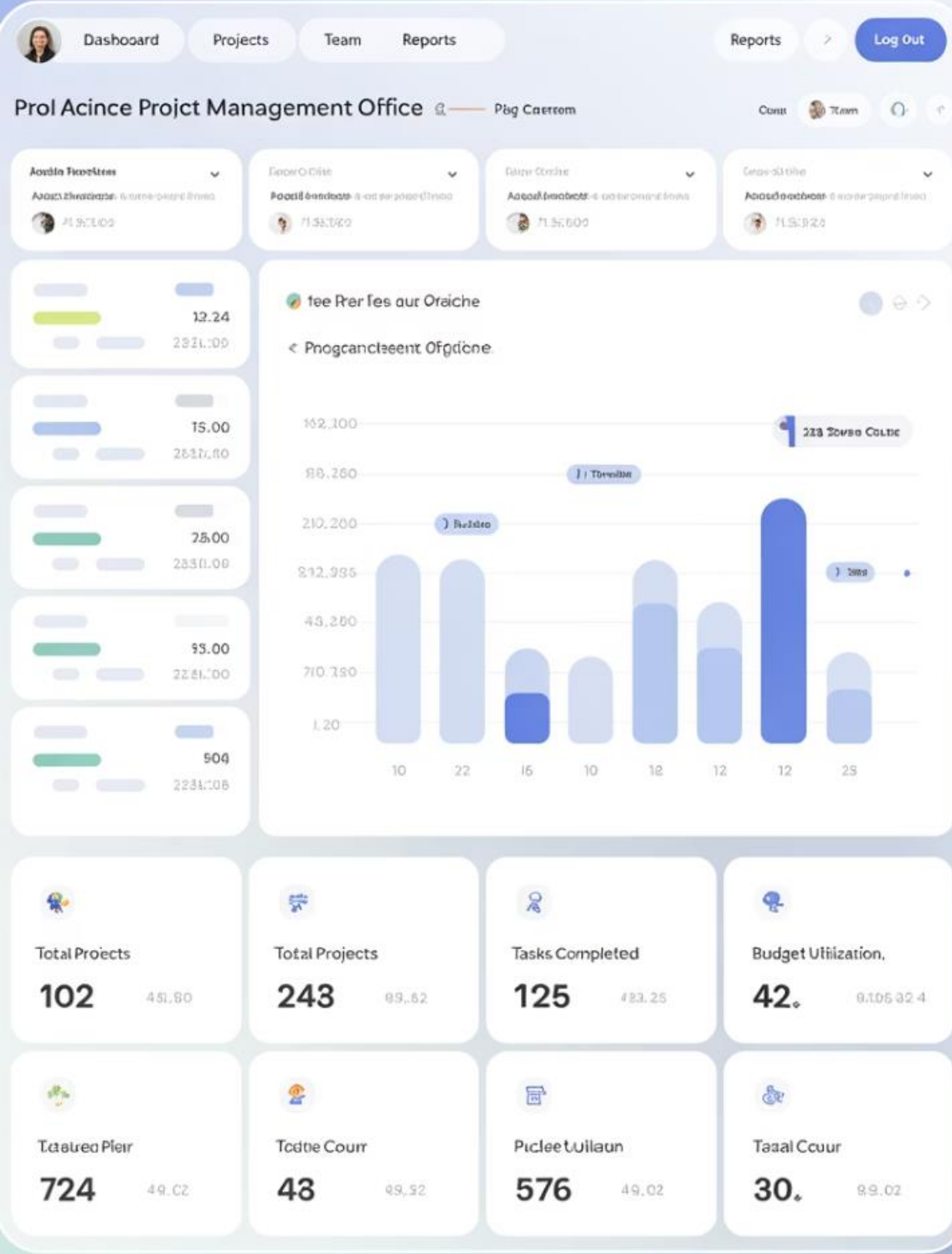


Power BI + Dynamics 365: Driving Project Insights

In project management, visibility is the secret to success. Integrating Power BI with Microsoft Dynamics 365 empowers teams with dynamic dashboards, real-time reporting, and interactive visualizations.

 by Kimberly Wiethoff





What Is Power BI?

Business Intelligence Tool

Microsoft's premier data visualization platform transforms raw data into compelling insights.

