

# Winning Approaches for a Successful BI Deployment

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**Business Objects**

INSIGHT

AMERICAS 2006

# About Guident

# Guident

*Bottom-Line Business Solutions*

- ▶ **150+ professionals**
- ▶ **Five presentations at 2006 Business Objects Insight Americas User Conference**
- ▶ **Founded in 1996 by ex-‘big four’ consultants**
- ▶ **Business intelligence focused**
  - BI Solutions, data warehousing, center of excellence, BI strategy, data quality, etc.
  - Business Objects partner
  - Involvement in 120 BusinessObjects deployments
  - Accredited expert BOBJ professionals
  - BusinessObjects XI release 1 and 2 beta tester
  - Multiple presentations at last 3 Business Objects international user conferences

# Topics

- ▶ **Introduction**
- ▶ **Analyze Tips**
- ▶ **Design Tips**
- ▶ **Develop Tips**
- ▶ **Implement Tips**
- ▶ **Change Management Tips**
- ▶ **Project Management Tips**
- ▶ **Conclusion**
- ▶ **Q&A**

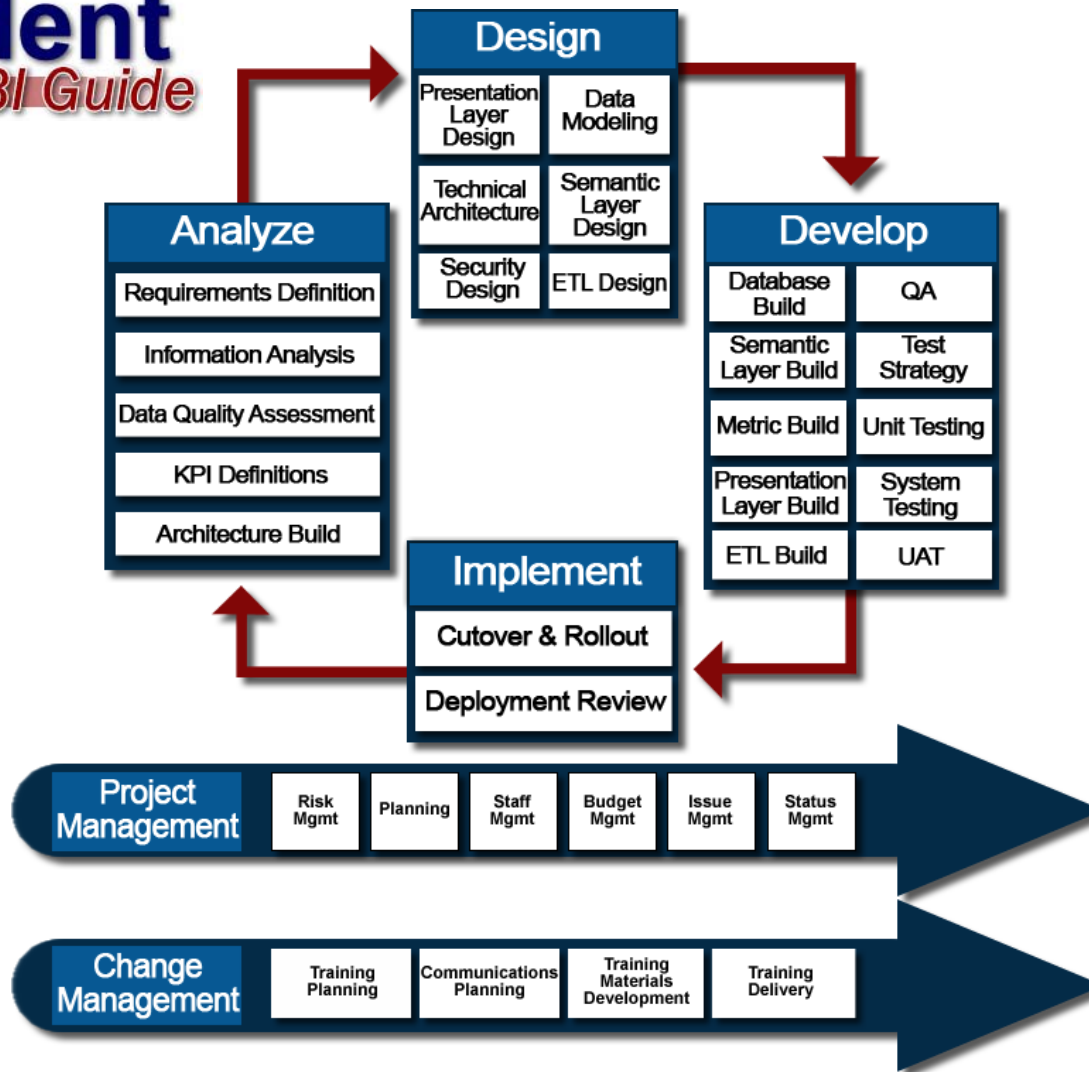
# Introduction (1 of 5)

