



Building Your BI House With the Right Set of Plans

Michael Bitterman
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Your Organization Needs You To Deliver Automated Intelligence More Than Even!

- “Fact Based” decision making is a *critical success factor*
 - It has never been more important to be able to make decisions quickly
 - The sources and amount of data available has never been greater and will continue to expand and grow
- Decisions are being made, even if not based on all the available *information*
 - Your organization isn't going to wait for IT to deliver the answers

Review of the 3 Top BI Success Issues

- Organizations implement BI without a solid plan, cogent strategy and business focused value proposition or ROI
 - Vendors oversell – the “tool” is not the solution
 - Buyers want to “believe” – we have all this data so there must be information we can use
 - IT over promises – we can get it all done for you
- The initial implementation is too complex, takes too long and costs more than promised
- Since the 70’s the world has changed, the user has changed and expectations have changed – most BI tools have not!

BI is an Important Tool – But Things Have Changed Since the '70s

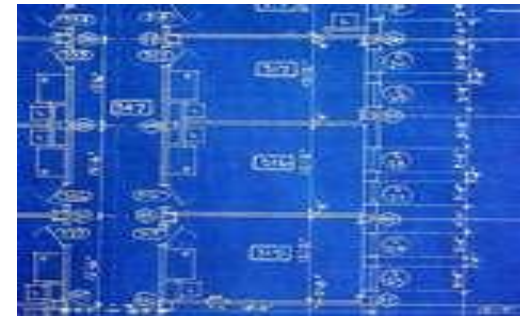
- The BI user has changed (silos of analysis)
 - Business Analyst (not too long out of school)
 - Sales and Marketing Manager
 - Warehouse and Inventory Manager
 - Production and Shop Floor Manager
- User expectations have changed dramatically
 - High degree of visualization
 - Ease of use
 - Need answers in minutes rather than weeks or months
 - Associative thinking replaces linear programming

"BI should think like I think!"

What Will Success Look Like

- BI application deployment will be fast and flexible
- A business focused value proposition will produce a rapid(< 6 months) ROI
- BI will answer the “questions” your users are asking today as well as the ones they haven’t thought of yet = high end-user adoption
- Transactional level data easily accessed
- Large volumes of data able to be handled
- Visualization of data will be in synch with user expectations

You Need a “Plan” and a “Strategy”



Why Build an Enterprise Strategy?

1. Helps you to think through the entire process
2. Helps you manage your deployment & resources
3. Helps you secure commitment and build credibility
4. Helps you align with corporate standards and architecture

How do we get started?

Plan a 3-day strategic retreat to Palm Springs to “think outside the box”

... **or** ...,

Start from an Enterprise Framework that allows you to incrementally build your strategy, taking advantage of other’s experience, samples, best practices and scenarios to draw from

But, before we get started...

It's going to be harder than you think!

1. Your previous experience has already told you this
2. The vendor made it sound a lot easier than it will be
3. You probably aren't a mind reader
4. You're always going to be trying to hit a moving target

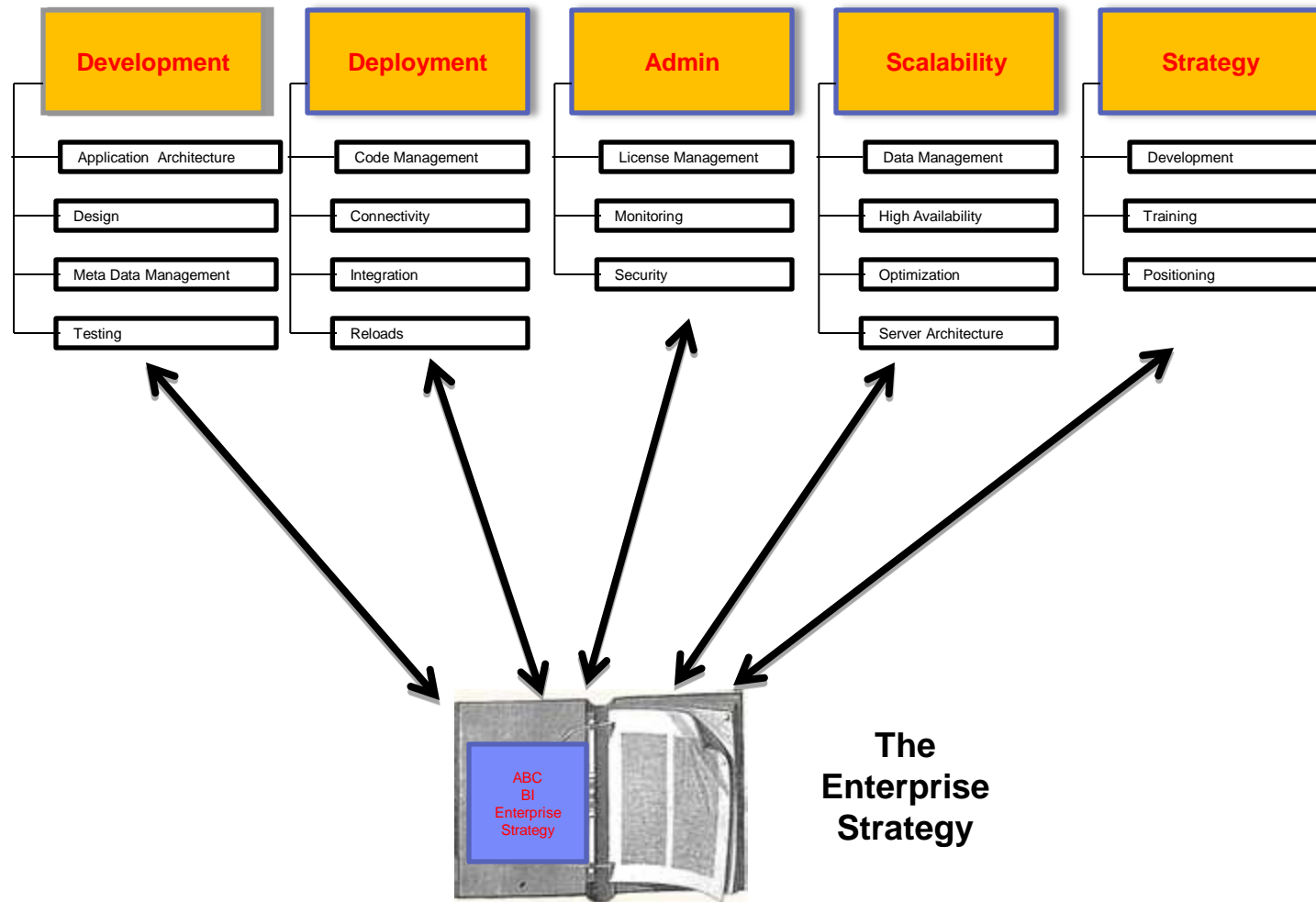
What do we do about these issues?