Seamless Integration

Connects directly to Dynamics 365 data across CRM, ERP, and Project Operations.

Visual Storytelling

Creates interactive dashboards that reveal performance trends and improvement areas.



Why Integrate Power BI with Dynamics 365?



Real-time KPIs

Access live metrics across sales, delivery, finance, and customer service.



Detailed Analysis

Drill down into task-level data to identify and resolve blockers quickly.



Unified View

Track project status, risks, costs, and resources in one interactive dashboard.



Stakeholder Reporting

Present polished visuals without manual updates or reformatting.





Project Health Dashboard



Project Status

Visual indicators show if projects are On Track, At Risk, or Delayed.



Budget Tracking

Monitor actual vs. planned spending with variance alerts.



Milestone Completion

Track key deliverables against timeline commitments.

Resource Utilization Dashboard

Workload Distribution

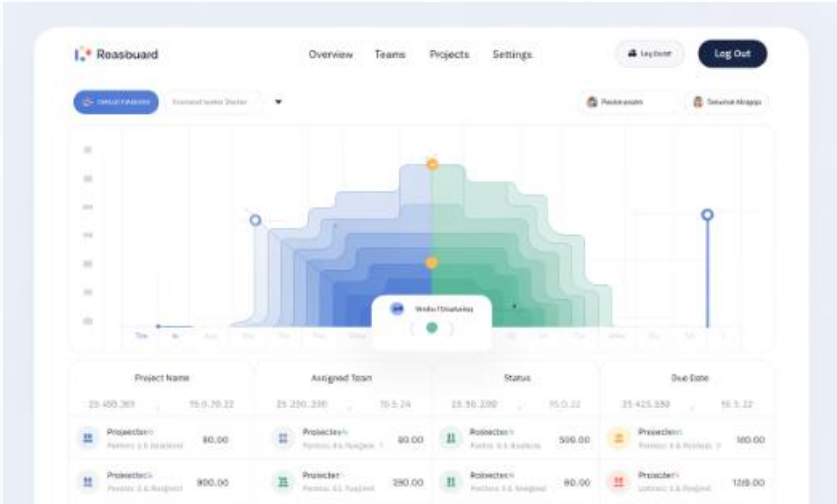
Visualize team capacity and identify overloaded resources.

Color-coded heat maps reveal allocation patterns across projects.

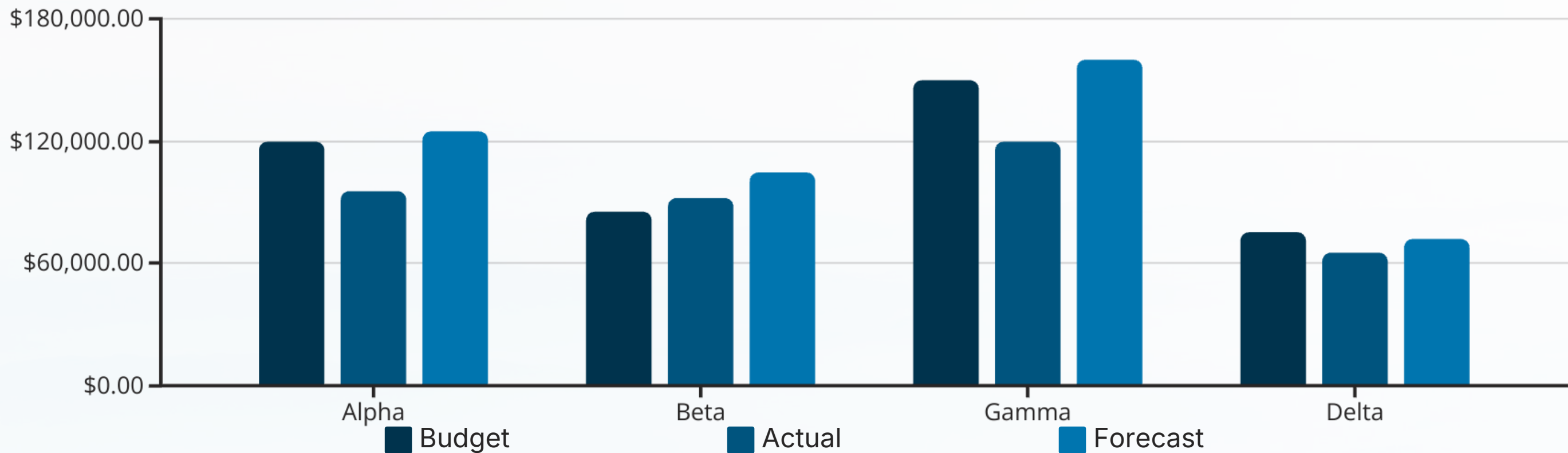
Billable Hours Tracking

Compare billable vs. non-billable time across team members.