- ▶ **Our approach is based upon the knowledge that Business intelligence differs from traditional IT implementations:**
  - Users are often unfamiliar with available data
  - Users often have little, if any, experience with analytical reporting tools
  - Business users often have little idea how they will use an ad-hoc querying tool
  - End solution is not a 'transaction' but a 'result' which should drive action

# Introduction (2 of 5)

## BusinessObjects methodology

### Guident BI Guide



### Key concepts:

- ✓ Phasing
- ✓ Iterative
- ✓ Includes piloting 'See and Touch'
- ✓ Promotes knowledge transfer
- ✓ Flexible
- ✓ Incorporates best practices

# Introduction (3 of 5)

- ▶ **MOST IMPORTANTLY...get your business users excited about using actionable information**

The screenshot shows a web application interface with a dark sidebar on the left containing navigation links: Welcome, Corporate Documents, Personal Documents, Inbox Documents, Create Documents, Search, Options, Logout, and Help. The main content area is titled "President's Council / Club 2003 Performance Summary" and features a circular logo for "MAUI 2003 PRESIDENT'S COUNCIL". Below the title, it states "Results as of 12/26/03" and displays a table with the following data:

Sales Rep	Hemenway, Brian	Region	South
Employee ID	054169	Area	North Carolina
Sales Position	Government Account Executive	Sub Market	ENC
Program Group	Direct Sales Representatives - Group 2		

Below the table, there are three motivational messages with illustrations:

- "You are not there yet - keep selling!" with an illustration of a person climbing a rope.
- "You are ranked 167 out of 635 eligible representatives in Direct Sales Representatives - Group 2" with an illustration of a person at a podium.
- "There are 3 business days left this month. Sell 372 more Net Voice Units to be at President's Council!" with an illustration of a person running.

At the bottom, a bar chart compares "My YTD Performance" (yellow bars) and "Council Benchmark" (blue bars). The Y-axis ranges from 100% to 200%. The chart shows four data points: the first two bars (My YTD and Council Benchmark) are at 100%, the third (My YTD) is at 150%, and the fourth (Council Benchmark) is at 100%.

# Introduction (4 of 5)

*A great real-life example of using BI: How did the Oakland Athletics use data to win games?*

## New York Yankees

- Payroll = \$110 million
- Wins = 95

## Oakland Athletics

- Payroll = \$34 million
- Wins = 102

2001 Major League Baseball American League standings

	Team [Click for roster]	Wins	Losses	WP	GB	Payroll
East	New York Yankees	95	65	.594	0	\$109,791,893
	Boston Red Sox	82	79	.509	13½	\$109,558,908
	Toronto Blue Jays	80	82	.494	16	\$75,798,500
	Baltimore Orioles	63	98	.391	32½	\$72,426,328
	Tampa Bay Devil Rays	62	100	.383	34	\$54,798,500
Central	Team [Click for roster]	Wins	Losses	WP	GB	Payroll
	Cleveland Indians	91	71	.562	0	\$91,974,979
	Minnesota Twins	85	77	.525	6	\$24,350,000
	Chicago White Sox	83	79	.512	8	\$62,363,000
	Detroit Tigers	66	96	.407	25	\$49,831,167
	Kansas City Royals	65	97	.401	26	\$35,643,000
West	Team [Click for roster]	Wins	Losses	WP	GB	Payroll
	Seattle Mariners	116	46	.716	0	\$75,652,500
	Oakland Athletics	102	60	.630	13	\$33,810,750
	Anaheim Angels	75	87	.463	41	\$46,568,180
Texas Rangers	73	89	.451	43	\$88,504,421	

