BlueprintBI

SAMPLE DESIGN PACK

SaaS Executive Revenue Overview

An executive Power BI report tracking ARR, Net Revenue Retention and Logo Churn against target, built on a Snowflake medallion warehouse fed by Salesforce and HubSpot.

SaaS & Technology | Power BI semantic model | Import | 4 report pages | 28 measures | 8 tables

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About this sample. Generated by the Blueprint BI pipeline on 2026-11-19 from the inputs in section 1, and not hand-edited. Figures shown in the KPI cards and report pages are illustrative sample data, not real results.

SECTION 1

Scope and inputs

Purpose. Are we on track to $12M ARR, are we retaining and expanding customers, and is pipeline sufficient to close the gap?

Audience	CEO, CFO, CRO and board members
Default period	Current fiscal year to date by month, refreshed daily
Industry	SaaS & Technology
Report type	Executive Overview
BI tool	Power BI
Currency	USD ($)
Data sources	Salesforce, Snowflake, HubSpot
Style and pages	Corporate Clean, 4 pages

KPIs provided

KPI	Definition	Target	Green	Amber	Red
ARR	Annualised recurring subscription value of active contracts at period end.	$12M	≥ $12,000,000	≥ $11,000,000	< $11,000,000
Net Revenue Retention	Current ARR of year-ago customers / their ARR 12 months ago.	110%	≥ 110.0%	≥ 100.0%	< 100.0%
Logo Churn %	Churned logos per month / customers active at start of month.	1.5%	≤ 1.50%	≤ 2.00%	> 2.00%

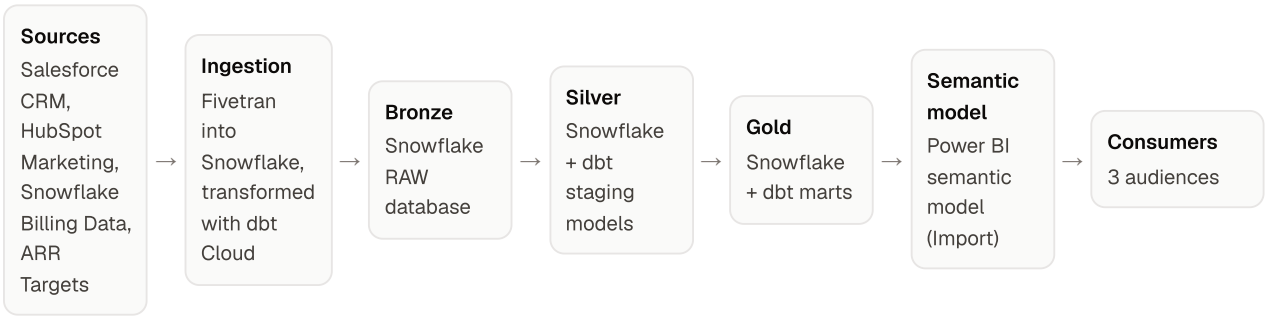
Business rules

Rule	Definition	Calculated in
ARR	Sum of annualised recurring subscription value (MRR x 12) on active contracts at month end, excluding one-off services.	Snowflake gold layer (dbt), monthly snapshot
Net Revenue Retention	ARR today from customers active 12 months ago divided by those customers' ARR 12 months ago, including expansion, contraction and churn.	Power BI measure over FactArrSnapshot
Logo churn	A customer churns in the month their ARR falls from above zero to zero; churn % = churned logos / logos active at start of month.	dbt flag ChurnFlag in gold; rate in Power BI measure
Active customer	A customer with ARR greater than zero at month end.	Snowflake gold layer (dbt), monthly snapshot

SECTION 2

Data architecture

Imported star schema from Snowflake gold views, refreshed after dbt completes.



Data sources

Source	System	Refresh	Notes
Salesforce CRM	Salesforce Sales Cloud	Daily 01:00	Accounts, opportunities, contracts and subscription line items.
HubSpot Marketing	HubSpot	Daily 01:00	Marketing-sourced leads, MQLs and campaign attribution.
Snowflake Billing Data	Snowflake	Daily 02:00	Billing and subscription invoices already landed from the billing platform.
ARR Targets	Snowflake (finance planning upload)	Monthly	Board-approved monthly ARR targets by segment.

Ingestion and layers

Stage	Technology	What happens
Ingestion	Fivetran into Snowflake, transformed with dbt Cloud	Incremental sync on SystemModstamp / updatedAt watermarks. Fivetran lands raw SaaS objects; dbt builds silver and gold models daily.
Bronze	Snowflake RAW database	Raw Fivetran replicas of Salesforce and HubSpot objects, untransformed.
Silver	Snowflake + dbt staging models	Cleaned, deduplicated, typed entities with conformed account IDs.
Gold	Snowflake + dbt marts	Kimball star: ARR snapshot, pipeline and lead facts with conformed dimensions.