Spot utilization trends that impact project profitability.

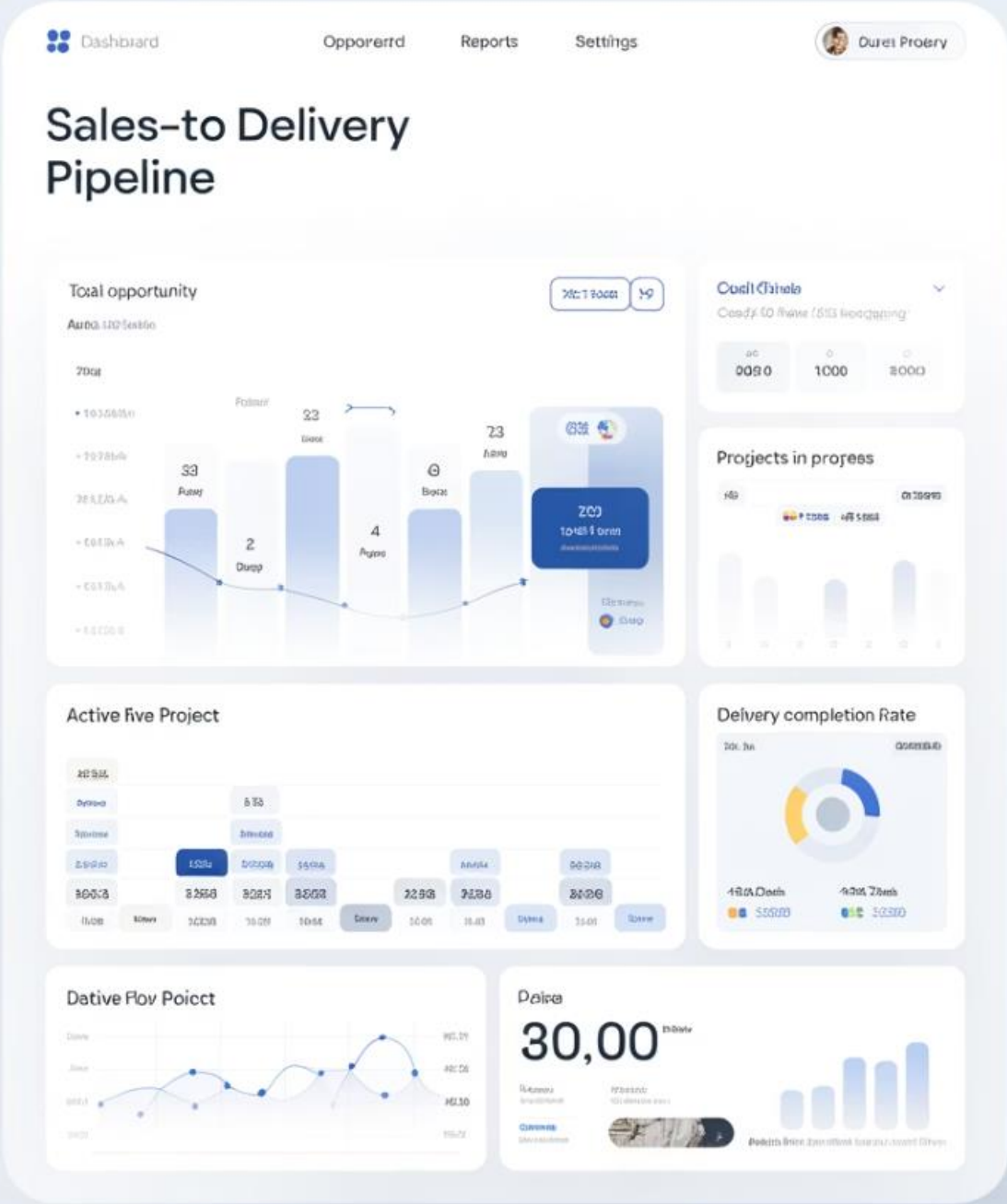
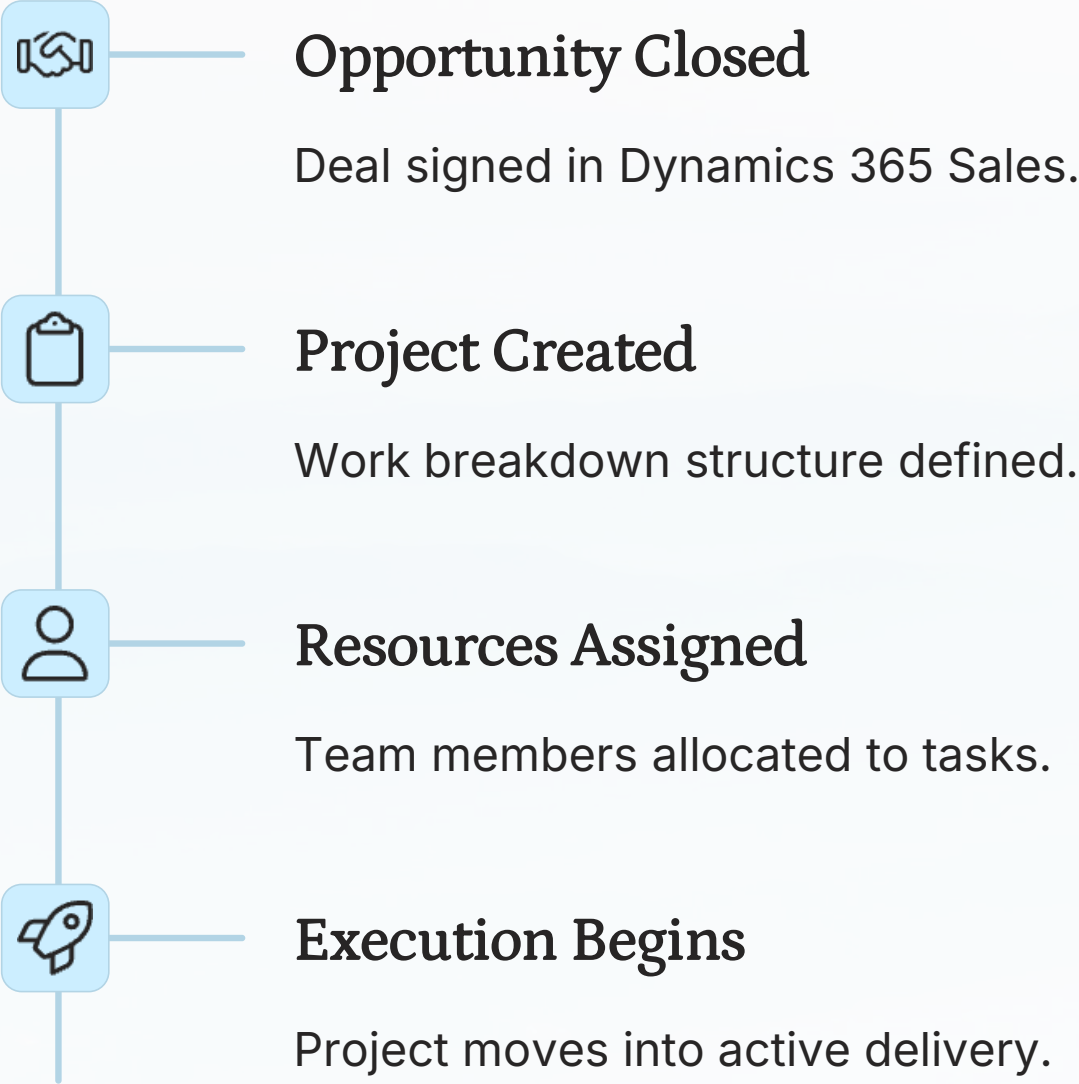


Financial Performance Dashboard



Financial dashboards pull budget data, forecasts, and actuals from Dynamics 365. They reveal cost-to-completion estimates and highlight projects at financial risk.

Sales-to-Delivery Pipeline Dashboard



Customer Satisfaction Dashboard

92%

CSAT Score

Overall customer satisfaction rating.

