

BI & Analytics Organizations That Work: Resolving Conflicts of Centralization and Self Service

Course Outline

1. Module 1- Introduction to BI Organizational Structure Issues
 - a. Definitions
 - i. Data Governance
 - ii. Metadata
 - iii. Shared (Central) Services
 - iv. Federation
 - v. BI Self Service
 - vi. COE and BICC
 - vii. EIM, BI, Analytics and IAM
 - viii. Changing Organization vs. Changing Process
 - b. Challenges
 - i. Territorial Disputes
 - ii. Fractured Executive Support
 - iii. Vendor Relationships
 - iv. New Information Silos
 - v. Business Units Need for Autonomy
 - vi. Balancing BI/Analytics Self-Service and Central Support
 - vii. Inflexible Traditional Information Architecture
 - viii. Process Inefficiencies
 - ix. Understanding and Skills Gap
 - x. Hard Feelings and Mistrust
 - xi. Lack of Central Planning
 - xii. Perceptions of Improvement Efforts
 - c. Goals
 - i. Why Reorganize?
 - ii. Streamline
 - iii. Distribute BI/Analytics Capabilities (Self-Service)
 - iv. Data Integration as Infrastructure
 - v. Healthy Federation
 - vi. Cost Conscious
 - vii. Stronger Team
 - d. No One Right Way
 - i. Balance Goals with Feasibility
 - ii. Avoid Building Barriers to Value Creation
 - e. Exercise #1
 - i. Assess Your Challenges and Goals
2. Module 2- BI Organization Structure Alternatives

- a. Highly Centralized in Blended Business/IT ORG
 - i. Vertical Integration
 - ii. Leadership Challenge- Extremely Diverse Team
 - iii. Advantages and Disadvantages
 - b. Separate IT DW/BI and Business Analytics Teams
 - i. Leadership Challenge- What to Share?
 - ii. Advantages and Disadvantages
 - iii. Separate Teams, Connected by Service Relationship
 - iv. Leadership Challenge- Keeping Ahead of Integration Needs
 - v. Advantages and Disadvantages
 - c. Highly Decentralized With BI CofE
 - i. Massive Diversity with Common Threads
 - ii. Leadership Challenge- Synchronizing Arch and Process
 - iii. Leadership Challenge- Self Service w/ No Center
 - d. Highly Decentralized
 - i. Advantages and Disadvantages
 - e. Hybrid Approaches
 - i. Inevitability of Organized Chaos
 - ii. Layers of Governance- “Federal”, “State” and “Local”
 - f. Exercise #2
3. Module 3- Coordinating Disparate Data Terms
- a. Managing Organizational Change
 - i. Change Management- People and Process
 - ii. Strong Leadership + Right Team + Good Plan
 - b. Readiness for Organizational Change
 - i. Changes in Culture and Management Approach
 - ii. Team, Process, Tools/Vendors and Architecture
 - iii. Roadmap
 - c. Data Governance
 - i. Different Levels of Governance for Different Needs
 - ii. Committees and Working Groups
 - d. Metadata Management
 - i. Types of Metadata and Its Importance
 - ii. Impact Analysis
 - iii. Challenges
 - iv. Pragmatic, Continuous Metadata Improvement
 - e. Coordinating Staff
 - i. Foster Relationships Among Different Backgrounds
 - ii. Encourage Staff Mobility Among Data Teams
 - iii. Train Broadly

- iv. Importance of Shared Purpose
 - f. Shared Tools and Vendors
 - i. Vendors Working Directly with Business Units
 - ii. Practical Goals for Tool/Vendor Standardization
 - iii. Beyond Vendor Management – Tool and Services Portfolio
 - g. Enterprise Architecture
 - i. Working with EA Teams
 - h. Exercise #3
- 4. Module 4- Summary and Conclusions
 - a. Summary of Key Points