First, we recognize that they exist and need to plan for them or around them

Second, in the words of Otto von Bismarck:

“Only a fool learns from his own mistakes, the wise man learns from the mistakes of others!”

Integrate the Strategy with a Framework



Why Adopt a Framework?

1. **Organization** of Enterprise Materials and Strategies
 - Where are the answers to your stakeholders questions about your BI application deployment?
2. **Presentation** of Enterprise Capabilities and Successes
 - What is the current state of BI and what is the future state (3 – 6 months)?
 - What has been done with BI so far, and what can the organization do in the future?
3. **Demonstration** of Enterprise Readiness
 - How will you scale the BI application to an enterprise level?

Building Your BI Application Strategy

1) Start with templates:

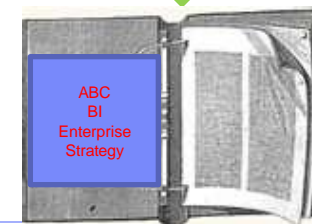
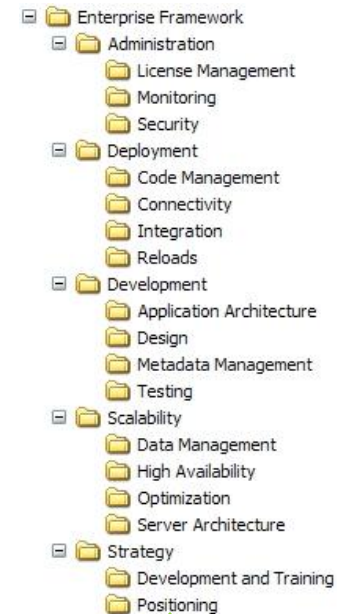
- Enterprise Framework
- BI Applications Strategy Document

2) Add documents to framework and customize content for your deployment and plans