8.7

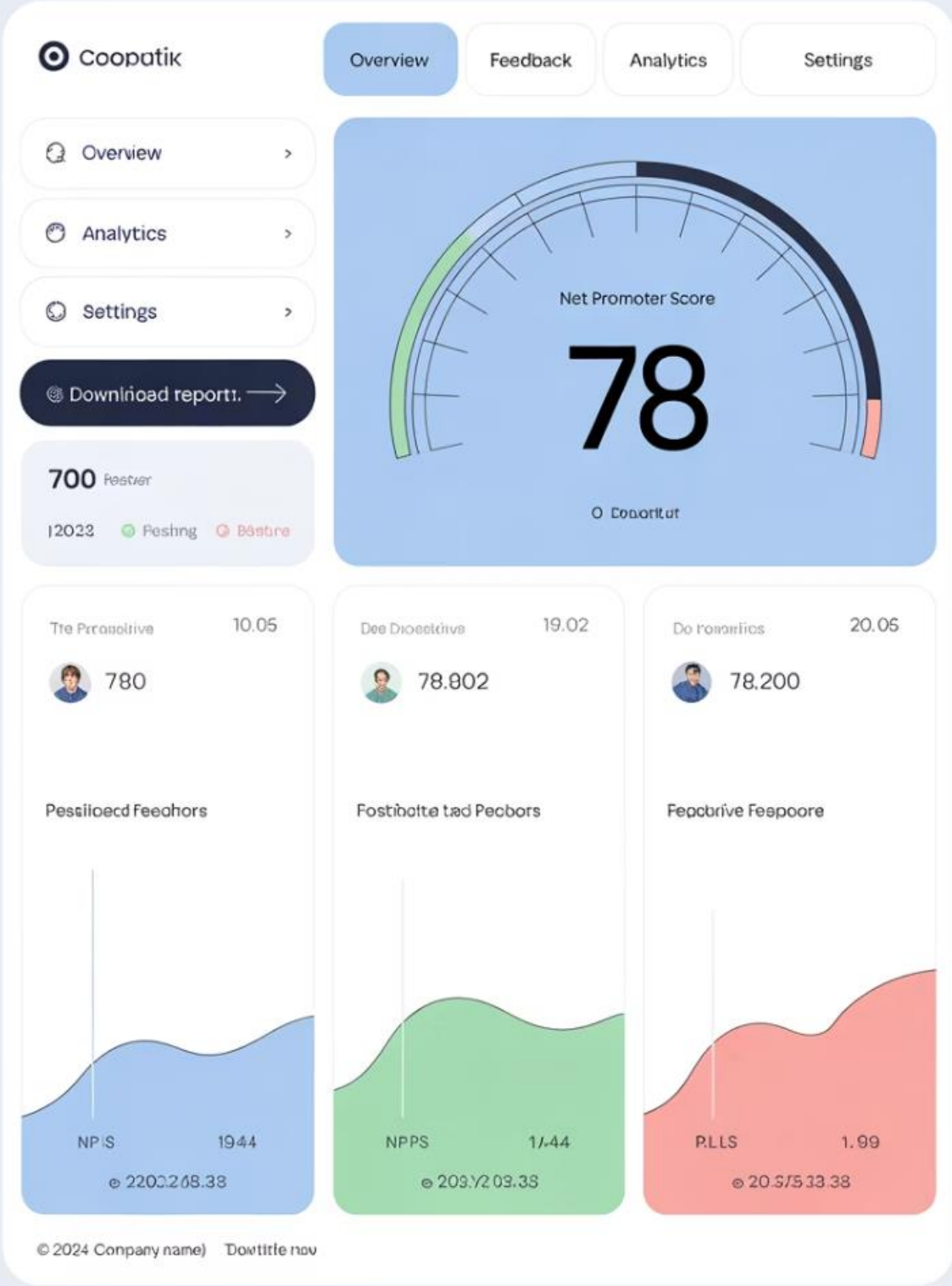
NPS

Net Promoter Score from client surveys.

