.

QUESTION	SOURCE 1: ___	SOURCE 2: ___	SOURCE 3: ___
Source system type (SQL, API, file, stream)			
Expected refresh frequency			
Row volume per refresh (est.)			
Does source data change after initial load? (CDC needed?)			
Does data require deduplication?			
Joins required with other sources?			
Complex business rules that transform values?			
PII requiring masking?			
Is this source authoritative?			

Decision Output

SOURCE	NEEDS BRONZE?	NEEDS SILVER?	NEEDS GOLD?	KEY TRANSFORMATION NOTES
	✓ Always			
	✓ Always			
	✓ Always			

Layer Specifications

BRONZE

- Append-only Delta table, partitioned by `_load_date`
- Mirror source schema exactly — no column renames or type changes
- Naming: `bronze_[source]_[entity]`
- Failed rows → `bronze_[entity]_error` (never dropped)

SILVER

- Conformed types, standardized column names (snake_case)
- Naming: `silver_[domain]_[entity]`
- Quality gates: null checks, type validation, referential integrity before promotion
- Failed rows → `silver_[entity]_quarantine`

GOLD

- Star schema preferred — fact + dimension
- Naming: `gold_[domain]_[subject]_fact / _dim`
- Semantic model reads here — no exceptions
- Must be refreshed before semantic model scheduled refresh

Pipeline starter template: see `land-pipeline-starter.json` (included in workbook download)

BRONZE IS SACRED

Never edit, dedupe, or "fix" bronze. The moment you change source data on the way in, you lose the ability to audit and replay. Push corrections downstream to silver.

Phase 3 – Go/No-Go Gate

● PHASE 3 GATE · ALL THREE MUST PASS		DAYS 25-50
Bronze data landing on schedule for all sources	<input type="checkbox"/> Pass	<input type="checkbox"/> Hold
Silver validated against source (row counts + spot checks)	<input type="checkbox"/> Pass	<input type="checkbox"/> Hold
At least one gold table previewed and confirmed by business owner	<input type="checkbox"/> Pass	<input type="checkbox"/> Hold
GATE SIGNED BY _____	DATE _____	

Notes & Sign-off Evidence

GATE ITEM	EVIDENCE / NOTES
Bronze run history (last 7 days)
Silver row-count delta vs. source
Gold preview attendees + date
Open issues to track into Phase 4

BUSINESS OWNER ≠ DATA ENGINEER

The business owner — not the developer — must confirm gold looks right. "Looks right" means a known scenario with a known answer matches. Get this in writing.

PHASE FOUR

04

Build

DAYS 50-75

GOAL

Turn validated data into reports that pass business review.

OWNER: BI DEVELOPER + BUSINESS ANALYST

PHASE 4

TEMPLATE 4A

Report Acceptance Criteria

Complete one section per report. Business owner signs *before* development begins.

REPORT	_____
BUSINESS OWNER	UAT DATE
_____	_____
TARGET WORKSPACE	REFRESH FREQUENCY
_____	_____

Data Requirements

CRITERION	DEFINITION	PASS CONDITION	TESTED BY
Data source	Which gold table(s)?	.....	Developer
Date range	Default filter on open	.....	Business Owner
Row-level security	Who sees what?	.....	IT Lead
Refresh latency	Data no older than ___ hours	.....	Business Owner
Row count	Expected count for standard date range	.....	Business Owner

Calculated Measures

MEASURE NAME	BUSINESS DEFINITION	EXPECTED VALUE (TEST CASE)

THE 3-DAY DEBATE ELIMINATOR

The test case column is the one that saves you the 3-day debate. Before development starts: "Give me a known scenario and the correct answer." That's your test case. UAT is now a math check, not a negotiation.

Performance Requirements

CRITERION	THRESHOLD	PASS CONDITION
Report load time (cold)	Under ___ seconds	Tested on dev, VPN connected
Visual render time	Under ___ seconds	.....
Export to PDF	Under 60 seconds	.....

UAT Sign-Off

REVIEWER	ROLE	SIGNATURE	DATE
.....	Business Owner	.....	.....
.....	Developer	.....	.....
.....	IT Lead (RLS)	.....	.....

UAT DISCIPLINE

The business owner tests *independently* — not over the developer's shoulder. The developer doesn't get to say "well, technically...". Discrepancies go in writing. Sign-off is a real signature, not a thumbs-up in Teams.

PHASE 4 **TEMPLATE 4B** **BPA Rules – The 10 That Matter Most**

Run in Tabular Editor before any report goes to UAT.

