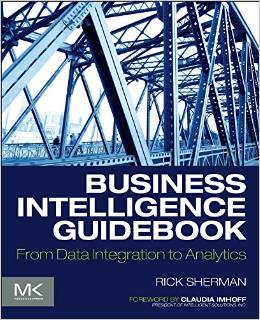
**Business Intelligence Guidebook**

**Templates**



**Chapter 18:**

**BI Project Plan Template**



[Company Name]

BI Project Plan

[Project Name]

Date: [Select Date]

Author(s):

Sponsor(s):

Table of Contents

[BI Milestone Plan 5](#_Toc440897979)

[Milestone Plan 5](#_Toc440897980)

[Resource Plan 7](#_Toc440897981)

[Project (Task) Plan 8](#_Toc440897982)

[Project Assumptions 12](#_Toc440897983)

[Approvals 13](#_Toc440897984)

[Appendix: Background Materials 14](#_Toc440897985)

[Authors and contributors 14](#_Toc440897986)

|  |  |
| --- | --- |
|  | The content of the template is what is important rather than how is presented or formatted.  **Note: to delete any tip, such as this one, just click the tip text and then press the spacebar.** |

# BI Milestone Plan

|  |  |
| --- | --- |
|  | See the section “Developing Scope, Preliminary Plan, and Budget” in Chapter 2 of the BI Guidebook for a discussion of the use and content of a BI project milestone plan. More in-depth discussion on developing a detailed project plan can be found in Chapter 18: “Project Management.” |

## Milestone Plan

|  |  |
| --- | --- |
|  | Present a project milestone plan listing the project phase completion dates and key milestones |

Table : BI Project Milestone Plan

| **Phases** | **Milestones** | **Completion Date** | **Person Responsible** |
| --- | --- | --- | --- |
|  | BI Project Start |  |  |
| **Scope & Plan** |  |  |  |
|  | Business Justification Sign-Off |  |  |
|  | Project Plan Sign-off |  |  |
| **Analysis & Definition** |  |  |  |
|  | Business Requirements Sign-off |  |  |
|  | Data Architecture Analysis Completed |  |  |
|  | Technical Architecture Analysis Completed |  |  |
|  | Software & Infrastructure Sign-Off |  |  |
| **Architect & Design** |  |  |  |
|  | Data Integration Architecture & Design Completed |  |  |
|  | BI Architecture & Design Completed |  |  |
| **Pilot** |  |  |  |
|  | DI Pilot Completed |  |  |
|  | BI Pilot/POC Application Completed |  |  |
| **Build & Test** |  |  |  |
|  | Data Integration Development & Testing Completed |  |  |
|  | BI Application Development & Testing Completed |  |  |
|  | Source Data Loaded |  |  |
|  | User Acceptance Testing (UAT) Completed |  |  |
|  | Systems Testing Completed |  |  |
| **Implement** |  |  |  |
|  | User Training Completed |  |  |
|  | BI & DI Operations Verified |  |  |
|  | BI Applications Access & Verified |  |  |
| **Deployment** |  |  |  |
|  | BI & DI Production Monitoring & Controls Verified |  |  |
|  | BI Roll-Out Completed |  |  |
|  | BI Project Completed |  |  |

## Resource Plan

|  |  |
| --- | --- |
|  | Provide the high-level resource plan or assumptions used to formulate the project milestone plan.  Notes:   * Resource Type – examples are BI developers, project manager, business analysts * FTEs = Full-Time Equivalent Resources, such as 3.5 people needed. |

Table : High-level Resource Plan

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Resource  Type | Internal vs  External | Resource’s Organization | FTEs  Resources | Start  Date | Finish  Date | Approved  (Y/N/P) |
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|  |  |  |  |  |  |  |
| Totals |  |  |  |  |  |  |

## Project (Task) Plan

|  |  |
| --- | --- |
|  | Present a project milestone plan listing the project phase completion dates and key milestones |