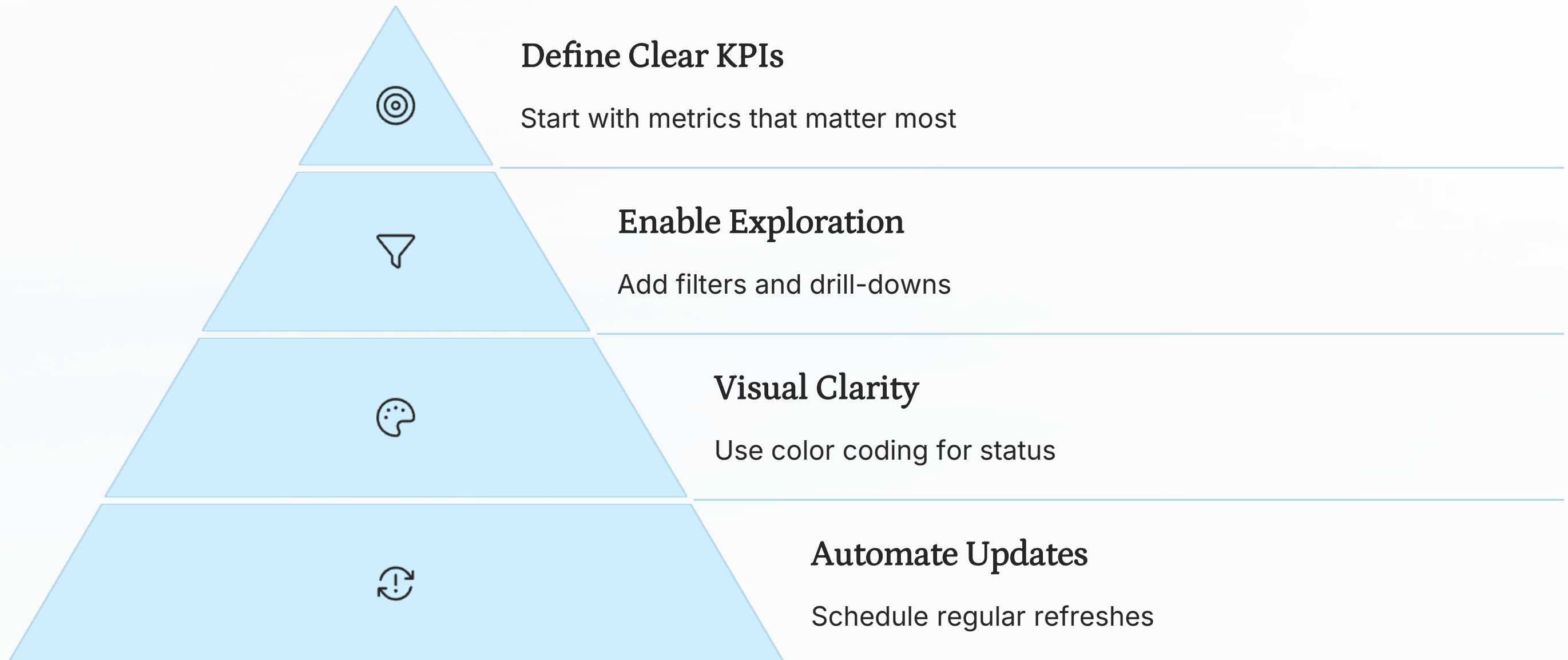
4h

Response Time

Average time to address client issues.



Dashboard Design Best Practices



Setting Up the Integration

Connect to Dataverse

Use Power BI Desktop to access the underlying data platform of Dynamics 365.

Select Entities

Choose standard or custom entities like Projects, Tasks, and Invoices.

