


Start Your BI Projects Off Right

Resource Kit to help you start your business intelligence implementation the right way



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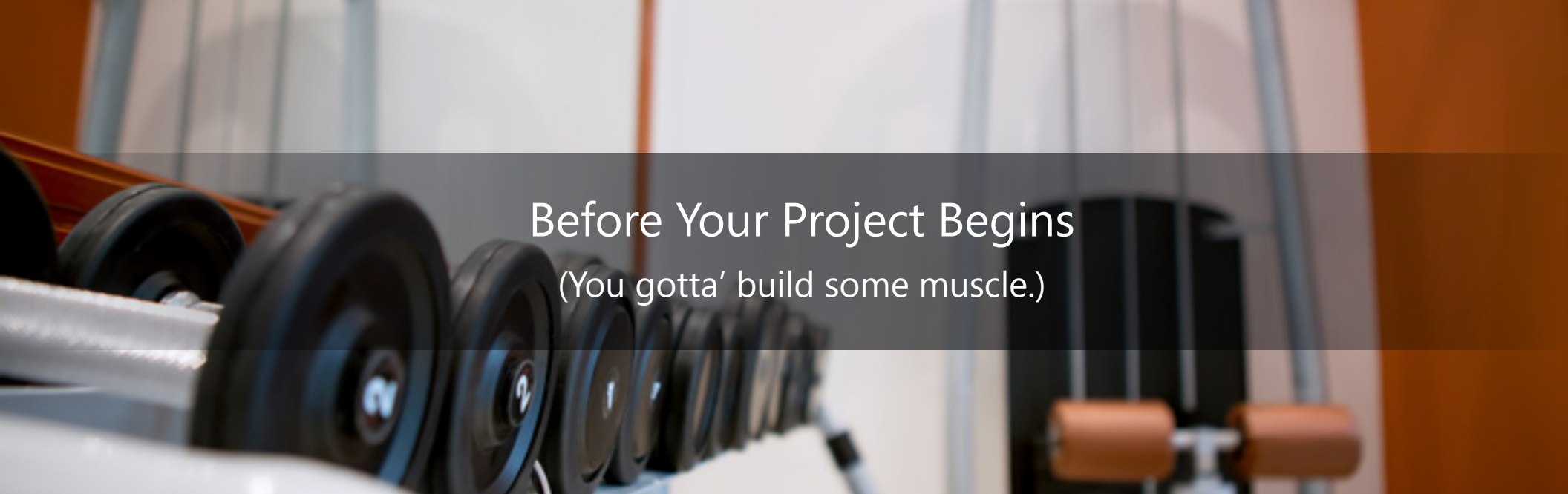
Introduction

When you finally buy a business intelligence platform, it feels like an ending, as you've wrapped up a long decision-making process. In actuality, though, it's just the beginning. You still have to deploy that baby!

As hard as the decision on selecting a platform probably seemed, deployment is even harder. And there are many, many things that can go wrong. So how can you start your implementation off on the right foot?

We've assembled this resource kit to help guide you through the different phases of implementation, from the initial decision on whether or not to hire a business intelligence consultant, to when it's time to take over the reins yourself.

If you find you want even more articles to help guide your BI deployment, visit our blog at www.dimins.com/blog. Pull up a seat and enjoy!



Before Your Project Begins

(You gotta' build some muscle.)

6 Considerations When Deciding Whether to Hire a BI Consultant.....	5
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A man with short brown hair and a beard, wearing a blue denim shirt over a white t-shirt, is sitting at a desk. He is looking down at a document he is holding in his left hand, with his right hand resting on his forehead and holding a black pen. The background is a blurred office setting with a desk lamp and a laptop. A semi-transparent orange banner is overlaid across the middle of the image, containing the text and a Twitter icon.

6 Considerations When Deciding Whether to Hire a BI Consultant

One of the first questions you may have when embarking on a new business intelligence (BI) project is, “Do I need to hire a consultant or can I source the project internally?” Unfortunately, there isn’t an easy answer – it varies from company to company. However, there are several things you should factor into your decision.

First, what exactly is a consultant?

There are a few misconceptions about consultants that need to be cleared up. A lot of people these days call themselves consultants, but they are really just contractors. They are experts in a particular subject matter and they get hired to perform a task. In the case of BI implementation, this might mean the person simply installs and configures the software and leaves. At the end of the day all you’re getting for your money is the actual implementation work. Now, there’s nothing wrong with that, but you need to be clear that that’s all you’re getting.

A true consultant is an expert or a professional with a large breadth of knowledge in one or more fields of expertise who is hired for his or her professional or expert advice. While consultants may actually perform the work in question, they more importantly coordinate the execution of the work they are hired for, as well as impart their knowledge and skills to your organization. In essence, consultants are partners, responsible for not just the work but also the success of the project.

BI consultants should be able to help you develop your business requirements or at the very least provide guidance based on insight into your business and your industry. The amount of their involvement will be dictated by how much assistance you actually need. **Consultants will:**

1

Perform the work if you require skills that are not in your wheelhouse.

2

Coordinate the work effort between executive sponsors, end-users, and key stakeholders.

3

Ensure you understand your deliverable, how it works, how to use the technology, how to fix any issues, and how to modify or simply maintain it.

4

Ensure deliverables match with requirements and defined scope.

Also, throughout the process, consultants will share their experience and insight so you know what you're doing and why you're doing it. As a result, you have a professional deliverable, specific to your needs, designed with industry best practices in mind, and you understand it all and can take ownership afterwards (if you want).