# Introduction (5 of 5)

*A great real-life example of using BI: How did the Oakland Athletics use data to win games?*

## New York Yankees

- Payroll = \$126 million
- Wins = 103

## Oakland Athletics

- Payroll = \$40 million
- Wins = 103

2002 Major League Baseball American League standings

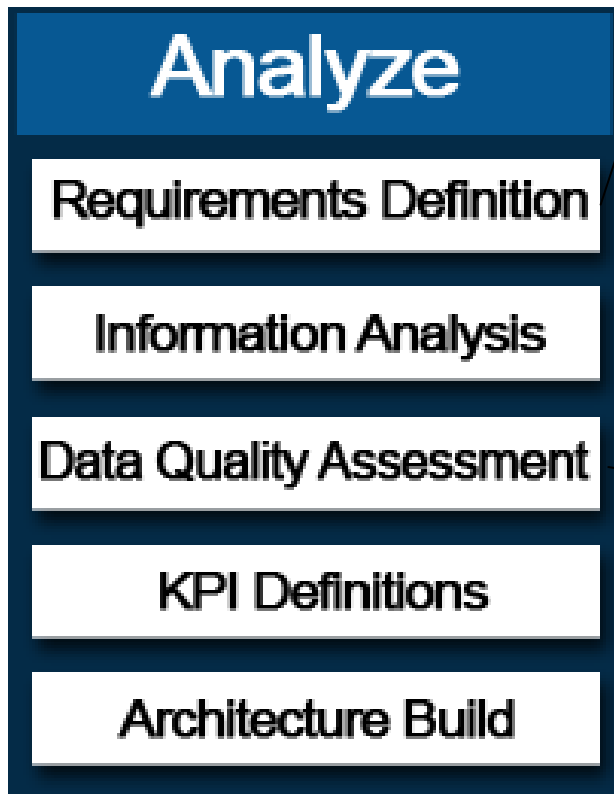
	Team [Click for roster]	Wins	Losses	WP	GB	Payroll
East	New York Yankees	103	58	.640	--	\$125,928,583
	Boston Red Sox	93	69	.574	10½	\$108,366,060
	Toronto Blue Jays	78	84	.481	25½	\$76,864,333
	Baltimore Orioles	67	95	.414	36½	\$60,493,487
	Tampa Bay Devil Rays	55	106	.342	48	\$34,380,000
Central	Team [Click for roster]	Wins	Losses	WP	GB	Payroll
	Minnesota Twins	94	67	.584	--	\$40,225,000
	Chicago White Sox	81	81	.500	13½	\$57,052,833
	Cleveland Indians	74	88	.457	20½	\$78,909,448
	Kansas City Royals	62	100	.383	32½	\$47,257,000
	Detroit Tigers	55	106	.342	39	\$55,048,000
West	Team [Click for roster]	Wins	Losses	WP	GB	Payroll
	Oakland Athletics	103	59	.636	--	\$39,679,746
	Anaheim Angels	99	63	.611	4	\$61,721,667
	Seattle Mariners	93	69	.574	10	\$80,282,668
	Texas Rangers	72	90	.444	31	\$105,302,124

# Topics

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# Analyze Tips (1 of 5)

## Analyze methodology



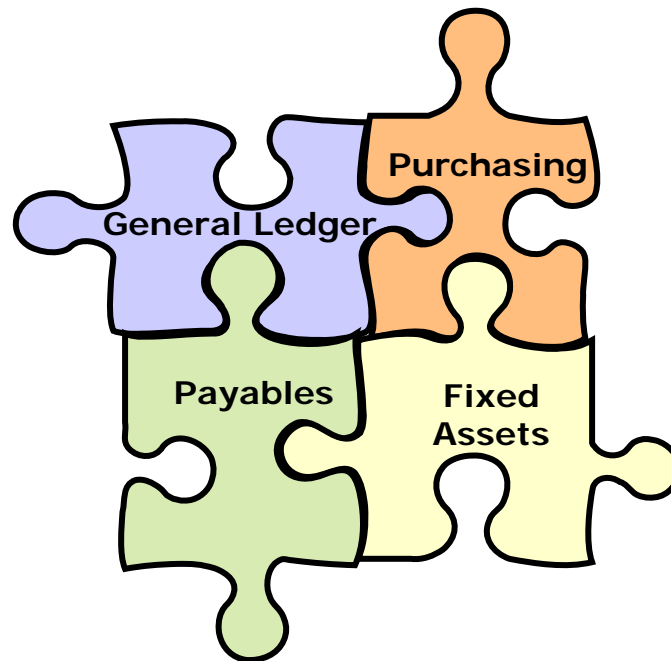
- Requirements list
  - Data elements
  - Technical
  - Security
  - Presentation catalog
- Dimensions/measures matrix