Build Visualizations

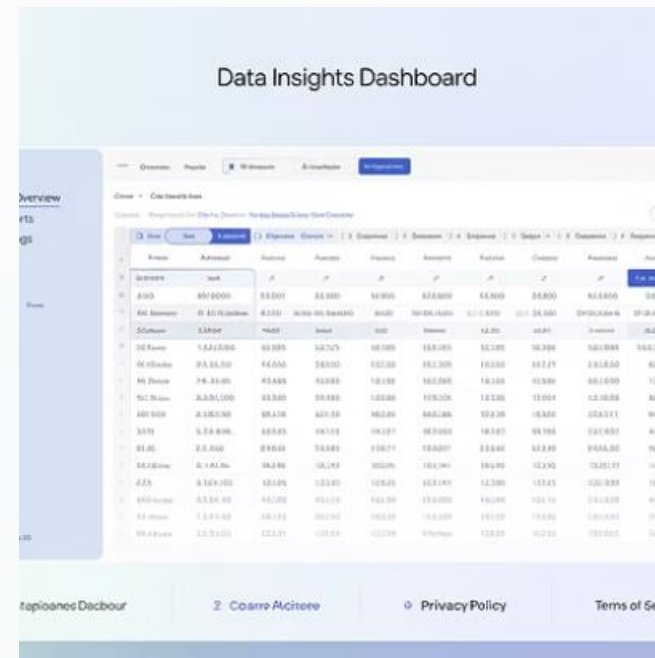
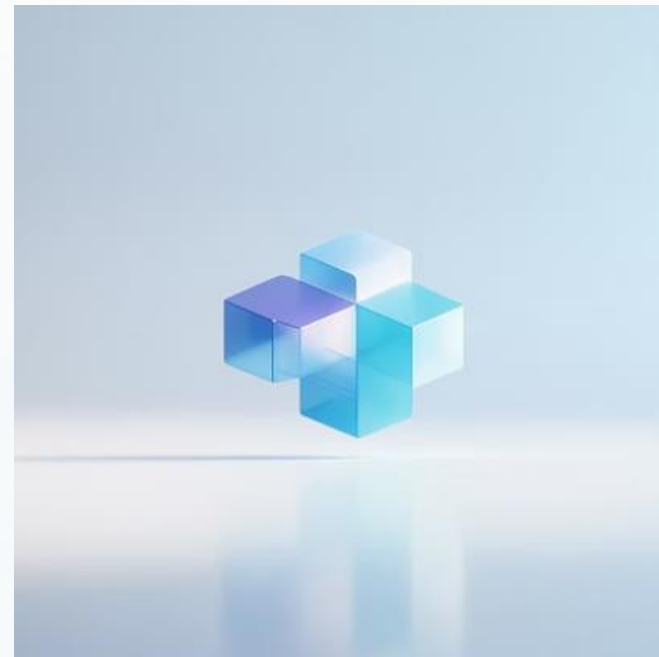
Create charts, tables, and KPIs that tell your project story.

Publish and Share

Deploy to Power BI Service and distribute to stakeholders.



Advanced Integration Options



Enrich your reporting ecosystem by integrating multiple data sources. Connect Azure DevOps, SharePoint, Excel, and SQL Server alongside Dynamics 365.



Role-Based Security

Executives

Access to high-level KPIs and financial metrics across all projects.

Clients

Limited access to status updates and deliverable tracking.



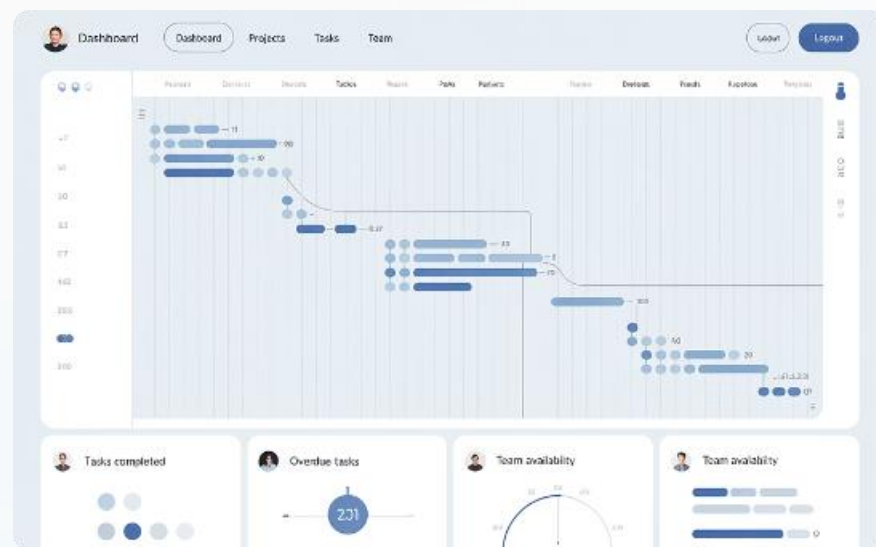
Project Managers

Full visibility into assigned projects with detailed task data.

