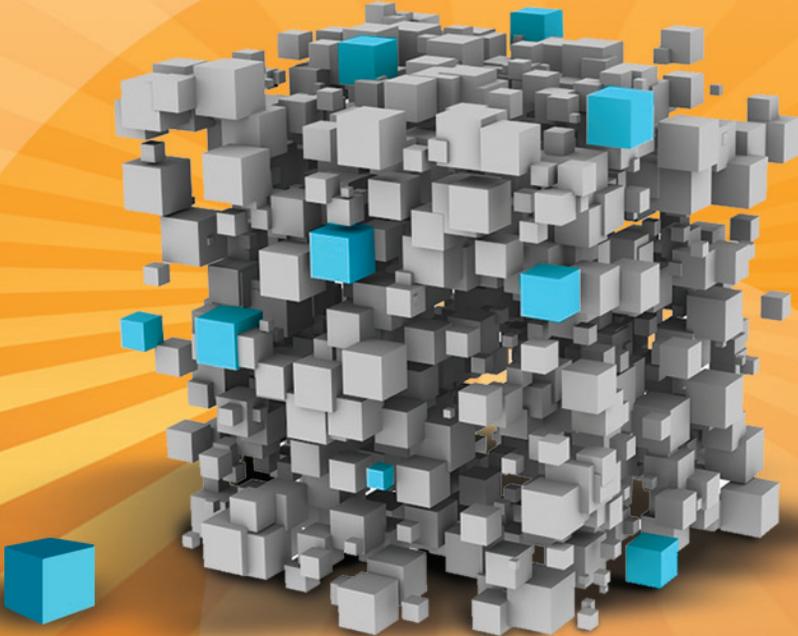


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**BUSINESS
INTELLIGENCE
PITFALLS**





1. Don't assume a BI project is complete just because the development effort is over.

A newly implemented solution is NEVER complete until it is fully adopted and effectively being used by the people that need it.

This is the scenario: The actual development effort is complete. The documentation is finished. The training was completed successfully. The BI consultant is done and out the door. Everything is working great and the project is a complete success, right? Not exactly. See, the actual users of the newly developed tool are pretty busy, and they won't get to "play" with it until next week. Then, next week rolls around, and the users are still pretty busy, and now one of them is on vacation. That seems alright, because they plan to break it out next week and really get their hands dirty. That would be great, except that next week is taken up by that big Sarbanes Oxley audit, so they won't have time then, either. See the pattern?

By the time the users get a chance to utilize what could have been a phenomenal source of information, they've forgotten "how", and often, even "why" these tools were built in the first place. Adoption and usage never catch on or become main stream and the business community is left wondering why they invested so much time and capital. The job of the BI professional is not complete until usage of the tools is part of the user's day-to-day activities.

2. A Business Intelligence initiative is impeded from the start if there is no executive level sponsorship.

If I were to rank this list in order of importance, this point would be very near the top, possibly number one. This is true for so many reasons. A BI project needs resources, both human and otherwise. These resources must be committed before the project is fully underway, and the people responsible for committing the resources must understand a few things: the scope of the project, the risks associated with the project, and, above all, the need for the project.

Without understanding and support, the project may not have the appropriate resources or may not get them in a timely manner. The benefits of a BI solution must be fully understood and championed at the top before the project starts so that the awareness and enthusiasm trickles down.

3. A BI project must have business community involvement from beginning to end.

In a BI project, there can be many stakeholders and these stakeholders must be managed as part of the project. Stakeholders are not only those members of upper level management who sponsor the project. They are not only end users of the final product. Stakeholders can range from the administrators of the data source systems, financial and/or business analysts, IT system administrators... really the scope is quite large.

Potentially, anyone that has contact with data used in the project can be considered a stakeholder. These are the folks that understand the current system, the data in the system, and the business rules that surround it. In other words, the resources needed to implement a successful BI solution.

Having a clear understanding of the business and how it works is crucial to the success of the project and stakeholders are the only people that can give you that understanding. This is another reason why executive level champions are so important. Forcing a BI developer to work in a vacuum because the people with the information they need are too busy doing their "real" jobs to deal with them will always result in a failed project.

