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TDWI Business Intelligence Program Management

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Module 1

Overview of BI Programs

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Program vs. Project

Different Management Needs

| PROJECT MANAGEMENT | PROGRAM MANAGEMENT |
|---|--|
| finite beginning and end | continuous without defined end point |
| defined pieces of work | multiple, simultaneous, overlapping projects |
| specified budget and timeline | manage budgets and schedules |
| build and implement something | enable services and capabilities |
| dependencies with related projects | encompasses multiple related projects |
| manage a team | manage across multiple organizations |
| patterned and repeatable (methodological) | dynamic and responsive (heuristic) |
| narrow and deep (latitudinal) | broad and shallow (longitudinal) |
| concerned with resource allocation | concerned with resource availability |
| focus on tasks and schedules | focus on communications and expectations |
| lead a team | shape and guide a community |
| implement or apply specific technologies | guide technology evolution |
| support and enable business processes | enable and improve business processes |
| turnover to operations | inclusive of operations |

Program vs. Project

Different Management Needs

WHAT IS BI PROGRAM MANAGEMENT?

Program management encompasses the disciplines and activities necessary to coordinate multiple simultaneous, overlapping, and interdependent efforts. Program management addresses both project efforts such as building a data mart or deploying an analytic tool, and ongoing efforts such as data warehouse operations or training and support. A BI program includes a governance structure and guiding principles, delineated architecture and methodologies, established standards, quality expectations, and measures of cost and value. The program's primary focus is on the strategic, long-term goals – building an information infrastructure that will serve current business needs and evolve with the changing needs.

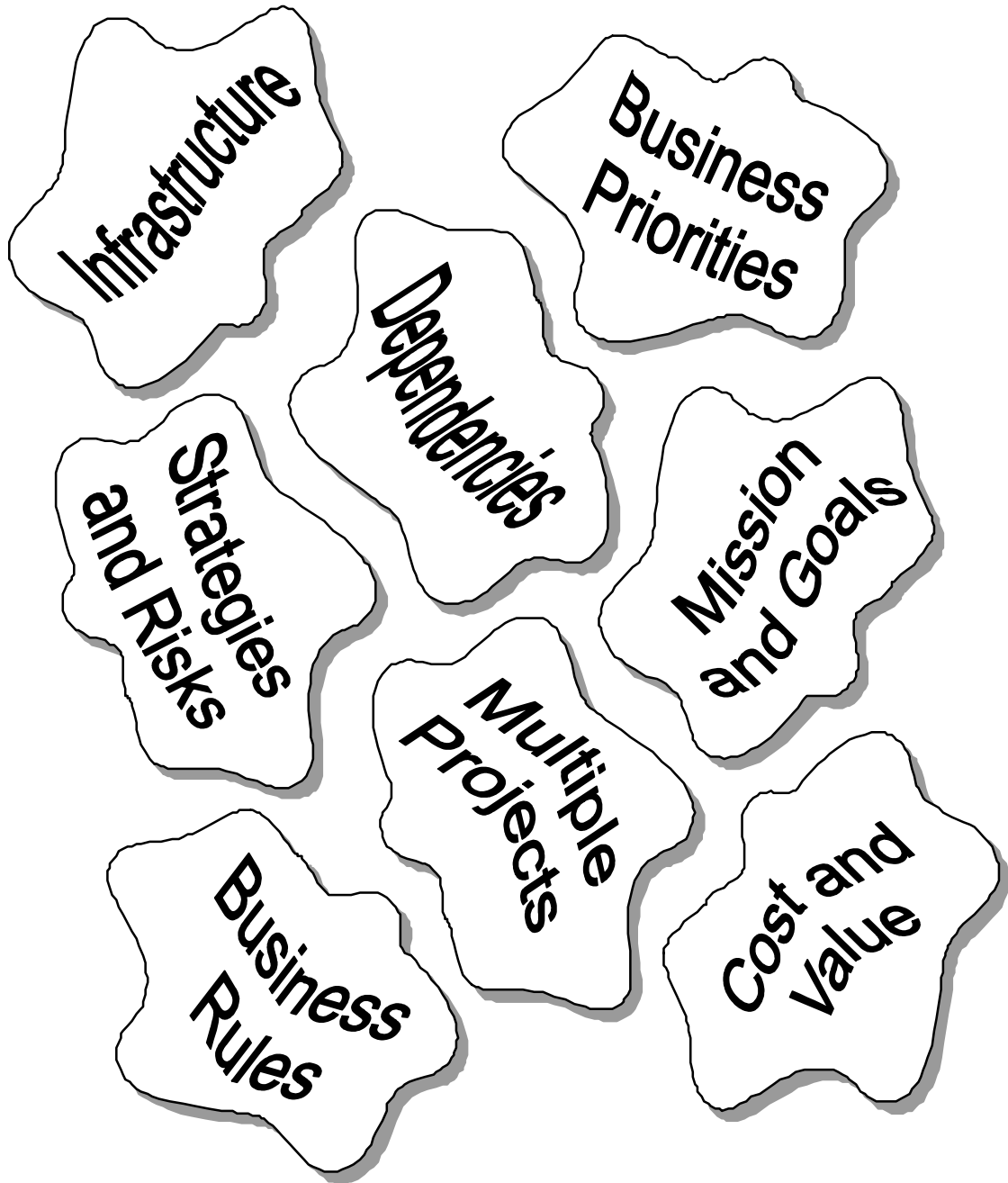
TIME-BOUNDED vs. CONTINUOUS

A BI program is a large and complex undertaking with a broad strategic perspective and long-term focus. It is the structure that ensures cohesion among multiple projects. The program has long duration (for the life of BI within the enterprise) and measures success by business impact and ROI.

BI/DW projects are one-time, time-boxed activities with a specific business and/or technical objectives. Projects have start and finish dates, and are chartered to produce explicit deliverables. Projects are relatively short in duration, and measure success by on-time, within-budget delivery of products.

Program Management Roles and Responsibilities

Aligning People, Projects, Processes, and Technology



Program Management Roles and Responsibilities

Aligning People, Projects, Processes, and Technology

ALIGNING PEOPLE, PROJECTS, AND PRIORITIES The key to successful program management is alignment of people, projects, and priorities to do the best possible job of fulfilling the program’s mission, enabling business strategies and tactics, and creating business value. Program management must attend to each of the following factors:

| | |
|---------------------|--|
| Business Priorities | Aligned with business priorities and quickly adapting to changing priorities |
| Mission & Goals | Program mission & goals are stated and designed to support business mission & goals. |
| Strategies & Risks | Risks are known and mitigated by active business participation & incremental projects. |
| Multiple Projects | BI is deployed through many small projects, each with specific, defined deliverables. |
| Dependencies | Relationships among projects, roles, and teams are known and actively managed. |
| Cost & Value | Cost and value are regularly measured and program ROI is published or communicated. |
| Business Rules | Business rules are captured, documented, & communicated. Rule changes are tracked. |
| Infrastructure | Scalable technical and non-technical infrastructure is actively managed and evolved. |

MEETING BUSINESS NEEDS Meeting business needs requires the right combination of aligning people, projects, and priorities. While all of these components factor into meeting business needs, alignment begins with a partnership between the BI organization and the business. Through this partnership, the program mission and goals are defined and agreed upon, strategies and risks are outlined, and priorities are confirmed. Successful BI programs begin with alignment, agreement, and clear context for the governance of the program. Clear context removes ambiguity and ensures expectations are managed to ensure business needs are addressed. Lastly, success measures should be defined to measure track and measure value.