BPA config file: see `build-bpa-config.json` (included in workbook download)

Critical – Stop Go-Live (zero tolerance)

#	RULE	WHY
1	No implicit measures	Auto-sum produces wrong results across filter contexts
2	Date table marked as date table	Time intelligence breaks silently without this
3	All relationships active	Inactive requires <code>USERRELATIONSHIP()</code> everywhere
4	No bi-directional on large tables	Exponential query growth above 100K rows
5	RLS roles defined	If security matrix requires RLS, model must implement it

Warning – Fix Before Go-Live (threshold: < 10)

#	RULE	WHY
6	All measures have descriptions	Self-service fails without discoverable measures
7	No deep CALCULATE nesting	> 2 levels creates filter context bugs
8	High-cardinality columns: summarization = None	Prevents accidental aggregation
9	Primary key on every table	Relationship integrity depends on it
10	No measures on fact tables	Measures belong on measure tables or dimensions

Phase 4 – Go/No-Go Gate

● PHASE 4 GATE · ALL THREE MUST PASS		DAYS 50-75	
Business owner signed off on at least 3 reports	<input type="checkbox"/>	Pass	<input type="checkbox"/> Hold
BPA audit: zero critical violations	<input type="checkbox"/>	Pass	<input type="checkbox"/> Hold
RLS validated by someone who is not the developer	<input type="checkbox"/>	Pass	<input type="checkbox"/> Hold
GATE SIGNED BY _____	DATE _____		

Report Sign-Off Log

REPORT	BUSINESS OWNER	UAT DATE	STATUS

RLS — NEVER TESTED BY THE DEVELOPER

If the only person who has tested row-level security is the same person who wrote it, you have not tested row-level security. Two profiles, two accounts, IT lead present.

PHASE FIVE

05

Operate

DAYS 75-90

GOAL

Hand off a running platform, not a delivered project.

OWNER: PLATFORM TEAM + BUSINESS OWNERS, JOINTLY

PHASE 5 **TEMPLATE 5A** **Day 90 Go-Live Checklist**

Platform Readiness

ITEM	OWNER	STATUS
All production pipelines run successfully at least once	Data Team Lead	<input type="checkbox"/>
All gold tables validated against expected row counts	Data Team Lead	<input type="checkbox"/>
All semantic models refreshed successfully in production	BI Developer	<input type="checkbox"/>
All BPA violations resolved (zero critical)	BI Developer	<input type="checkbox"/>
All RLS roles tested with production user accounts	IT Lead	<input type="checkbox"/>
Capacity utilization baselined (2-week average)	IT Lead	<input type="checkbox"/>
Deployment pipeline tested end-to-end	IT Lead	<input type="checkbox"/>

Documentation Readiness

ITEM	OWNER	STATUS
Operational runbook completed and reviewed	IT Lead	<input type="checkbox"/>
Workspace naming documented	Data Team Lead	<input type="checkbox"/>
Security model documented	IT Lead	<input type="checkbox"/>
Source-to-gold lineage documented	Data Team Lead	<input type="checkbox"/>
Refresh schedule and SLA documented	Data Team Lead	<input type="checkbox"/>

Business Readiness

ITEM	OWNER	STATUS
Business owner UAT sign-off received for all reports	Business Owner	<input type="checkbox"/>
Business owner demonstrated self-service without IT assist	Business Owner	<input type="checkbox"/>
Business owner knows the P1/P2/P3 incident reporting process	Business Owner	<input type="checkbox"/>
Payback tracking method agreed and scheduled	Finance Contact	<input type="checkbox"/>

Monitoring Readiness

ITEM	OWNER	STATUS
Pipeline failure alerts configured and tested	IT Lead	<input type="checkbox"/>
Semantic model refresh failure alerts configured	IT Lead	<input type="checkbox"/>
Monitoring script self-alert configured	IT Lead	<input type="checkbox"/>
First on-call person identified and has read the runbook	IT Lead	<input type="checkbox"/>

Monitoring alerts script: see `operate-monitoring-alerts.ps1` (included in workbook download)

Go-Live Approval – three signatures required

ROLE	NAME	SIGNATURE	DATE
Executive Sponsor
IT Lead
Business Unit Owner

PHASE 5

TEMPLATE 5B

Operational Runbook

Platform Overview

TENANT	CAPACITY
PRODUCTION WORKSPACES	
BUSINESS OWNER	IT OWNER

Escalation Contacts

SEVERITY	CONTACT	METHOD	SLA
P1 — Reports unavailable, executive reports broken	Phone	30 min
P2 — Pipeline failure, reports stale	Teams	2 hours
P3 — Single report issue, cosmetic	Email	Next business day

Daily Health Check (< 5 minutes)

1. Open Fabric Admin Portal → Capacity Metrics
2. Confirm capacity within normal range: _____ to _____ CUs
3. Check pipeline run history — all scheduled runs completed
4. Confirm semantic model refresh completed within SLA

