5 Tips for Better BI Planning

By Brian P. Watson

"Business intelligence" has quite a ring to it. What company would say no to these software tools, which peer deep into an organization's data to aggregate records and deliver reports and analyses? Not many. But before diving in, technology managers interviewed for the November issue of *Baseline* make these suggestions—and warnings—on how to do BI right:

1. Think ahead. Find out what the business needs and what types of reports users want, says Jeff Anderson, director of new equipment systems for Otis Elevator. He warns that failing to define business intelligence goals could lead to setbacks: "If [businesses] don't have a very clear idea of what the end result is supposed to be, they should never start."

2. Align your data structures. Do your homework and research the various ways to arrange your data before putting a software tool on top of it, says James Young, senior financial systems analyst for book publisher Simon and Schuster. "Otherwise, you'll constantly be patching and trying to make up for that initial mistake," Young says. The most common way of aligning data is in a data warehouse. But before building that, Young and other users say the most important part of aligning data is finding the true source of that data--in other words, financial records should come from the company's core financial system, not from a line of business' records.

3. Find a sponsor. Getting a high-level sponsor, like a chief financial officer or business department head, can help push the project along and identify needs, says Tery Howard, director of information technology for the Miami Dolphins football franchise. On top of that, Miles Mewherter, vice president for application development and enterprise reporting with Dick's Sporting Goods, says managers should look first to power users who will embrace the tool right away. Without a viable sponsor and a group of power users, the software investment could fall through the cracks, unnoticed.

4. Bring in experts. Before and after your evaluation of potential vendors and deployment of the selected tools, form a team of workers knowledgeable in both the software's capabilities and the needs of your business, says Monica Moore, director of data warehousing and business intelligence for Cox Communications. That group should come not only from in-house experts, but also from consultants, who can study the marketplace and evaluate new products. By not expanding its knowledge base, a company might only get a narrow view of what business intelligence software can do for it.

5. Partner. Take advantage of all the vendor has to offer, says David Wheat, decision support systems director for United Agri Products, a seed and fertilizer distributor in Greeley, Colo. He suggests that businesses should try to negotiate a deal to bring in experts from the vendor to build the first batch of reports, while having users work alongside to get better acclimated with the tools. Without this type of collaboration, companies could end up spending more on training workers in the new software--or recruiting suitable replacements.