Semantic model and operations

Tool and storage mode	Power BI semantic model, Import
Refresh and alerts	Ready by 06:00 ET daily; failures alert the BI support Teams channel and RevOps lead
History kept	4 years of monthly snapshots, covering 12-month NRR lookback plus prior-year comparison
Environments	Dev, Test and Prod workspaces; dbt dev and prod targets
Deployment	Power BI deployment pipelines; dbt Cloud jobs
Source control	Semantic model and report as PBIP in Git, dbt project in the same repository

- **Storage mode caveat:** Data is only as fresh as the last scheduled refresh, not real time.
- **Storage mode caveat:** Model size must stay within the Premium/Fabric capacity memory limit.
- **Storage mode caveat:** Incremental refresh needs RangeStart/RangeEnd folding to Snowflake.

Consumers

- Executives - Power BI App
- Board pack - PDF subscription monthly
- Finance - Analyze in Excel

Governance

- RLS by Region using UserRegionMap from Salesforce user territory, CEO/CFO unrestricted.
- dbt tests: unique and not-null keys, ARR non-negative, snapshot month continuity.
- ARR reconciled to billing monthly with tolerance 0.5%, alerting Finance.
- Refresh failure alerts to the BI support Teams channel.
- Certified dataset endorsement and Purview lineage.

SECTION 3

Data model

Star schema (galaxy with conformed dimensions): 3 fact tables and 5 dimensions. Measures are stored on a dedicated _Measures table.

FactArrSnapshot

fact

Grain: One row per customer per month end · Source: Snowflake gold (Salesforce contracts + billing)

Column	Type	Key and role	Description
DateKey	INT	FK, → DimDate[DateKey], hidden	Month-end date key.
CustomerKey	INT	FK, → DimCustomer[CustomerKey], hidden	Customer surrogate key.
ProductKey	INT	FK, → DimProduct[ProductKey], hidden	Primary product plan.
ARR	DECIMAL(18,2)	Semi-additive, hidden	Annual recurring revenue at month end.
NewARR	DECIMAL(18,2)	Additive, hidden	ARR from new logos this month.
ExpansionARR	DECIMAL(18,2)	Additive, hidden	Upsell and cross-sell ARR increase.
ContractionARR	DECIMAL(18,2)	Additive, hidden	Downgrade ARR decrease, negative.
ChurnedARR	DECIMAL(18,2)	Additive, hidden	ARR lost from churned logos, negative.
ChurnFlag	INT	Additive, hidden	1 if customer churned this month.
ActiveFlag	INT	Semi-additive, hidden	1 if ARR greater than zero at month end.

FactPipeline

fact

Grain: One row per open or closed opportunity per daily snapshot date · Source: Salesforce Opportunity

Column	Type	Key and role	Description
DateKey	INT	FK, → DimDate[DateKey], hidden	Snapshot date key.
CustomerKey	INT	FK, → DimCustomer[CustomerKey], hidden	Account surrogate key.
OpportunityStageKey	INT	FK, → DimOpportunityStage[OpportunityStageKey], hidden	Pipeline stage.
OpportunityId	NVARCHAR(18)	Degenerate ID, hidden	Salesforce opportunity ID.
CloseDate	DATE	Date	Expected or actual close date.
PipelineARR	DECIMAL(18,2)	Semi-additive, hidden	Opportunity ARR amount on snapshot date.
IsOpen	INT	Semi-additive, hidden	1 if open on snapshot date.

FactArrTarget

fact

Grain: One row per segment per month · Source: Finance planning upload

Column	Type	Key and role	Description
DateKey	INT	FK, → DimDate[DateKey], hidden	Month-end date key.
SegmentKey	INT	FK, → DimSegment[SegmentKey], hidden	Customer segment.
TargetARR	DECIMAL(18,2)	Semi-additive, hidden	Planned ARR at month end.

DimDate

dimension · marked as date table

Grain: One row per calendar day · Source: dbt generated date spine

Column	Type	Key and role	Description
DateKey	INT	PK, hidden	yyyymmdd key.
Date	DATE	Date	Calendar date.
MonthNumber	INT	Attribute, hidden	Month 1-12.
MonthName	NVARCHAR(10)	Attribute, sorted by MonthNumber	Short month name.
YearMonthNumber	INT	Attribute, hidden	yyyymm sort key.
YearMonth	NVARCHAR(8)	Attribute, sorted by YearMonthNumber	Label e.g. Mar 2025.
QuarterNumber	INT	Attribute, hidden	Quarter 1-4.
Quarter	NVARCHAR(2)	Attribute, sorted by QuarterNumber	Q1-Q4.
Year	INT	Attribute	Calendar year.
IsMonthEnd	BIT	Attribute, hidden	True on last day of month.

DimCustomer

dimension · SCD type 2

Grain: One row per customer account version · Source: Salesforce Account

Column	Type	Key and role	Description
CustomerKey	INT	PK (surrogate), hidden	Generated surrogate key.
AccountId	NVARCHAR(18)	Business key, hidden	Salesforce account ID.
SegmentKey	INT	FK, → DimSegment[SegmentKey], hidden	Current segment.
CustomerName	NVARCHAR(200)	Attribute	Account name.
Region	NVARCHAR(20)	Attribute	Sales region, used by RLS.
Industry	NVARCHAR(50)	Attribute	Customer industry vertical.
AcquisitionChannel	NVARCHAR(30)	Attribute	HubSpot original source.
ValidFrom	DATE	Date, hidden	SCD2 start.
ValidTo	DATE	Date, hidden	SCD2 end.

