

BI KnowledgeShare

News from Southport Services Group



Confessions of a Business User July 2008 – Volume 1, Issue 2

I have spent the bulk of my professional career on the business side of the Business Intelligence equation. Before leaving to become a consultant, I was principal liaison to the technical team for a large, client facing application. With the benefit of distance and perspective, I can now admit that it is possible that we as the business may not always be fair with our tech teams. We don't always research our requirements as much as is needed, and perhaps unrealistically expect technology to iron out the issues during development without further communication. Particularly for Business Intelligence projects, data can be viewed, interpreted and utilized in many ways by various users who have different underlying business needs. As it is nearly impossible to foresee all of the use cases, often there is not sufficient detail in requirements to fully inform a solid design.

That said, I still want what I want regardless of any shortcomings in the requirements. While this proposition is somewhat unfair, **there are hard line business consequences for the company if my requirements are not met.** Beyond the fact that I may need to ask for and justify more funding for the project, I will need to explain to my clients why they can't have what they want. I can't deliver on my promise for "bigger and better" things to come, as these things will be delayed while I clarify requirements to take care of this problem.

My greatest fear is that I am going to need to have the following conversation with my tech team. The dialog that generally ensues in conflicts like these has the following characteristics and leads to these most often feared phrases from the tech team.

Me: "This doesn't do what I need".

Tech team: "It works as designed". At this point, I've translated this into "this is what we plan to deliver". I tread cautiously forward...

Me: "How can we do what I need it to do?" At this point, the tech team will have one of two answers for me: The first is bad but manageable.

Tech team: "This needs to be a change control".

The scarier scenario is:

Tech team: "..."

After repeating this conversation at some level in all of the projects we did, I helped capture lessons learned from this and we built an improved process. I have taken these lessons learned to the consulting

world to help other businesses in need. There are several fundamental practices that can be employed by the business user that can help technology ensure that your BI project is successful. While they seem simple, they are often more difficult than they appear and require careful planning to implement.

1. Communicate the vision and the overall goal of the business process that relates to the report, dashboard or application. It is impossible to write requirements for every nuance of a business process or goal and my documented report rarely captures all of the process implicit in the users' need. With this communication strategy, the tech team will become more empowered, and they can add value beyond the requirements by taking these nuances into consideration and creating better solutions.
2. Validate the technical design early and often. This involves iterative effort, coordination with the user base and lots of expectation setting. BI projects are especially well suited for early validation as the development cycles tend to be shorter and testing cycles tend to be longer.
3. Prototype the actual solution. This allows you to see where your base requirements have shortcomings and provide technology with feedback on the implicit "unwritten" requirements.... maybe even before they turn into change requests.

Most of all, realize that you, as the business user, own the ultimate responsibility for ensuring the application gets delivered. You reap all the benefits and you bear all the costs. Remember that if technology has a problem, then this ultimately creates problems for you. The easier you make it for them to deliver your requirements, the more your tech team will embrace the opportunity to make you successful.

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