Table : BI Project Milestone Plan

| Phases | Task  No | Tasks &   * Subtasks (this would become separate tasks) | Start  Date | Finish  Date | Duration | Predecessors | Resources | Task  Owner |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | 0 | BI Project Start |  |  |  |  |  |  |
| Scope & Plan |  |  |  |  |  |  |  |  |
|  | 1.100 | Gather high-level project requirements |  |  |  |  |  |  |
|  | 1.200 | Develop Business Justification |  |  |  |  |  |  |
|  | 1.300 | Develop Project Plan, Resource Plan & Budget |  |  |  |  |  |  |
| Analysis & Definition |  |  |  |  |  |  |  |  |
|  | 2.100 | Gather Business & Data Requirements & Priorities   * Gather by business groups & individuals within groups * Gather by technology groups involved * Consolidate & refine requirements * Prioritize requirements |  |  |  |  |  |  |
|  | 2.199 | Business Requirements Sign-off |  |  |  |  |  |  |
|  | 2.200 | Perform Data Architecture Analysis   * Source Systems Requirements * Data Profiling * Data Modeling |  |  |  |  |  |  |
|  | 2.210 | Gather Detailed Source Systems Requirements   * Gather by source system & objects within SOR * Consolidate & refine requirements * Prioritize requirements |  |  |  |  |  |  |
|  | 2.220 | Perform Data Profiling   * Gather by source system & objects within SOR * Determine data gaps & identify data quality issues * Review above with business & SOR SMEs * Refine requirements based on review |  |  |  |  |  |  |
|  | 2.230 | Design Staging Data Model   * Design by SOR |  |  |  |  |  |  |
|  | 2.240 | Design DW Integration Schema Data Model   * Design by data subject & SOR * Design support for SCD & Hierarchy Mgt |  |  |  |  |  |  |
|  | 2.250 | Design DW Distribution Schema Data Model   * Design by data subject & distribution target |  |  |  |  |  |  |
|  | 2.260 | Design BI Schemas Data Model   * Design each data mart, OLAP cube, in-memory columnar database or other BI-specific data store |  |  |  |  |  |  |
|  | 2.299 | Data Architecture Analysis Completed |  |  |  |  |  |  |
|  | 2.300 | Perform Technical Architecture Analysis   * Design database & data architecture * Design data integration architecture * Design BI architecture * Design infrastructure & support architecture * Consolidate software (on-premise & cloud) & infrastructure (on-premise & cloud) recommendations * Consolidate into an overall technology architecture |  |  |  |  |  |  |
|  | 2.399 | Software & Infrastructure Sign-Off |  |  |  |  |  |  |
| Architect & Design |  |  |  |  |  |  |  |  |
|  | 3.100 | Data Integration Architecture & Design   * Refine details of data integration architecture * Design (or designate) common functionality & standards * Design source-to-target mappings by source * Design DI workflow by targets – stage, DW integration schema, DW distribution schema & BI schemas |  |  |  |  |  |  |
|  | 3.200 | BI Architecture & Design   * Refine details of BI architecture * Design (or designate) common functionality & standards * Design preliminary storyboards for BI applications by business requirements |  |  |  |  |  |  |
| Pilot |  |  |  |  |  |  |  |  |
|  | 4.10 | DI Pilot – for selected data sources   * Create & unit test DI code for SOR to Stage * Create & unit test DI code for Stage to DW Integration Schema * Create & unit test DI code for DW Integration Schema to DW Distribution Schema * Create & unit test DI code for DW Integration Schema to each BI Schema * Perform systems test of DI Pilot * Validate data for BI Pilot |  |  |  |  |  |  |
|  | 4.20 | BI Pilot/POC Application – for selected BI applications & data   * Create & unit test each BI application * Create & unit test each BI storyboard with associated BI applications * Conduct user acceptance testing (UAT) * Validate BI applications & storyboards   Note: This may be conducted using an Agile methodology |  |  |  |  |  |  |
| Build & Test |  |  |  |  |  |  |  |  |
|  | 5.10 | Data Integration Development & Testing   * Create & unit test DI code for SOR to Stage * Create & unit test DI code for Stage to DW Integration Schema * Create & unit test DI code for DW Integration Schema to DW Distribution Schema * Create & unit test DI code for DW Integration Schema to each BI Schema |  |  |  |  |  |  |
|  | 5.20 | BI Application Development & Testing   * Create & unit test each BI application * Create & unit test each BI storyboard with associated BI applications   Note: This may be conducted using an Agile methodology |  |  |  |  |  |  |
|  | 5.30 | Source Data Loaded   * Load current data by source system * Load historical data by source system * Initiate ongoing data load by source system |  |  |  |  |  |  |
|  | 5.40 | Conduct User Acceptance Testing (UAT)   * Conduct user acceptance testing (UAT) by business requirements & business groups * Validate BI applications & storyboards * Validate data |  |  |  |  |  |  |
|  | 5.50 | Conduct Systems Testing   * Conduct test of each subsystem * Conduct tests of each workflow & subsystem dependencies * Conduct test of overall system |  |  |  |  |  |  |
| Implement |  |  |  |  |  |  |  |  |
|  | 6.10 | Conduct User Training   * Conduct testing by business groups or business functions |  |  |  |  |  |  |
|  | 6.20 | BI & DI Operations Verified   * Validate by each subsystem |  |  |  |  |  |  |
|  | 6.30 | BI Applications Access & Verified   * Verify by business groups or business functions and by business applications |  |  |  |  |  |  |
| Deployment |  |  |  |  |  |  |  |  |
|  | 7.10 | Test & Verify BI & DI Production Monitoring & Controls   * Test by each subsystem |  |  |  |  |  |  |
|  | 7.20 | Conduct BI Roll-Out   * Deploy by business group, geography or whatever breakdown agreed upon |  |  |  |  |  |  |
|  | 7.30 | BI Project Completed |  |  |  |  |  |  |

## Project Assumptions

|  |  |
| --- | --- |
|  | Provide a brief description of the assumptions that were made in project planning. These assumptions may include business conditions, technical capabilities, resource availability, resource skills or deployment conditions. |

# Approvals

|  |  |
| --- | --- |
|  | It is a best practice to obtain sign-off approval of each project milestone. An organization’s policies and culture will dictate who the approvers will be, but typically the sponsors and key stakeholders are included. |

|  |  |  |
| --- | --- | --- |
| Title | Name | Approval  Date |
|  |  |  |
|  |  |  |
|  |  |  |
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|  |  |  |

# Appendix: Background Materials

|  |  |
| --- | --- |
|  | This section includes all background or supporting materials for the BI Milestone Plan. These materials may include:   * The milestone plan assumptions such as resources, funding, etc. * A more detailed project plan, if defined |

## Authors and contributors

|  |  |
| --- | --- |
|  | List all the people involved in obtaining and analyzing the requirements along with the authors of this deliverable. |