Now that we've gotten that out of the way, the question is: **Do you need a consultant for your next project?** Here are six considerations:

1 Human resource constraints

Do you have the people to do the work?

Every project will require a lot of resources:

- People who define the project requirements
 - stakeholders
 - executives
- People who execute the project requirements
 - project managers
 - data validation experts

Also consider the time your users need to be trained on the software and come up the learning curve. Any BI project is labor intensive so you need to consider all resource constraints, not just who is going to do the work.

Some constraints are unavoidable, but others can be managed by a hiring a consultant.



2 Skill-set constraints

This goes hand-in-hand with the resource consideration.

It's not just about having the people with the time for your project.

You also need to consider whether you have the right people with the right skill sets:

- Are they technically adroit?
- Can they come up the curve fast enough to make internal ownership feasible?



3 Time constraints

More than just “Do our people have the time for the project?” you need to consider your timeline.

Do you need this project sooner than it would take for your internal resources to develop it?

If there are knowledge gaps, your employees will need even more time to come up to speed. A consultant, on the other hand, should be able to jump right in and crank the project out much more expediently. This is ideal if you are under the gun. Also consider the ramifications of developing your project internally if it drags out due to lack of resources and proficiency. Organizational enthusiasm, urgency, and momentum may wane if the project takes longer than planned. This may greatly impact your change management initiatives, so keep that in mind as well.



4 Availability of training material

No matter how good your internal people are, if the technology you're using isn't well documented or there is a lack of training available, there may be no recourse other than to hire someone.

You could have your internal resources simply learn as they go, but you probably don't have the time for that to be a feasible option.



5 Monetary constraints

There's an old saying about how if it's not time, it's money. Usually you have one but not the other.

Sometimes you may not have the budget to hire a consultant. In that case, you might have to do it internally. But be sure to think this one through carefully. If you think all you need is someone to help you get over the technical hurdle and nothing more, then maybe you can hire a part-time contractor at a much lower cost. That will get you a good part of the way there. In the end, though, a consultant worth his or her mettle will likely save you money in the long run. That person will get the work done, make sure it's done right, help guarantee the success of your deliverable, and make sure you have the skills to remain successful long after the consultant project comes to a close.



6 The cost of failing

While you need to consider the cost in terms of time and resources by completing your project internally, even more than that, you need to consider what will it cost you if you do all that work and then fail.

You may then still need to bring in a consultant after the fact to fix whatever went wrong. At that point, there's no guarantee your consultant can reuse the work you already did. It's similar to a homeowner who tries and fails to remodel his or her kitchen only to have to hire a contractor who has to rip it all out and start from scratch.

That hurts.



Alternatives: There are also alternatives that are not “all” or “nothing” when it comes to hiring a consultant.

Start Small

You could define a smaller project in which you hire a consultant to help you come up the curve initially and give you the skills to be proficient moving forward. Many organizations start small and then iterate as way to ensure resources and skills set gaps don't get the best of them.

1X

You might decide you don't need to internalize any of these skills, but you hire a consultant on a one-time basis.

Ad Hoc

You might decide to hire a consultant as projects come up, since they are not frequent enough to demand that you bring those skills in house. Information sharing is still critical, even though your consultant might only be working project to project.

Bottom line: Every organization is different and you need to assess what will work best for you to help ensure success.



7 Questions You Should Ask Before Hiring a BI Consultant



When you're embarking on a business intelligence project, many decision makers spend lots of time thinking about the technology that's being implemented, but not as much time on the people who will be implementing it. It's important to invest the time in putting together the right team. These people are paramount to your project success. If you have, indeed, decided to hire

a BI consultant, you'll probably wonder what makes for a good consultant. How do you tell the good from the bad? Here is a list of 7 questions you should ask before hiring a BI consultant. While these questions don't cover everything you should be asking (a lot depends on the particulars of your project), they should help you get the ball rolling as you begin your selection process.

?

Best Choice



1 How long have you been working with the software?

Experience counts. Software in general is often easy to learn but hard to master. The more familiar and proficient your consultant is with the BI tool, the better the economies of scale. An experienced consultant will be more productive, offer faster turn-around on issues, and overall, give you more bang for your buck. A master of the software will be able to make any complex problem you have look easy because that person will be more resourceful and will likely be able to come up with more creative solutions.

For example, many organizations have a one-off problem that they have been struggling with for a while. Savvy and experienced BI consultants have often “been there, done that” and will know exactly how to solve that problem, whereas a less experienced consultant will not have encountered it before. This shows that it pays to have experience.



