Deliver what the business really wants

Capturing requirements for BI project success

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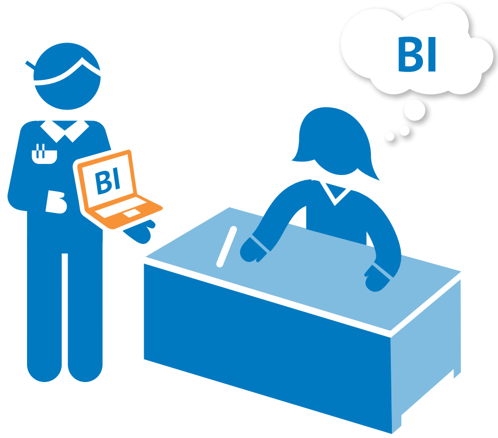

BI can be the greatest opportunity or biggest point of failure for enterprises today. The BI initiatives that succeed share one critical element: business involvement. While BI solutions are inherently technical and historically the domain of IT, it is the business that needs access to timely, accurate information to make critical business decisions. As IT professionals, we can either deliver what the business wants, or the business will find ways to get the information they need without us.

According to a recent Information Week article, only 19 percent of organizations indicate business and IT work well together. For BI projects to be successful, enterprises need a process that keeps the business engaged from project initiation through delivery. In this article, we will discuss how to collaborate with the business to ensure complete and accurate project scope.

Start with the questions users want answered

Building a BI solution without business user involvement is like building a house without the input of the homeowner. Without the homeowner's requirements, how do you know what type of house to build? The same is true of a BI solution. Your BI solution cannot deliver business value if the business is not involved from the get go.

You do not have to be a detective to uncover business requirements, you just need to actively listen to your user community. Understand the questions users are looking to answer and their current barriers to obtaining that information. Key inputs include:

- What information do they need to do their job?
- From whom do they receive this information?
- In what form do they receive this information?
- How often do they receive this information?

In addition, it's important to understand information output to complete the flow of information.

- What information do you owe others?
- To whom do you send this information?
- In what form do you send this information?
- How often do you send this information?

The answers to these questions form the basis for your solution requirements.

Assess the potential return on investment

With limited resources, both budget and skills, IT organizations need to focus on the solutions that provide that provide the business the highest return on investment. After you have gathered the information requirements, assess the value of the information request across two dimensions: value to the business and feasibility of the solution.

Determine:

- The value of the information being delivered to the enterprise. Is it a billion dollars or five dollars?
- The feasibility of delivering that solution. Is it relatively easy, very difficult or impossible to obtain the information requested?

The focus should be on delivering the highest value initiatives that are also the most technically feasible. Ideally, those that can be delivered in 90-day increments.

Make requirements visual and collaborative

In a typical BI project requirements, are housed in disparate Word documents, spreadsheets and Visio diagrams, making collaboration difficult at best. We recommend visualizing those requirements in ways that foster user understanding and encourage collaboration.

Let's consider the following business requirement: a product manager wants to understand sales of his new product across various geographies and time periods.

The first step in working with business users is to define and agree on the business terms the solution will report on. In this example, business terms would include:

- Sales
- Product
- Location
- Time

Having agreed upon definitions by the business is key to ensuring the solution will deliver the information users are asking for. In fact, each business term should be vetted with all stakeholders that it could potentially affect. The goal is to begin building a common enterprise business vocabulary. By leveraging a repository of standardized business terms, your organization will increase the reliability and relevancy of the information you deliver through BI solutions.

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With the business terms defined, you should then create a visual representation of the how the business requirement will be satisfied. For example in our tool Consensus, we create Information Packages (solution sets) that consolidate user requirements in a non-technical way and serve as a discussion tool to facilitate collaboration with business sponsors. The information package allows users to clearly see how their business question will be answered, as well as how the solution could anticipate additional business questions in the future. Information packages provide the user a visual roadmap of what will be built, allowing IT to get buy-in and gain the confidence of business users early in the development process.

Establish usability requirements

After defining the solution sets, you will want to work with key users to understand the usability requirements for surfing the data. This will include key navigational hierarchies and reporting attributes required by your solution. Though users may articulate the lowest grain of the information they need, it is also important to understand the navigation path users would likely take to reach granular data. Conversely, it's valuable to consider how that data might be aggregated upward into broader reports. Solutions need to be designed to support logical navigation and aggregation making it easy for users to traverse data and get to the information they need quickly.

Prototyping and iterating with the users

While visualizing the solution is a key step in gaining user buy-in and acceptance, we also recommend building out a simulated version of the target application. This would include the target database environment and the business intelligence semantic layer, exploiting all query and OLAP capabilities, using the business terminology you defined and reviewed with the business users.

When a user sees a real working version of the solution generated into a BI platform the lights come on and they can begin giving you real and meaningful feedback such as:

- Can you add another level to group that information?
- Can you change the presentation to include these additional measures?
- Oh that is what you were trying to tell me – now I see – this is GREAT!

By engaging users throughout these work steps you will avoid costly rework, ensure project scope is complete and accurate, and create solutions that truly satisfy the business.