

Business Intelligence Best Practices

Presenter

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Introductions

iSeerix -

- ❑ Design and development of Business Intelligence solutions
- ❑ Located in Pittsford NY
- ❑ Established 2004
- ❑ Oracle Partner

Agenda

- The Research
- The Formula
- Best Practices
- Re-cap
- Next Steps
- Raffle

The Research - 1999

Reason for Failure	Number of Cases
Inadequate user involvement	3
Insufficient funding	3
Organizational politics	3
Weak sponsorship and/or management support	3
Wrong or poorly analyzed project scope	2
Data problems	2
Problems with end-user access tools	2
Poor choice of technology	2
Scope creep	1
Turnover of organizational personnel	1

(Watson, Gerard, Gonzalez, Haywood, and Fenton, 1999)

TDWI – Business Intelligence Journal – Critical Factors for Data Warehouse Failure
<http://www.tdwi.org/research/display.aspx?ID=6592>

The Research - 2004

Factors for Success

- Dependable architecture
- Strong partnership between the business community and IT
- A different kind of methodology
- Well-defined business problems
- A willingness to accept change

BeyeNetworks – Claudia Imhoff Ph.D - Business Intelligence – Five Factors for Success –
August 2004

<http://www.b-eye-network.com/view/252>

The Research - 2005

- ❑ BI Tools fell short of the “self service” proclamation in the early to late 1990s
- ❑ BI Platforms should have the following characteristics:
 1. *Support All Users Via Integrated BI Suites*
 2. *Conforms to The Way Users Work*
 3. *Integrates with Desktop and Operational Applications*
 4. *Delivers Actionable Information*
 5. *Foster Rapid Development*
 6. *Provide a Robust, Extensible Platform*

TDWI - Wayne W. Eckerson The Keys to Enterprise Business Intelligence: Critical Success Factors – June 2005

<http://download.101com.com/pub/TDWI/Files/TDWIMonograph2-BO.pdf>

The Formula

$$\text{PROCESS} + \text{CULTURE} + \text{TECHNOLOGY} \\ = \\ \text{BUSINESS INTELLIGENCE}$$

The way you approach a business intelligence project and the culture of the organization is as much of a factor of success as the integrated technology used to deliver the solution.

The Process

□ Top – Down

- outline the process
- determine the flow of information
- identify specific measures
- monitor the success of the process
- identify enhanced ways to communicate information

□ Bottom – Up

- determine sources of information
- identify key tables and columns
- identify existing reports

BALANCE REQUIREMENTS WITH REALITY

The Process

- ❑ Timebox
 - smaller increments
 - set intervals
- ❑ Iterate, Evolve and Involve
 - prototype
 - encourage continued feedback
 - refine and evolve
 - accept feedback
 - create ambassadors
- ❑ Communicate, standardize
 - standardize definitions
 - socialize definitions
- ❑ Prioritize
 - acknowledge requirements
 - bucket requirements into phases
 - collaboratively assign priorities
- ❑ Partner
 - utilize technology specialists and business subject matter experts
 - be sensitive to time commitments – meaningful collaboration

THINK STRATEGICALLY, IMPLEMENT TACTICALLY

Case Study in Culture - Initial

Culture / Maturity

- Wholesaler
 - no / limited manual business intelligence
 - new implementation of operational system

Initial Approach

- outline goals
- identify technology
- identify key business processes to measure
- skill up staff
- develop internal processes

Proposed Goals

- robust business intelligence platform
- socialize business intelligence concepts
- prototype
- enlist technology and business ambassadors
- identify operational gaps

Success Criteria

- executive sponsorship
- technology installed and integrated
- prioritized implementation plan
- hardware and software blueprint
- adjust / adopt an implementation methodology

CHANGE HAPPENS ONE PERSON AT A TIME

Case Study in Culture - Established

Maturity

- High Tech / Telecommunications
 - spreadsheets galore
 - departmental or silos of business intelligence
 - existing solution not meeting expectations

Approach

- review existing solutions
- determine short falls and issues
- Identify quick win area for improvement
- skill up staff
- communicate
- identify success metrics

Proposed Goals

- enhance business intelligence framework
- communicate new measures and approach
- adoption of new metrics
- develop ambassadors
- common perspective and understanding

Success Criteria

- executive and operational sponsorship
- technology installed and integrated
- prioritized adoption plan
- enhance implementation methodology

THE JOURNEY IS AS IMPORTANT AS THE DESTINATION

Technology

❑ Architecture

- Hardware
 - sufficient capacity to meet expectations
 - scalable
- Performance
 - identify and eliminate bottlenecks
 - use features and capabilities of the environment

PLANNING – THE ART OF REDUCING REWORK

❑ Design

- Aesthetics and Ergonomics
 - appropriate color schemes
 - brand and customize with company logos
 - standardize and integrate
 - intuitive and simple navigation
 - utilize graphics to convey information

FIRST IMPRESSIONS ARE LASTING IMPRESSIONS

- Content
 - accurate and actionable information
 - standard business models and definitions
 - use shared templates and standardize content
 - relevant and focused content areas
 - empower and delegate content management
 - relevant and customizable landing pads

A PICTURE IS WORTH A THOUSAND WORDS

Re-cap

- ✓ Executive sponsorship
- ✓ Plan an integrated BI Platform
- ✓ Balance requirements with reality
- ✓ Think strategically implement tactically
- ✓ Iterate, evolve and Involve
- ✓ Understand your culture and the effects of change
- ✓ With flexibility comes responsibility
- ✓ A picture is worth a thousand words

Next Steps

□ Contact Us

- <http://www.iseerix.com>

□ Services

- solution and application audits / reviews
- solution value assessments
- methodologies and best practices
- prototyping
- architecture and blueprints
- complete project lifecycle development