2 How long have you been working in my industry?

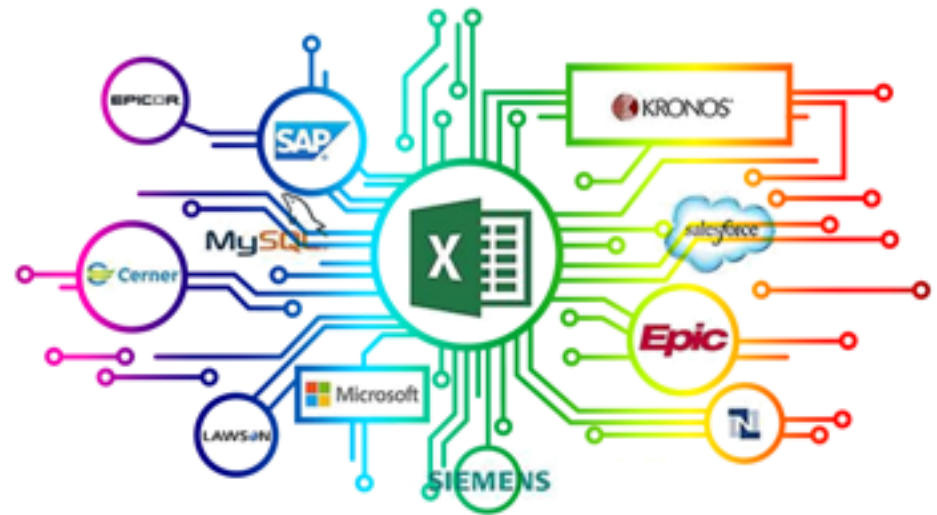
Knowing the software is essential. Just as invaluable is knowing your industry. This is where the true value of your consultant comes into play. While data is data, and the mechanisms and methodologies for analysis don't really change from industry to industry, the nature of your business does. What you do with the data and how you analyze it likely varies greatly. A consultant who has spent a great deal of time in your industry is not only going to be more familiar with the types of things you likely want to measure, but will also be able to offer suggestions based on things he or she has seen or done for others.

For example, if your consultant has worked with a half-dozen other hospitals on dashboards for surgical operations, he or she will be able to better articulate the types of measures that could be used and how others have tackled similar complex issues you may be struggling with, such as block utilization or compliance with industry regulations.



3 Are you familiar with my source system(s)?

If you already have dedicated resources to generate feeds from your source system(s) then this question may be unnecessary. But if you expect that your consultant will also pull the data from your source system(s), expertise will be instrumental. Understanding the schema well enough to know where to go for the necessary data elements is extremely valuable. Also just knowing the way around different data structures will save time. A relational database varies greatly from a hierarchical database. The more internal knowledge you have of your own systems, the more this becomes nice to have vs. a must have. At minimum, your consultant should be able to navigate his or her way through your system. That said, a reference person on your side for questions your consultant might have is always helpful.



4 What's the plan for transition?

Some organizations never have any intention of taking ownership or supporting their BI implementation. But if you do intend to take it over after the consulting project is complete, ask this question upfront. It will take time and training, both of which you will need to budget for.

Knowing upfront that you plan to take over the project may also determine how the implementation is scoped. Consulting deliverables might be adjusted to include additional commenting to any coding, and include additional documentation to make the transition easier.

You also want to consider your transition options. Will it be a massive knowledge transfer at the end of the project or will you work in tandem with the consultant as an observer and learn as the project develops? If the consultant is amenable to the latter methodology, this may be your best chance for a successful transition. That said, be aware that it will likely take longer and drive up costs in the short-term. However, these upfront costs will be worth it if it means a greater chance of success for transition.



5 What do I do if/when you're unavailable?

Well, that depends on the issue that you're facing. If it's a software-related question and your consultant is unavailable, you should be able to contact the support line of your software vendor and they can assist you. Odds are you are already paying for access to support or it is included with the annual software maintenance fee, so why not make use of the resource? Hint: you're likely paying extra if you ask the consultant questions that the support group could easily answer.

If it's a more complex issue such as troubleshooting a failure or a detailed question related to the specifics of your implementation, you're obviously going to want to talk to your consultant. Here, consistency counts. Your consultant is familiar with your implementation. You feel comfortable with that person. You start to depend on your consultant. So what happens when that person goes on vacation, gets sick, or even worse, changes jobs? Now what?

You need to know your service won't be interrupted, so make sure there is a back-up plan. Having redundancy on your project will ensure consistent support.



6 How successful are your past customers?

When it comes down to it, results speak louder than words. Ask for a referral (or many). A consultant's job is not just to perform a series of implementation tasks, it's to help improve your situation and – most importantly – to deliver business results. So if a consultant is successful, he or she should have a multitude of satisfied customers and should be willing to share them with you. If not, it would be wise to question that person's track record and look elsewhere.



7 What do you need from me?

Successful BI implementations happen when both the customer and the vendor work together to achieve results. On the consultant's end, it is a huge help to know the main point of contact for each data source. In bigger organizations with multiple data sources, there may be a point person for each data source system. That point person is going to be the best person to talk to when there are questions on where to find the data and any special rules to be aware of within your organization. In addition, it's especially helpful to know who the business owners of the metrics are. Who in your organization has their success or failure measured on the basis of these metrics? These will be the primary users of the analytics and data visualizations we create, and as such, they should participate in the business rule definitions and be available for questions. On the whole, identifying your desired metrics, metric definitions, data sources, and the main contacts mentioned above is a huge help when starting the project.





10 Things a BI Consultant Should Tell You Before Your Project Begins



Now that we've examined the questions you should ask a potential BI consultant, let's take a look at what the consultant should proactively tell you. Here are 10 things a consultant should tell you before your project begins.

1 Determine your desired metrics and business rules before you speak to me.

While consultants are usually happy to sit in on calls or meetings in which you determine the metrics to use and how to compute them, it's often not a good use of your time and money, since the consultant won't have much input. These meetings can be long and drawn-out, and get side-tracked or even heated.

Instead, you should put your list of measures and definitions together first and then seek the consultant's input. He or she will be able to review, ask follow-up questions, and offer input much more efficiently.



