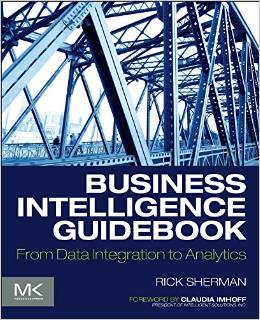
**Business Intelligence Guidebook**

**Templates**



**Chapter 2:**

**BI Roadmap Template**



[Company Name]

BI Roadmap

[Project Name]

Date: [Select Date]

Author(s):

Sponsor(s):

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|  |  |
| --- | --- |
|  | 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 RoadMap - Summary

|  |  |
| --- | --- |
|  | **BI Roadmap and a high-level BI Project Release Schedule are identical in the context of this document.** |

|  |  |
| --- | --- |
|  | The following is the BI Roadmap Highlights template used to summarize in one presentation slide or document table the key attributes of each proposed BI release.  The number of releases listed will be dependent on the scope – deliverables and timeframe – for each release along with the amount of planning that is performed. It is a best practice to plan, at least in a high-level context, for the next 1 to 2 years matching the business planning horizon.  The longer the planning horizon the more changes in your business, your data, the economy and other unknowns increase uncertainty, however, it is still best to create tentative release plans even if conditions will alter those plans. |

Table : BI Roadmap Highlights

| Project Release | N | N + 1 | N + 2 | N + 3 |
| --- | --- | --- | --- | --- |
| Timeframe |  |  |  |  |
| Key Deliverables |  |  |  |  |
| Business Sponsor(s) |  |  |  |  |
| Business Constituency |  |  |  |  |
| Business Processes |  |  |  |  |
| Business Applications |  |  |  |  |
| Data Subjects |  |  |  |  |
| Source Systems |  |  |  |  |
| Service Level Agreements (SLAs) |  |  |  |  |
| Applications Retired |  |  |  |  |
| Technology Required |  |  |  |  |
| Budget Allocation |  |  |  |  |
| Project Team (IT & Business) |  |  |  |  |
| Participating Resources  (outside of direct project team) |  |  |  |  |

|  |  |
| --- | --- |
|  | See page 35 of the BI Guidebook for more on roadmaps. The tips below will help you fill out the BI Roadmap table:   * **Timeframe:** List the completion milestones for BI releases or projects. Typically listed by quarter or month with year. Focus of the highlights table is major releases rather than ongoing updates or maintenance. * **Key Deliverables:** List key analytical functionality or BI applications, such as dashboards or reports. Defer listing specific dashboards, reports or analysis to more detailed plans. An example of a key deliverable would be “sales pipeline analysis” in this table and then listing specific reports later. * **Business Sponsors**: List business groups and business executives funding the project. List the IT executive, such as the CIO, if IT is sponsoring or co-sponsoring the project. * **Business Constituency:** List the business groups that will use the resulting deliverables. They are BI application’s information consumers and key stakeholders. * B**usiness Processes.**  List the business process impacted by the release and whether the BI deliverables will be embedded in those processes. Examples: marketing campaign or budgeting processes. * **Business Applications:** List the business applications being used with or impacted by the BI deliverables, e.g., data feeds or extracts. * **Data Subjects:** List the data subjects needed for the BI deliverables. These include data subjects used as data sources or for analytics. Examples: customer, employee and product. Note: The granularity may be more detailed based on the project’s scope. * **Source Systems:** List the source systems required for each release. Often this highlights table will only list the source systems that are being added in a release and list all the source systems being used by the BI applications in a more detailed listing. * **Service Level Agreements (SLAs).** List the expectations established for such factors as data currency, data load times (this occurs when there are data loading time periods that are agreed upon with source applications), query performance (typically associated with specific data sets or dashboards), length of time data is available, etc. * **Applications Retired,** if applicable, along with retirement criteria and dependencies * **Technology Required** including hardware, software, cloud services along with corresponding licenses and versions * **Budget Allocation**, if applicable, with capital, labor and other expenses * **Project Team (IT and Business)** * **Participating Resources** outside of the full-time BI project team |

# BI release: [Release Name]

|  |  |
| --- | --- |
|  | This section provides more details for a BI release. Clone this section for each BI release. Although fewer details will be known as planned releases get further in the future, it is a best practice to fill out as much data as is available. |

## Timeframe

|  |  |
| --- | --- |
|  | List the start and finish dates for the release. |

## Key Deliverables

|  |  |
| --- | --- |
|  | List and briefly describe the key data, sourcing and technology deliverables needed to enable the business deliverables listed in the highlights table. The deliverable will be grouped by the following categories. |

### Business Deliverables

### Data Deliverables

### Sourcing Deliverables

### Technology Deliverables

## Sponsors

|  |  |
| --- | --- |
|  | List the business sponsors by business executive (name and title) along with the business groups they represent. List the IT executive, such as the CIO, if applicable. |

