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BI Director: How to Become One, Succeed, and Know When to Leave

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Introduction

There are many positions open to BI professionals, from application developer and architect to data modeler and end user support specialist. To climb the organizational ladder, becoming a BI director is a logical goal. The position can significantly impact organizational performance and also bring professional and personal rewards.

As a starting point for understanding the position, I visited several job websites such as Monster.com to see how the job is described. Figure 1 presents a generic composite of what I found. As you can see, being successful requires the right mix of business, technical, managerial, and organizational experience and skills.

I've had the good fortune to know many excellent BI directors through TDWI and the companies I work with. I decided to tap into my network to better understand the position and conducted phone interviews with three seasoned pros who have been successful BI directors in one or more firms (see Figure 2). I asked each of them the following:

- How do you prepare to be a BI director?
- How do you prepare and interview for the job?
- How do you distinguish between a good and a bad opportunity?
- What should you do when you first take over the position?
- What do you need to do to succeed?
- When do you move on to another position or company?

The interviews revealed insights about the position that should help both people who aspire to it and those currently in the job.

Preparing to Be a BI Director

BI offers many “shiny objects”—dashboards that monitor conditions nearly in real time, visualizations of millions of data points, and the discovery of previously unknown relationships. Well known to BI directors,

however, is that none of this is possible without a strong data infrastructure and an analytics capability. That is why understanding how data can be stored, maintained, analyzed, and used is a critical skill for future BI directors.

Developing data and analysis skills can start in school with database, statistics, and BI courses and continue on the job. Directors need to know about data modeling, how data is stored, the importance of data quality and metadata, and the various ways that data can be analyzed and displayed.

As organizations store more data and data types and move along the BI maturity curve to advanced applications, BI managers and professionals must “up their game.” Whether in school or on the job, they should learn how to work with non-relational platforms and tools like SAS Enterprise Miner, IBM SPSS Modeler, and R.

As Jim Gallo says, “BI is ultimately about the business. Directors should speak its language, understand its strategic plans, and know the pain points.” In many instances, it falls to the BI director to explain in layman’s terms what BI can do for the business. They must be able to translate what the business needs into the technical specifications required for building a solution. Users do not and should not be concerned with how an application is technically delivered.

Director, Business Intelligence

About the Company: Acme is a leading designer, manufacturer, and distributor of high-end pool and patio products. Located in beautiful San Diego, California, the company has a casual but highly productive work environment.

What the BI Director Does: The director of business intelligence reports directly to the senior vice president for strategic and corporate planning and is responsible for managing a professional staff of managers, project managers, business analysts, developers, and technical specialists. The director provides strategic leadership and tactical direction for business intelligence and analytics. The director works with senior management to develop a strategic vision for BI and see that vision successfully implemented by working effectively with key business leaders.

General Qualifications of the BI Director: The candidate should have at least 10 years of IT work experience and at least three years of BI, data warehousing, and analytics experience. The candidate should have outstanding management, leadership, relationship-building, team-leadership, and communication skills, with a proven track record of delivering customer-focused results as well as an ability to identify, respond, and benefit from technology advances and trends.

Specific Qualifications of the BI Director:

- Experience managing diverse teams
- Extensive project management experience
- Strong negotiation skills for interacting with internal and external business customers and partners
- Excellent background in data warehousing principles and methodologies
- Experience developing sustainable BI architectures
- Experience developing BI solutions
- Experience with BI tools and a wide variety of analytical processes
- Experience designing, building, and maintaining large data warehouses and databases
- Experience developing BI governance committees and processes
- Bachelor’s degree required, MIS or computer science preferred; MBA a plus

Jim Gallo is vice president of business analytics for ICC. He is a respected author, popular speaker, and acclaimed instructor as well as an industry-recognized expert in business analytics and data warehousing.

Brian Valeyko is the director of enterprise data warehousing, business intelligence, and big data analytics at NCR. His current projects include implementing a unified data architecture to efficiently support the analysis of many different data types.

Alicia G. Acebo is the owner and founder of Rock Paper Data, a consulting firm specializing in data management, data warehousing, and business intelligence. Her current projects involve architecting systems and building teams that allow companies to create new value through the effective deployment of IT solutions.

Figure 1: A BI director’s job description.

Figure 2: The BI directors interviewed for this article.

Some of the business knowledge can be gained in school. Much of it, however, is either inherent in the person or learned on the job. Some people are just good at understanding the business and interacting with users while others struggle. In addition, work experience is important. Few people learn to work effectively with users without experiencing some failures. As I tell my students, “I wish I could teach a course on three years’ experience, but you will have to learn that on your own.”

Interviewing for the Job

The starting point is to ensure a reasonable match between the specified qualifications and your background, skills, and experience. Assuming a good fit, the best advice is to learn as much as possible about the company and the industry in which it competes. Understand the company’s business model and what is necessary for success. See what can be learned about the company online, including from annual reports.