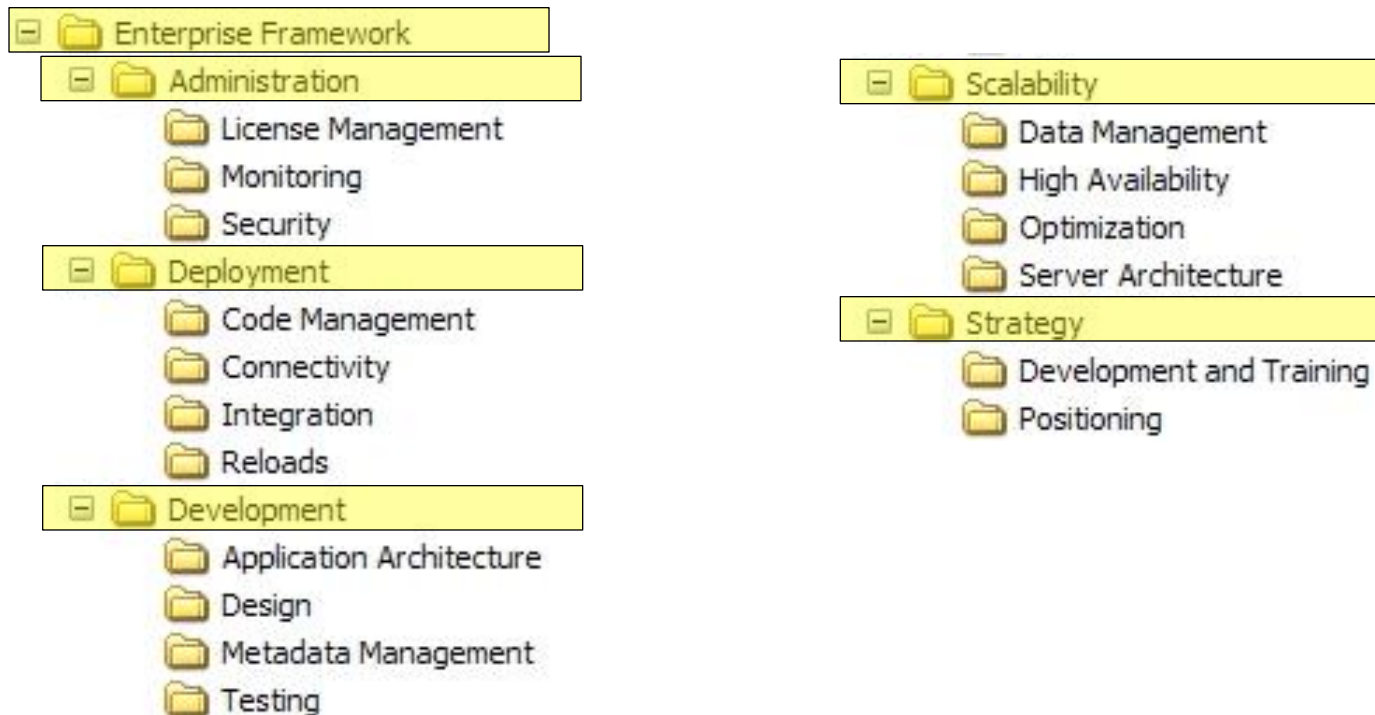
3) Add current state/future state and links to Strategy Document to tie them together

4) Make Framework and Strategy documentation an integral part of your BI application plan and processes

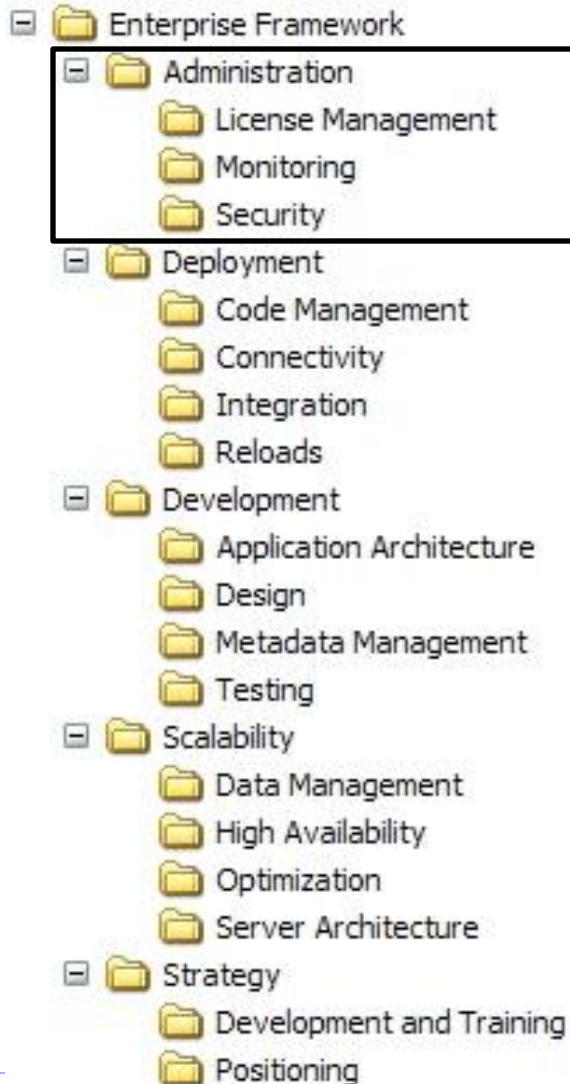
Enterprise Framework



The Enterprise Framework Components



The Enterprise Framework Components - Administration



License Management:

- License utilization summary
- License oversight and procedures



Monitoring:

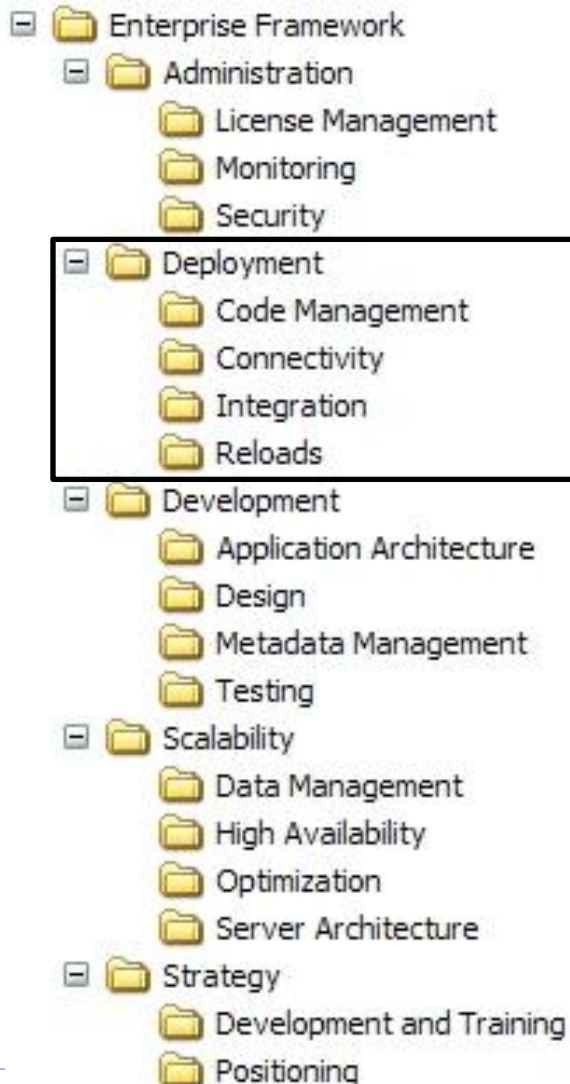
- Monitoring of BI best practices
- Ops Monitor application
- Monitoring procedures/checklist



