

Guest to Member Pathway: Power BI rebuild guide

This guide covers what you need to rebuild the Guest to Member Pathway report in Power BI. The pathway is built from one prepared table with a row for each first-time adult guest, plus the workflow card tables for the stall-point section.

Data files

File (in the data folder)	What it holds
Guest Pathway.csv	One row per first-time adult guest: first_visit_date, campus, followup_call_date, discover_class_date, first_group_date, first_served_date, member_since.
Workflow Cards.csv	The First-Time Guest Follow-Up workflow: current_step, stage, assignee, moved_to_step_at, overdue.
Workflow Card Steps.csv	Each completed step with its date and who completed it.

Prepare the model

1. The Guest Pathway table is prepared from Planning Center exports. The first visit is the Sunday on or just before the connect card was entered (the workflow card's created date), the call date from the completed Pastor phone call step, the class date from the Discover class event in Check-Ins, the group date from the earliest Groups membership joined date, the serving date from the earliest confirmed Services plan, and member_since from the membership date field in People. In a live setup these merges happen in Power Query, and the file in this kit is the result.
2. Load the three CSV files, set ID columns to Text, and set every date column to Date (or Date/Time on the workflow tables).
3. Create the Date table and relate it to Guest Pathway[first_visit_date].
4. Add the calculated columns below to Guest Pathway.

Key DAX

```
Date =
VAR firstDay = DATE ( 2023, 1, 1 )
VAR lastDay = DATE ( 2026, 12, 31 )
RETURN
    ADDCOLUMNS (
        CALENDAR ( firstDay, lastDay ),
        "Year", YEAR ( [Date] ),
        "Month Start", DATE ( YEAR ( [Date] ), MONTH ( [Date] ), 1 ),
        "Is Sunday", WEEKDAY ( [Date], 1 ) = 1
    )
```

```
Guest Year =  
VAR y = IF ( MONTH ( 'Guest Pathway'[first_visit_date] ) >= 10, YEAR ( 'Guest  
Pathway'[first_visit_date] ), YEAR ( 'Guest Pathway'[first_visit_date] ) - 1 )  
RETURN "Oct " & y & " to Sep " & ( y + 1 )
```

```
Furthest Step =  
SWITCH (   
    TRUE (),  
    NOT ISBLANK ( 'Guest Pathway'[member_since] ), "6. Became a member",  
    NOT ISBLANK ( 'Guest Pathway'[first_served_date] ), "5. Started serving",  
    NOT ISBLANK ( 'Guest Pathway'[first_group_date] ), "4. Joined a group",  
    NOT ISBLANK ( 'Guest Pathway'[discover_class_date] ), "3. Attended Discover class",  
    NOT ISBLANK ( 'Guest Pathway'[followup_call_date] ), "2. Follow-up call made",  
    "1. First visit"  
)
```

```
Days to Call =  
IF ( ISBLANK ( 'Guest Pathway'[followup_call_date] ), BLANK (), DATEDIFF ( 'Guest  
Pathway'[first_visit_date], 'Guest Pathway'[followup_call_date], DAY ) )
```

```
First-Time Guests = COUNTROWS ( 'Guest Pathway' )
```

```
Called =  
CALCULATE ( [First-Time Guests], NOT ISBLANK ( 'Guest Pathway'[followup_call_date] ) )
```

```
Attended Class =  
CALCULATE ( [First-Time Guests], NOT ISBLANK ( 'Guest Pathway'[discover_class_date] ) )
```

```
Joined Group =  
CALCULATE ( [First-Time Guests], NOT ISBLANK ( 'Guest Pathway'[first_group_date] ) )
```

```
Started Serving =  
CALCULATE ( [First-Time Guests], NOT ISBLANK ( 'Guest Pathway'[first_served_date] ) )
```

```
Became Member =  
CALCULATE ( [First-Time Guests], NOT ISBLANK ( 'Guest Pathway'[member_since] ) )
```

```
Joined Group % = DIVIDE ( [Joined Group], [First-Time Guests] )
```

```
Median Days to Call = MEDIAN ( 'Guest Pathway'[Days to Call] )
```

```
Median Days to Group =  
MEDIANX (   
    FILTER ( 'Guest Pathway', NOT ISBLANK ( 'Guest Pathway'[first_group_date] ) ),  
    DATEDIFF ( 'Guest Pathway'[first_visit_date], 'Guest Pathway'[first_group_date], DAY )  
)
```

```
P75 Days to Group =
PERCENTILEX.INC (
    FILTER ( 'Guest Pathway', NOT ISBLANK ( 'Guest Pathway'[first_group_date] ) ),
    DATEDIFF ( 'Guest Pathway'[first_visit_date], 'Guest Pathway'[first_group_date], DAY ),
    0.75
)
```

```
Report Date = DATE ( 2026, 10, 11 )    // use TODAY () in a live report
```

```
Open Cards =
CALCULATE ( COUNTROWS ( 'Workflow Cards' ), 'Workflow Cards'[stage] IN { "ready", "snoozed" } )
```

```
Past Due Cards =
CALCULATE ( [Open Cards], 'Workflow Cards'[overdue] = TRUE () )
```

```
Median Wait Days =
MEDIANX (
    FILTER ( 'Workflow Cards', 'Workflow Cards'[stage] IN { "ready", "snoozed" } ),
    DATEDIFF ( 'Workflow Cards'[moved_to_step_at], [Report Date], DAY )
)
```

Visuals

Visual	Fields and notes
Slicer	Guest Pathway[Guest Year] as buttons, single select.
Pathway columns	Six cards or a column chart: First-Time Guests, Called, Attended Class, Joined Group, Started Serving, Became Member, each with its share of First-Time Guests.
Where people stop	Column chart: X Guest Pathway[Furthest Step], Y First-Time Guests.
Time between steps	Table or bar chart of the median and 75th percentile measures for each pair of steps (repeat the Median Days to Group pattern for the other pairs).
Days to the phone call	Line chart: X Date[Month Start], Y Median Days to Call, with a constant line at 7.
Open cards by step	Table: Workflow Cards[current_step], Open Cards, Past Due Cards, Median Wait Days, and the assignee.
Campus comparison	Matrix with Guest Pathway[campus] on rows and the counts and Median Days to Call as values.

Apply the theme file from the Giving Analytics kit (Wren Hollow Giving Theme.json) or a church's own colors. Check the finished numbers against the HTML dashboard before sharing the report.

Sample data. All names, organizations, and figures are fictional.