



Does a Business Intelligence implementation scare you?

Here are 5 things to avoid.

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While small and midsize businesses (SMB's) recognize the value of Business Intelligence (BI) many feel that BI solutions are beyond their reach. Nowhere, however, is this need more keenly felt than in SMB's where the right decisions can mean all the difference between success and failure. With limited budget and staff size BI-Metrix can help.

Gartner, a leading IT research and advisory company, lists defective strategy - or not having a strategy at all - as one of the "fatal flaws" in BI project implementations. A good BI strategy, on the other hand, is the key to a successful implementation, helping to maximize return on investment.

How do you know if your BI strategy has defects? Below are five telltale signs.

1. Failing to Involve Users in the BI Tool Selection

As part of a BI initiative, you may have multiple tool selections: ETL, data cleansing, relational database, and the business intelligence tools. For the most part, users care little about which tools IT selects on the back end. Users, however, own the BI tool. Failing to involve them in the selection almost guarantees mediocre adoption and lack of buy-in. If the beneficiaries of the system are not involved in the design of the system it is unlikely to be successful when implemented.

Different stakeholders involved in BI tool selection require tools that meet their particular needs.

- IT wants the easiest tool to deploy and maintain, as well as one that fits within existing architecture standards.
- Purchasing may want to extend a relationship with an existing software supplier who also provides BI tools, rather than work with a new BI vendor.
- End users want sexy, intuitive tools that empower them to access their own report or to do their own analysis.

Ideally, a BI selection committee is comprised of a team that includes all of the above stakeholders. This enables the various teams to communicate and prioritize their requirements. For IT, the challenge is to translate technical requirements into user cost/benefits. For example, users will not care if the technical architecture is ROLAP or MOLAP, but they care if queries are slow or if data updates are infrequent. If users do not see the benefit of the BI tool they may continue to use the alternative tools for as long as possible. Thus IT is left supporting two data sources and multiple versions of the truth and the resulting return on investment on the BI project is very low.

BI software implementations require frequent injections of business process and strategy to guide the IT team or business partner. This major IT effort requires executive sponsorship by the CFO, Chief Marketing Officer and other business areas that will rely on the BI tool for its information. Strong business sponsorship will prevent scope or data creep and skyrocketing costs.

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2. Failing to Fix the Data

BI relies on accurate data. When IT delivers poor quality data through a BI tool, the BI tool will quickly get blamed for any data discrepancies. It's difficult for users to differentiate between the BI tool and the data sources.

Some data problems are programmatic while others are process related and still others are simply input errors. Programmatic errors can be resolved by quality assurance (QA) procedures. Fail to fix any programmatic errors before users see them in the BI tool, and you justifiably face a credibility issue.

For process and input errors, users often have to see the data in the BI tool before the problem can be identified. The BI tool can help users uncover and correct these errors by analysis and exception highlighting. Assigning a business user (rather than IT) to sign-off on data quality is recommended.

Poor quality data can destroy the credibility and utilization of business intelligence systems. This is not an IT challenge but a business challenge. If the business is not involved in identifying the right data and solving the inconsistencies the project has a high chance of failure.

Bottom line: with clean data, your BI tool can be successful. With bad data, any BI tool will fail.

3) Selecting tools that are difficult to use.

Too many BI implementers forget that the biggest benefit of a BI software solution comes from widespread deployment. In order to get widespread deployment and high adoption, the software user interface, graphics and end-user capabilities have to be intuitive to the business user.

It's very easy to get drawn into playing with fancy technology that, although demo's very well, requires IT or high-powered users to build reports. Self-serve analytics and reporting is a concept that empowers business users to get the information that they need when they need it without reliance on IT or high-powered users, a goal that SMB's should strive for when implementing a BI tool.

The ultimate business goal of the BI tool is to deliver information and business value. The faster you fulfill the business goals, the more momentum and success the BI applications will have. The longer you take to do that, the more opportunities you will miss.

4. Failing to Differentiate Users of BI Tools

Users have different reporting and analysis needs and information requirements. BI tools have varying capabilities. A good BI strategy will match the user types with the tool capabilities. Two general categories of users are report authors and report consumers. Report authors may be business analysts or IT personnel or both. These two different categories of report authors will have different sets of requirements. Report consumers can range from executives who only want to receive a report when there is a problem, to knowledge workers who want to analyze data to uncover problems and opportunities.

Today's BI tools should meet the needs of these four user segments (IT author, power user author, executive consumers, and knowledge workers). Therefore, it is important to understand

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the different needs to avoid getting “sold” on a fancy dashboard that will meet the needs of a single type of user. SMB’s should also look for areas in which to minimize the number of tools any one user will have to learn.

5. Failing to Promote the BI Application

Promoting a BI application should not be the responsibility of the IT department. The business users should communicate the benefits throughout the organization. This is important because not all users requested the BI application. Probably only a select few have been involved in the various planning, selection, development, and implementation phases.

You should begin promoting the BI application during the planning stages. Your messaging at this early stage should be quite high level, focusing on general capabilities and subject areas. “In 2011, we will be delivering a new sales reporting tool.” As you move closer to delivering the capabilities, the messaging should be more specific, emphasizing how the new BI tool will benefit that particular user and when. “The BI sales reporting tool allows interactive analysis so you can identify and better serve top customers.”

Use a variety of media to promote the BI application, again tailored for each user segment. Promotional media includes email, corporate intranet, company newsletters, staff meetings or road shows.

Develop a plan to “Think Big and Start Small”

For SMB’s, a BI and planning framework must, first and foremost, be practical. It may draw upon the conceptual framework used in larger companies, yet it must be scaled to a smaller company with fewer resources.

SMB’s need a solution that provides essential analysis, reporting and planning capabilities without extensive resources. Over time, as business grows, it’s important to avoid an unwieldy combination of vendors, products, and services. For SMB’s an integrated solution makes sense, one that already understands the data source of your GL or ERP. A single solution can provide the essential BI and planning functions while setting the stage for future growth.

A BI framework for SMB’s should also enable firms to adopt a think big and start small strategy. They should avoid an “all or nothing” approach and instead employ a BI and planning strategy that hinges on deploying components tactically and incrementally. This approach creates a clear path for connecting additional components over time.

SMB’s can start small by focusing on key pain points. This can start anywhere, for example, with only reporting and analysis, and add capabilities as the business grows and its requirements change. This approach enables a project rollout that matches resource capacity and budget. It also helps companies realize business benefits quickly and provide justification for further investment in more advanced BI capabilities as they grow.

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About BI-Metrix

BI-Metrix's integrated Business Intelligence solutions help small and midsize businesses optimize processes, save money, and improve decision-making through the power of information. Its BI solutions are powerful, easy to use, and cost effective and offer capabilities to support the three pillars of BI – analysis, reporting and planning.

BI-Metrix has deep and proven expertise in delivering business intelligence solutions to small and midsize businesses in a wide variety of industries and departments. Our solutions present data in a business context that business users understand while ensuring data accuracy and consistency throughout the organization. This allows all users in different departments to spend more time analyzing data and formulating business strategy. They can adjust plans, budgets and forecasts to respond quickly and effectively to changing business conditions. BI-Metrix enables small and midsize companies to meet these challenges in one simple integrated solution.

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