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When Bridging the Business/IT Divide

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FOREWORD

Organizations constantly struggle with their technology and software projects. Aside from linking business and technology requirements to solutions and building the right infrastructure, collaboration between business units and their IT departments is necessary to ensure overall project success. Without a high level of cohesion between these two entities, key project requirements might be overlooked, features and functions may not address the needs of the business, and business-facing solutions may not incorporate the best and most appropriate technologies.

To avoid these issues, you must build cohesion between business and IT departments. What this boils down to is communication. How disparate departments interact with each other and whether they can overcome different perspectives can be the difference between project success and failure. This *Ten Mistakes to Avoid* addresses how to overcome communication gaps and use successful collaboration to help ensure successful BI implementations.

ABOUT THE AUTHOR

Lyndsay Wise is the president and founder of WiseAnalytics. Lyndsay has 10 years of IT experience in business systems analysis, software selection, and implementation of enterprise applications. She provides consulting services for small and midsize companies and conducts research into leading technologies, market trends, BI products and vendors, mid-market needs, and data visualization. Lyndsay is the author of *Using Open Source Platforms for Business Intelligence: Avoid Pitfalls and Maximize ROI.*

MISTAKE ONE:

MAKING IT ABOUT THE TECHNOLOGY AND NOT ABOUT THE BUSINESS PAIN

Many organizations make BI one of their priorities because of top-down or executive direction. This is helpful in terms of project sponsorship, but the reality is that it can also present broader challenges when balancing the needs of the business versus technology adoption. Although technology does support business success, it is the people behind the technology that create real value for the business. Take advantage of newer technologies that enable your organization to scale and enrich application use based on native growth and future expansion. However, your true goal should be to address a real business pain using analytics.

Business-driven projects will focus on answering questions that are presented as challenges within your company. Looking at how to best address these questions—while maintaining regular insights into metrics and enough flexibility to drill deeper based on additional questions that may arise—will drive your technology choices. Thus, solution choices will be based on specific technical requirements. Both are tied together but need to be driven by the problems or operational gaps being experienced by the intellectual capital of your organization. This focus also improves collaboration between business departments and IT because both are required to make sure the most effective and efficient BI project choices are made.

MISTAKE TWO:
IT-DRIVEN SPONSORSHIP

Many organizations run BI initiatives through IT-driven sponsorships. Although technology based, BI solutions are aimed at solving business needs (as mentioned in Mistake One). This means that information access and design need to be driven by the business units most affected by the implementation. IT's involvement is essential, but in support of business-driven sponsorship and not in lieu of it. This also includes enterprisewide implementations in which IT manages the overall BI infrastructure. In these cases, IT has a stake in the entire BI project but should still fall back to business-driven BI efforts and sponsored initiatives to ensure that business requirements always take precedence over IT infrastructure.

The importance of this cannot be overlooked, because many organizations make the mistake of centralizing their BI initiatives under the guise of IT. Centralized IT and IT-sponsored projects help with initiative management, but sometimes this type of sponsorship takes away from driving business value from BI and analytics implementations. Therefore, your BI projects should be sponsored by business units to ensure their requirements are being met through technology adoption, not as a byproduct of what already exists in-house.

MISTAKE THREE:
UNDERESTIMATING THE VALUE OF DATA QUALITY

With a focus on business-driven applications, you run the risk of underestimating the value of data quality management, or thinking that data quality should be an IT-led initiative. IT needs to manage the process, but business-driven applications include targeted business rules and in-depth knowledge of the ins and outs of data. These ins and outs complement data quality definitions. Aside from inconsistent or duplicate records, subject matter experts (SMEs) will be able to identify data quality level acceptance, what types of issues should be flagged, and how they can be corrected. Once all of these considerations are taken into account, IT can develop an automated approach to management and lean on business stakeholders to manage new issues as they occur.

Business users need to realize that getting the best value from their BI and analytics investments requires having access to consistent, relevant, and correct data. Otherwise, you risk analyzing data that is invalid or conducting rework to develop a solution with trusted information. All too often, knowledge workers are stuck with access to information that they don't trust, but have to work with anyway. Your BI solution should provide a way to address data trust issues by managing quality consistently.

MISTAKE FOUR:
OVERLOOKING STAKEHOLDERS DURING THE REQUIREMENTS-GATHERING PHASE

In some projects, sponsors feel they understand all the requirements. They have an end goal in mind and don't solicit broader insights from their colleagues and employees that could enable them to better understand the analytics required to improve their visibility into business challenges and goals.

Project sponsors and key stakeholders often provide crucial insights when developing a new or enhanced solution, but the people interacting with analytics and making decisions every day may have ideas that haven't previously been shared, and might see new ways to use analytics within the broader organization. These ideas are kept private because they aren't raised during the requirements-gathering process.

The mistake for organizations falls into two areas. The first is that in cases like this, substantial rework may be required. Once solutions are implemented and more people start interacting with them, stakeholders who were not involved in the process may have ideas about what is required now that the solution is up and running. The second mistake is that if stakeholders are not invited into the process initially, they may not adopt the solution at all, making its implementation a failure.

MISTAKE FIVE:
UNDERESTIMATING THE VALUE AND IMPORTANCE OF A CENTRALIZED IT INFRASTRUCTURE

There is constant debate over whether it's more effective to have departmental solutions or develop a centralized BI infrastructure. Many organizations mistake the concept of quicker implementation times or a more targeted solution with better BI access. Regardless of which approach your organization chooses, you must understand the value proposition of centralized IT management and information access. Although some departments get frustrated having to wait for changes or submit requests for change, a departmental solution risks limiting the types of analytics and data access available.