DimSegment

dimension · SCD type 1

Grain: One row per customer segment · Source: Salesforce picklist

Column	Type	Key and role	Description
SegmentKey	INT	PK (surrogate), hidden	Generated surrogate key.
SegmentCode	NVARCHAR(10)	Business key, hidden	Segment code.
Segment	NVARCHAR(20)	Attribute, sorted by SegmentOrder	SMB, Mid-Market, Enterprise, Strategic.
SegmentOrder	INT	Attribute, hidden	Sort order.

DimProduct

dimension · SCD type 1

Grain: One row per subscription product plan · Source: Salesforce Product2

Column	Type	Key and role	Description
ProductKey	INT	PK (surrogate), hidden	Generated surrogate key.
ProductCode	NVARCHAR(20)	Business key, hidden	SKU code.
ProductFamily	NVARCHAR(50)	Attribute	Platform, Analytics, Security, Integrations.
PlanTier	NVARCHAR(20)	Attribute, sorted by PlanTierOrder	Starter, Professional, Enterprise.
PlanTierOrder	INT	Attribute, hidden	Tier sort order.

DimOpportunityStage

dimension · SCD type 1

Grain: One row per opportunity stage · Source: Salesforce OpportunityStage

Column	Type	Key and role	Description
OpportunityStageKey	INT	PK (surrogate), hidden	Generated surrogate key.
StageName	NVARCHAR(40)	Business key, sorted by StageOrder	Salesforce stage name.
StageOrder	INT	Attribute, hidden	Funnel order.
WinProbability	DECIMAL(5,2)	Non-additive, hidden	Default stage probability.

Relationships

From (many)	To (one)	Cardinality	Filter	Active	Reas
FactArrSnapshot.DateKey	DimDate.DateKey	many-to-one	single	Yes	
FactArrSnapshot.CustomerKey	DimCustomer.CustomerKey	many-to-one	single	Yes	
FactArrSnapshot.ProductKey	DimProduct.ProductKey	many-to-one	single	Yes	
DimCustomer.SegmentKey	DimSegment.SegmentKey	many-to-one	single	Yes	
FactPipeline.DateKey	DimDate.DateKey	many-to-one	single	Yes	

From (many)	To (one)	Cardinality	Filter	Active	Reas
FactPipeline.CustomerKey	DimCustomer.CustomerKey	many-to-one	single	Yes	
FactPipeline.OpportunityStageKey	DimOpportunityStage.OpportunityStageKey	many-to-one	single	Yes	
FactArrTarget.DateKey	DimDate.DateKey	many-to-one	single	Yes	
FactArrTarget.SegmentKey	DimSegment.SegmentKey	many-to-one	single	Yes	

SECTION 4

DAX measures

28 measures in 9 display folders, stored on a dedicated `_Measures` table. Each block shows the measure name, format string, DAX and description.

Automated checks: 0 errors and 3 warnings found (see the Measures tab in the Studio for details).

ARR

ARR

`$#,0`

```
ARR =
VAR _LastDate = LASTNONBLANK ( DimDate[Date], CALCULATE ( COUNTROWS ( FactArrSnapshot ) ) )
RETURN CALCULATE ( SUM ( FactArrSnapshot[ARR] ), _LastDate )
```

ARR at the last snapshot date in context.

Time Intelligence

ARR PY

`$#,0`

```
ARR PY =
CALCULATE ( [ARR], SAMEPERIODLASTYEAR ( DimDate[Date] ) )
```

ARR at same point last year.

ARR YoY %

`0.0%`

```
ARR YoY % =
VAR _PY = [ARR PY]
RETURN IF ( _PY > 0, DIVIDE ( [ARR] - _PY, _PY ) )
```

ARR growth versus prior year.

Net Revenue Retention PY

`0.0%`

```
Net Revenue Retention PY =
CALCULATE ( [Net Revenue Retention], SAMEPERIODLASTYEAR ( DimDate[Date] ) )
```

NRR at same point last year.

Logo Churn % PY

`0.00%`

```
Logo Churn % PY =
CALCULATE ( [Logo Churn %], SAMEPERIODLASTYEAR ( DimDate[Date] ) )
```

Logo churn rate same period last year.

Targets

ARR Target

`$#,0`

```
ARR Target =
VAR _LastDate = LASTNONBLANK ( DimDate[Date], CALCULATE ( COUNTROWS ( FactArrTarget ) ) )
RETURN CALCULATE ( SUM ( FactArrTarget[TargetARR] ), _LastDate )
```

Planned ARR at last target month in context.

ARR vs Target

`$#,0;-$#,0`

```
ARR vs Target =
VAR _T = [ARR Target]
RETURN IF ( NOT ISBLANK ( _T ), [ARR] - _T )
```

ARR gap to target in dollars.

ARR vs Target %

`0.0%`

```
ARR vs Target % =
VAR _T = [ARR Target]
RETURN IF ( _T > 0, DIVIDE ( [ARR], _T ) )
```

ARR attainment against target.

NRR Target

`0.0%`

```
NRR Target =
1.10
```

Board target for NRR, 110%.

NRR vs Target

`+0.0%;-0.0%`

```
NRR vs Target =
VAR _N = [Net Revenue Retention]
RETURN IF ( NOT ISBLANK ( _N ), _N - [NRR Target] )
```

NRR gap to target in percentage points.