Security:

- Enterprise security overview
- Security documentation
- Security audit procedures

The Enterprise Framework Components - Deployment



Code Management:

- Development workflows
- Deployment processes
- Production checklists



Connectivity:

- Data connectors
- Connection scripts & standards



Integration:

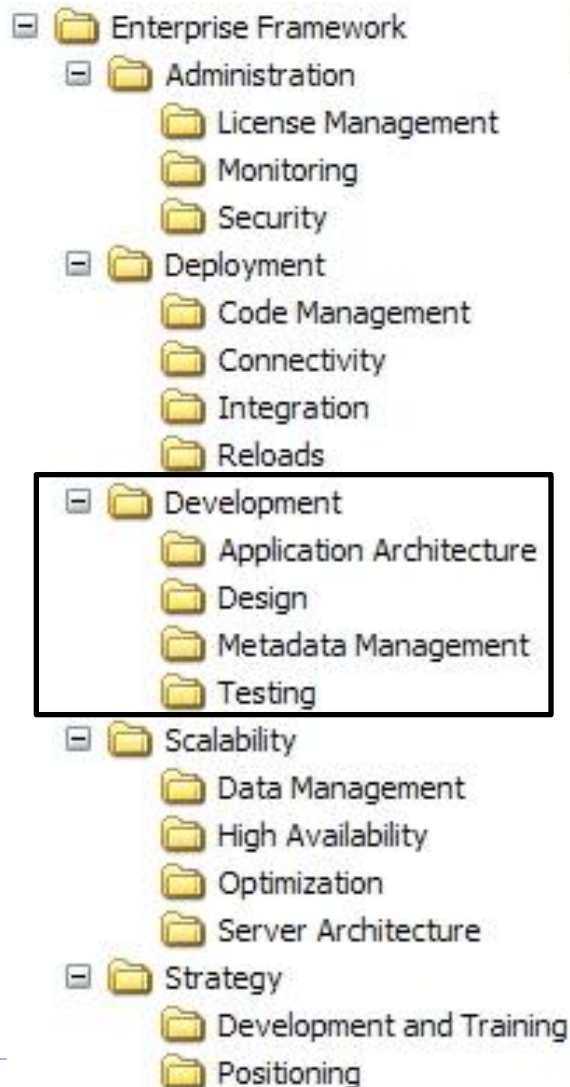
- Portal integration
- Access point usage and policies



Reloads:

- Job and task standards
- Reload architecture

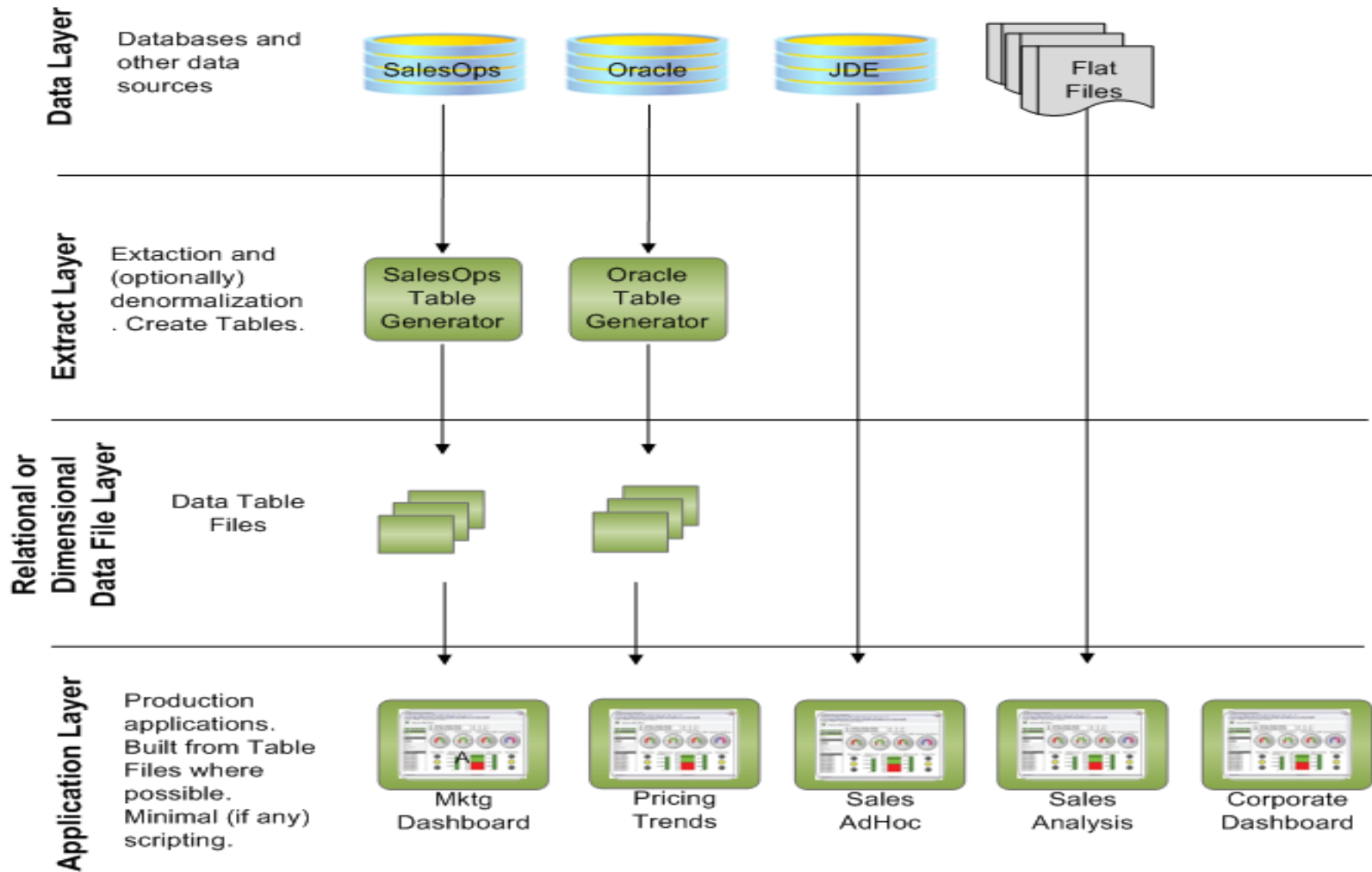
The Enterprise Framework Components - Development



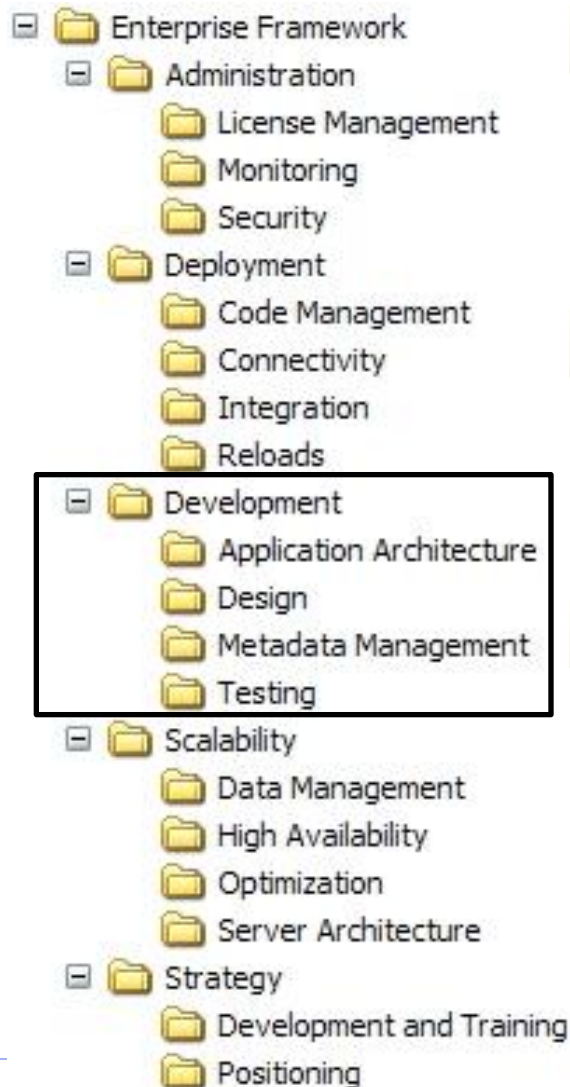
Application Architecture:

- Architecture diagrams
- Segmentation and chaining best practices
- Data file assemblies, overview and use

Typical BI Application Architecture



The Enterprise Framework Components - Development



Application Architecture:

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Design:

- Design best practices
- Corporate branding themes and templates
- Requirements/design templates