- Data quality assessment document

# Analyze Tips (2 of 5)

## ▶ Tip #1 – Phase your solution: 120 day rule

- Work with customer to break-out solution into phases (business processes, data sources, user communities, data complexity, etc.)



- Allows lessons learned and education so requirements definition is improved for phase two, three, etc.
- ‘Quick win’ allows fast realization of benefits

# Analyze Tips (3 of 5)

## ▶ **Tip #2 – Allow requirements to change**

- Requirements are initially defined
- Users go through learning events as the project moves forward
- Requirements can be added and modified during the course of the project
- Strong project management is required for this approach

## ▶ **Tip #3 – Educate your users**

- Provide an initial training session on the BusinessObjects product software toolset.
- Allows customers framework to better understand functionality, capabilities, and initiates learning process

# Analyze Tips (4 of 5)

- ▶ **Tip #4 – Perform gap analysis at same time as requirements gathering**
  - Project team must have member(s) that are completely knowledgeable of BusinessObjects
  - During interactive requirements gathering process, gap analysis is performed to determine the gap between requirements and BusinessObjects functionality
  - Facilitate methods to configure (BusinessObjects functionality) and customize (e.g. SDK) the solution to address each gaps

# Analyze Tips (5 of 5)

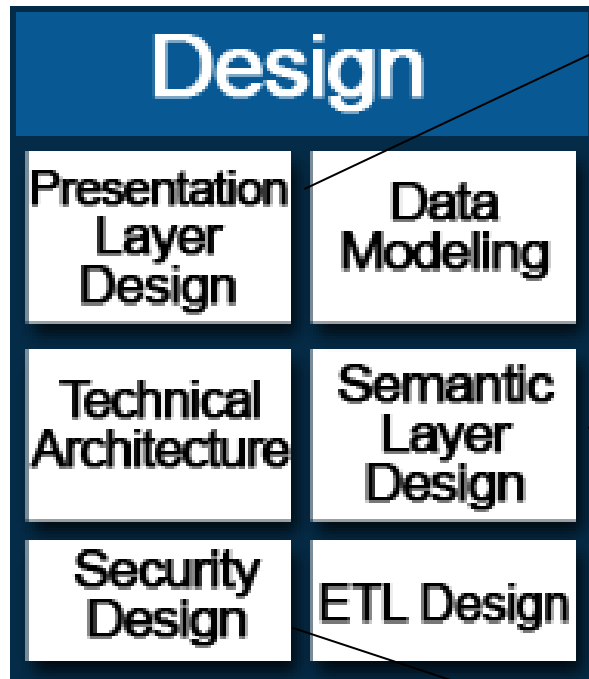
- ▶ **Tip #4 – Perform gap analysis at same time as requirements gathering (continued)**
  - Provide a 'level of effort' for gaps that cannot be easily configured or customized
  - Users are responsible for justifying the costs for the necessary requirements
  - Requirements must be SMART (specific, measurable, achievable, realistic, traceable)

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# Design Tips (1 of 3)

## *Design methodology*



- Presentation layer design document
- Presentation layer standards

- Universe standards
- NO universe design document (in this phase)

- Security design document
  - CMC user/group rights matrix
  - Row based security
  - User authentication

## Design Tips (2 of 3)

- ▶ **Tip #5 - Get users involved**
  - Use 'conference room pilot' approach
  - Prototyping
  - Engages user community
  - Users can 'see and touch' early in the development lifecycle
  
- ▶ **Tip #6 – Deployment should be business driven**
  - Heavily engage business users throughout every stage
  - Standardize naming conventions and terminology
  - Use standard naming conventions in universe
  - Educate users on how this directly affects their job