Many companies are tied to a particular vendor’s set of BI tools. It is wise to be familiar with these tools before interviewing. Companies expect their BI directors to be comfortable with the technology already in place.

Identifying Good and Bad Job Opportunities

When assessing whether to apply for a position, it is useful to think about the firm and the industry in which the company competes. As Jim Gallo says, “It is important to know whether BI is a ‘nice to have’ or if it is critical to accomplishing the business strategy.” In the latter situation, BI is going to be more strategic and provide interesting challenges and opportunities.

Is the company progressive in its product offerings, willingness to change its organization structure, and use of BI? If it has been progressive in the past, it is likely to provide an exciting work environment in the future.

Somewhat related to the strategic importance of BI is where the BI team fits in the organization structure. For example, if it is placed under application development, it is unlikely to be viewed as strategic. Reporting to the CIO is better. Better still is if it reports to the COO, CMO, or CFO.

Who your boss would be and the composition of your team are also important. You want your boss to be high enough in the organization to make things happen. You also want the existing staff to know and have good relationships with the business, and you want to be able to go outside the firm to hire needed talent.

A good BI job has an ongoing budget. It is a bad sign if funding happens by the project. Such a situation indicates that BI is not considered strategic, and creates funding uncertainty because you would likely be constantly competing with other investment opportunities in the firm.

Another consideration is who takes part in the interviews. If they are primarily in IT rather than senior business managers, assume that BI is not considered truly important by the business.

What to Do During Your First Days on the Job

A major focus should be on developing a BI strategy.

This cannot occur in isolation from the business strategy, however, because the two must be aligned. Consequently, it is necessary to understand the company’s vision for the future. Identify the key business leaders, meet with them, and learn about the business strategy.

Meet with IT leaders to take inventory of what technologies, capabilities, and skills they have. It is difficult to succeed with a BI strategy without strong support from IT.

Brian Valeyko says, “Take a look at the BI road map and major projects undertaken over the past three years. Learn what projects succeeded and failed. Understand why the successes and failures occurred.”

Meeting with the current BI staff is the starting point for learning about them and building mutual respect. This is especially important with any staff members who applied for the BI director position you now hold, as they may harbor resentment.

In these meetings, it is possible to begin understanding what the staff members currently do, what their skills are, and their career goals. You can then make decisions about what new skills to bring in, which staffers do not fit into future plans, and what training and career development are needed.

Do *not* start by dictating directions, implementation plans, and solutions before understanding the business strategy, IT's capabilities, and the strengths and weaknesses of your staff.

How to Succeed

Pay special attention to the needs of senior management. Try to make sure they use and benefit from BI. Meet with them regularly, if possible. Be a strategic business partner, not just the BI director.

You and your team must be highly skilled, add value, help reduce “organizational pain,” and provide good service. In addition, your skill must be recognized, which usually requires careful marketing and some self-promotion. Provide people in the business with the information they need to do their jobs, accompanied by a carefully crafted message that the information was generated from the data warehouse/BI. Collect and be able to tell stories about the successes that the business has realized from the use of BI. You know that you are successful when business leaders come to you for advice and help and talk about you positively to their peers.

Develop strong technical, business, interpersonal, communication, and leadership skills within your team. Most staffers will need to improve in at least one of these areas to grow professionally and achieve their aspirations. For example, a recent college graduate will need to improve technical skills; a BI analyst may need to enhance their business and interpersonal skills. You know you have been successful when your staff can perform *your* job.

When It Is Time to Move On

A BI director might voluntarily leave a position for a variety of reasons—a better opportunity, deteriorating conditions where they currently are, or simply a desire to live in a different part of the country.

When a BI director is in a bad situation and doesn't feel things are going to change, it is best to “declare victory” and move on to something else, hopefully wiser for the experience.

Alicia Acebo believes “there are two kinds of people—those who enjoy building something and those that are better at maintaining and expanding what is currently

in place.” Directors in the first category are likely to get bored and move on to new challenges after they have achieved success. I found it interesting that all three directors I interviewed prefer building rather than maintaining.

Most fundamentally, if a BI director is not enjoying the job anymore, it is time to do something else. Fortunately, good opportunities abound for these skilled professionals.

Conclusion

Jim Gallo is a big fan of *The 7 Habits of Highly Effective People* by Steven Covey. He has found three of the habits to be highly applicable to success as a BI director.

The first applicable habit (#5 in Covey's book) is “Seek first to understand, then to be understood.” In a BI context, first understand what the business wants and needs and only then suggest what can be done. It is through understanding that one can act with wisdom.

The second habit (#2) is “Begin with the end in mind.” Before initiating any project, understand its business value, then build a prototype that users can touch and feel. This creates clarity about what the business wants and ultimately saves time and money.

“Sharpen the saw” is the final habit (#7). When the technology for BI changes, the potential use cases change as well. BI directors need to constantly track technology advances and explore how they can benefit the business. A network of peers to learn from is especially useful here. ■