Capacity Baseline – fill in after 2 weeks of production

METRIC	NORMAL RANGE	ALERT THRESHOLD
CU utilization (peak)
CU utilization (average)
Bronze pipeline run duration
Semantic model refresh duration
Report load time (P95)

Incident Response

P1 — REPORTS UNAVAILABLE

1. Confirm it's not user-specific (test with a second account)
2. Check Fabric capacity: Admin Portal → Capacity → Health
3. If throttled: identify top consumer in Capacity Metrics, escalate to data team lead
4. If workspace inaccessible: check workspace status in Admin Portal
5. Notify business owner within 30 minutes regardless of resolution status

P2 — PIPELINE FAILURE

1. Open workspace → Pipelines → Run history
2. Identify failed pipeline and error message
3. Common causes:
 - **Source timeout:** re-run; if persists, check source system availability
 - **Schema mismatch:** source column added/removed — update bronze pipeline schema
 - **Capacity throttling:** reschedule to off-peak or add capacity
4. If bronze failed: fix bronze first — silver and gold will also fail downstream
5. Notify business owner if data will be stale beyond SLA

P3 — REPORT CALCULATION ERROR

1. Confirm issue is in semantic model, not gold table (query gold directly)
2. If gold is correct: DAX measure has a filter context issue
3. Run BPA audit — check for new violations
4. Escalate to BI developer with: measure name, incorrect value, expected value, date range
5. **Do not hotfix DAX in production** — use dev workspace and deployment pipeline

Incident Log

DATE	SEVERITY	DESCRIPTION	RESOLUTION	TIME TO RESOLVE

SECTION 07

Quick Reference Card

Print this page. Tape it to the wall. Don't open the admin portal until you can explain every box on it.

The 5 Gates

PHASE	DAYS	GATE (ALL MUST PASS)
01 · ASSESS	1-15	Named sponsor · Measurable Day 90 outcome · Capacity approved
02 · GOVERN	15-25	Naming IT-approved · Security matrix signed · Deployment pipeline end-to-end
03 · LAND	25-50	Bronze on schedule · Silver validated · Business owner previewed gold
04 · BUILD	50-75	Business owner signed ≥ 3 reports · BPA zero criticals · RLS tested by non-developer
05 · OPERATE	75-90	Go-live checklist signed by all 3 · Self-service demonstrated · Runbook reviewed

Monday Morning – One Action

Name your executive sponsor before you open the Fabric admin portal.

10 Anti-Patterns

If you spot any of these in flight, find the gate that kills it and run it.

01

PHASE 1

No named executive sponsor**Fix:** Gate — sponsor named before Phase 2

02

PHASE 1

Vanity use case (no measurable outcome)**Fix:** Gate — Day 90 outcome in one sentence

03

PHASE 2

Workspace naming retrofitted in month 3**Fix:** Convention before first workspace created

04

PHASE 3

Service principal added "when needed"**Fix:** Provisioned in Phase 2, tested in dev

05

PHASE 3

Bronze skipped to hit demo deadline**Fix:** Medallion matrix before first pipeline

06

PHASE 3

Reports connected to unstable gold**Fix:** Gate — gold stable before semantic model

07

PHASE 4

UAT run by the developer**Fix:** Business owner tests independently

08

PHASE 4

No acceptance criteria before development**Fix:** Criteria written and signed in Phase 1

09

PHASE 5

Runbook written but never reviewed**Fix:** Reviewed runbook is a gate item

10

PHASE 5

Training = a demo, not behavior change**Fix:** Gate — self-service demonstrated

SECTION 08

Payback Calculator

Five short tables. One number for your CFO.

Part 1 – Current State: Manual Reporting Hours

REPORTING TASK	WHO DOES IT	HOURS/WEEK	STAFF COUNT	TOTAL HOURS/WEEK
TOTAL				____ hrs/wk

Fully-loaded hourly rate: \$ _____ /hour (salary × 1.4 ÷ 2080 hours)

Current annual reporting cost: _____ hrs/wk × 52 × \$ _____ /year

Part 2 – Platform Investment

ITEM	ONE-TIME	ANNUAL
Fabric capacity (F-SKU)	—	\$ _____
Implementation / consultant fees	\$ _____	—
Internal staff time	\$ _____	—
Training	\$ _____	—
Ongoing maintenance	—	\$ _____

Year 1 total investment: \$ _____

Part 3 – After Platform: Projected Hours

REPORTING TASK	HOURS/WEEK (AFTER)
TOTAL	_____ hrs/wk

Part 4 – The Math

Hours saved/week	= Part 1 total - Part 3 total	= _____ hrs/wk
Dollar value/week	= Hours saved × hourly rate	= \$_____ /wk
Dollar value/month	= Weekly savings × 4.33	= \$_____ /mo
Payback month	= Year 1 investment ÷ monthly savings	= _____ months
Payback week	= Payback month × 4.33	= _____ weeks