Logo Churn Target

`0.00%`

```
Logo Churn Target =
0.015
```

Board target monthly logo churn, 1.5%.

Logo Churn vs Target

`+0.00%;-0.00%`

```
Logo Churn vs Target =
VAR _C = [Logo Churn %]
RETURN IF ( NOT ISBLANK ( _C ), _C - [Logo Churn Target] )
```

Churn gap to target; positive is worse.

ARR Movement

New ARR

`$#,0`

```
New ARR =
SUM ( FactArrSnapshot[NewARR] )
```

ARR from new logos in period.

Expansion ARR

`$#,0`

```
Expansion ARR =
SUM ( FactArrSnapshot[ExpansionARR] )
```

Upsell and cross-sell ARR in period.

Contraction ARR

`$#,0;-$#,0`

```
Contraction ARR =
SUM ( FactArrSnapshot[ContractionARR] )
```

Downgrade ARR in period, negative.

Churned ARR

`$#,0;-$#,0`

```
Churned ARR =
SUM ( FactArrSnapshot[ChurnedARR] )
```

ARR lost to churn in period, negative.

Net New ARR

`$#,0;-$#,0`

```
Net New ARR =
[New ARR] + [Expansion ARR] + [Contraction ARR] + [Churned ARR]
```

Net ARR change in period.

Customers

Active Customers

`#,0`

```
Active Customers =
VAR _LastDate = LASTNONBLANK ( DimDate[Date], CALCULATE ( COUNTROWS ( FactArrSnapshot ) ) )
RETURN CALCULATE ( SUM ( FactArrSnapshot[ActiveFlag] ), _LastDate )
```

Customers with ARR at last snapshot.

Churned Logos

`#,0`

```
Churned Logos =
SUM ( FactArrSnapshot[ChurnFlag] )
```

Customers that churned in period.

Retention

Net Revenue Retention

0.0%

```
Net Revenue Retention =
VAR _End = MAX ( DimDate[Date] )
VAR _Start = EOMONTH ( _End, -12 )
VAR _Cohort = CALCULATETABLE ( VALUES ( FactArrSnapshot[CustomerKey] ), FactArrSnapshot[ActiveFlag] =
1, DimDate[Date] = _Start, REMOVEFILTERS ( DimDate ) )
VAR _StartARR = CALCULATE ( SUM ( FactArrSnapshot[ARR] ), _Cohort, DimDate[Date] = _Start,
REMOVEFILTERS ( DimDate ) )
VAR _EndARR = CALCULATE ( SUM ( FactArrSnapshot[ARR] ), _Cohort, DimDate[Date] = EOMONTH ( _End, 0 ),
REMOVEFILTERS ( DimDate ) )
RETURN IF ( _StartARR > 0, DIVIDE ( _EndARR, _StartARR ) )
```

Trailing 12-month ARR retained and expanded from the year-ago cohort.

Logo Churn %

0.00%

```
Logo Churn % =
VAR _Months = DISTINCTCOUNT ( DimDate[YearMonthNumber] )
VAR _Opening = CALCULATE ( [Active Customers], PREVIOUSMONTH ( DimDate[Date] ) )
RETURN IF ( _Opening > 0 && _Months > 0, DIVIDE ( DIVIDE ( [Churned Logos], _Months ), _Opening ) )
```

Average monthly logo churn rate on opening customers.

Pipeline

Open Pipeline ARR

$#,0

```
Open Pipeline ARR =
VAR _LastDate = LASTNONBLANK ( DimDate[Date], CALCULATE ( COUNTROWS ( FactPipeline ) ) )
RETURN CALCULATE ( SUM ( FactPipeline[PipelineARR] ), FactPipeline[IsOpen] = 1, _LastDate )
```

Open opportunity ARR at latest snapshot.

Pipeline Coverage

0.0x

```
Pipeline Coverage =
VAR _Gap = [ARR Target] - [ARR]
RETURN IF ( _Gap > 0, DIVIDE ( [Open Pipeline ARR], _Gap ) )
```

Open pipeline over remaining ARR gap; blank once target is met.

Open Opportunities

#,0

```
Open Opportunities =
VAR _LastDate = LASTNONBLANK ( DimDate[Date], CALCULATE ( COUNTROWS ( FactPipeline ) ) )
RETURN CALCULATE ( DISTINCTCOUNT ( FactPipeline[OpportunityId] ), FactPipeline[IsOpen] = 1, _LastDate )
```

Distinct open opportunities at latest snapshot.

Labels

Selected Period Label

Text

```
Selected Period Label =
VAR _Min = MIN ( DimDate[Date] )
VAR _Max = MAX ( DimDate[Date] )
RETURN "Period: " & FORMAT ( _Min, "MMM yyyy" ) & " - " & FORMAT ( _Max, "MMM yyyy" )
```

Selected period label for page subtitles.