CREATING BUSINESS VALUE Creating business value is the result of successful BI program management. Business rules are outlined clearly and change is actively managed. Multiple efforts are planned with clear dependencies and the BI infrastructure is in place to ensure stable operations. As all these components come together, costs related to the program need to be measured and controlled. The effective management of these components ultimately delivers business value. Business value should be tracked via the success metrics outlined as part of the program.



Module 2

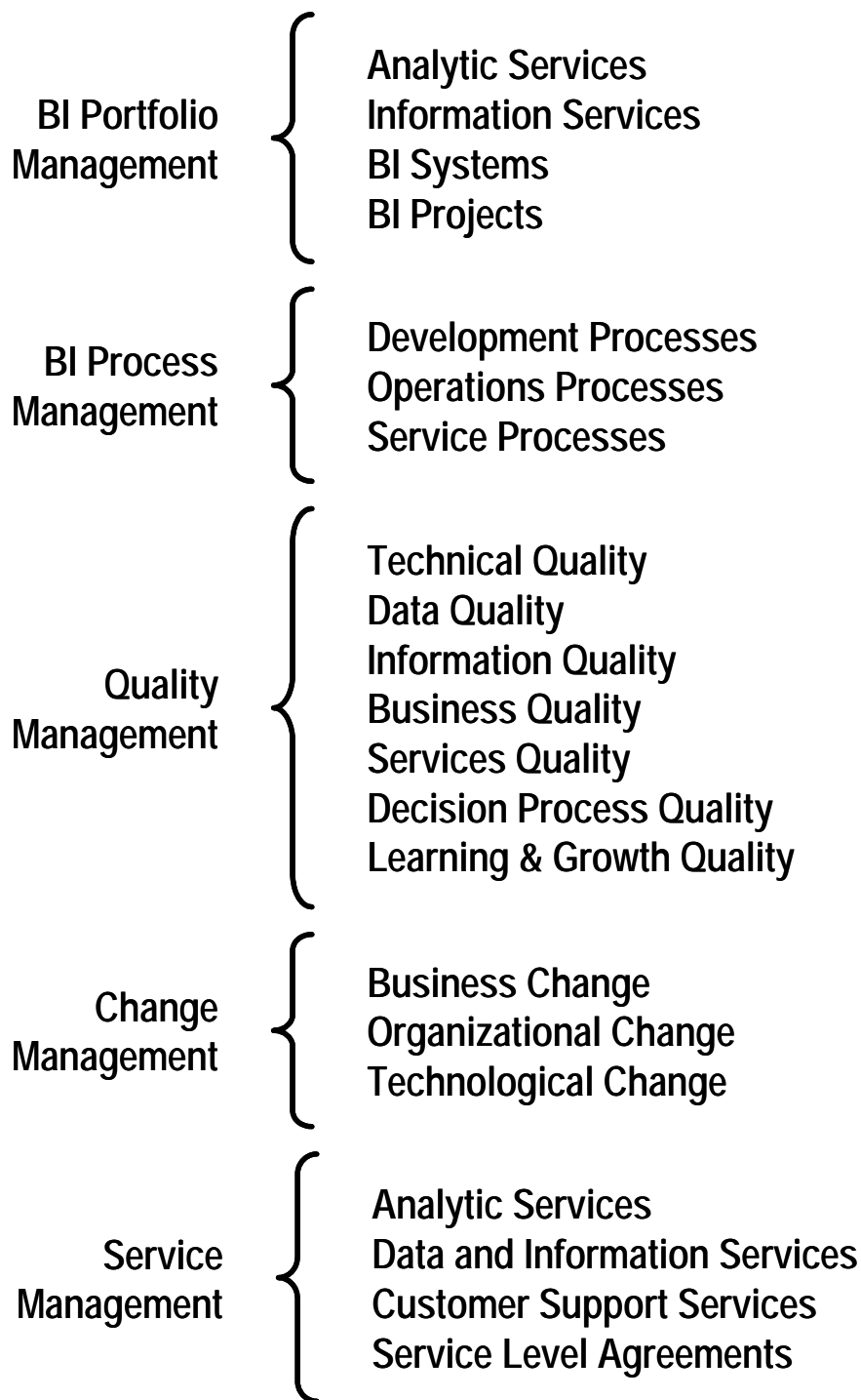
Activities of BI Program Management

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Scope of Responsibilities

BI Program Management Overview



Scope of Responsibilities

BI Program Management Overview

PROGRAM MANAGEMENT COMPONENTS

Program management focuses on strategic, long-term goals to creating an information infrastructure that supports current needs and provides flexibility for future needs. To create and support the infrastructure, several program management functions are necessary:

BI Portfolio Management – The BI portfolio contains services, systems, and projects. Services include both analytic services such as data mining and OLAP capabilities and information services such as reporting or data downloads. The portfolio also includes the management of current BI systems such as data integration systems such as the ETL or reporting systems delivered via a BI tool. Lastly, BI projects are included as part of the portfolio. It is typical to have one or more BI projects as part of a portfolio possibly delivered as part of a release for a BI system.

BI Process Management – Process management ensures the efficient delivery of projects, the smooth operation of the BI environment, and satisfied end users. A methodology for development is required for the delivery of new functionality and to support project delivery. The operation of the BI system environment demands support to ensure tasks such as the data refresh or database maintenance are completed in a timely manner. Processes must exist to ensure that end users gain value through BI.