2 Make sure the data for your metrics is available before you want to use it.

You have your metrics identified, your business rules established, and you're ready to go! Right? Not always. Often, your consultant starts the project just waiting while someone goes hunting for the data. Sometimes the data is in a source system that requires a special resource to extract. Sometimes the team determining the measures doesn't know where the data is coming from. This often leads to a discovery that it either doesn't exist, or it is maintained in a spreadsheet that is updated manually on an irregular basis. The result? Long delays and a drawn out project timeline.

If you determine the data availability when you are deciding which metrics you want, you will save time, energy, and spare yourself the disappointment if that measure you had your heart set on isn't doable right now.

Want to speed things up even more? Have sample feeds ready to review before getting started. That will really get things moving.



3 Include key business owners and decision makers when defining your project.

BI projects are often the well-intentioned brainchild of an IT executive team with little to no input from those who will actually use the data and know it best. Often, you and your consultant will spend weeks or months building out a great dashboard, and when it's time for validation, a key user is brought in to help with it. This user was not involved in the initial scoping of the project, so guess what? The initial assumptions were wrong. The business rules are wrong, the wrong table was used for benchmarking, or the design of the dashboard doesn't fit with the types of data and analysis they need to do.

There is nothing more frustrating than having to go back and rework everything because the facts weren't straight from the beginning. Now there is more work, more cost incurred for the rework, and delayed deliverables. Save a lot of hassle and include everyone from the beginning.



4 I can sometimes reuse preexisting feeds.

With a number of companies using more than one BI system, you likely already have a great number of feeds from your different source systems. So why reinvent the wheel? There are times when your consultant can just pick the needed fields from a pre-existing feed if it contains all the necessary data in the right format. This saves you a lot of time and resources by not having to write yet another custom extract, and your consultant doesn't have to wait around for it. Win, win.



5 I often would like to write the feed extracts myself.

This one is often a sensitive issue and it is not always possible given your organization's security policies. But if it is do-able, your consultant would often like to write the feed extracts. This is a matter of preference. But if given the option, it simplifies the process. Your consultant can control the data, make changes if necessary, and work faster since there is one less intermediary to go through. If you have the internal resources readily available, sometimes it's just easier to provide a feed specification and say, "Here, you deal with it." But if your consultant is comfortable with your source system (or can get some help from someone on your staff who is) and knows SQL (most consultants do), then this is often the best option to speed things along.



6 Make sure resources are available throughout the course of the project.

Your consultant will inevitably run into issues and have questions. If the key resources don't have time or are on vacation when your consultant is working on that phase of the project, your project is likely dead-in-the-water until the right input is provided. Help keep the project on track by making sure the necessary resources are available. It also helps if the project is properly prioritized. If the required resource doesn't think answering your consultant's questions is a priority, then it can be just as bad as when that person isn't available.



7 Designate someone to support the project after we part ways.

This resource should be comfortable with the data, the business rules, and the technology. He or she will be the coordinating resource for any further projects or for changes to the existing implementation. Establish this resource early on to make the transition from your consultant to that person easier. If you wait until the very end of the consulting engagement then there will be an overwhelming amount to learn.



8

Make plans for training as soon as you have something to work with.

You're anxious to learn how the BI tool works and want to learn as much as you can ASAP. Who doesn't want to play with their newest toy? However, if your users get trained too early and don't have anything to work with for the next three months while the project is in development, then the old adage "if you don't use it, you lose it" will be all too true.

Then you have to pay to train them all over again, which is a waste of everyone's time and your money. It's better to train in two phases. First: your power users. Schedule the training so they will know how to use the tool just in time to help with validation efforts of your project. This way, they'll be able to use the tool right after training. Then schedule training of your first round of users right at go-live so they can be trained on the tool and the data at the same time.



9 Determine from the beginning both your users and the security considerations.

Sometimes your implementation will need to be structured specifically to meet your security needs. So if you wait to tell your consultant at the end of the project what security is required and what data restrictions need to be configured, then guess what? You may not be able to do your project within the current design. Additional changes will need to be made, which is yet more time and money.



10

Don't be afraid to ask questions, raise concerns, or clarify things.

Don't just make assumptions if there is ambiguity. Instead, follow the motto, "There are no dumb questions." You and your consultant may unearth something during your discussions that could save both of you a lot of trouble later down the road. A good consultant will know the right questions to ask to get to the root of any issue and give you the best solution possible. But despite vast knowledge and experience, your consultant can't always anticipate every little idiosyncrasy that a project entails. Your questions also add value to the project so speak up!





Kicking Off Your Project

(The race begins.)

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A man in a dark suit is crouching and pushing a large, hand-drawn rocket ship against a wall. The wall is covered in various space-themed graffiti, including stars, planets, and another rocket. The scene is lit with dramatic, low-key lighting, creating a sense of effort and ambition.

A 4-Step Process to Expedite Your Project Development

Business intelligence implementations can often take forever, with mixed end results. Is it possible to speed up development without compromising quality? Thankfully, the answer is yes. There's one phase of the project that's critical to get right: defining the project specifications. While defining the specs itself can be time-consuming and frustrating, it sets the stage for all other work. It's like when you're building a house, you need a solid foundation. With that, the rest of the work goes much more smoothly. Without the right specifications, a project can fail or require a lot of unnecessary rework in later stages. Here's a 4-step process to get it right.

1 All successful projects start with great teams. Build your team.

Before you even ask the question, “Do I really need to have everyone involved?”, know that the answer is yes. (That is, if you want the project to succeed.) By not including all of the above you are likely to get a mixed result. Either metrics will be poorly defined, or data will be inaccurate, or end users will not find the tool useful, or executives will be dissatisfied.