RAG

ARR RAG

0

```
ARR RAG =
VAR _Value = [ARR]
RETURN
    SWITCH (
        TRUE (),
        ISBLANK ( _Value ), BLANK (),
        _Value >= 12000000, 1,    -- Green
        _Value >= 11000000, 2,    -- Amber
        3                   -- Red
    )
```

1 Green (≥ $12,000,000), 2 Amber (≥ $11,000,000), 3 Red (< $11,000,000). Drives conditional formatting for ARR.

Net Revenue Retention RAG

0

```
Net Revenue Retention RAG =
VAR _Value = [Net Revenue Retention]
RETURN
    SWITCH (
        TRUE (),
        ISBLANK ( _Value ), BLANK (),
        _Value >= 1.1, 1,    -- Green
        _Value >= 1, 2,    -- Amber
        3                   -- Red
    )
```

1 Green (≥ 110.0%), 2 Amber (≥ 100.0%), 3 Red (< 100.0%). Drives conditional formatting for Net Revenue Retention.

Logo Churn RAG

0

```
Logo Churn RAG =
VAR _Value = [Logo Churn %]
RETURN
    SWITCH (
        TRUE (),
        ISBLANK ( _Value ), BLANK (),
        _Value <= 0.015, 1,    -- Green
        _Value <= 0.02, 2,    -- Amber
        3                   -- Red
    )
```

1 Green (≤ 1.50%), 2 Amber (≤ 2.00%), 3 Red (> 2.00%). Drives conditional formatting for Logo Churn %.

SECTION 5

KPIs and RAG rules

Each KPI target becomes a RAG measure (section 4) that returns 1 for Green, 2 for Amber and 3 for Red. Visuals use these codes for colour, and every status is shown as colour, icon and word together, so it never relies on colour alone.

KPI	Measure	Target	Green	Amber	Red	RAG measure
ARR	`ARR`	$12M	≥ $12,000,000	≥ $11,000,000	< $11,000,000	`ARR RAG`
Net Revenue Retention	`Net Revenue Retention`	110%	≥ 110.0%	≥ 100.0%	< 100.0%	`Net Revenue Retention RAG`
Logo Churn %	`Logo Churn %`	1.5%	≤ 1.50%	≤ 2.00%	> 2.00%	`Logo Churn RAG`

Sample values

Illustrative values used in the report pages, with the status each one gets from the thresholds above.

KPI	Sample value	Change	Status	Direction
ARR	$11.4M	+31.2%	⚠ Amber	Higher is better
Net Revenue Retention	112.4%	+2.1 pts	✓ Green	Higher is better
Logo Churn %	2.30%	+0.6 pts	✕ Red	Lower is better

Status colours

✓ Green `#047857`	⚠ Amber `#B45309`	✕ Red `#B91C1C`

SECTION 6

Report design

4 report pages. Layouts below use the theme and the illustrative KPI values from section 5; charts show placeholder shapes.

Theme: Corporate Clean Indigo

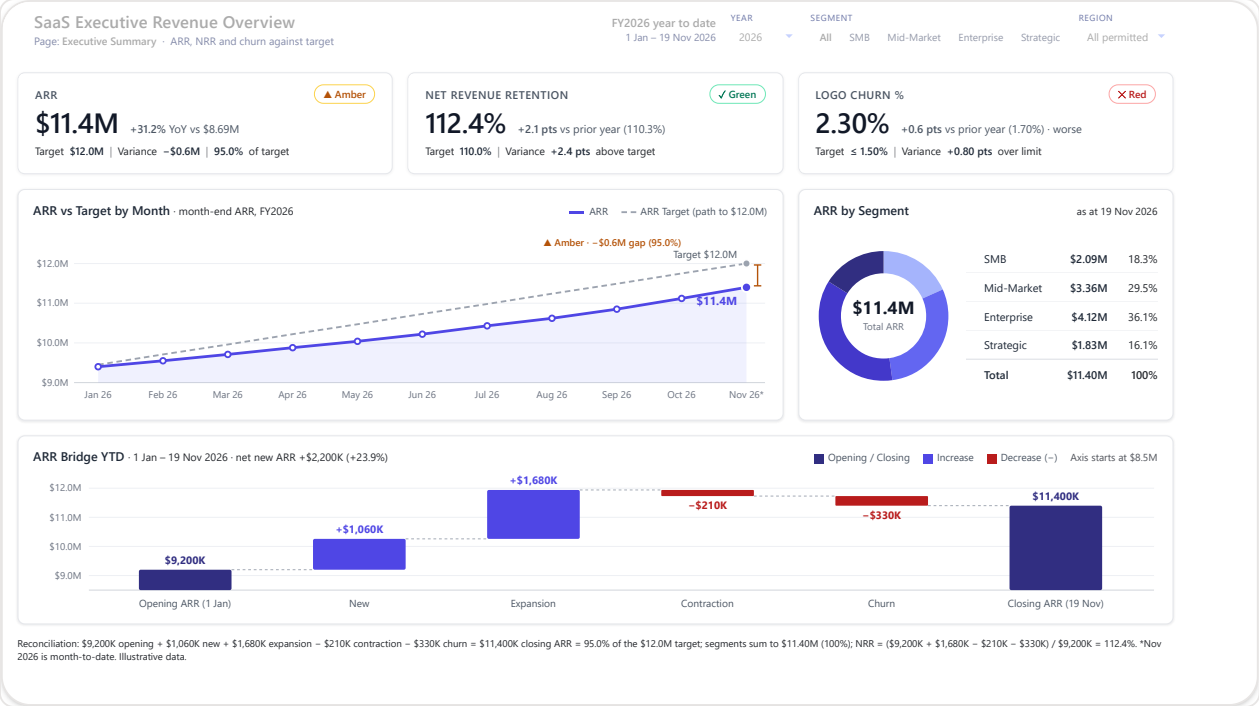
Primary #4F46E5 | Secondary #312E81 | Accent #818CF8 | Background #FFFFFF | Text #1F2937

Data colours, in order: Font: Segoe UI

Page 1: Executive Summary

Show ARR, NRR and churn against target at a glance. Default filter: Current fiscal year to date.