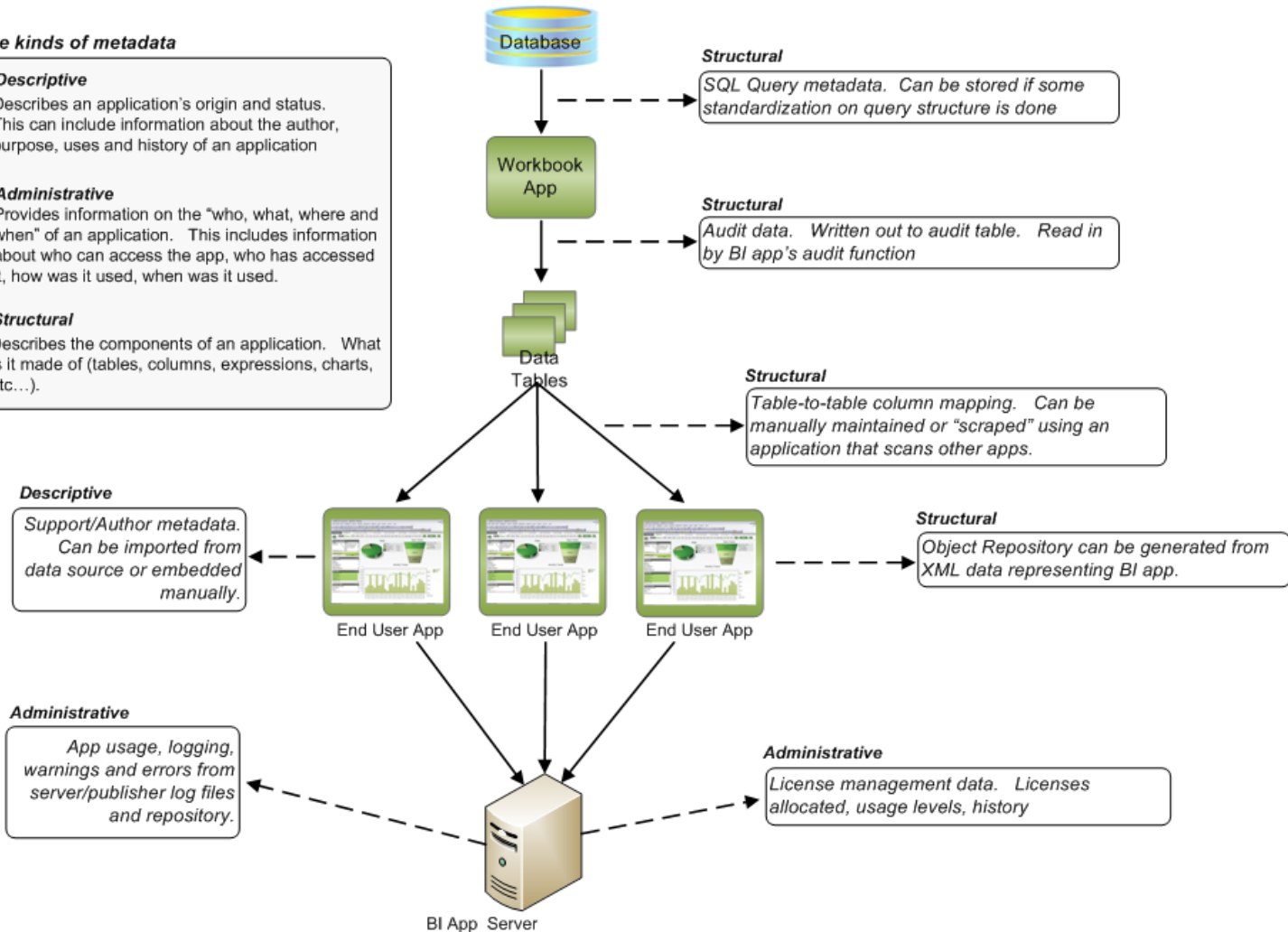
Metadata Management:

- Metadata best practices/demos
- Metadata architecture

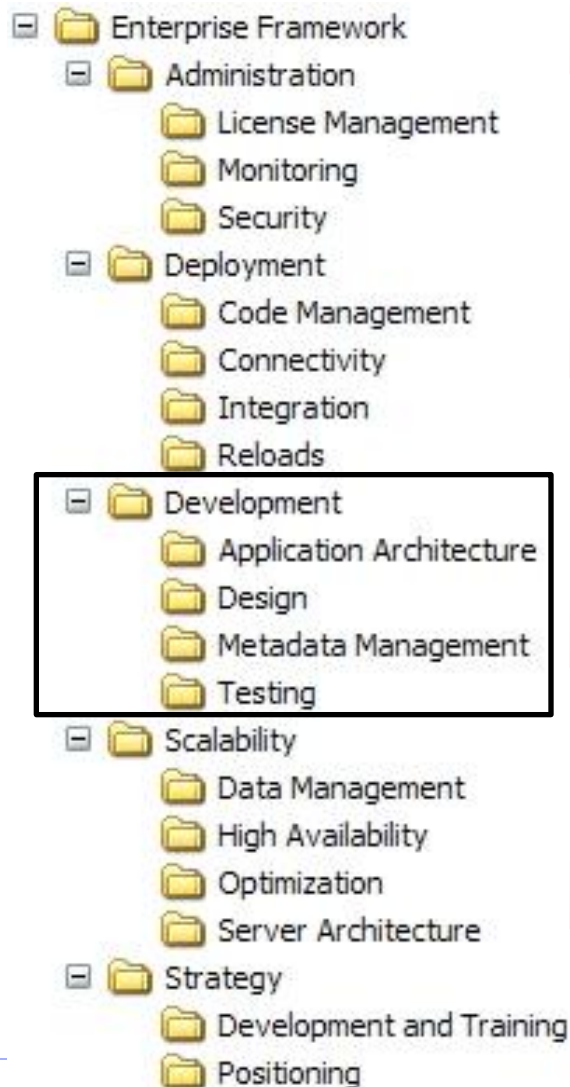
Three Types of Metadata

Three kinds of metadata

- Descriptive**
 Describes an application's origin and status. This can include information about the author, purpose, uses and history of an application
- Administrative**
 Provides information on the "who, what, where and when" of an application. This includes information about who can access the app, who has accessed it, how was it used, when was it used.
- Structural**
 Describes the components of an application. What is it made of (tables, columns, expressions, charts, etc...).



The Enterprise Framework Components - Development



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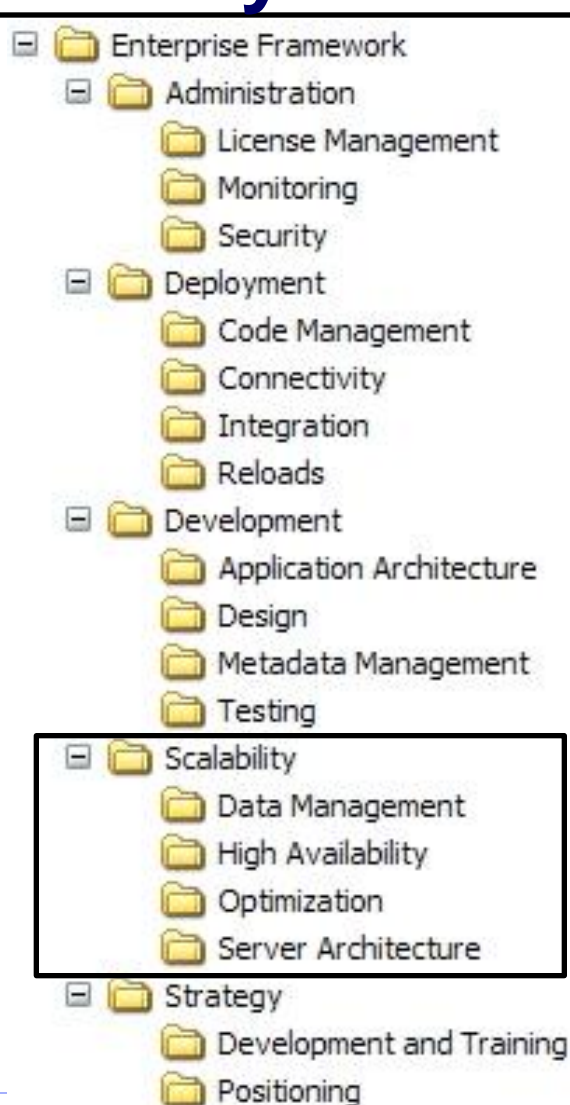
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- Metadata architecture



Testing:

- Testing best practices
- Testing tools and demos
- Test plans/results templates

The Enterprise Framework Components - Scalability



Data Management:

- Data model best practices
- Data architecture diagrams
- File capacity plans/estimates



High Availability:

- Server clustering overview
- Backup/recovery procedures



Optimization:

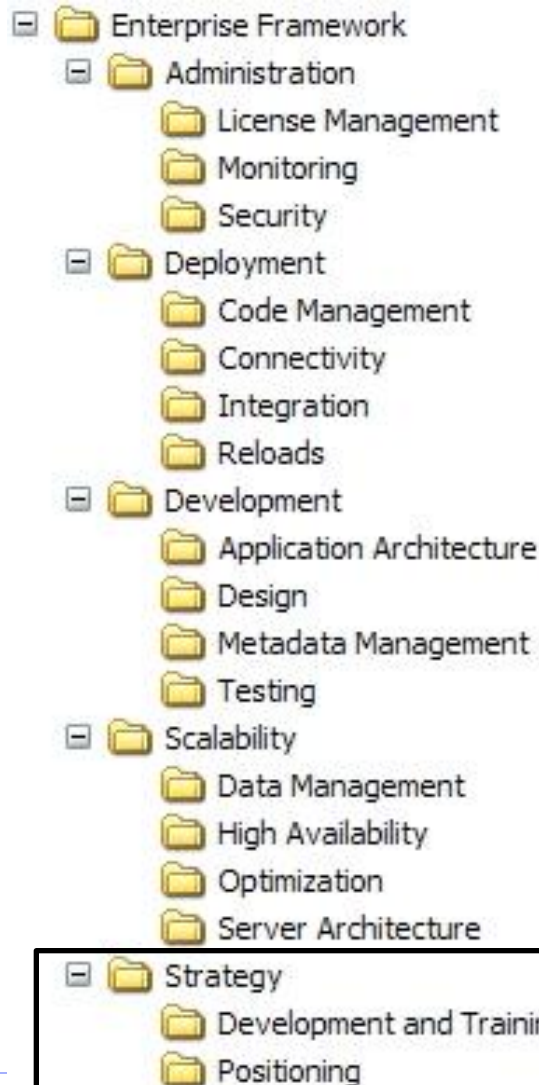
- BI application optimization best practices
- Performance testing tools/techniques
- Performance benchmarks