User buy-in is the life-blood of any BI implementation. First impressions matter. You usually only have one chance to successfully roll it out. If users deem it not useful or inaccurate on the initial roll-out, you will have a hard time getting them to adopt it because they won’t trust it. With everyone’s input upfront your chances for success are greatly improved.

While it can be hard and even costly to get all the necessary resources under one roof for this meeting, without everyone, the fallout could be even more costly.

One person who likely does not need to be in the room is your consultant. The consultant can certainly help give your team ideas on what types of things to include in your dashboard if you are unsure, or if you are looking for guidance as to what similar organizations are doing. But don’t involve your consultant in all discussions. It’s not a good use of his or her time – or your money for that matter.



Your team should include:

- The executives sponsor(s). They will help set priorities, provide final sign-off, settle disputes, and help ensure user adoption.
- The business owner(s). These are the employees who need the metrics and will help define them.
- The data steward(s). They are the keepers of the data sources. They will help your team identify what data is available, how accessible it is, and any other considerations that should be made.
- The end user(s). Not all users need to be present at the outset, but a few folks who will ultimately use the tool on a day-to-day basis will be helpful when identifying needs. Sometimes the business owners, executives, and the end users are one-in-the-same.

2 Agree on what you're measuring

The next step would be to determine the measures you want to include. Include as many as you can think of, and then pare them down from there. If you feel they are all necessary, then break them up into phases based on need. A phased implementation makes BI development more manageable.

You likely already defined your end users when you formulated your team. But this is the time to double-check that you know who your end users will be since they will dictate how the metrics will be defined and if the dashboard or scorecard has the desired functionality to meet their needs.



3 Define the business logic

Now that you have your team and your measures figured out, you will want to define the business logic for the measures. This may seem straightforward, but it can often be the hardest part of this endeavor. In many organizations, there has never been a standard definition for the business logic and different people or departments have been calculating it in their own way. If no standards exist, now is the time to determine a standard definition and stick with it. It will make change management and user adoption easier in the long run. If your organization has a data governance group, members should be able to help define measure definitions. Also, designate a business owner for each measure. This person should know enough to answer any questions your consultant may have.

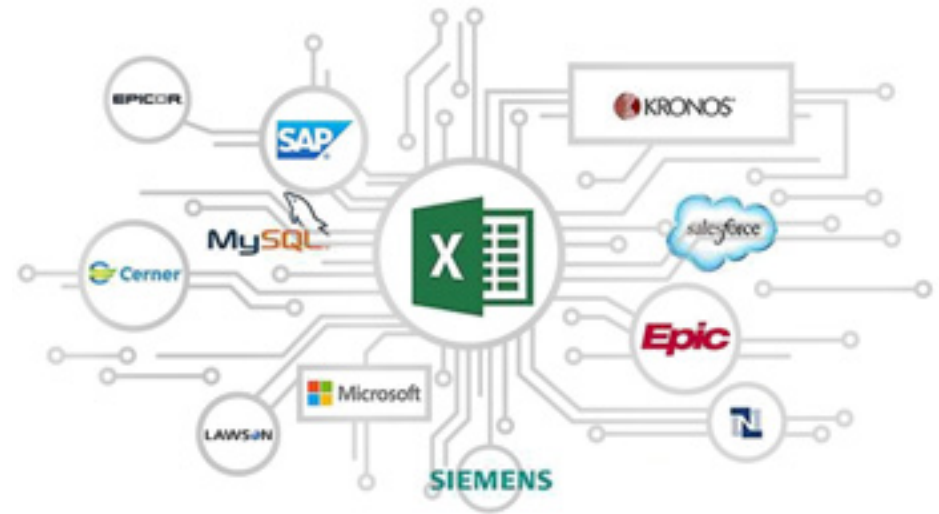


4 Determine your data sources

Next, you need to know where the data is coming from. This is just as important as defining your measures. If you determine you don't have the right data available then certain measures must be put on hold until you can capture the necessary data. You will want to designate a data steward for each data source who is an expert on the source system and the data within. This resource will help with data extracts and answer any questions your consultant may have.

You'll also want to create a measure master. Since you've invested all this time and energy to establish all this information, it's only logical you will want to record it. Do so in an easy-to-use format that you can review and modify as necessary. At the end of this guide, we have a sample measure master for your reference.

Review this measure master with your consultant. Now that you have all your ducks in a row, you should float your ideas by your consultant. If your consultant is worth his or her mettle, he or she should be able to offer insight and suggestions, and ask valid questions to help improve the deliverable. This may require a bit of back-and-forth with the consultant and your team but spending the time upfront will prove invaluable.



Now you're ready to roll

Once the measure master is signed off by all parties you are ready to begin your BI implementation. Defining the project specs may have been a lot of effort, but it is worth it. With your I's dotted and your T's crossed, you should be in for a relatively smooth ride throughout the rest of the implementation.



How a Phased Approach Helps You Avoid the Pitfalls of Enterprise-Wide BI Implementation



Implementing an enterprise-wide business intelligence solution can be a game changer for your organization. It brings all company data under one toolset and provides integrated insight into all corners of your business.

Despite all the promise of BI, in practicality, implementation is often met with mixed results (a lot of failures). There are many horror stories of organizations whose efforts to implement enterprise-wide BI are fraught with massive scheduling delays, major budget overages, data issues, and dissatisfied end-users.