## Design Tips (3 of 3)

- ▶ **Tip #7 – Build more than what exists today**
  - Understand current reporting and analytical environment
  - Don't settle on only rebuilding current reports
  
- ▶ **Tip #8 – Design environment for future use**
  - Architect for future, build for now
  - Leave hooks in universe for future integration
  - Use conformed dimensions in data model
  - Design architecture for long-term

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# Develop Tips (1 of 2)

## *Develop methodology*

Develop	
Database Build	QA
Semantic Layer Build	Test Strategy
Metric Build	Unit Testing
Presentation Layer Build	System Testing
ETL Build	UAT

- Test strategy
- Test plans
- Executed tests

## Develop Tips (2 of 2)

- ▶ **Tip #9 – Build the universe right the first time**
  - The universe developer must have experience developing universes
  - The universe developer must be educated on both technology and business
  - Pay attention to the 'Art of Building Universe' (i.e. class/object ordering, # of objects, commonly-used conditions)
  
- ▶ **Tip #10 – Use the business community early and often**
  - Have business users create reports
  - Proves structure of universe
  - Allows test for data accuracy and completeness
  - Have business users be part of system test

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# Implement Tips (1 of 2)

## *Implement methodology*

**Implement**

**Cutover & Rollout**

**Deployment Review**

- Issue list
- Lessons learned document
- Enhancements list
- Interview questions best practices

# Implement Tips (2 of 2)

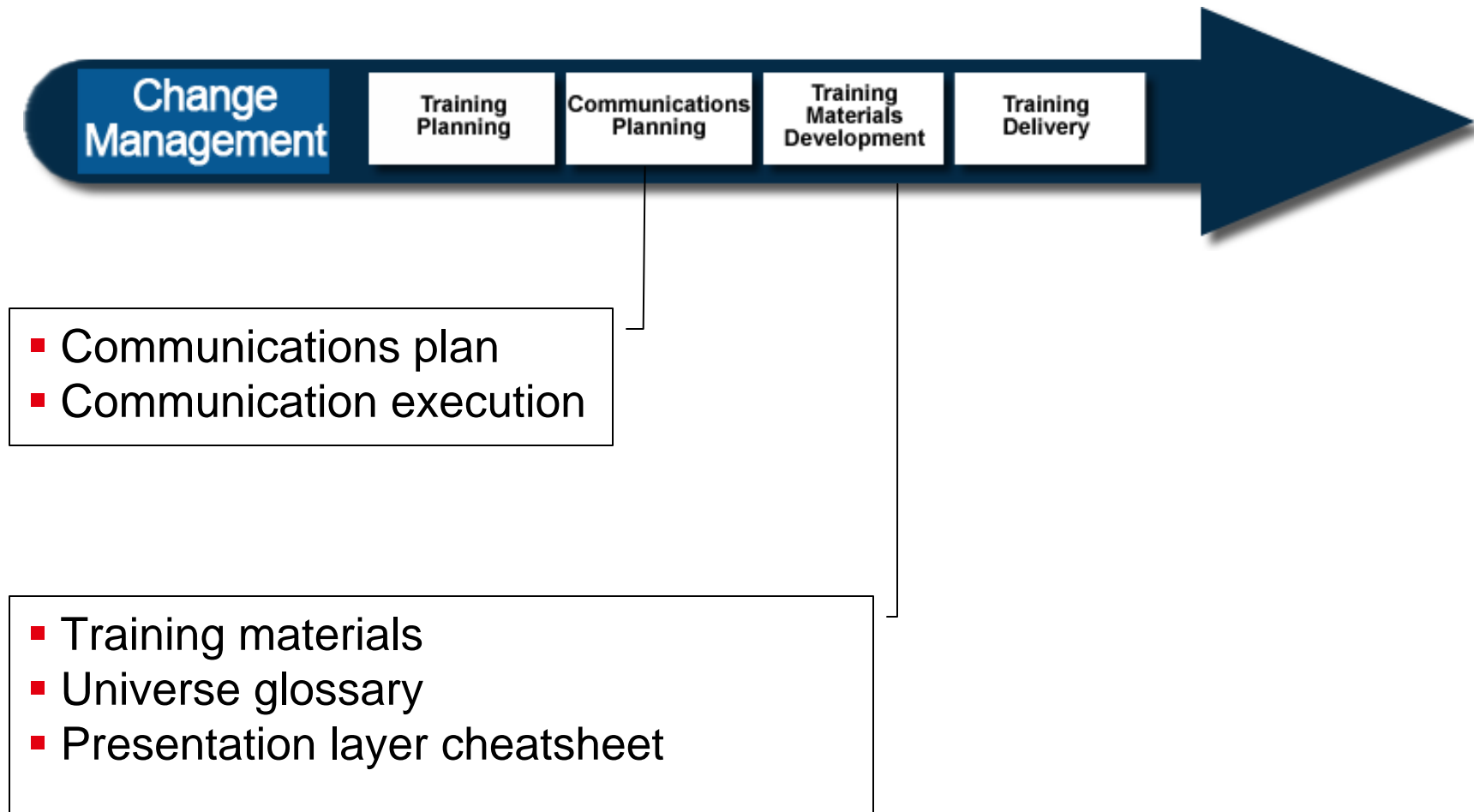
- ▶ **Tip #11 – Build report templates for adhoc users**
  - Nobody likes to start with a blank screen
  - ‘Save as’ helps adaptability
  - Audit personal reports to determine corporate reports
  