Audience: CEO, CFO, board · Slicers: DimDate[Year] (dropdown), DimSegment[Segment] (buttons), DimCustomer[Region] (dropdown)



Page 1 as drawn by the AI Design Studio, unedited. Illustrative sample data.

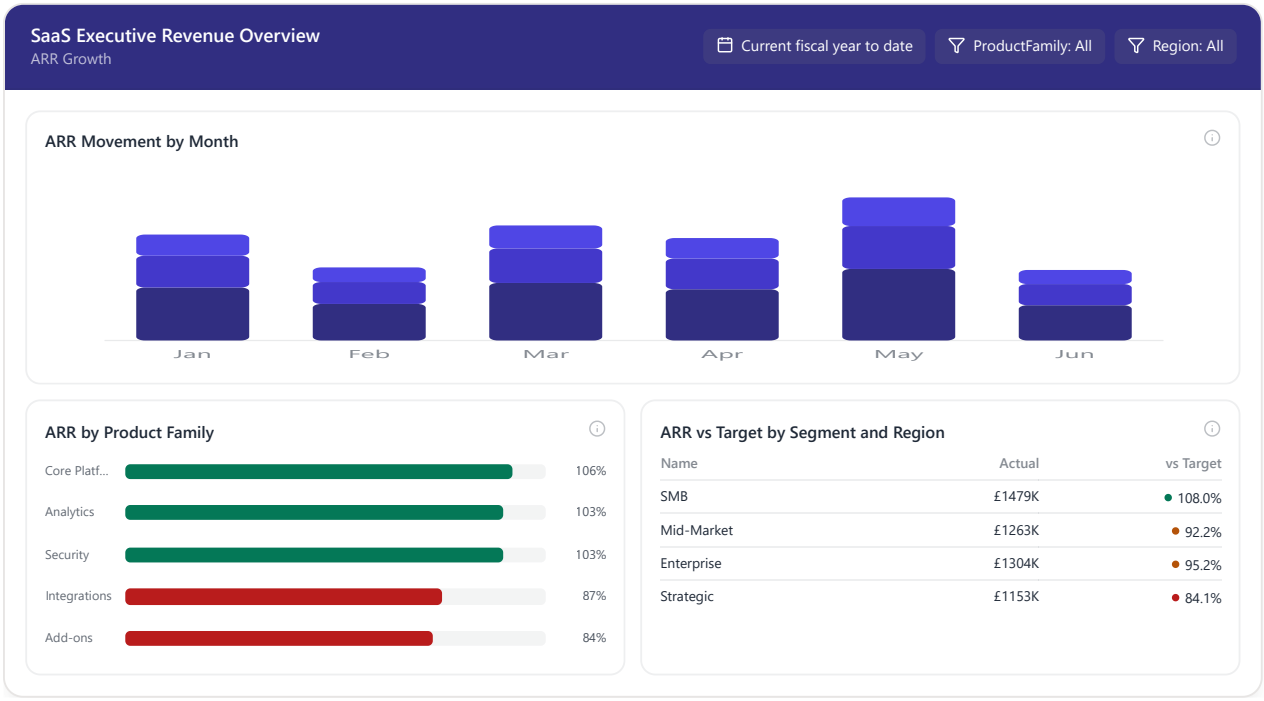
Page 1 visuals

Visual	Type	Fields	Formatting and interaction
Headline KPIs	kpi strip	**Values:** `[ARR]`, `[Net Revenue Retention]`, `[Logo Churn %]` **Tooltip:** `[ARR vs Target %]`, `[ARR YoY %]`	Status icon and word from each KPI's RAG measure Variance vs target shown below value
ARR vs Target by Month	line	**Axis:** `DimDate[YearMonth]` **Values:** `[ARR]`, `[ARR Target]` **Tooltip:** `[ARR vs Target]`	Target as dashed grey line Data labels on last point in $M
ARR by Segment	donut	**Legend:** `DimSegment[Segment]` **Values:** `[ARR]`	Labels show percent and $M
ARR Bridge YTD	waterfall	**Axis:** `[New ARR]` **Values:** `[Expansion ARR]`, `[Contraction ARR]`, `[Churned ARR]`	Increases in brand indigo, decreases in red with labels Data labels in $K

Page 2: ARR Growth

Explain ARR growth by product, segment and region. Default filter: Current fiscal year to date.