The pitfalls of enterprise-wide BI

When BI projects fail, the story often plays out something like this: The development team meets with all stakeholders at the beginning of the project, the team gathers requirements, and then goes off to try to accomplish everything and roll-out the entire deliverable all at once. Doesn't sound too bad, right? Wrong.

This seldom works well for any number of reasons:

- Delays because the different reporting areas take forever to agree on what the business rules are for their desired metrics.
- Assumed data sources or business rules were incorrect.
- Numerous data validation issues.
- Reporting displays and dashboard functionality were different than desired.
- Requirements were misinterpreted and the deliverables were different than what was anticipated.
- Delays because different areas of the business are all on different schedules.
- The end result isn't what the executive stakeholders had in mind.

As a result, the executive stakeholders are dissatisfied; end-users are distrusting of the solution; time, money, and resources have been wasted; and you're no closer to the BI solution you need.

This approach is often referred to as "Big-Bang Implementation Strategy." It's archaic, derived from a time when businesses moved slower, less changed, and there were fewer moving pieces. Businesses today need a faster, more nimble way to deploy business intelligence.

A phased approach works best when implementing BI. BI implementation, especially at an enterprise level works best when it functions more like Agile software development. You don't need to know anything about software development to understand Agile software development; for all intents and purposes, it is simply a staged or phased implementation strategy. When you are implementing BI with a phased approach, there are 5 things you should do that will help you avoid hiccups along the way:

1 Gather requirements upfront:

This is a must, and it is a best practice to involve all stakeholders from the executive team to the end-users. Having all the necessary insight up front saves a lot of extra rework down the road.



2 Break down the requirements into key business areas and phases:

This makes for much more manageable chunks of work which means it's easier to stay on schedule and project members feel more productive knowing work is getting accomplished. With larger projects in which you just have one big deliverable, roadblocks can push a project out innumerable times and you have nothing to show for all the work that has gone into them.

Multiple project phases allow for a more iterative development process in which interaction with project stakeholders is frequent and consistent. More frequent interaction leads to more feedback to guide and correct your development course. This is opposed to trying to do the whole project and then finding out at the end you took a hard right turn when you should have gone left. Smaller iterations allow you to gently adjust course when roadblocks occur.



3 Select the priority of phases:

There is no hard and fast rule to scheduling your phases. It is very much dependent on the dynamics and internal politics of your organization. But when determining the schedules and priorities consider the following:

- Which departments stand to benefit most from a particular phase?
- Which phases will make the greatest impact on the organization as a whole?
- Are there certain phases that are more complex or bound to have additional challenges?
- Which business area is likely going to be most receptive to using a new tool?
- Which departments have the time and flexibility to work on a particular phase?
- Which business areas have clearly defined metrics that can be successfully implemented without delay?
- Which dashboards have readily available data?

PRiORiTIES

- 1.
- 2.
- 3.



4 Continually validate data:

Iterations are also significantly important when it comes to data validation. Data integrity is paramount. If data is determined inaccurate during initial roll-out, you can lose your audience forever. No matter what you do, sometimes they just won't trust the system again. Result? All your development time, personnel and financial investment are wasted.


Constantly getting eyes in front of the data during development allows for more opportunities to catch errors and it makes the final validation/QA stage easier on your validation team.



5 Rollout to departments gradually:

Iterative rollout as functionality becomes available makes change management and user adoption much easier. Rather than trying to force the whole organization at once to make a complete paradigm shift, rolling out to departments and/or business areas as dashboards become available allows you to focus your resources a little at a time to make sure rollout is smooth and thorough. As you have successful rollouts to different departments, good word of mouth about the successful implementation and usefulness of the tool can get uninitiated departments excited about their rollout and more engaged when their turn comes. BI isn't static; it's a living, breathing creature. Measurement and analysis lead to constant improvement, which leads to new BI initiatives. What you study also changes. And as the business grows and changes there will ultimately be modifications to your BI system to accommodate those new changes. Because of this, you can't really treat it as a one-shot deal. It needs to be iterative, flexible, and rapid. As business moves faster and faster, your BI capabilities need to adapt as quickly as the rest of your business does. Requirements change and if your implementation takes too long, you'll likely find that the initial requirements don't hold true to the requirements of today.





Wrapping Up Your Project

(And winning the race.)

3 Considerations When Deciding Whether to Take
Ownership of Your BI Implementation 50

A hand holding a set of keys, symbolizing ownership or transition. The background is a bright blue sky with scattered white clouds. A semi-transparent blue banner is overlaid across the middle of the image, containing the title and a Twitter icon.

3 Considerations When Deciding Whether to Take Ownership of Your BI Implementation



Eventually your business intelligence implementation will be all grown-up and you'll consider bidding a fond farewell to your consulting team who helped you get there. So when is the right time for you to take ownership?

The answer? (Wait for it.) It depends.

How to decide if it's the right time for a hand-off

Sometimes you don't have a choice in the matter. Sometimes your planned implementation work has a due date and after that you're on your own. Hopefully you're not in that situation.