- ▶ **Tip #12 – Think big and remember your lessons learned**
  - The Business intelligence system is likely to evolve
  - Lessons learned and methodology can be basis for ‘center of excellence’
  - Document lessons learned, methodology, best practices, etc.

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- ▶ Introduction
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# Change Management Tips (1 of 2)

## *Change management methodology*



# Change Management Tips (2 of 2)

## ▶ **Tip #13 – Don't forget change management!**

- Build a change management and training plan early
- Remember that change management is part marketing, part public relations, part training, part support
- Understand the training technologies (e.g. knowledge accelerator, CBT tools) that are available today
- Training on the data is at least as important as training on the BusinessObjects software

# Topics

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- ▶ Q&A

# Project Management Tips (1 of 3)

## *Project management methodology*



# Project Management Tips (2 of 3)

- ▶ **Tip #14 – Project team should be cross-trained**
  - BusinessObjects is heavily dependant on data model
  - Ensure ‘reporting’ resources are part of same team as ‘data’ resources
  - Cross-train resources on data modeling, ETL tools, BusinessObjects, etc. Methods for this include ‘bootcamp’, assignments with heavy quality assurance and supervision

# Project Management Tips (3 of 3)

## ▶ Tip #15 – Know how to best utilize consultants

<b>Resource type</b>	<b>Consultant Usage</b>
Project management	heavy
Strategy and roadmap	heavy
Architecture	heavy
Universe	heavy
Standards	heavy
Data warehousing	moderate
Report development	light
Change management	light

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# How Do You Build a Major League Baseball Team?

*What data is given to you?*

- ▶ **Draft**
- ▶ **Free agency**
- ▶ **Player development**



# Who should I Draft?

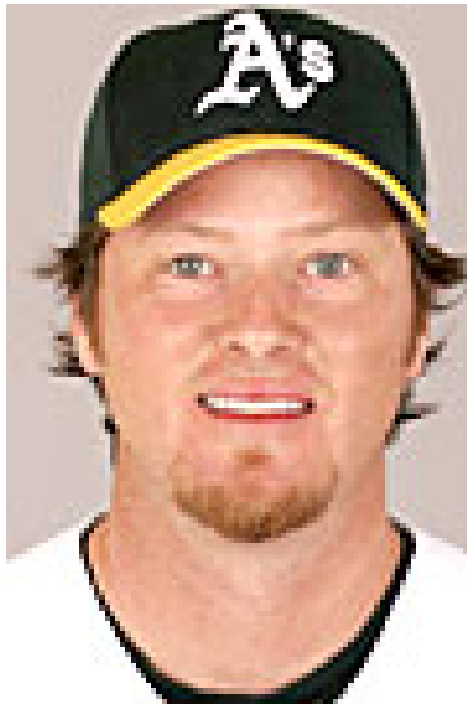
## *Turn data into actionable information*

- ▶ College pitchers are **TWICE** as likely than high school pitchers to become a major league baseball player
- ▶ College position players are **FOUR** times more likely than high school position players to become a major league baseball player
- ▶ **Decision: draft college players**