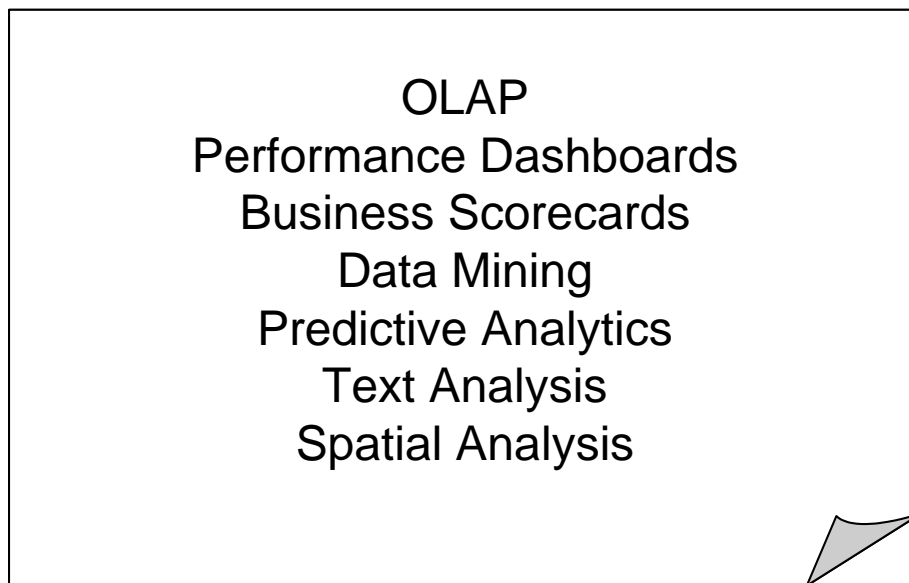
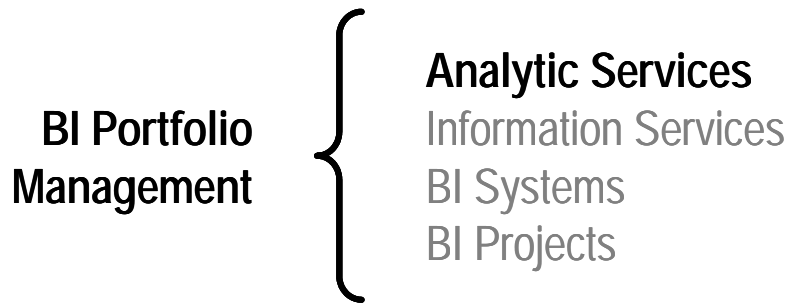
Quality Management – Quality management covers many aspects of the BI program. To deliver value from BI quality management needs to be applied to areas such as technology, data, information, business, services, decisions, and the growth of the BI environment. Quality management spans from ensuring the right technology is in place to ensuring the user community is growing from the use of BI.

Change Management – With the continuous change inherent to a BI environment change management is essential to manage impacts of change and ensure smooth operations. Changes occur in all of business, organizations, and technology.

Service Management – Many different services are necessary to enable BI consumers to gain value from BI. Ideally, services are tailored to fit varied skill and experience levels and can cover training, system support, or information delivery services. A typical BI program includes the management of a catalog of BI services.

BI Portfolio Management

Analytic Services



BI Portfolio Management

Analytic Services

ANALYTIC SERVICES PORTFOLIO

Analytic services provide the ability to perform quick analysis with information often by delivering information in the context of a business function or process. Services such as performance dashboards provide the ability to quickly assess key performance indicators. Another example of an analytic service is spatial analysis, which enables the analysis of information by geography. Analytic services focus on the packaging of information in a specific format and context to enable easy analysis and provide the ability to apply statistical models to special data types or data sets.

MANAGING ANALYTIC SERVICES

As part of the BI portfolio, analytic services contain a suite of capabilities to support easy or in-depth analysis of information. These services are necessary to facilitate BI. Depending on the maturity of the BI program and the needs of BI consumers, the services offered may range from simple to more complex. Some examples of analytic services include:

OLAP –Online Analytical Processing (OLAP) provides the capability to view data dimensionally. Slicing and dicing the data different ways and drilling down into the detail supports the analysis of trends and can help identify the detail behind trends.

Performance Dashboards/ Business Scorecards – Graphical and tabular representation of business measures and metrics that quantify business activity in a manner to quickly determine performance or the achieving of targets.

Data Mining – Data mining is the process of analyzing large volumes of data for patterns or associations. A retail example of data mining is the ability to identify specific buying patterns through exploration of customer activity.

Predictive Analysis – Predictive analysis is a technique used to forecast behavior or predict events likely to occur.

Text Analysis – Text analysis involves the use of semantics and statistical techniques to identify relevant content from text data.

Spatial Analysis – Spatial analysis involves the application of quantitative techniques to behavior or characteristics of a location.



Module 3

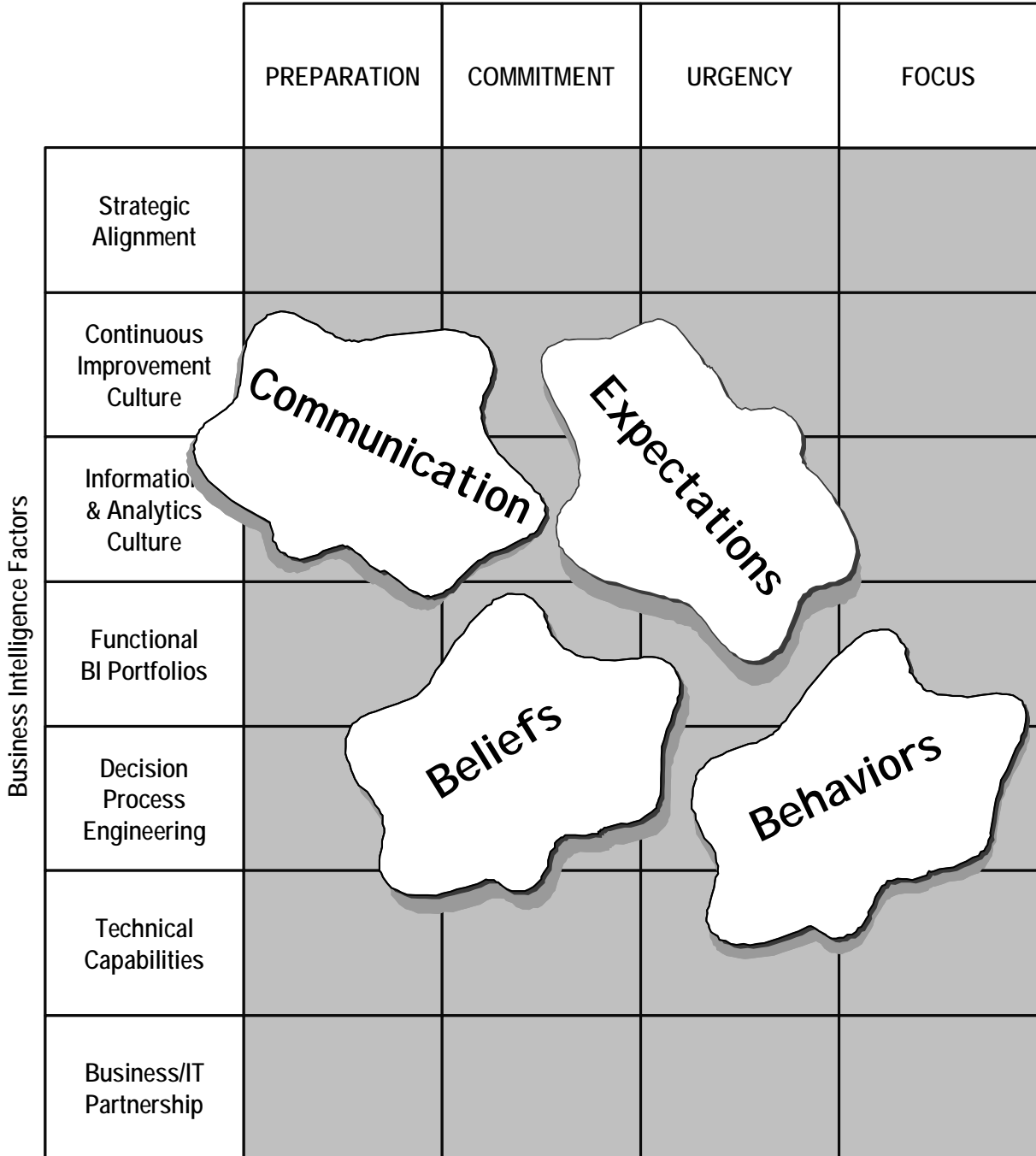
Assessment of BI Programs

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Principles of BI Assessment

The Dimensions of Assessment



BI Assessment Factors adapted from The BI Pathway®, Decision Path Consulting

Principles of BI Assessment

The Dimensions of Assessment

THE BI DIMENSIONS When evaluating business intelligence the elements of readiness – preparation, commitment, urgency, and focus – are combined with proven success factors for business intelligence. BI success factors include:

Strategic Alignment – Matching of BI goals, activities, projects, processes and applications with the goals and strategies of the organization.

Continuous Improvement Culture – A business environment that applies goal-setting and measurement to evaluate business performance and effectiveness of actions, continuously seeking higher levels of performance.

Information and Analytics Culture – A business environment and corresponding IT infrastructure where information services and applied business metrics are seamlessly integrated into the strategic, functional, and operational processes of the business.

Functional BI Portfolios – Managed collections of business information and analytics for each major function of the business, all of which are cohesive with and supportive of enterprise-level information and analytics.

Decision Process Engineering – A disciplined, rigorous, structured and measured approach to high-quality, well-informed decision-making processes.

Technical Capabilities – Technical competency throughout the organization, in both IT and business, to meet responsibilities to capture essential data, deliver information, measure the business, and apply information and analytics to decision processes.

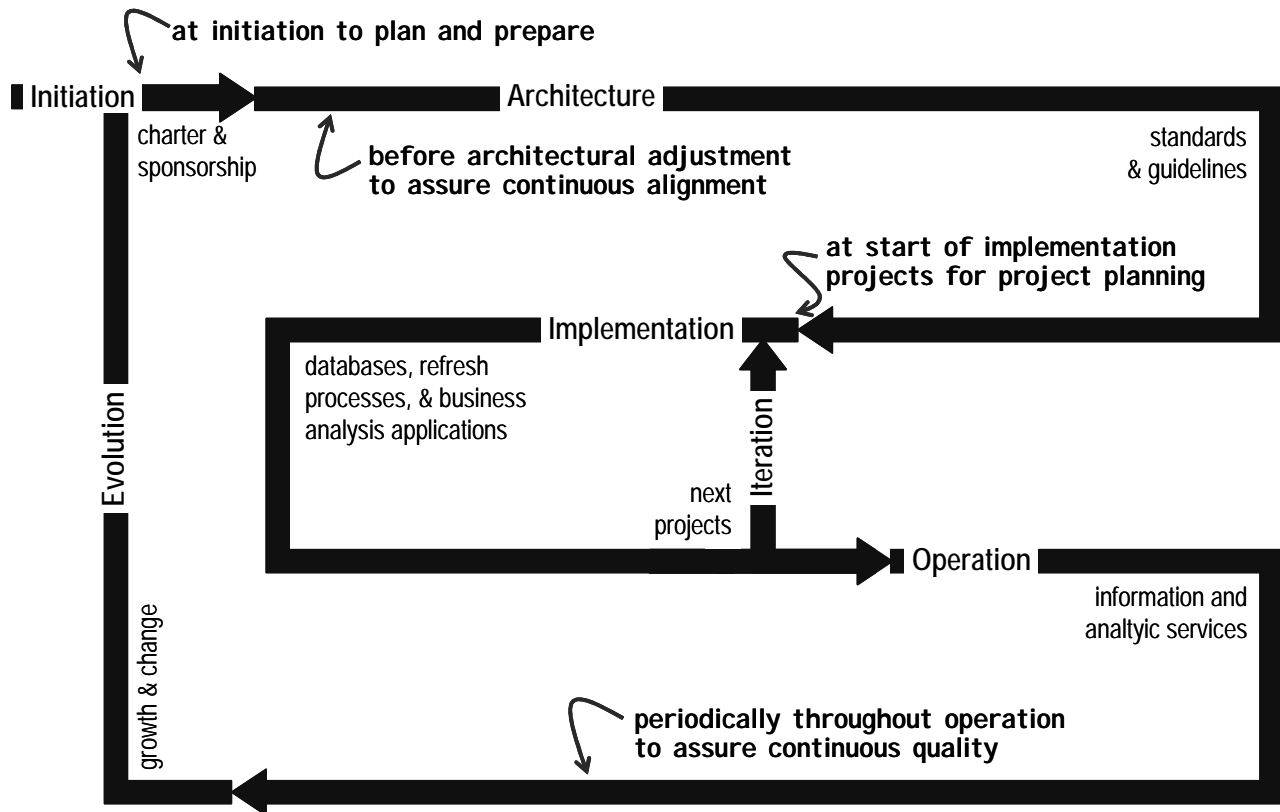
Business/IT Partnership – A strong, cooperative, and mutually-beneficial business/IT working relationship where business people continuously become more IT savvy and IT people more business savvy.

WHAT WE THINK, SAY, AND DO

Much of readiness is based on actions – what we think, say, and do with regard to success factors. Communications, expectations, beliefs, and behaviors are key influences on the effectiveness of a BI program.

Principles of BI Assessment

When to Assess?



Principles of BI Assessment

When to Assess?

ASSESSMENT THROUGHOUT THE BI LIFECYCLE

Every BI program begins with an **initiation** step that establishes the charter, sponsorship, initial funding, and expectations. Assessment when a program is initiated helps to ensure that it begins with the right team, stakeholders, goals, and expectations.

Definition of **architecture** typically follows initiation. Architecture identifies the components of BI solutions – data, information, technology, process, project, and organizational – and describes the roles of each and the relationships among them. It establishes standards and guidelines for implementation and operation. Design of the beginning architecture gains valuable insights from assessment performed at initiation. As the program matures and change occurs, architecture evolves to embrace new components. Assessment prior to architectural adjustment assures continued alignment with business, cultural, organizational, and technological needs and constraints.

Implementation projects are the development activities of BI programs. Typically executed iteratively as a series of small, short-duration projects, this step delivers the databases, refresh processes, applications, and technology deployments necessary to realize BI solutions. Assessment at the start of each project assists in project planning and project management. Identification of strengths, weaknesses, and risks inherent in a project offers the opportunity to leverage strength, remediate weakness, and mitigate risk.

Operation encompasses administration of and delivery of information services through BI solutions. Day-to-day operation of the data warehouse and delivery of information and analytic services are abundant with opportunity to recognize and even anticipate change. Periodic assessment throughout the operational life of the program helps to assure continuous alignment and quality. Recognizing need for change drives **evolution**, closing the lifecycle loop by returning to the architecture phase.



