

Best practices for business intelligence and performance management projects

BI Symposium 18 September 2007

Marco van der Kooij



Agenda



- Introduction
- Why BI and PM projects are different?
- Critical Success Factors
- Best practices
- Don'ts
- How to deal with.....?
- Recommendations

Introduction iNovasion



- Microsoft – Qurius AS - iNovasion
- Focus on and experts in consultancy and realization of business intelligence and performance management solutions
- Single point of contact and trusted advisor with proven approach
- Partnership with Qurius for extensive knowledge of Microsoft applications and technology

Help you and your organization to be more successful

Why BI and PM projects are different?



- Change
- Disparate systems and platforms
- External and unstructured data
- Excel is point of reference for ease of use

BI is a process not a project

Critical Success Factors



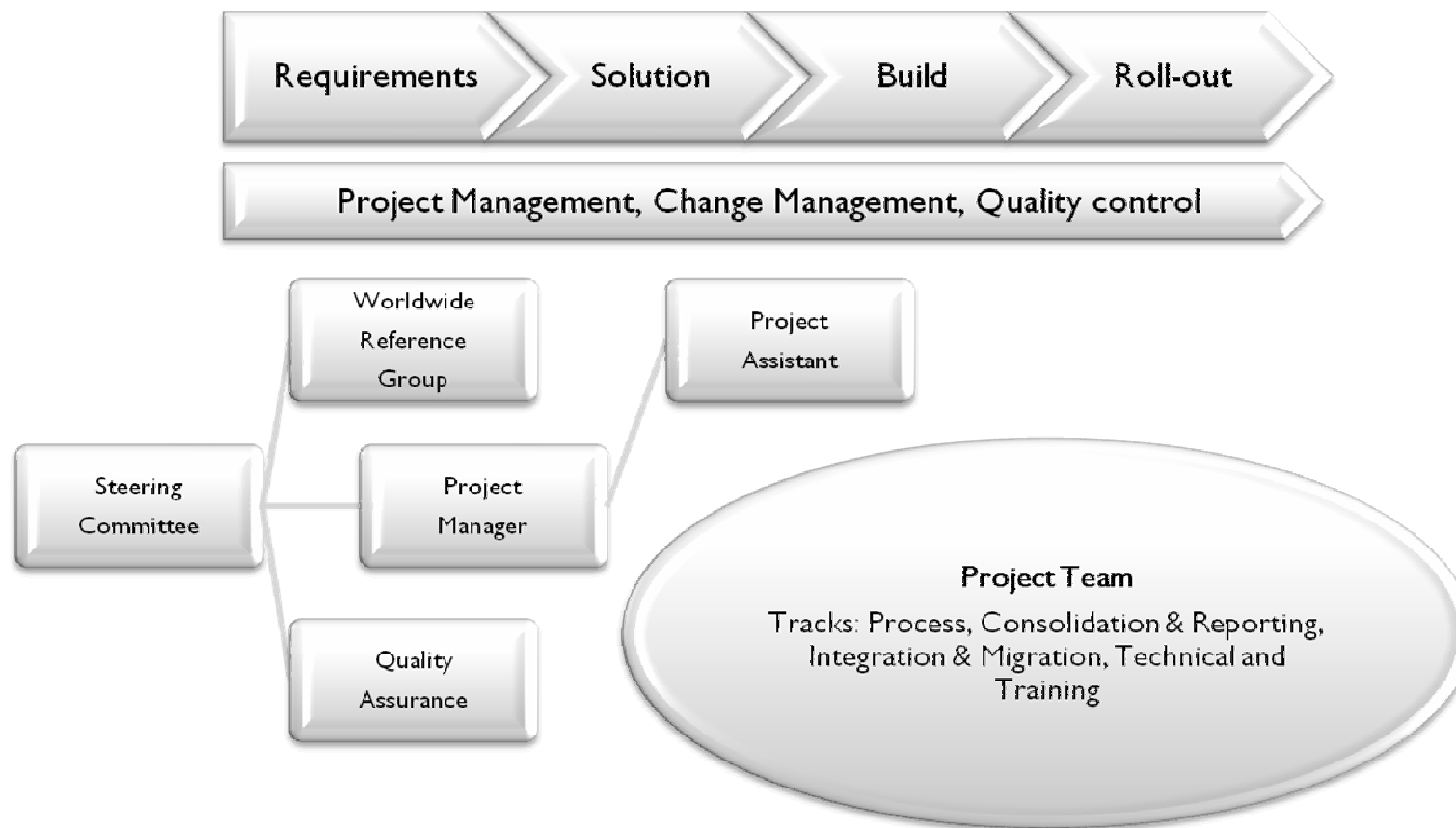
- Executive sponsorship
- Focus on strategy and objectives
- Understand business drivers and regulations
- Secure the right resources (people, data, systems)
- User acceptance is key; conduct feedback sessions