# What Free Agent should I pursue?

*Turn data into actionable information*

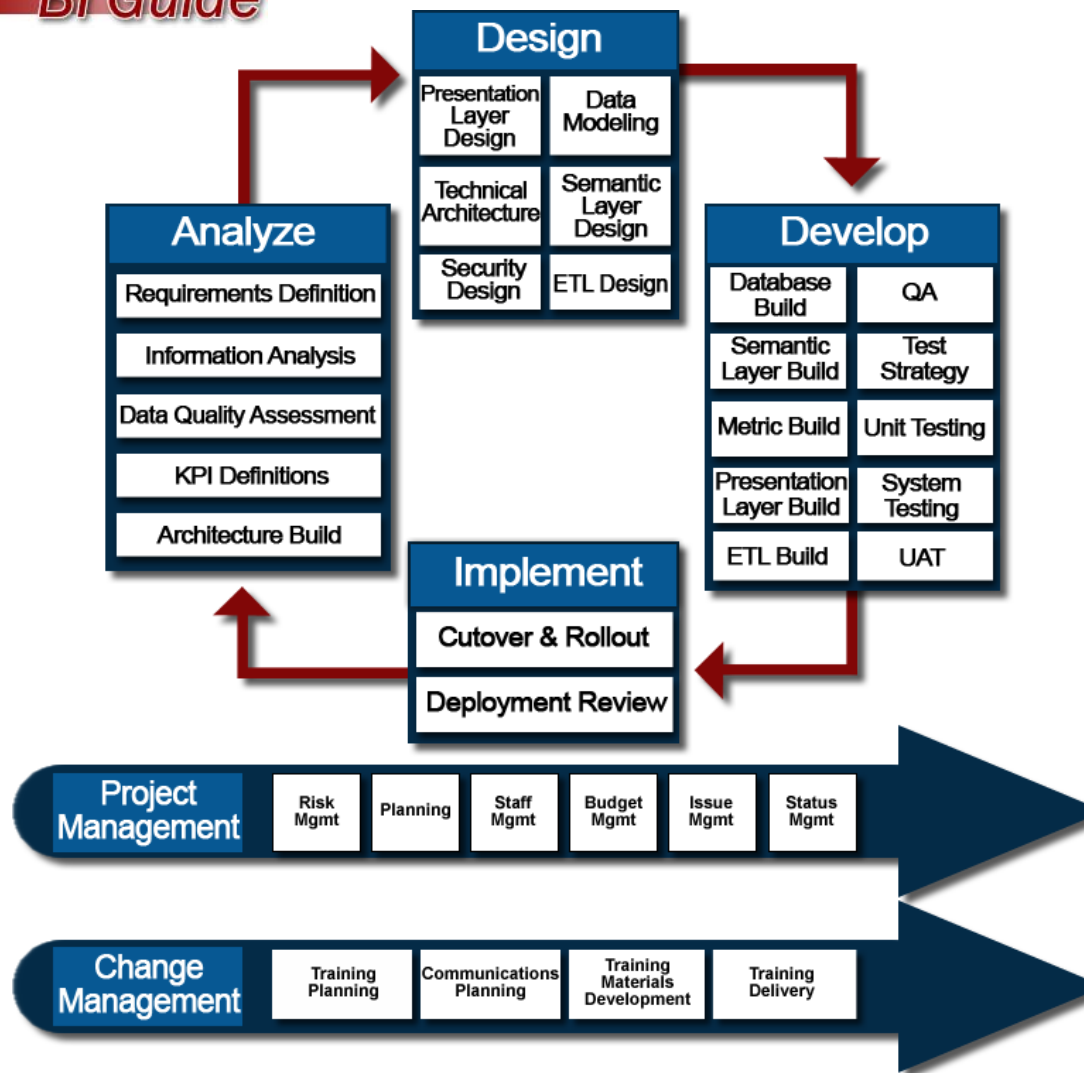
- ▶ **#1 statistical indicator of producing runs: on-base percentage**
- ▶ **Decision: let's take a look at Scott Hatteberg...**





# Conclusion

## Guident BI Guide



### Key concepts:

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# Questions?



- ▶ **Any questions?**
- ▶ **Contact information**  
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