Module 4

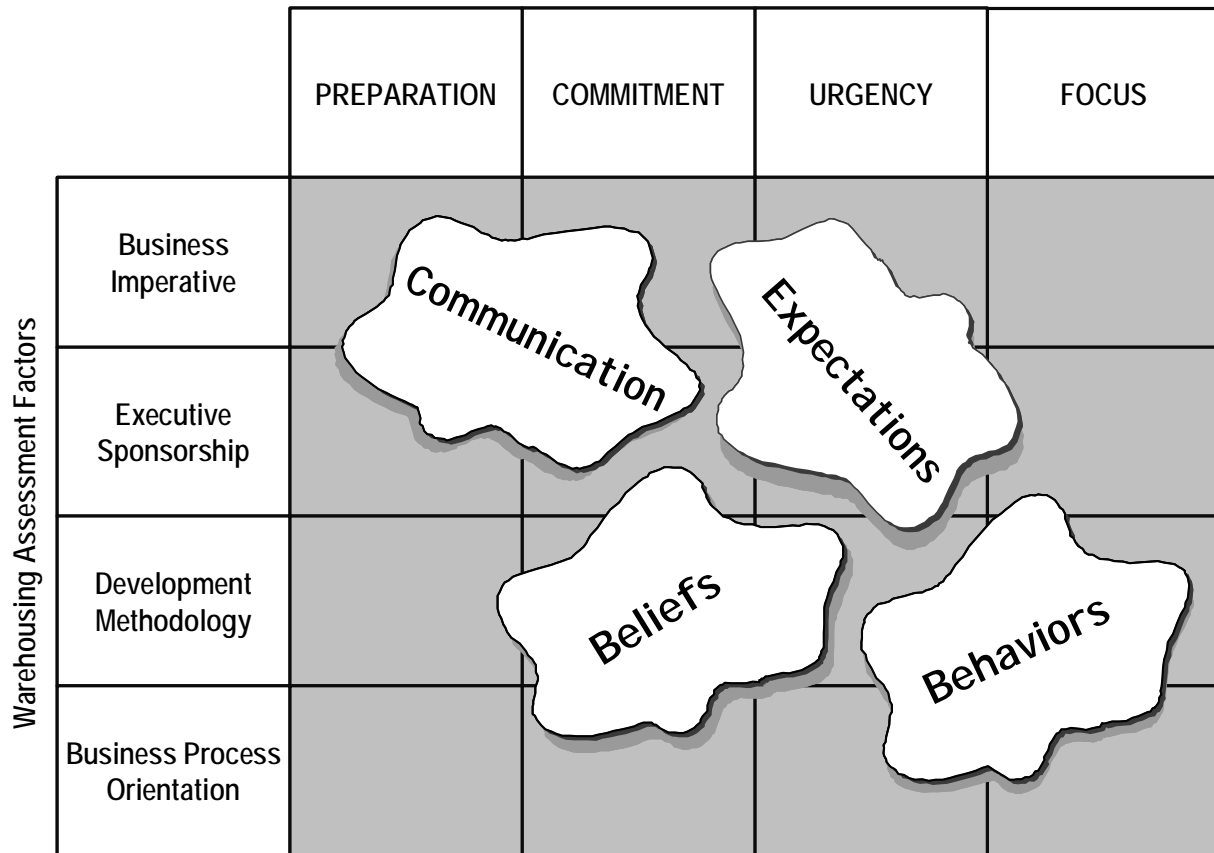
Complementary Assessment Techniques

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| Quality, Service, and Value (QSV) Assessment | 4-16 |

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Data Warehousing Assessment

The Dimensions of Assessment



Data Warehousing Assessment

The Dimensions of Assessment

THE DW DIMENSION When evaluating data warehousing the elements of readiness – preparation, commitment, urgency, and focus – are combined with proven success factors for data warehousing. Warehousing success factors include:

Business imperative – Understanding and communicating of sound business reasons for a data warehouse initiative is essential to success. The business imperative is found in the strategic vision and planned business impacts for the warehouse.

Executive sponsorship – Successful data warehouse efforts are sponsored as business initiatives, not as technology projects. The sponsor of a data warehouse initiative sets the tone of warehouse acceptance for the entire organization. The sponsor should be an advocate of the initiative, highly visible, actively supportive, and in a position to affect policy decisions and acquire funding needed for the warehouse.

Data warehouse development method – Data warehouse project planning and management demands a formal process for data warehouse development and implementation. That process must begin with the business and conclude with implemented data warehouse increments

Business process orientation – People and organizations who already think in terms of business processes help to position you for data warehouse success. Data warehouse goals are expressed in terms of the impacts on one or more business processes. Information needs are identified from a business process perspective. And process perspective helps ensure that the data warehouse is aligned with business needs.

*(from *The Keys to the Data Warehouse*, J. Thomann and D. Wells, 1998)*

Data Warehousing Assessment

Self-Assessment Measurement Technique

Measurement Perspectives

| | | People (individual) | Business Organizations | IT Organizations |
|--------------------|------------------------------|------------------------|---------------------------|---------------------|
| Assessment Factors | Business Imperative | 1 | 2 | 3 |
| | Executive Sponsorship | 4 | 5 | 6 |
| | Development Methodology | 7 | 8 | 9 |
| | Business Process Orientation | 10 | 11 | 12 |

Data Warehousing Assessment

Self-Assessment Measurement Technique

MEASURING DW READINESS

Intersecting four assessment factors (business imperative, executive sponsorship, business process orientation, and development methodology) with three measurement perspectives (people, business, and IT) provides twelve points of measurement for data warehouse readiness. These twelve measurement points are described in the table below:

| Assessment Factor | Measurement Perspective | Measurement Point Description |
|------------------------------|-------------------------|--|
| Business Imperative | People | 1) Each individual in the data warehouse initiative clearly understands the need and supports the effort |
| | IT | 2) The IT organization understands the business' need for a data warehouse and is willing to support it. |
| | Business | 3) The participating business areas clearly understand the need for the data warehouse and are willing to support its development. |
| Executive Sponsorship | People | 4) The sponsor understands his/her role in the data warehouse initiative and is prepared to exercise it fully. |
| | IT | 5) The sponsor understands the IT needs for a data warehouse, knows which are missing, and supports the means to obtain them. |
| | Business | 6) The business area sponsors the data warehouse initiative, leads the effort, and assumes ownership for the resulting warehouse. |
| Development Methodology | People | 7) Each individual understands the method and his/her role in relation to it. |
| | IT | 8) IT has a development method and the knowledge and skills to practice that method. |
| | Business | 9) The business area has a clear role in the method and agrees to exercise that role. |
| Business Process Orientation | People | 10) Each individual understands the organization's business in terms of its business processes. |
| | IT | 11) The IT organization focuses its efforts to support the business based on the business process. |
| | Business | 12) The business operates based on business processes, and the business units can describe these processes. |