4. A BI project will flounder without a clearly defined list of questions that need answers, business problems that need resolution, or issues that need tracking.

Admittedly, this seems like common sense when you read it on paper, but in practice, this simple truth is ignored more often than it should be. The term "Business Intelligence" is big and it sounds great. Who doesn't need more intelligence in their business, right? Too often, though, money is spent and capital is invested on a solution with no clearly defined goal. The inevitable result is an amazing, cutting-edge BI solution that doesn't really deliver anything useful to the business.



5. “Data quality issues!? We don’t have any data quality issues!”

Here’s another point that is greatly affected by having executive level sponsorship. The likelihood that issues with data quality, or, quite honestly, business processes, will surface is pretty good. It gets better as the project gets larger and/or the number of disparate source systems increase.

This is a risk, and a risk which is inherent with the vast majority of Business Intelligence projects. Issues with the cleanliness of the data, and/or the quality of the business processes which produce or alter it must be identified and fixed. Whether the data coming out of the BI system is correct or not, if the end user doesn’t trust it, it’s wrong... every time.

6. BI initiatives, strategies, and goals should evolve. Actual BI projects should not.

It is a great idea for organizations to create a BI roadmap. The road map should outline where the business wants to go and the associated BI strategies. This road map is a work in progress and as the business changes, so too should the roadmap evolve to incorporate these changes. However, continuously altering and re-altering specific BI projects which are already underway will simply muddy the vision for the end goal of that project, often times leading to extended periods of time with no deliverables, or even completing a project that has become too broad in scope and no longer delivers anything of value.

Keep projects small in scope and align them to fit the roadmap. If a project is no longer a good fit, it is better to just not do it then it is to “bend and twist” a current project to fit a goal that didn’t exist when the project was identified.

7. Over customization of a BI project can lead to extended development and testing time with minimal value added.

On the surface, this one is a “no-brainer”. However, it gets to be a little more difficult to avoid this one in practice. The problem can be as simple as a single person wanting to use a stop light to represent an Orders Cancelled KPI, while another user really wants a speedometer. Perhaps one group wants inventory turn counts for a certain product to be by the pallet, while another wants individual item counts.

There is no right or wrong answer to the “Which is the best way”, or “Does it make sense to track both?” As with most things in BI, the answer tends to be “it depends”. The effort involved with producing these numbers must be weighed against the benefit of having the solution finely customized to a very low level.

8. Lack of auditing controls or auditing effort

The outcome of a BI process is different than other processes, which may have an outcome that is easier to track. In an order processing system, did the order ship correctly? Was I successfully able to input and review patient records in an EMR system? These outcomes are tangible and easily identifiable.

When there is an issue, it is clearly evident. However, with a BI process the end goal is to generate a number or group of numbers against which decisions affecting the business will be made. How do we know if this value is correct? Constantly checking and rechecking against known “good” numbers throughout the development life cycle is imperative. This often requires effort from the business community, as well.



9. “One bite at a time...”

BI projects, especially enterprise level projects, can be large and complicated. Development of the entire solution in one shot can easily turn “large and complicated” into “overwhelming and unmanageable” which, in turn, leads to failure.

The adage, “How do you eat an elephant... one bite at a time” applies here. The project should be split into smaller, more manageable projects, each with a defined, tangible deliverable and a tightly focused scope. Instead of tackling an entire financial data warehouse and BI solution, start with an Accounts Receivable data mart with a defined set of KPI's... then expand on these KPI's. Once this solution is delivered and in use, then start on Accounts Payable, etc.

10. Going at it alone

Simply put, you don't have to. It often makes more sense to rely on the experience and know-how of a dedicated Business Intelligence consultant. Although it can, sometimes, make sense to utilize existing internal resources to develop BI solutions (after all, who knows the organization better than somebody who works there, right?), business intelligence projects are a different “breed” of project when compared to other types of software development.

Quite often, relying on the know-how and experience of a dedicated BI professional to ask the right questions, utilize industry best practices, and avoid traps and pitfalls makes all the difference in implementing a successful BI project.

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