Part 5 – Business Case Summary (for your CFO)

*We are deploying Microsoft Fabric to eliminate [primary use case]. Current cost: \$_____ Year 1. Savings: \$_____/month post go-live. Payback: **Week** _____.*

Reference – Composite Org (from the session)

	BEFORE	AFTER
Finance GL variance	6 hrs/wk (2 analysts)	20 min/wk (self-service)
IT ad-hoc requests	4 hrs/wk (1 engineer)	0
Operations KPI review	3 hrs/wk (3 managers)	30 min/wk
Total	13 hrs/wk	~1 hr/wk

Platform investment: **\$180K** · Monthly savings: **~\$16K** · Payback: **Week 11**

SECTION 09

90-Day Project Plan

PROJECT	START DATE (DAY 1)
_____	_____
SPONSOR	GO-LIVE (DAY 90)
_____	_____

Phase 1 – Assess (Days 1-15)

DAY	MILESTONE	OWNER	<input type="checkbox"/>
1	Kickoff — project charter signed, sponsor confirmed	<input type="checkbox"/>
5	Executive sponsor named and briefed	<input type="checkbox"/>
7	Primary use case defined with measurable outcome	<input type="checkbox"/>
10	Stakeholder map complete	<input type="checkbox"/>
12	Data source inventory complete — quality ratings assigned	<input type="checkbox"/>
14	Capacity sizing reviewed and approved	<input type="checkbox"/>
15	● Phase 1 Gate	<input type="checkbox"/>

Phase 2 – Govern (Days 15-25)

DAY	MILESTONE	OWNER	<input type="checkbox"/>
16	Workspace naming convention drafted	<input type="checkbox"/>
18	Naming convention approved by IT	<input type="checkbox"/>
18	Security matrix completed and signed	<input type="checkbox"/>
20	Fabric capacity assigned to domain	<input type="checkbox"/>
21	Service principal provisioned and tested in dev	<input type="checkbox"/>
24	Deployment pipeline tested end-to-end	<input type="checkbox"/>
25	● Phase 2 Gate	<input type="checkbox"/>

Phase 3 – Land (Days 25–50)

DAY	MILESTONE	OWNER	<input type="checkbox"/>
25	Medallion matrix completed for all sources	<input type="checkbox"/>
28	First bronze pipeline running and monitored	<input type="checkbox"/>
38	All sources in bronze	<input type="checkbox"/>
45	Silver complete	<input type="checkbox"/>
48	First gold tables built	<input type="checkbox"/>
50	Business owner previews gold	<input type="checkbox"/>
50	● Phase 3 Gate	<input type="checkbox"/>

Phase 4 – Build (Days 50–75)

DAY	MILESTONE	OWNER	<input type="checkbox"/>
50	Acceptance criteria reviewed with business owner	<input type="checkbox"/>
52	Semantic model connected to gold layer	<input type="checkbox"/>
55	BPA audit run — zero critical violations	<input type="checkbox"/>
62	First UAT pass — business owner tests independently	<input type="checkbox"/>
70	All reports in UAT — discrepancies resolved	<input type="checkbox"/>
75	● Phase 4 Gate	<input type="checkbox"/>

Phase 5 – Operate (Days 75–90)

DAY	MILESTONE	OWNER	<input type="checkbox"/>
75	Monitoring alerts configured	<input type="checkbox"/>
78	Runbook drafted and reviewed	<input type="checkbox"/>
82	Business owner completes self-service — no IT assist	<input type="checkbox"/>
87	Go-live — promoted to production	<input type="checkbox"/>
90	● Phase 5 Gate + Formal Handoff	<input type="checkbox"/>

SECTION 10

Supporting Files

The following scripts and config files are included in the workbook download.

FILE	PHASE	WHAT IT DOES
<code>govern-sp-provisioning.ps1</code>	PHASE 2	PowerShell script — service principal provisioning, 5 steps
<code>land-pipeline-starter.json</code>	PHASE 3	Fabric pipeline starter template with the 4-activity bronze pattern
<code>build-bpa-config.json</code>	PHASE 4	Tabular Editor BPA rule config — import and run against your semantic model
<code>operate-monitoring-alerts.ps1</code>	PHASE 5	PowerShell monitoring script with all 3 alert types pre-configured

USE THESE AS STARTING POINTS, NOT AS FINISHED WORK

Each file is a working baseline. Read it, understand it, then adapt it to your environment. Anything you don't understand, you shouldn't run.

*"The order matters.
Start with the sponsor."*

— JONATHAN STEWART