Redefining the role of IT in a modern BI world

How IT can evolve from producer to enabler and foster collaboration around analytics

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Since its inception over two decades ago, the primary objective of business intelligence has been the creation of a top-down single source of truth from which organizations would centrally track KPIs and performance metrics with static reports and dashboards. This stemmed from the proliferation of data in spreadsheets and reporting silos throughout organizations, often yielding different and conflicting results. With this new mandate, BI-focused teams were formed, often in IT departments, and they began to approach the problem in the same manner as traditional IT projects, where the business makes a request of IT, IT logs a ticket, then fulfills the request following a waterfall methodology.

While this supplier/consumer approach to BI appeared to be well-suited for the task of centralizing an organization's data and promoting consistency, it sacrificed business agility. There was a significant lag between the time the question was asked, and the time the question was answered. This delay and lack of agility within the analysis process led to lackluster adoption and low overall business impact.

The emergence of self-service BI in recent years has challenged the status quo, especially for IT professionals who have spent the better part of the past two decades building out a BI infrastructure designed for developing top-down, centralized reporting and dashboards. Initially, this self-service trend was viewed as a nuisance by most IT departments and was virtually ignored. The focus remained on producing a centrally-managed single source of truth for the organization.

Fast-forward to today and IT finds itself at a crossroad with self-service BI as the new normal that can no longer be ignored. The traditional approach to BI is becoming less and less relevant as the business demands the agility that comes with self-service to drive adoption and improve organization outcomes. This, paired with the continued exponential growth in data volume and complexity, presents IT with an important choice. Either the demand for self-service BI is **embraced**, and IT evolves to become the enabler of the broader use and impact of analytics throughout their organizations, or it is **ignored** and IT continues as the producer of lower-value enterprise reporting stifled by the limitations of traditional tools. IT professionals who are ready to serve as the catalyst and embrace this opportunity will deliver far greater value to their organizations than those who choose to ignore the real needs of their business users and analysts.

As organizations begin the transition from a traditional top-down approach driven by IT to a self-service approach enabled by IT and led by the business, a new framework and overall strategy is required. This means that past decisions supporting the core foundational components of a BI program—people, process, and platform—must be revisited. Adjustments are needed in these three core areas to support the shift from a model of top-down BI development and delivery to a self-service-based modern BI model which is driven, and primarily executed on, by the business. The order in which these components are considered and prioritized is significant and is a critical aspect for IT to understand to effectively execute on the transition true self-service through enablement.

People

A successful transition to self-service business analytics begins with people and should be the top priority for IT when considering changes required for BI modernization. In a traditional BI model, people were often considered last after platform and process. The widely-used mantra "if you build it, they will come" exemplifies the belief that business users would gravitate toward a well-built system of record for BI that would answer all of their business questions. This desired end-state rarely came to fruition since there was little to no collaboration between the business users and IT during the process of building the solution after an upfront requirements-gathering phase. In the absence of active engagement and feedback from the business during the time between requirements gathering and project completion, there are many opportunities for failure that typically emerge. A few of the most common include:

- Business or organizational changes occur during the development process that render the initial requirements obsolete or invalid

- Incomplete or inaccurate requirements given in the initial process phases

- Errors in the process of translating business requirements into technical requirements

The end result of these situations is often that business users disengage from the BI program completely and an organization's investment in time and resources are wasted due to lack of adoption. Business users and analysts need to use analytics in order for it to have any impact and deliver organizational value. A BI model that embraces self-service puts these users first and allows them to explore, discover, and build content that they will ultimately use to make better business decisions and transform business processes. Collaboration between the business and IT is critical to the success of the implementation as IT knows how to manage

data and the business knows how to interpret and use data within the business processes they support. They have the context within which analytics and the insight derived from it will be used to make better business decisions and ultimately improve outcomes. This collaboration of the groups early on will not only lead to the deployment of a platform that meets the needs of the business but also drives adoption and impact of the platform overall.

Process

Self-service analytics does not mean end users are allowed unfettered access to any and all data and analytic content. It means they have the freedom to explore pertinent business data that is trusted, secure, and governed. This is where process comes into play and represents the component that requires the most significant shift in traditional thinking for IT. A successful modern BI program is able to deliver both IT control and end-user autonomy and agility. A well-established and well-communicated process is required for an organization to strike this delicate balance.