### Business Executives(s)

### Business Group(s)

### IT Executive (if applies)

## Business Constituency

|  |  |
| --- | --- |
|  | List the business groups and business roles, such as financial analyst or HR compensation analyst, who will be consumers of the BI deliverables. |

## Business Processes

|  |  |
| --- | --- |
|  | List the business processes that will be involved in or impacted by the BI deliverables. The BI applications may be used in conjunction with or embedded in those business processes. |

## Business Applications

|  |  |
| --- | --- |
|  | List the business applications that will be involved in or impacted by the BI deliverables. The business application may be used in conjunction with, exchange data with and/or be a data source for the BI deliverables. |

## Data Subjects

|  |  |
| --- | --- |
|  | List and briefly describe the business data subjects that the BI deliverables will be involved with. |

## Source Systems

|  |  |
| --- | --- |
|  | This section includes both the new data sources added in this release along with any existing data sources that will be used in the BI application deliverables.  *Data sources should include:*   * *Business Applications – also list application modules if applicable* * *External Sources* * *Other Sources* |

## Service Level Agreements (SLAs)

|  |  |
| --- | --- |
|  | This section helps to set expectations for all parties, especially for the BI application consumers and developers, is essential for success. The list provided are key attributes that need to be agreed upon, but there may be other specific SLAs for your organization that will need to be added. |

### Query Performance

### Analytical Access

### Data Distribution

### Source Systems’ Access

### Data Quality

### Data History and Retention

## Applications Retired

|  |  |
| --- | --- |
|  | List and briefly describe applications that will be retired by this project. Also list key metrics that will be requirements to retire these applications. Categorize the applications by IT supported application and data shadow systems supported by the business. Chapter 16 of the BI Guidebook covers data shadow systems. |

### IT Applications

### Data Shadow Systems

## Technology Required

|  |  |
| --- | --- |
|  | List and briefly describe the technology – hardware, infrastructure, software or service – required by this project. Categorize the technology by whether it exists (and its use will be expanded) or if it is being acquired and implemented. |

### Existing

### New

## Budget and Staffing

|  |  |
| --- | --- |
|  | List and briefly describe the project budget and staffing levels. The budget presented will be summarized. Typically, a finance group will assist in developing a detailed financial budget deliverable.  The staffing levels presented will be summarized and described in more details below. |

### Budget

* Capital
* Labor
  + Internal Labor
  + External Labor – Consulting and Services
* Expenses, not Labor

### Staffing

* (Direct) Project Team
  + Internal Labor
  + External Labor – Consulting and Services
* Non-Direct Project Resources
  + Internal Labor
  + External Labor – Consulting and Services
* Business participants
  + Internal Labor
  + External Labor – Consulting and Services

## Project Team (IT and Business)

|  |  |
| --- | --- |
|  | List and briefly describe the project team’s resources and roles. This section sometimes is shifted to the appendix. |

### Business Project Leader

### IT Project Leader

### Other Sub-Team Leaders

### Number of Resources (Full Time Equivalents or FTEs)

* Internal
* External

## Participating Resources

|  |  |
| --- | --- |
|  | List and briefly describe people outside of the project team that need to participate in the project. Include their roles. This section can be shifted to the appendix. |

### Business

### IT

### External

# Approvals

|  |  |
| --- | --- |
|  | It is a best practice to obtain sign-off approval of the BI Roadmap, typically by the sponsors and key stakeholders. An organization’s policies and culture will dictate who should approve it. See page 40 of the BI Guidebook. |

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

# Appendix

Table : BI Roadmap - Release Details

| Project Release | 1.0 | 2.0 | 3.0 | > 3.0 |
| --- | --- | --- | --- | --- |
| Timeframe |  |  |  |  |
| Key Deliverables |  |  |  |  |
| Business Sponsor(s)   * Business Executives(s) * Business Group(s) * IT Executive (if applies) |  |  |  |  |
| Business Constituency |  |  |  |  |
| Business Processes   * Used with * Embedded in |  |  |  |  |
| Business Applications   * Used with * Exchange data with |  |  |  |  |
| Data Subjects |  |  |  |  |
| Source Systems   * New Sources * Existing Sources   Includes:   * Business Applications * External Sources * Other Sources |  |  |  |  |
| SLAs   * Query Performance * Analytical Access * Data Distribution * Source Systems’ Access * Data Quality * Data History & Retention * Other |  |  |  |  |
| Applications Retired   * IT Applications * Data Shadow Systems |  |  |  |  |
| Technology Required   * Existing * New |  |  |  |  |
| Budget Allocation   * Capital * Labor   + Internal   + External * Expenses, not Labor |  |  |  |  |
| Project Team (IT & Business)   * Business Project Leader * IT Project Leader * Other Sub-Team Leaders * # Resources (FTEs)   + Internal   + External |  |  |  |  |
| Participating Resources  (outside of direct project team)   * Business * IT * External |  |  |  |  |