



BI Strategies Series: Broad User Adoption

Introduction

Most organizations have some form of business intelligence. But many of these deployments tend to be localized at the department level. With the drive toward collaboration on a larger scale, organizations need something more flexible: an enterprise BI system that everyone can use.

With the advent of open Web Services architectures, such scalable systems are now available. The challenge is ensuring it is adopted by the broadest group of users across the organization. But to gain such user adoption, an organization must move beyond multiple tools, processes and people to achieve success. An enterprise-wide, standards-based approach is one of the best ways to make that happen.

The discussion

With this in mind, IBM met with business and IT managers from various companies and government organizations at two parallel teleconferences.

The basis for the discussion: gaining broad user adoption. Organizations realize that putting BI into the hands of people is not enough. To ensure the technology is accepted and used effectively, IT and business require best practices and guidelines.

The IBM teleconferences served as a platform for open discussion. Delegates focused on how to turn BI from a tactical tool to a strategic platform for the whole organization.

The observations from these teleconferences are summarized in this document. It focuses on the business value of broad BI adoption, and some key recommendations and proven practices to help make it happen. By sharing these different viewpoints, we hope to enhance your understanding of the enterprise BI journey and help you find success.

Success Factor 1: Creating technology standards

Why standardize on an enterprise platform? For one, it allows a consistent and coordinated view of information across the organization. It also simplifies the IT environment, increases return on investment and can significantly reduce administrative and maintenance costs. Most notably, BI standardization is a necessary prerequisite for broadening the user base.

“Ultimately, our company has increased its ROI and decreased its cost of ownership; and IT is no longer a roadblock, but rather a facilitator,” said one participant. “BI is now tapped into the pulse of our user base like never before.”

But creating standards and broadening adoption is not easy. Delegates outlined some key proven practices and recommendations:

- Have a strong executive sponsor.
- Partner IT with business users.

Executive support

Gaining executive support is critical to the process. Business leaders in the organization need to be sold on the standard and the idea of broad user adoption. As sponsors or champions, they play a pivotal role in getting word out to business users.

“Get somebody high up on the business side (CEO or VP) using it because if they’re excited about it, everyone else is going to want to use it,” said one delegate. “There’s no way they want their boss knowing something before they do.”

Educating key stakeholders about the advantages of employing BI also helps to build the lines of communication between regions and departments to prevent a silo-driven approach to implementation.

In one case, IT communicated the value to key executives – what the reporting standard could do in terms of formats and user self-service. The goal was to get management to say: “Yes, I want this.” That in turn helped pushed the platform out to more users.

Converging IT and business users

To build BI implementations that people want, IT should partner with users to form a BI strategy, determine information requirements and work out issues. This will ensure IT delivers relevant solutions that more users will want to use.

Many of the delegates stressed the importance of this kind of partnership. In a word: business drives how you use the technology.

From one participant: “Get subject matter experts from the business side involved, since it’s their lives you’re affecting. If you don’t get them on board, they may sabotage your efforts.”

How to get business users on your side? Solve their pain. Gaining an early, high-value win is vital to success and helps build positive momentum throughout the organization

As one attendee suggested, you start with a pain point you know a department is trying to address. You then find a champion who is willing to collaborate to identify a solution. “Then you support them to the max; that blossoms out and they become your speaker across the business. That will help you drive adoption in other parts of the business.”

Success Factor 2: Communicating success and demonstrating value

If the organization clearly understands the value and benefits of an enterprise-wide initiative, more users will want to co-operate and communicate.

Delegates outlined some proven practices for helping the organization realize the strategic value of a broad user initiative:

- Communicating success.
- Measuring and demonstrating value.

Communicating success

Attendees acknowledged that broadening the user base requires communication and information sharing. It is essential that IT communicate the importance of BI to everyone across the organization.

One department promotes BI user groups, which provide a forum for people to demonstrate their solutions. The idea is to share as much information across the business as possible. Other IT groups have BI user days or organize lunch and learn sessions for general audiences – the idea is to show how other users are tackling similar issues and strategies.

Other suggestions: provide proof of concepts, invite your vendor to come in and show off the software, and showcase innovative solutions people have used the technology for.

Measuring and demonstrating value

It is also important that IT prove the value of strategic BI. This ensures ongoing support, especially from upper management.

A recommendation for demonstrating ROI is to run reports on your reports. That is, document how many times a particular report is run, by who and how often it is opened. One department produced monthly statistics to demonstrate its growth and value: a baseline that has grown from 5000 to 35,000 reports each month.

You also want to understand, gather and report on the major business benefits gained by the various business units using the solution. For example: Are they able to close the books in hours instead of days? Were sales increased or were marketing campaigns more effective?