Server Architecture:

- Server architecture diagrams
- BI application architecture white papers
- Server sizing plans/estimates

The Enterprise Framework Components - Strategy



Development :

- Development team roles
- Center of Excellence/competency
- Documents



Training:

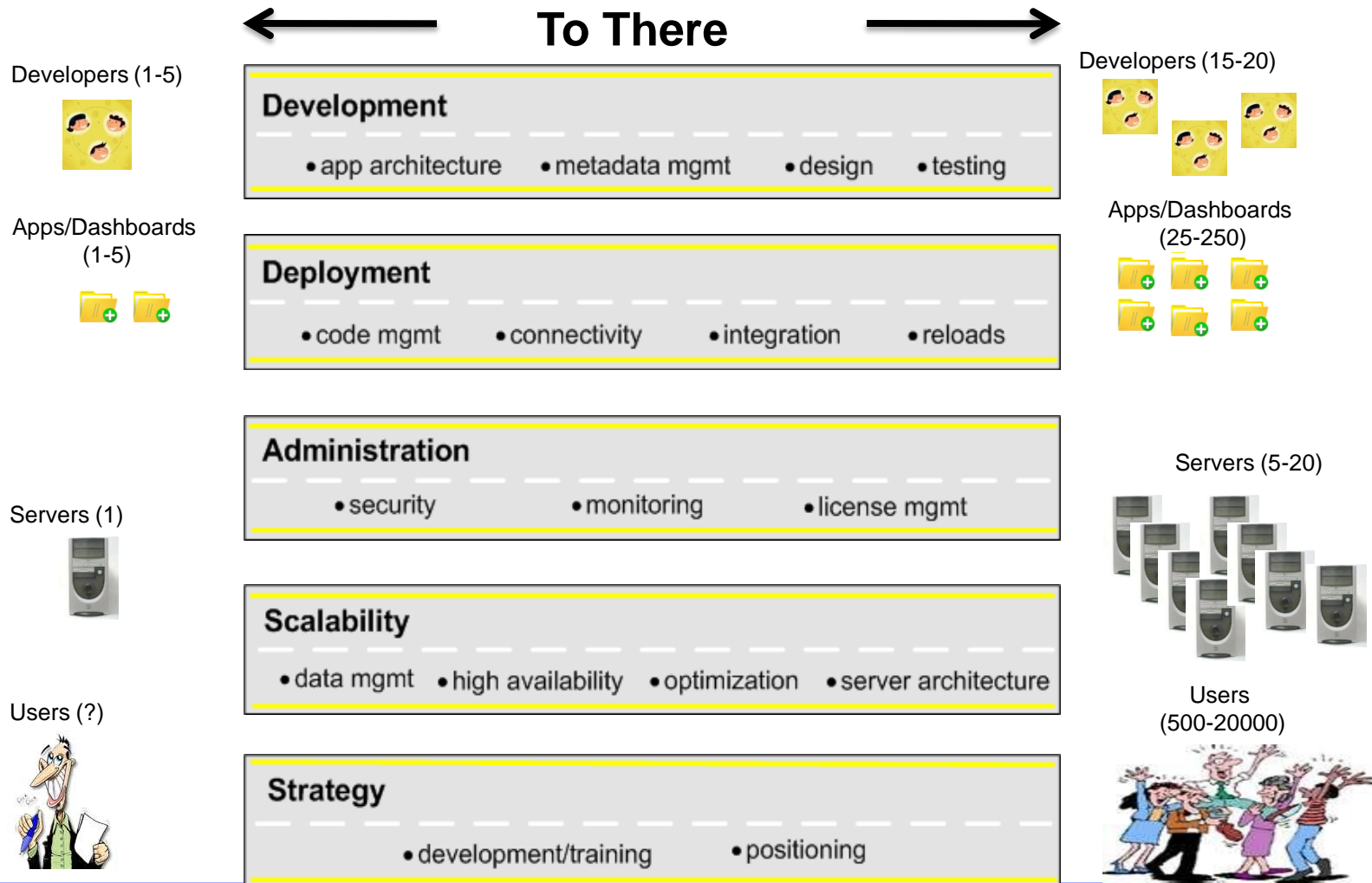
- BI application training plan/policies



Positioning:

- QlikView positioning diagrams
- BI pattern matching – QlikView
- QlikView roadmap

In Summary: How Will I Get From Here



The Bottom Line - What Needs to Happen

- A cogent, concise and value based plan and strategy need to be built and put in place
 - Create the *Enterprise Framework*
 - Find, collect, build your strategy documents
 - Fill in the “as is” state and determine the “to be” state you want to get to.
- Strive to start (or re-start) with a low risk, low cost and fast “demonstration” application (< 90 days).
 - Rapid and demonstrable ROI
 - Show quick, high business value
 - Think about using a SaaS model

To receive additional materials on

***Building Your
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contact ITPMG at:

**by email:
information@itpmg.com**

**or phone:
+1 843.377.8228**