Team Members

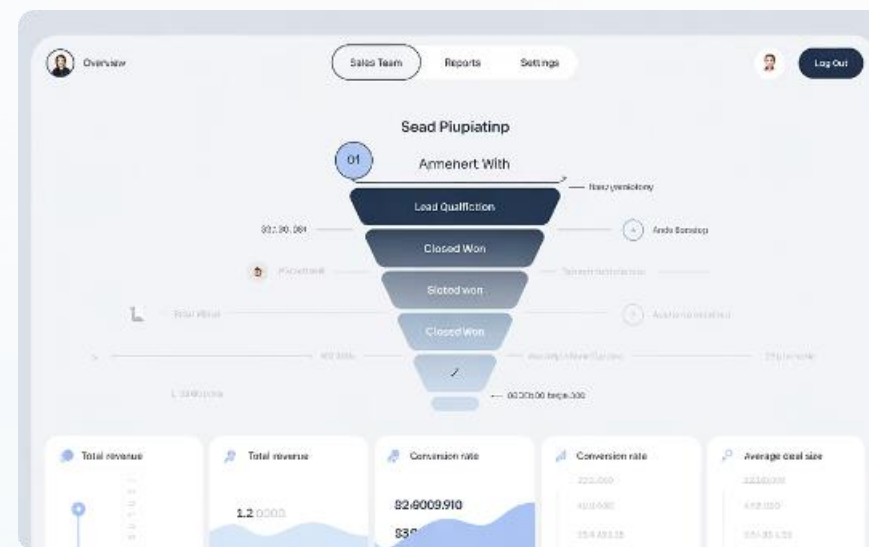
View of personal assignments and team-level metrics.

Prebuilt Templates



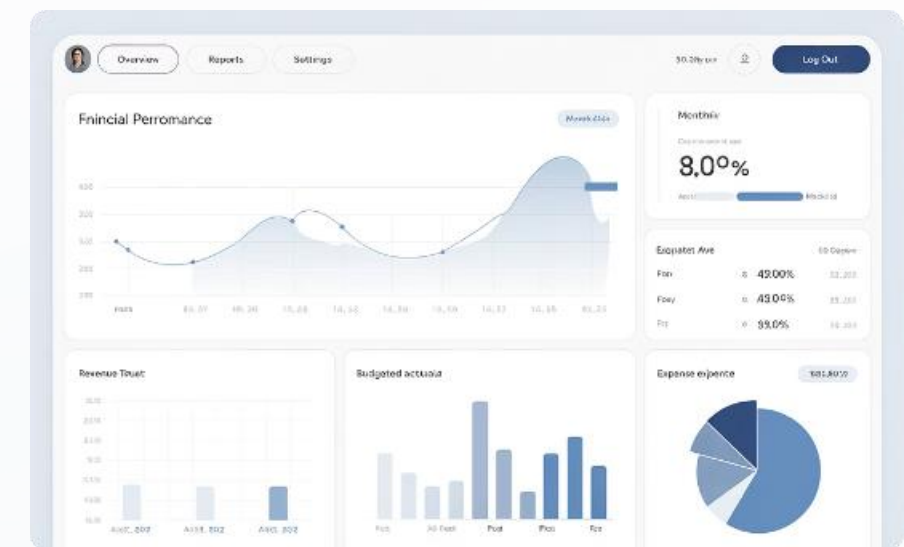
Project Operations

Track resources, tasks, and financials with ready-to-use visuals.



Sales Pipeline

Monitor deal flow from opportunity to closed projects.



Financial Analysis

Analyze project profitability and budget performance.

Benefits for Project Managers



Real-Time Visibility

Monitor project health with live data instead of outdated reports.



Proactive Management

Identify issues before they become problems.



Improved Communication

Share consistent, accurate information with all stakeholders.



Data-Driven Decisions

Base choices on facts rather than gut feelings.



Next Steps



Define your KPIs

Identify the metrics that matter most to your projects



Set up your connection

Connect Power BI to your Dynamics 365 environment



Build your first dashboard

Start with a project health or resource utilization view



Final Thoughts

Project managers today need more than spreadsheets and status reports—they need **live data, real-time insights, and visual storytelling tools** to lead with confidence. The combination of **Microsoft Dynamics 365** and **Power BI** delivers just that, giving PMs a powerful edge in managing projects, people, and performance.

If you want to elevate your project reporting, bring your data to life, and make better decisions faster—Power BI is the key.