Communicate, communicate & communicate

Best practices



- Structure the project: order of activities, work streams, roles and responsibilities



Best practices



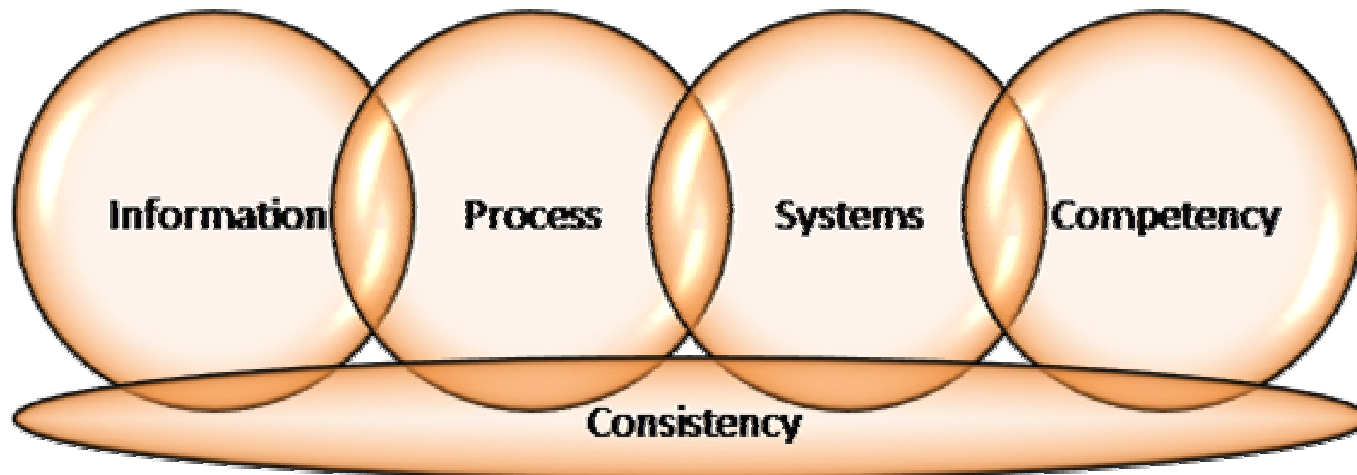
- Source analysis and assess quality of data
- Information matrix, uniform metrics and global data model

Metrics	Scenarios and required dimensions	Entity	Dim	Dim	Dim	Dim	Cycles	Frequency	Domain
Financial P&L: Sales	Actual Budget Forecast	Legal Mgt CBS	Product	Brand Label	Customer	Sales Region	Draft 1 st submission	Yearly Monthly Daily	Finance
Financial BS: PPE	Time: Year QTR Month		Movement Schedule				2 nd submission		Marketing Sales
Cash flow Working Capital	View: Periodic YTD								Human Resources
Non Financial: KPI's Volumes	Currency								IT
	Intercompan y								

Don'ts



- Focus on a limited number of building blocks and forget consistency



Don'ts



- Too many indicators and measures
- Inflexible attitude (keep the organization's business in mind)
- Projects longer than 1 year
- Make it complex (e.g. budgeting and forecasting cycles)
- Too many meetings with too many minutes, too many people and no preparation

How to deal with.....?



- Scope changes
- Evolving insight
- Changes in staff
- Technical failures
- Issues in source systems or processes
- Historical data

Recommendations



- Sponsorship
- Make one person/contractor responsible for the whole project
- Take a project manager with both functional and technical knowledge
- Knowledge transfer starts at the beginning of the project
- Ownership of master data, definitions and process for change requests
- Proper issue management
- Independent audit and quality control

Thank you

www.inovasion.nl

Marco van der Kooij

06-30718245

mvdkooij@inovasion.nl

