Balanced Insight

5 Rules for BI Project Success

By: Tom Hammergren

Depending on where you stand, Business Intelligence (BI) is either the greatest failure or the greatest opportunity for businesses today. While business end-users unfortunately experience most of the pain associated with failed delivery of BI, the IT community is often blamed for project dissatisfaction. A 2011 Gartner user survey showed that "improved decision making" is the top driver of BI purchases. Here in lies the problem. Technology purchases alone don't guarantee BI project successes that translate into improved decision-making.

The secret to BI success lies in having a process that keeps business users engaged throughout project design, development, and ongoing support. This may seem like a gross overstatement of the obvious, but in the last two decades of BI consulting we have found that lack of end-user engagement continues to be the number one cause of failure.

Organizations will increase the business value of BI when technologies are supported by delivery processes focused on continuous engagement. This article contains five rules of better BI engagement and over the coming months we will be drilling down on all these in more detail.

1 Deliver what the business really wants (not what IT wants to give them)

IT is often faulted with taking the technology du jour and using it to solve this year's business problems. For IT to provide true value to the business they must solve the real business problems challenging end-users. The shift to business-focused vs. technology-focused delivery requires new levels of collaboration with the business. Following this path will help you deliver the intelligence the business is asking for:

- Engage users early and often to fully understand scope and requirements to ensure their business questions get answered
- Develop direct ways to visualize requirements that don't rely on Word docs and spreadsheets to ensure everyone is on the same page
- Establish usability requirements upfront to facilitate data exploration in the final deliverables
- Anticipate future questions that will enable self-service and flexibility in final deliverables
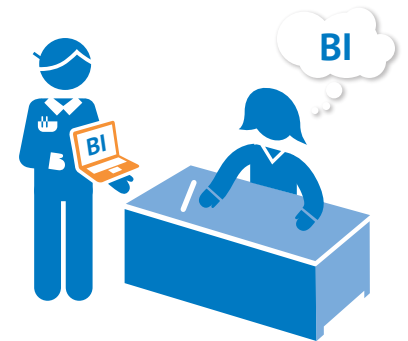
2 Create a standard business language everyone can agree on

Enterprises are riddled with semantic challenges. Think of the word "customer" for example. How many different ways could that term be defined in an organization? Yet, having a common definition of "customer" is critical for broad understanding. Imagine your CEO wants to understand the lifetime value of the company's customers. Having 10 different definitions of customer makes delivering a definitive answer to that question nearly impossible.

Organizations need to establish a standardized business language for the enterprise that starts at the project level and grows organically with each BI project. You should encourage business stakeholders to come together and align and refine business terms across BI projects. Establishing a repository of reusable business terminology can really help jumpstart future BI projects.
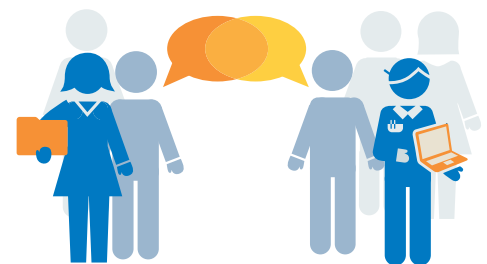
3 Deliver frequent, incremental value.

In the past few years, Agile BI development has taken our industry by storm. If we look past the hype for a minute, the agile method illuminates an important principle for successful BI delivery, namely delivering value in frequent increments. What if you could deliver every 30 to 90 days without eroding quality? You'd be a hero to the business. As you work with end-users to develop solution roadmaps, think about the overall capability you are creating and how that can be delivered in feature releases in 90-day increments. The focus should be on delivering the highest value initiatives that are also the most technically feasible. It's a win-win situation, the business sees value every 90 days, and you get iterative feedback along the way that will eliminate the need for rework once a project is complete.

4 Make technology invisible and flexible

The technologies we have at our disposal can be likened to the hi-tech gadgetry found in Batman's Bat Cave. And classically we expose these flashy toys to business users with great pride. The problem is they don't really care. They just want a BI solution that answers their business questions. They don't care how it was built. For instance, if someone asked you what time it was, you would tell him or her without going into the details of how your watch was constructed. As IT professionals, we need to approach BI projects the same way. Our job is to make it happen and technology should be invisible to the user. One of the best ways to do this is to leverage technology agnostic development tools that enable model- driven solution generation. To do that requires mapping the business requirements to the technical implementation in a flexible way that anticipates future needs.

5 Capture knowledge to create "organizational memory™".

The ability to flex up and down when it comes to staffing is the new reality in business. But, this presents some challenges when it comes to BI delivery. Leveraging the knowledge gained from previous projects is essential to truly advancing the quality of BI solutions. Today, that project knowledge is housed inside the heads of individuals, and if a team member should leave the organization, so does that intellectual capital.

Think about when you go into Home Depot. Ask any associate from any department where something is, and they immediately can point you in the right direction. Why? Because the merchandising plan and store layouts have been standardized and well-documented. Associates are trained on a system; therefore their knowledge is based on a common information resource. Is your BI plan, inventory and layout easily accessible to your colleagues and associates?

IT organizations need an enterprise information solution that maintains a history of team discussions around business terms and metrics. This enables ongoing collaboration with the user population to refine these terms over time. We call that creating "organizational memory". Developing a repository of reusable metrics, business models and standardized data definitions can facilitate faster, more efficient and repeatable BI success across the enterprise.

Addressing these five points will assist you in innovating and improving your current BI initiatives.

About the Author

Tom Hammergren founded Balanced Insight in 2003, after leading major BI initiatives for Procter & Gamble, Quantum Chemical, Cinergy, and FirstEnergy. Through this experience, Tom saw the need for tools that would help IT professionals deliver BI projects more successfully. He created Balanced Insight with one mission in mind – to help IT overcome the common challenges of BI delivery.

A well-known BI innovator, speaker and consultant, Tom has spent over two decades in the trenches designing and developing market leading offerings with top BI providers, including Cognos, Cincom and Sybase. Tom is the author of *Data Warehousing for Dummies, Data Warehousing on the Internet: Accessing the Corporate Knowledge Base,* and *Data Warehousing: Building the Corporate Knowledge Base.*

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