Examining Scope Management through Two Business Intelligence System Implementations

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Two BI Project Dimensions

- Product previously procured for past requirements
- 9 Months
- > $1M
- 2,000+ internal Users
- Accessed via Corporate Intranet

- 6 month Product RFP
- 4 months for initial phase
- > $500K
- Beginning with 50 internal Users, scaling up to 500 Users
- Accessed via Corporate Intranet

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First, what do we mean by a "Business Intelligence System"?

- Datawarehouse?
- Decision Support?
- OLAP?
- Balanced Scorecard?
- Performance Measurement?
- Web Portal?
- All of the above? (Wrong Answer)

Understanding the Business Drivers

- Need for flexible, quick ad-hoc reporting;
  - OLAP is really for super-users.
- Need for more user-friendly reporting;
  - "Nobody Uses our Financial System's Reporting";
  - "No one outside of Finance can figure out what reports to run".

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Understanding the Business Drivers

- Need for On-Demand Reporting;
  - Easy, Quick Access, Integrating Many Sources.
- Need for Fresher Reports;
  - Information Up-to-Date as of Yesterday.
- Executive Reporting;
  - Information Rich vs. Data Rich.
  - Communicates a Result at a Glance.

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Find the Right Tools for the Job

- Careful due diligence on software solutions – Avoid the hype;
- Stay Mindful of Future Requirements;
  - Long-Term Strategy for Investment Protection
- Buying Hardware and Software is important, but completely understanding the implementation costs is most important.

Find the Right Tools for the Job

- Understanding the Technology Strategy:
  - ERP Vendors have their bolt-on solutions;
  - Different Market Leaders for meeting Different Business Drivers;
  - Leading Edge vs. “Bleeding Edge”.

More Importantly…..

Information Analysis Comes First

- Is the Required Information Clearly Defined?
  - Sources are clearly mapped;
  - Key Indicators are clearly defined;
  - Do the pieces of reporting information map properly to each other vs. “comparing apples to oranges”.
- The Best Tools in the World cannot answer these challenges for you.

Suggested Approach

1. Determine Key Business Driver(s);
   - If Project must have many, consider it a Program, and plan accordingly
2. Detail Data Requirements;
   - Ensure that these can be met
3. Conduct High-Level Reporting Requirements;
4. Review Solution Options;

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Suggested Approach

5. Determine, Compare Total Implementation Costs;
   - Hardware
   - Software
   - Training
   - Support / Upgrade
   - Operating / Maintenance
   - Internal & Consulting People
6. Procure Tools, Implement Infrastructure;
7. Initiate Implementation Project.

Implementation Methodology

- Three Major Project Streams running concurrently:
  - Data Requirements;
  - Reporting Requirements, including Delivery and Presentation;
  - Technology Solution Development & Implementation.

Implementation Methodology

- Have extended team(s) with a complete cross-section of end-users to work on first two streams:
  - Data Requirements;
  - Reporting Requirements, including Delivery and Presentation.
- Teams meet regularly i.e. every 2 weeks.

Implementation Methodology

- Data Requirements methodology should be more structured i.e. waterfall, data model, architecture;
- Reporting methodology – Most tools today lend themselves to Prototyping;
  - Reports
  - Graphs
  - Presentation
  - Web Portal
- Frequently Involve the User Teams.

Additional Considerations

- Different stakeholders have different, almost contradictory interests – keep referring back to the project's key business driver(s);
- Common Look & Feel with other Departmental Web Applications i.e. GOL;
- Bilingualism;
- Group Requirements and create fewer, faster release dates i.e. 4 per year;
- Corporate Technology Architecture, Standards.

An Emerging BI Maturity Model

Stage I

- The organization makes the move to a decision-support, datawarehousing solution to provide operational reporting outside a transactional system.
- The key benefit sought by clients at this stage is greater access to more timely information, and performance relief on the transactional system.

An Emerging BI Maturity Model

Stage II

- The organization begins to create a datawarehouse that seamlessly integrates data from multiple source systems e.g. Peoplesoft HR, Influatec's Salary Management System, SAP Financials, a Grants & Contributions Systems, etc.
- The key benefit sought by clients at this stage is timely amalgamation and reconciliation of data from several sources.

An Emerging BI Maturity Model

Stage III

- The transactional datawarehouse evolves into an executive-level performance measurement system, perhaps containing metadata - “a datawarehouse of the datawarehouse”.
- The major benefit sought by clients at this stage is to quickly translate data-rich reporting into more information-rich reporting, and providing executives this key information in two or three mouse-clicks.

An Emerging BI Maturity Model

Stage IV

- Relatively few clients are at this stage of maturity. This stage entails using Internet and interface capabilities to dynamically link to third-party information sources and integrate this information with internal information in real-time.
- One key sector making great strides in this area is the Justice, Police, and Correctional Services clients where sharing information across jurisdictions is a critical mandate.

Thank You

- Question & Answer Period