In essence, a centralized IT infrastructure provides any department within the organization access to the same information. Targeted business rules can still be applied individually, but data will be standardized across the organization. Data quality, data governance, and master data management initiatives can all be applied broadly within the organization so that analytics use can be looked at more holistically.

Many departmental solutions only access a subset of organizational data, whereas centrally controlled IT initiatives enable support for broader information access. This translates into greater visibility, collaboration, understanding, and opportunity identification. Information access and a more cohesive and accurate view of data assets only represent the business side of why centralization shouldn't be overlooked. Technical considerations include security, broader information management, integration of external and customer-facing data sources, licensing, support, maintenance, and development.

MISTAKE SIX:
LOOKING AT THE PROJECT FROM A SINGLE VIEWPOINT

Things get missed when looking at a project from only one point of view and not considering collaboration between IT and the business. Because no department lives in a vacuum or only accesses one data set to get the best insights, your BI project needs to consider all viewpoints before implementing a solution. Otherwise you run the risk of rework from not understanding the broader implications, or looking outside one area to gain broader perspective.

Evaluating multiple outlooks requires more than simply involving many stakeholders. It also involves looking at how data is collected and used and the insights hoped for. Such an evaluation allows project stakeholders to identify the primary ways they use data as well as additional ways that may not have been considered. This is a mistake because general project success is measured by being delivered on time and within budget. If a project meets these factors initially but only takes a single viewpoint into account, rework and customizations will follow. This transforms a project from being a success into one that is viewed as a hassle by those involved, within both business units and IT departments.

MISTAKE SEVEN:
OVERLOOKING THE NEEDS OF A WIDER AUDIENCE

Developing BI at the departmental level without considering wider future use can lead to multiple deployments across the organization. In addition to having to manage multiple solutions and potential redevelopment of similar requirements, in many cases departments require similar BI applications anyway. This means that if wider needs are considered in advance, departments can share their budgets and select one solution for mass deployment. This also makes it easier for IT to manage broader deployments because they are developing solutions for one set of applications that leverage the same data sources and are structured the same way. In these cases, requirements need to be similar enough to warrant adopting the same BI platform or set of dashboards and analytics.

For some organizations, the analysis of wider audience requirements will mean that different solutions are required. However, without looking more widely at BI needs in advance of implementation, an organization won't know this until after the fact. Although solutions can be expanded, these additions will also probably include additional costs for data capture, licensing, support, and so on. Evaluating these criteria in advance enables sponsoring departments to plan and negotiate contracts that take into account multiple departmental use and any overlaps that might occur.

MISTAKE EIGHT:
LOOKING AT DATA ACQUISITION WITHOUT TAKING INTO ACCOUNT RELATED BUSINESS PROCESSES

An overlooked reality is that the quality and validity of the data collected has a direct correlation to gaining value and insight from business intelligence (BI) applications. If analyses of data assets do not take into account business rules or related business processes, you risk developing a solution that doesn't provide the value of successful BI use.

More practically, BI's value proposition lies in the ability to integrate information and business processes to enable better decision making. To do so effectively involves understanding the tasks and business processes involved in daily activities and how information is used to support these processes. Identify information assets by defining key metrics and how each can make it easier for business users to get answers to their questions and plan, evaluate, and interact with data more efficiently.

Collaboration between business and IT units actually helps this process by integrating IT's knowledge of the data sources required for business process automation and analytics-related events with integral business rules and the importance placed on various information assets. Only open communication between departments will enable a broader understanding of the intricacies that exist. For organizations lacking large IT support, there is potential to reach out to data and service providers to develop a greater understanding of how the information provided as a service integrates with the related business processes.

MISTAKE NINE:
UNDERESTIMATING THE VALUE OF COMMUNICATION

Understanding BI requirements involves communicating with stakeholders, evaluating how to transform data into information, making sure that BI projects are communicated across the organization, and fully evaluating the technical requirements. Not doing this leads to stumbling blocks during implementation and increases risks associated with gathering requirements and matching them to technical infrastructure.

Thinking that BI can be successful with only a small set of people involved in the project is a common mistake. Even if initial implementations are successful, a lack of communication can lead to a lack of buy-in and use, mismatched capabilities, and people feeling like they don't have a stake in the project. All of these can lead to project failure. After all, people need to commit to the project and its outcome to fully realize the benefits of BI.

To be successful, focus on the human side of the implementation by making sure that project goals are communicated to all users of the solution and that they feel connected to the project. Practical ways to do this for business users who will not be involved in the project development process include training seminars, marketing campaigns, and self-service delivery to enable high levels of interactivity.

MISTAKE TEN:

NOT UNDERSTANDING WHAT MAKES PEOPLE TICK

Not understanding what motivates people to do what they do can create undercurrents in any project. Whether business sponsors or resources within IT, people are driven by factors other than following corporate demands. For example, some people are passionate about what they do, while others are frustrated by their lack of visibility into their data or their inability to make the changes they need without making requests to external resources.

Without understanding what makes people tick, project managers may encounter resistance to change or a lack of commitment to the project without knowing why. Evaluating what drives people will help develop a solution that is tailored to their needs. This includes helping them save time, make better decisions, and identify opportunities that may otherwise be outside their reach.

Additionally, looking at why people act as they do provides greater insight into the general divide between business units and IT departments. Different outlooks exist because of different goals and viewpoints. Consequently, understanding why people make the choices they do can help address infrastructure or ease of use. For instance, many IT decision makers will make choices that affect the broader IT infrastructure that extends beyond BI, which business sponsors also need to understand to create better cohesion between both groups.

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