Audience: CFO, CRO · Slicers: DimProduct[ProductFamily] (dropdown), DimCustomer[Region] (dropdown)



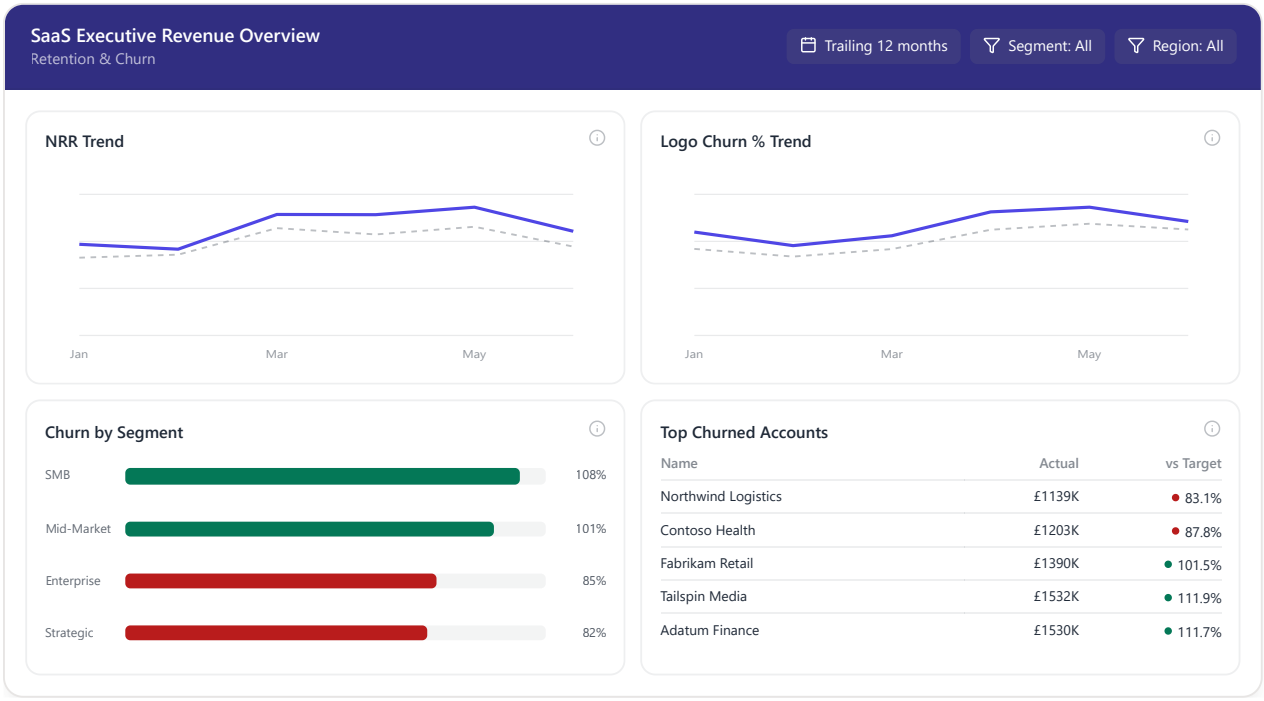
Page 2 visuals

Visual	Type	Fields	Formatting and interaction
ARR Movement by Month	stacked column	**Axis:** `DimDate[YearMonth]` **Values:** `[New ARR]`, `[Expansion ARR]`, `[Contraction ARR]`, `[Churned ARR]`	Net New ARR shown as line overlay
ARR by Product Family	bar	**Axis:** `DimProduct[ProductFamily]` **Values:** `[ARR]` **Tooltip:** `[ARR YoY %]`	Sorted descending Data labels in $M
ARR vs Target by Segment and Region	matrix	**Rows:** `DimSegment[Segment]` **Values:** `[ARR]`, `[ARR Target]`, `[ARR vs Target %]`	Icon and colour from [ARR RAG] Region not used: targets are by segment only

Page 3: Retention & Churn

Track NRR and logo churn, and find at-risk segments. Default filter: Trailing 12 months.

Audience: CEO, VP Customer Success · Slicers: DimSegment[Segment] (buttons), DimCustomer[Region] (dropdown)