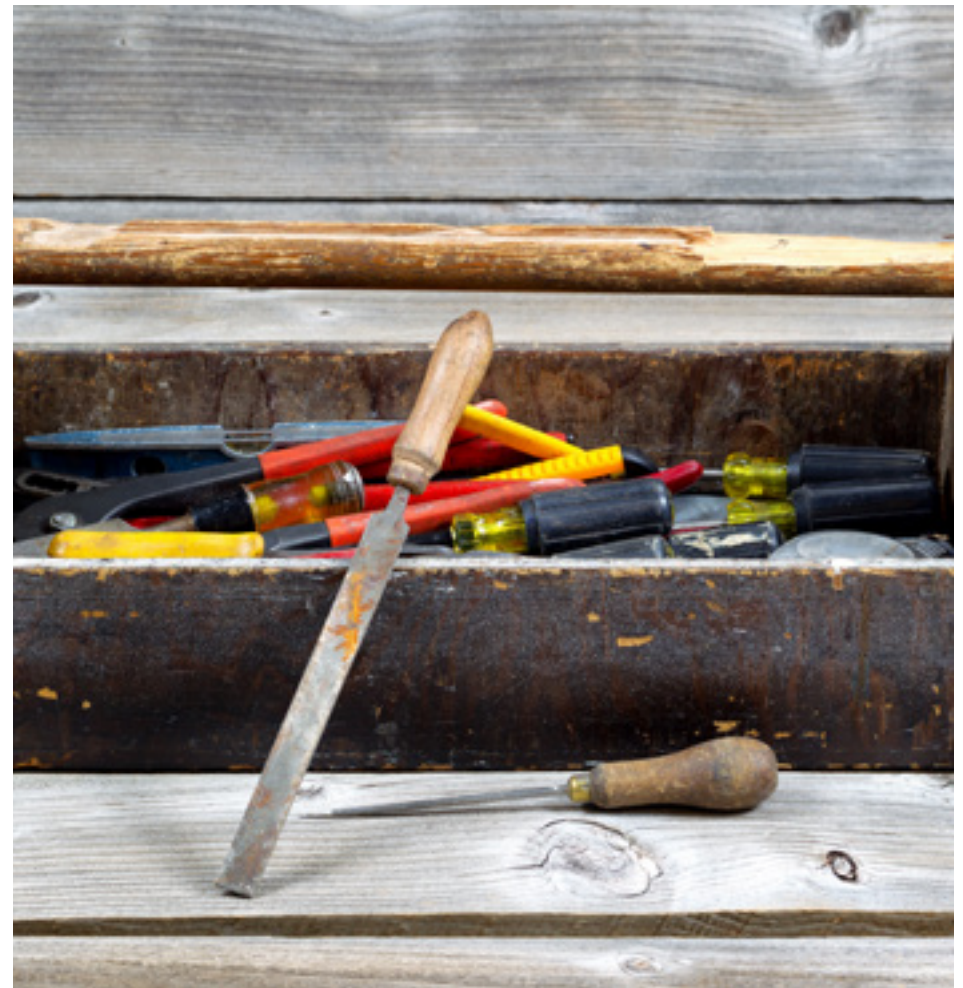
If you are still in the early stages of planning your BI implementation, it's best to devise a transition plan with your consulting team, and build it into the scope to determine when and how the hand-off will be made. It's worth noting that your transition plan may change due to a number of factors including: adjustments in scope, resource availability, and changes in understanding and perceptions of the software. And that's okay. It's good to get something in writing and have a plan in place so you're not unprepared.

If you're in a state of flux in which you have consultants managing your BI implementation and you're considering a transition, consider the following 3 things when deciding if it's time for a hand-off:



1 You will need the following resources for a successful hand-off:

- **People:** If it took a team of consultants to build your BI implementation, it's safe to say you will need more than one resource to carry the torch. Each person may specialize in certain aspects of functionality or in certain business areas. You might even have a resource just for basic administration. Additionally, with more than one allocated resource, there will be redundancy in the event of vacations, sick days, and employee turnover.
- **Time:** The scale and complexity of your implementation will dictate whether or not your resources need to be part-time or full time. If they are part-time, make sure they have the flexibility and bandwidth to handle all their responsibilities.
- **Skills:** You will need tech-savvy people to manage the software. You will need project managers to organize and prioritize different requests and organizational initiatives. You will also need "data gurus" with skills to understand the needs of different business areas and translate those into actionable deliverables. Then you need resources to understand the software, which leads to the next point.



2 Initial and continuing education

Unless you hire someone already familiar with the technology, be prepared to invest time for them to come up to speed on the software, ideally before you take full ownership. You should also plan to factor in time and money for continuing education. Learning is a constant endeavor and not a one-time thing, so allocate the resources for additional training classes so your people can hone their skills.



3 Don't be afraid to ask for help

Unless you're a BI rock star, you will likely need to lean on your consulting resources as you start to take ownership. And that's okay. No one can do it all from day one.