Module 5

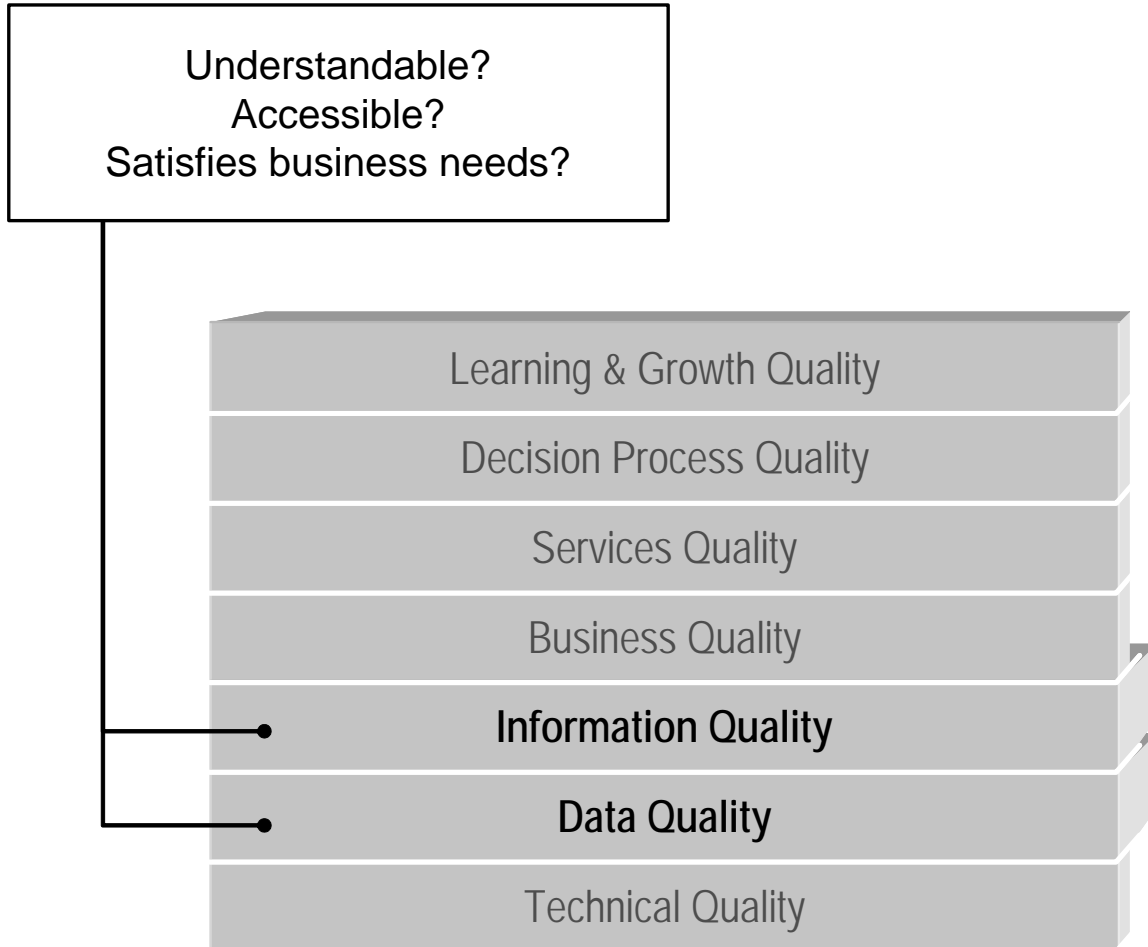
Measuring and Managing Quality

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| Quality in BI Systems | 5-10 |
| Measuring the Quality of BI Systems | 5-18 |
| Managing the Quality of BI Systems | 5-32 |

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Quality in BI Systems

Information Quality



Quality in BI Systems

Information Quality

DEFINITION

Information quality is the degree of integration of business intelligence into the flow of business processes such that business activities are naturally information-enabled and decision-making processes are well informed.

DISCUSSION

A BI system with a high level of information quality supplies data that is pre-formatted and designed to meet the specific needs the information consumer. Common attributes of a BI system with low information quality include unformatted data, data without a clear business purpose, and lack of confidence in the reliability of the data.

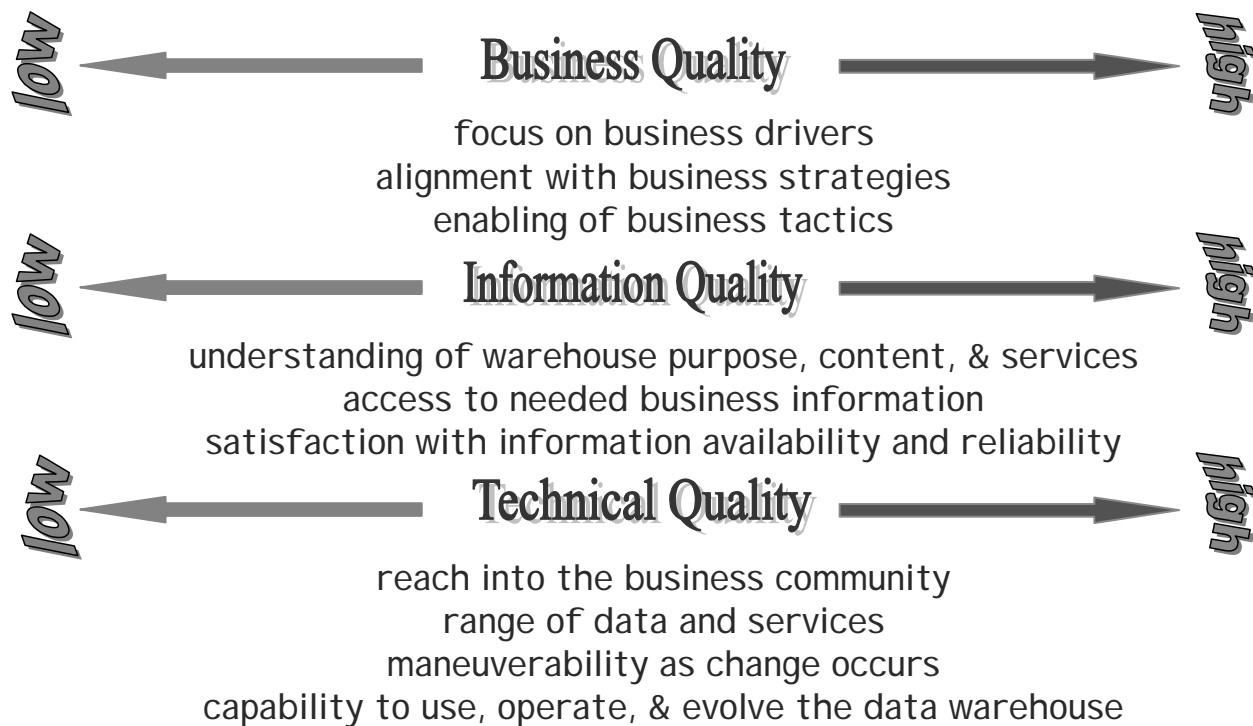
Information quality is evident when BI services are available, easy to use, and used as intended. To observe information quality, look for these indicators from the business people for whom the data is intended:

- They know what information is available and they know how to obtain and use it.
- They use information to drive decision-making and action-taking processes.
- They are satisfied — the data meets their needs now and will continue to do so in the future.