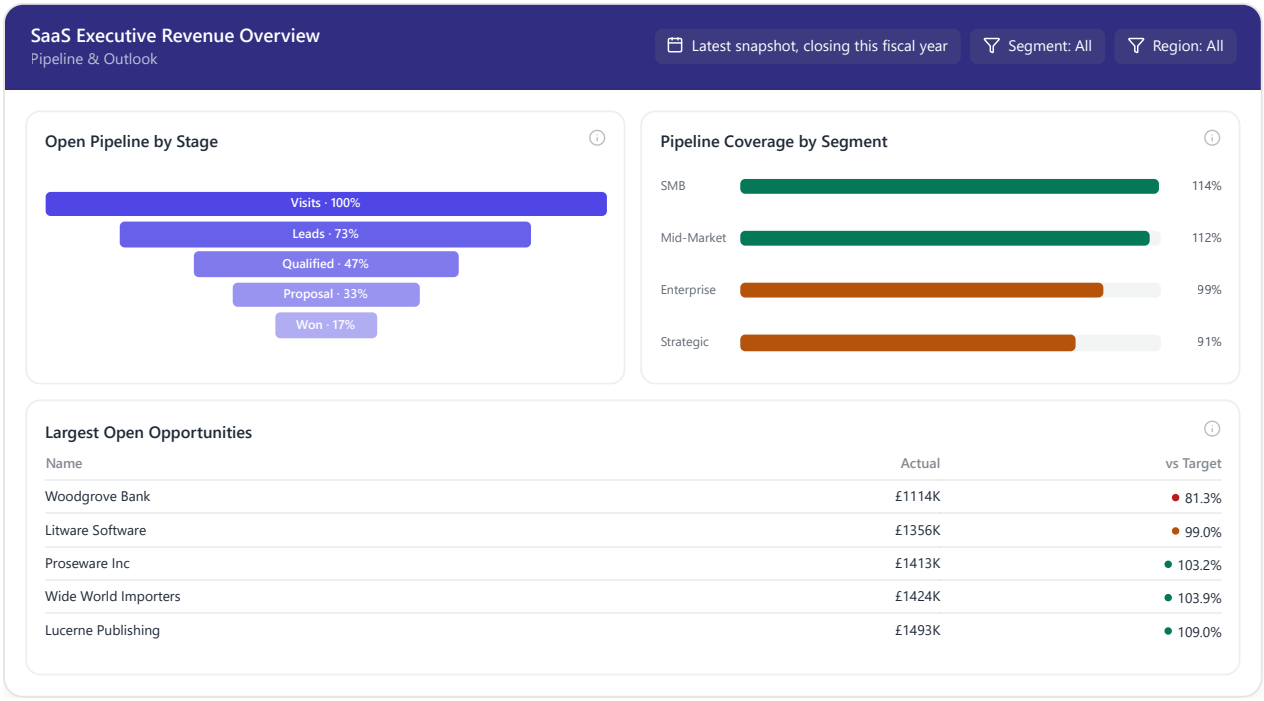
Page 3 visuals

Visual	Type	Fields	Formatting and interaction
NRR Trend	line	**Axis:** `DimDate[YearMonth]` **Values:** `[Net Revenue Retention]`, `[Net Revenue Retention PY]`	Constant line at 110% target
Logo Churn % Trend	line	**Axis:** `DimDate[YearMonth]` **Values:** `[Logo Churn %]`, `[Logo Churn % PY]`	Constant line at 1.5% target
Churn by Segment	bar	**Axis:** `DimSegment[Segment]` **Values:** `[Logo Churn %]` **Tooltip:** `[Churned Logos]`	Bar colour from [Logo Churn RAG] with labels showing status
Top Churned Accounts	table	**Values:** `DimCustomer[CustomerName]`, `DimSegment[Segment]`, `DimCustomer[Region]`, `[Churned ARR]`	Sorted by Churned ARR ascending Filter: Top 10 by largest [Churned ARR] loss

Page 4: Pipeline & Outlook

Assess whether pipeline covers the remaining ARR gap. Default filter: Latest snapshot, closing this fiscal year.

Audience: CRO, CFO · Slicers: DimSegment[Segment] (buttons), DimCustomer[Region] (dropdown)



Page 4 visuals

Visual	Type	Fields	Formatting and interaction
Open Pipeline by Stage	funnel	**Axis:** `DimOpportunityStage[StageName]` **Values:** `[Open Pipeline ARR]` **Tooltip:** `[Open Opportunities]`	Data labels in $K
Pipeline Coverage by Segment	bar	**Axis:** `DimSegment[Segment]` **Values:** `[Pipeline Coverage]` **Tooltip:** `[Open Pipeline ARR]`	Constant line at 3.0x Blank shown as 'Target met'
Largest Open Opportunities	table	**Values:** `DimCustomer[CustomerName]`, `DimOpportunityStage[StageName]`, `FactPipeline[CloseDate]`, `[Open Pipeline ARR]`	Sorted by Open Pipeline ARR descending Filter: Top 15 by [Open Pipeline ARR]

SECTION 7

Assumptions and open questions

Confirm these with the business before build. Each one changes the model or measures if the answer differs.

#	Assumption or question	Impact if different
1	Reporting uses the calendar year; prior-year comparisons use calendar months.	Add fiscal columns to DimDate and rebase YoY measures on fiscal periods.
2	ARR excludes one-off services, usage overages and is net of discounts.	Change ARR logic in dbt and restate snapshot history.
3	Logo churn is counted at account level; a reduction to zero followed by return within 30 days is not churn.	Adjust ChurnFlag rule and churn counts in gold.
4	ARR targets are set by segment and month only, so target measures are not sliced by region or product.	Add RegionKey or ProductKey to FactArrTarget and relate it to those dimensions.
5	RLS region mapping comes from Salesforce user territory assignments.	Source a separate security table from HR or Entra ID groups.
6	Customer segment changes are tracked as SCD2 and NRR uses current segment.	Use historical segment on snapshot rows if cohorts must keep original segment.

Recommended next steps

1. Configure incremental refresh on FactPipeline by snapshot date, keeping 2 years and refreshing the last 7 days.
2. Build NRR cohort logic in dbt as a monthly table if DAX performance degrades beyond 2 seconds.
3. Document every measure description and publish a KPI glossary page in the Power BI app.
4. Use a field parameter later to let executives switch between ARR, NRR and churn on one trend chart.
5. Schedule a monthly ARR reconciliation review with Finance before the board pack subscription sends.
6. Track app usage metrics and retire visuals unused after 90 days.