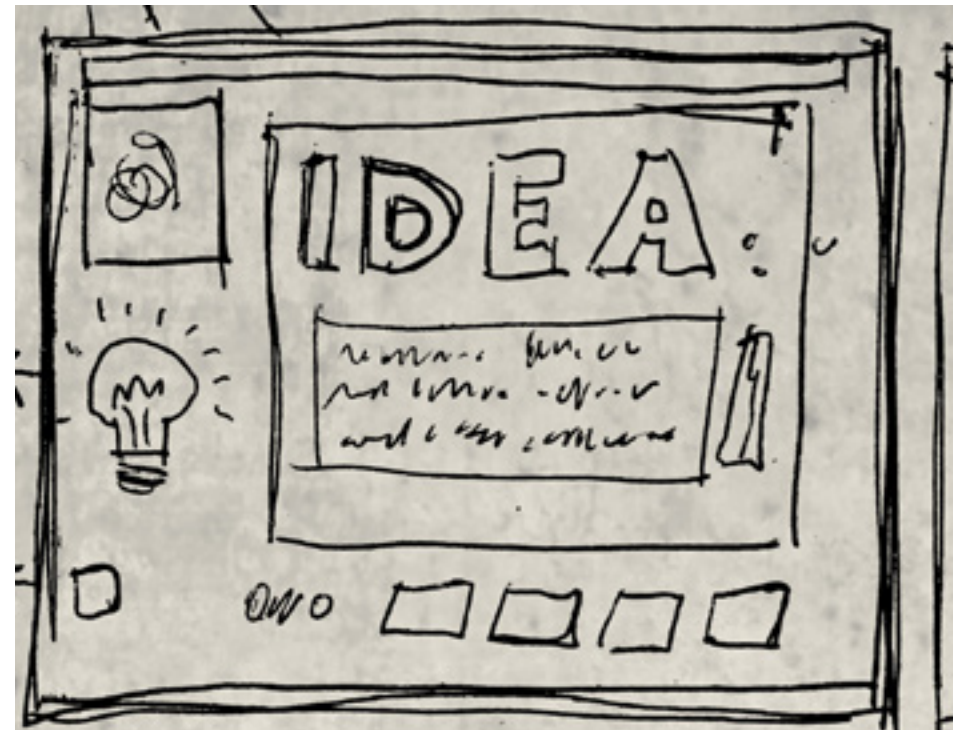
Sample transition plan

Over the next few pages is an example implementation and transition plan with a proven track record of success. You can use this as a framework for your own plan.



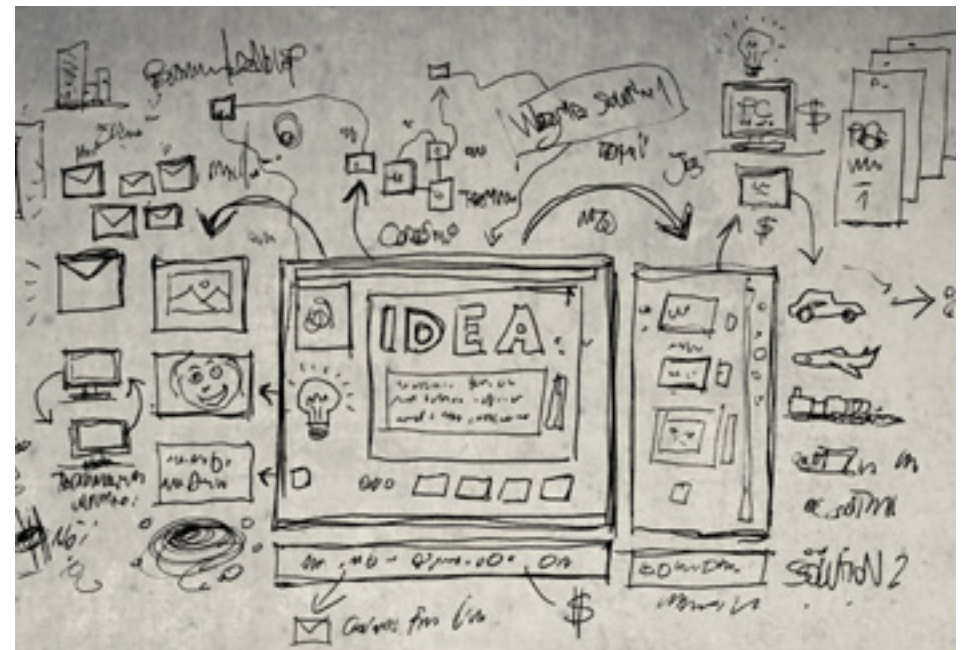
1 Define a project.

This project will essentially function as a spring-board to launch your BI initiative. While your consulting team implements this initial project utilizing best practices, you are given a chance to familiarize your organization with the structure, processes, and technology. We've already discussed the importance of this phased approach to business intelligence.



2 Define a second project.

This project should be relatively simple and straightforward. This will function as your transition project. Your internal resources will be tasked with the implementation and your consultant will function as a coach to help guide you through the process and ensure you are following best practices. Since there is already a project in place, your resources can use the logic from the first project as a template and reference.



3 Train during (not after) your project.

Throughout the transition project, your consultants should train you to ensure that you and your staff obtain certain skills before you need to use them. That way you are learning and doing in-step. Training and hands-on work running parallel to each other ensures that your staff are fully up to speed on the software and familiar with the intricacies of it.



4/5

Take over the implementation, but ... don't cut off your relationship.

After the project is done, you move into a primary ownership role.

Once you are in that ownership role, still maintain a relationship with your consulting organization for a little while. You should do this for the purposes of "Tier 2" support to fall back on when you encounter something you're not sure how to handle. Over time you will learn from these support encounters and build on your ability to maintain everything yourself.



Good luck when you decide to make this transition. It's a brave new world!



Appendix
(Prepare for your next race.)

Sample Measure Master..... 60

Sample Measure Master

[\(Click HERE to download the Excel Workbook.\)](#)

The Measure Master workbook is simply too large to display on one page of this eBook. Please download the file to use this valuable tool.

	A	B	C	D	E	F	G	H	I	J
1	Dashboard	Category	Phase	Measure Name	Business Owner	Data Steward	Description	Business Rule	Comments	Numerical Data Source
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About Dimensional Insight

Dimensional Insight is the leading provider of integrated business intelligence and performance management solutions. Our mission is to make organizational data accessible and usable so everyone from analysts to line of business users can get the information they need to make an informed, data-driven decision.



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