Once IT has partnered with the business to understand the key metrics they need to measure and monitor, the organization also needs to understand how they can better achieve results, what results have been seen to date, and how to document and communicate the value.

Success Factor 3: Providing accessibility

To ensure the broadest adoption of BI, IT has to ensure that the tool is easy for users to access. “You can’t have a standard and make it hard for people to get,” said one delegate. In this case, the IT department provides licenses and gives users immediate access to the environment, along with training.

Timing is everything, so getting people on board quickly is critical. Otherwise, as one delegate noted, you can lose your users.

“If we say: ‘This is what we’re going to do, but it’s going to take this long to get the tools in for the project and negotiate the licenses,’ it will turn them away. Users don’t want to sit around and wait.”

Some strategies and proven practices in this area:

- Provide free access, at least on a trial basis.
- Find the right balance of self-service and IT support.
- Purchase an enterprise BI license, and manage it centrally.

Free access

If users perceive that the software is both available and “free” or at very low cost, IT can gain significant buy-in. As such, many delegates agreed that the best strategy is to have IT cover the software as overhead. “We made a decision not to drive down the costs to the individual departments,” one attendee noted. “So in essence, those licenses are free. That, along with an existing infrastructure regionally deployed, has really increased our adoption and alignment to the standard.”

User self-service

A self-service tool can mean less headaches and time-consuming support for IT. But how much user self-service is appropriate?

If users don't have to wait for IT to create cubes or build reports for them; they can get on with the business at hand. At the same time, there may be instances where security, legal issues or complexity make it more logical for IT to take the wheel. The consensus: Don't be afraid to put a stake in the ground, especially in a large organization; boundaries still need to be set.

As one participant noted, users should be able to create and generate their own reports. However, IT still needs to set security, run metrics and control production.

Another delegate suggested a tiered approach for users accessing and using the system. "Associate rights and privileges with deeper knowledge of the technology, and give people more capability as they go along."

Enterprise license

In most cases, delegates agreed that it was best to go with a vendor that offered an enterprise standard and licensing – this is more readily managed centrally, and provides the requisite scalability as the organization grows.

One delegate noted that with an enterprise license, you have to gain a balance between offering free BI tools and ensuring departments don't ask for more than they need. (With a smaller license pool, it is easier to allocate amounts as needed and charge back.)

To manage this issue, one strategy is to conduct audits to track who is doing what with the software. In some cases, IT departments might pull some licenses back if they're not being used. Charging maintenance fees may also help to ensure departments focus on value and make the best use of the software.

In the case of organizations that can't afford an enterprise license at the outset, one delegate had this advice: "Start with enough licenses so it seems ubiquitous. And grow from there. Use the champions or sponsors you have and show the value. Eventually, you'll be able to get to an enterprise platform."

Success Factor 4: Providing product management

It is important to have a single point of contact for managing the BI standard, training, vendor relations, support and issues resolution. This way, there is no confusion for users or IT teams and there are far fewer redundancies. “We have a standards board, so we don’t have individuals going out and doing software evaluations on their own,” said one participant.

In most cases, the product management contact should be someone from the technical side of the organization, rather than having a business focus – but who will work closely with the business to ensure that requirements are met.

Training

Training support ensures users get up and running with the software as quickly as possible. In most organizations, it usually consists of a mix of vendor sessions and in-house learning.

One delegate said their business developed computer-based training for the BI platform. As well, they provide product and information demos every couple of weeks to different departments.

Another participant said they videotape BI sessions, so they’re available on demand. And one group includes demos in the software environment – in one instance, demos are accessible through a single tab.

Other strategies:

- Train power users, and have major reports and analysis flow through them.
- Train and certify the trainers; they become the point persons for sharing knowledge and in-house training for general users.
- For each new data mart built, send one person to the vendor for training.
- Hold workshops every month to go through basics in areas such as analysis, scorecarding and reporting.

While there were a variety of approaches, delegates agreed that it is essential to have a good training plan in place and ensure that skilled resources are on hand to assist with sharing knowledge and skills.

Summary

Too often, organizations still operate in silos or tactically. BI deployment is inconsistent, and there is no enterprise focus.

Instead, enterprise BI creates value and return on investment. A standardized implementation is simpler to manage. It saves time and money. It means fewer tools to administer, and it ensures consistent information across the organization. Most notably, it enhances and enriches business operations.

As the IBM teleconferences suggest, standardization is more than deploying enterprise software. Just as critical, IT has to ensure the technology is adopted by the greatest number of users.

That requires a strategic approach, understanding best practices and the critical elements that go into it. The tool has to be available to everyone. You need executive sponsorship and support. You have to educate users and communicate value. Business and IT also have to work together.

The goal is to create a centralized approach to implement, support and manage strategic BI. This can ensure a successful deployment and broader usage across the enterprise so that BI is consistent, predictable and repeatable.



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