When a BI system achieves high information quality, then political success goals are readily met.

Quality in BI Systems

Quality Management Factors



Quality in BI Systems

Quality Management Factors

BUSINESS QUALITY FACTORS

Business drivers provide the focus for information to be delivered through BI services. Drivers establish the primary goals that BI systems will help to achieve.

Business strategies depend on information for effective implementation and management. High-quality BI systems are aligned with the strategies of the business, and the associations of BI services with strategies are clearly understood.

Business tactics are the activities and actions necessary to carry out business strategies. High-quality BI systems are tactically as well as strategically, and the associations of BI services with processes and tactics are clearly understood.

INFORMATION QUALITY FACTORS

Understanding of BI services and information is characteristic of high-quality BI systems. When people understand what services exist and how to employ those services, then both business and BI goals can be readily met.

Access to both services and information is essential for BI success. Knowledge of who accesses, how frequently, and for what purposes is central to quality management.

Satisfaction describes the degree to which users of BI systems believe that the systems supply reliable and useful information. Key elements of satisfaction include the level of “happiness” with BI services and the willingness and desire to use it.

INFORMATION QUALITY FACTORS

Reach describes the technical capability of information consumers to access BI services and information.

Range is the technical capability of BI systems to satisfy a wide scope of information needs (both data and services) across a broad scope of business.

Maneuverability is the technical capability to adapt the data warehouse to the business as change takes place.

Capability is the ability of each part of the business to deliver, use, operate and evolve their BI competency in meaningful ways that contribute to business value.



Module 6

Summary and Conclusion

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| Best Practices in BI Program Management | 6-4 |
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Best Practices in BI Program Management

Learned through Experience

1. ACTIVELY MANAGE THE BI PORTFOLIO

**ANALYTIC SERVICES PORTFOLIO
INFORMATION SERVICES PORTFOLIO
BI SYSTEMS PORTFOLIO
BI PROJECTS PORTFOLIO**

2. MANAGE FORMAL AND REPEATABLE BI PROCESSES

**DEVELOPMENT PROCESSES
OPERATIONS PROCESSES
SERVICE PROCESSES**

3. CONTINUOUSLY MANAGE BI QUALITY

**TECHNICAL QUALITY
DATA & INFORMATION QUALITY
BUSINESS QUALITY
SERVICES QUALITY
DECISION PROCESS QUALITY
LEARNING & GROWTH QUALITY**

4. PROACTIVELY MANAGE CHANGE

**BUSINESS CHANGE
ORGANIZATIONAL CHANGE
TECHNOLOGICAL CHANGE**

5. PROVIDE A CATALOG OF MANAGED BI SERVICES

**DATA AND INFORMATION SERVICES
ANALYTIC SERVICES
CUSTOMER SUPPORT SERVICES
FORMAL SERVICE LEVEL AGREEMENTS**



Appendix A

Quality Management Workshop

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| Workshop 1: Defining Quality | A-2 |
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| Workshop 3: Applying GQMM for BI Quality | A-10 |
| Workshop 4: Developing Quality Questions | A-12 |
| Workshop 5: Understanding Metric Structures | A-16 |
| Workshop 6: Developing Quality Metrics | A-18 |
| Workshop 7: From Metrics to Measures | A-20 |

Workshop 2: Setting Quality Goals

Developing Goals - An Example

The example below page illustrates the kinds of information intended to be completed in the goals worksheet. The worksheet is simply a tool whose purpose is to facilitate clear and complete thinking about data warehouse quality goals.

| | |
|--|---|
| <p>Goal Statement</p> <p>Warehouse users believe that the data warehouse is a fast, efficient way to fulfill their needs for information.</p> | |
| <p>Quality Factor</p> <p>Satisfaction</p> | <p>Goal Name</p> <p>Perceived Efficiency of Information Delivery</p> |
| <p>Description</p> <p>This goal addresses responsiveness to queries, focusing on speed and efficiency of the warehouse in delivering information when a query is initiated. Scope of information, accuracy of information, and ease of developing queries are not included here, but may be the focus of other goals.</p> | |
| <p>Desired Impact</p> <p>There is little or no gap between expected and actual responsiveness of the data warehouse. Lack of responsiveness is never a reason to turn to a different source for information that is available from the data warehouse.</p> | |
| <p>Key Results Indicators (KRIs)</p> <ul style="list-style-type: none"> • Expectations for responsiveness are known and standardized. • 95% of queries are completed within the time specified as an agreed-upon service level that sets expectations for query duration. • Use of alternative sources for warehouse supported information is near zero. | |



Appendix B

A Sample Framework of Quality Metrics

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| A Framework of Quality Metrics | B-3 |
| Business Quality Examples | B-4 |
| Information Quality Examples | B-7 |
| Technical Quality Examples | B-10 |

A Framework of Quality Metrics

Structure of the Framework

| | quality area | quality factor | quality goals | quality questions (by measurement level) | metrics | measures |
|---------------------|---------------------|--|--|---|--|--|
| business quality | business focus | warehouse quality goals (typically multiple goals per factor) | questions to know when goals are met (appropriate to level / multiple questions likely) | existence | supporting metrics (possibly multiple metrics per question) | data gathering measures (expect multiple measures per metric) |
| | | | | quantity | | |
| | | | | quality | | |
| | strategic alignment | | | existence | | |
| | | | | quantity | | |
| | | | | quality | | |
| | tactical enabling | | | existence | | |
| | | | | quantity | | |
| | | | | quality | | |
| information quality | understanding | existence | | | | |
| | access | quantity | | | | |
| | | quality | | | | |
| | | satisfaction | existence | | | |
| | quantity | | | | | |
| | quality | | | | | |
| | technical quality | reach | existence | | | |
| | | range | quantity | | | |
| | | | quality | | | |
| maneuverability | | | existence | | | |
| | | quantity | | | | |
| | | quality | | | | |
| capability | | existence | | | | |
| | | quantity | | | | |
| | | quality | | | | |



Appendix C

Quality Toolkit

Toolkit Contents

This toolkit consists of a set of worksheets to help you apply the Goal-Question-Metric-Measure (GQMM) approach to data warehouse quality. The worksheets are designed to be used as a set of thinking, organization, and documentation tools to facilitate a process which begins with goal setting and ends with specification of measures to be implemented. The roadmap on the following page illustrates the relationship among the worksheets and the flow of results among them.

The toolkit worksheets are:

| Worksheet | Purpose | Inputs | Produces |
|-------------------------------------|---|--|--|
| Goals Worksheet | Identify, name, and describe a goal, and assign kris for the goal | One quality goal | Description of goal, and list of key results indicators |
| Questions Worksheet | For one KRI, determine needed levels of measurement and identify questions at each level | One KRI | List of quality questions by level of measurement |
| Metrics Worksheet | Develop a complete list of the metrics required by a question | One quality question | List of needed metrics |
| Measurement Needs Summary | For one goal: summarize kris, questions, and metrics to identify measures needed | One quality goal Lists of all needed metrics for the goal | List of measurement needs |
| Measurement Specification Worksheet | For one measurement need: identify and name the measure; specify data collection requirements | One measurement need | Measurement requirements and data collection specification |



Appendix D

Program Assessment Workshop

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| Workshop 1: BI Program Questionnaire | D-2 |
| Workshop 2: BI Assessment Survey | D-4 |
| Workshop 3: Data Warehousing Assessment | D-10 |
| Workshop 4: QSV Assessment | D-16 |

Workshop 1: BI Program Questionnaire

Page 1 of 2

INSTRUCTIONS

Complete the questionnaire by quickly marking your responses to each of the questions. We'll discuss the responses briefly then refer to them throughout the remainder of the workshop.

| | | |
|---|---|--|
| 1. What is the scope of your program? (check only one) | <input type="checkbox"/> Data Warehousing <input type="checkbox"/> Both BI and DW | <input type="checkbox"/> Business Intelligence <input type="checkbox"/> Don't Know |
| 2. What is the current state of your program? (check all that apply) | <input type="checkbox"/> Initiating <input type="checkbox"/> Deployed <input type="checkbox"/> Problematic <input type="checkbox"/> Legacy/Obsolete | <input type="checkbox"/> Developing <input type="checkbox"/> Evolving <input type="checkbox"/> Legacy/Static <input type="checkbox"/> Don't Know |
| 3. Who <i>sponsors</i> the program? (check all that apply) | <input type="checkbox"/> Business Executive(s) <input type="checkbox"/> Business Manager(s) <input type="checkbox"/> Business Staff <input type="checkbox"/> Other | <input type="checkbox"/> CIO/IT Executive(s) <input type="checkbox"/> IT Manager(s) <input type="checkbox"/> IT Staff <input type="checkbox"/> Don't Know |
| 4. Who <i>owns</i> the data warehouse and/or BI applications? (check only one) | <input type="checkbox"/> Business Executive(s) <input type="checkbox"/> Business Manager(s) <input type="checkbox"/> Business Staff <input type="checkbox"/> Other | <input type="checkbox"/> CIO/IT Executive(s) <input type="checkbox"/> IT Manager(s) <input type="checkbox"/> IT Staff <input type="checkbox"/> Don't Know |
| 5. Which business needs does the program support? (check all that apply) | <input type="checkbox"/> Data Integration <input type="checkbox"/> Tactical DSS <input type="checkbox"/> Performance Mgmt. <input type="checkbox"/> Supply Chain Mgmt. <input type="checkbox"/> Workforce Analytics | <input type="checkbox"/> Operational Reporting <input type="checkbox"/> Strategic DSS <input type="checkbox"/> CRM <input type="checkbox"/> Operations Analytics <input type="checkbox"/> Don't Know |
| 6. How would you rate the alignment of the program with business drivers and business strategies? (check only one) | <input type="checkbox"/> Excellent <input type="checkbox"/> Fair <input type="checkbox"/> Don't Know | <input type="checkbox"/> Good <input type="checkbox"/> Poor <input type="checkbox"/> Don't Know |
| 7. How would you rate the alignment of the program with business functions and business tactics? (check only one) | <input type="checkbox"/> Excellent <input type="checkbox"/> Fair <input type="checkbox"/> Don't Know | <input type="checkbox"/> Good <input type="checkbox"/> Poor <input type="checkbox"/> Don't Know |
| 8. How would you rate the alignment of the program with business processes and business operations? (check only one) | <input type="checkbox"/> Excellent <input type="checkbox"/> Fair <input type="checkbox"/> Don't Know | <input type="checkbox"/> Good <input type="checkbox"/> Poor <input type="checkbox"/> Don't Know |
| 9. Where does your program have impact vertically? (check all that apply) | <input type="checkbox"/> Business Executive(s) <input type="checkbox"/> Business Managers <input type="checkbox"/> Other | <input type="checkbox"/> Business Manager(s) <input type="checkbox"/> Business Staff <input type="checkbox"/> Don't Know |
| 10. Where does your program have impact horizontally? (check all that apply) | <input type="checkbox"/> Enterprise Wide <input type="checkbox"/> Single Division <input type="checkbox"/> Single Department <input type="checkbox"/> Other | <input type="checkbox"/> Many Divisions <input type="checkbox"/> Many Departments <input type="checkbox"/> Specific Individuals <input type="checkbox"/> Don't Know |



Appendix E

Additional Reading

| Topic | Page |
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| The Keys to the Data Warehouse | E-6 |
| Beyond Information Delivery | E-16 |
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Ten Best Practices in Business Intelligence

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Ten Best Practices in Business Intelligence and Data Warehousing

(a reprint of the TDWI Flashpoint from April 10, 2003 by Dave Wells)

As we move beyond data warehousing (DW) and into business intelligence (BI), the nature of BI programs and projects is changing. Advances in technology, increasing complexity, rising business expectations, and cost-consciousness are among the primary contributors to the change. With changing programs and projects, we also experience changes in best practices for BI/DW. DW best practices of recent years addressed topics like which data to put in the warehouse, how to organize and structure data, and support of end-user access and inquiry. Today's BI best practices attend more to business factors than to technical considerations, addressing issues like business value, effect on business processes, and impact on people and their jobs. This article summarizes some practices that I have observed as common among successful BI organizations.

1. Understand the Drivers

BI success begins with clear understanding of the reasons that BI is important to your business. Knowledge of both business and BI program drivers defines the strategic and tactical positioning of a BI program. Business drivers are external forces that cause an enterprise to act and change – the things to which business strategies must respond. Changing economy, changing workforce, and changing regulations are common business drivers. BI/DW program drivers establish a basis to align information technology with business strategies. Drivers like market penetration, performance improvement, cost reduction, process optimization, and risk mitigation establish the context in which information will be used and analytics will be applied. Understanding both business and program drivers is essential to realize value from a BI investment.

2. Measure Results

Applied analytics succeed in organizations that use metrics effectively. When you acknowledge the BI/DW program as both a business process and an investment, it becomes an obvious target of applied metrics. Establish measurable goals and define actionable metrics for the program. Measure both the financial and cultural impacts of the program. Include total cost of ownership (TCO) and total value of ownership (TVO) as financial measures. They are necessary to derive metrics like ROI and NPV, and they provide measures needed to manage BI resources wisely and cost-effectively. Define cultural measures and metrics to manage how BI is used. Collect and apply data about who is using BI products, which products are most (and least) used, how they are used, and how they affect business activities. Cultural metrics allow you to extend the reach of BI, to recognize new needs and opportunities, to enhance valued BI products, and to retire unused products.