A top-down, waterfall-based process only addresses the IT control part of the equation. A traditional BI deployment focuses primarily on locking down data and content with governance. This means limiting access and freedom to only a few people with specialized technical skills who are expected to meet the needs and answer the questions of the many. This typically involves developer-centric processes to design and build the enterprise data warehouse (EDW) model, build the ETL jobs to transform and load data into the model, construct the semantic layer to mask the complexity of the underlying data structures, and finally build the business-facing reports and dashboards as originally requested by the business. The unfortunate reality is that this approach often fails to deliver on the vision and promise of BI—to deliver significant and tangible value to the organization through improved decision-making with minimal time, effort, and cost. Top-down, IT-led BI models often have an inverse profile of time, effort, and cost relative to the value they deliver to the organization.
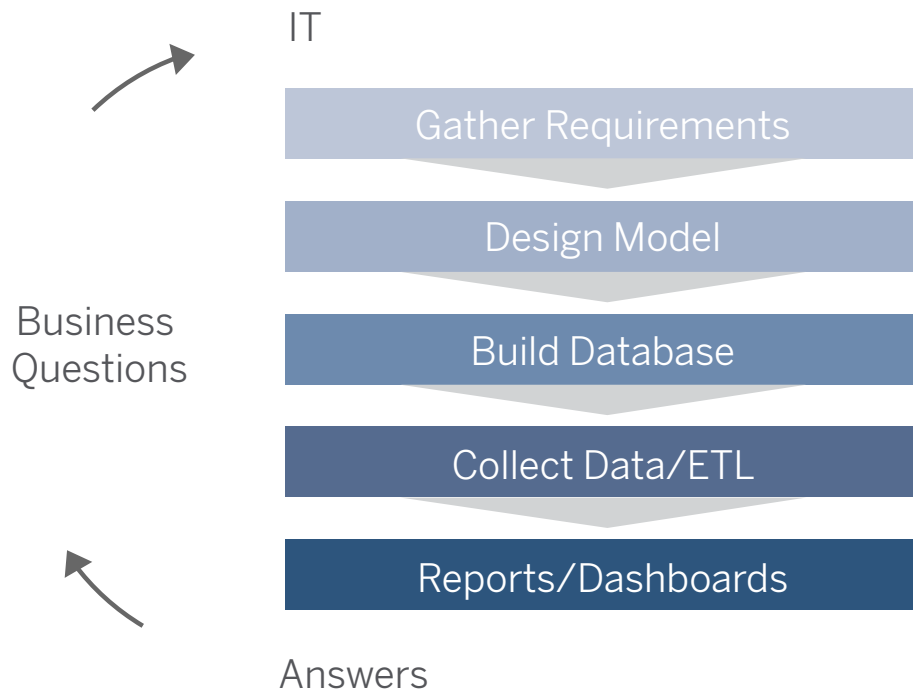
IT

Gather Requirements

Design Model

Build Database

Collect Data/ETL

Reports/Dashboards

Business Questions

Answers

Figure 1. Traditional IT-led, top-down approach to BI

A modern analytics solution requires new processes and newly-defined organizational roles and responsibilities to truly enable a collaborative self-service-based development process. IT and users must collaborate to jointly develop the rules of the road for their secure environment that each other must abide by in order to maximize the business value of analytics without compromising on the governance or security of the data.

IT's success is highlighted, and its value to the organization realized, when the business can realize significant value and benefit from investments in analytics and BI. Should IT still be considered successful even if not a single end-user utilizes the BI system to influence a single business decision? Traditional processes intended to serve top-down BI deployments are too often measured by metrics that are not tied to outcomes or organizational impact. If the ETL jobs that IT created ran without failure and the EDW was loaded without error and all downstream reports refreshed, many IT organizations would consider themselves successful.

Merely supplying data and content to users without any regard for whether or not it is adopted and provides value through improved outcomes is simply not enough. Modern BI requires updated processes to support self-service analytics across the organization. It also requires the definition of new success metrics for which IT and the business are jointly accountable and are therefore equally invested.

Platform

Since BI has been historically viewed as an IT initiative, it is not surprising that IT drove virtually every aspect of platform evaluation, selection, purchasing, implementation, deployment, development, and administration. But with drastic changes required to modernize the people and process components of a BI and analytics program, IT must change the criteria for choosing the technology to meet these evolving requirements. Perhaps the most obvious change is that IT must intimately involve business users and analysts from across the organization in evaluating and ultimately deciding which modern platform best fits the organization and addresses the broad needs of the users. For more information on selecting the right analytics platform, check out the Evaluation Guide.

A modern platform must address a wide range of needs and different personas as well as the increased pace of business and the exponential growth in data volume and complexity. IT requires that the chosen platform enables governance and security while end users require easy access to content and the ability to explore and discovery in a safe environment. The chosen platform must also be able to evolve with the landscape and integrate easily with other systems within an organization. A centralized EDW containing all data needed for analysis, which was the cornerstone of traditional BI, is simply not possible in the big-data era. Organizations need a platform that can adapt to an evolving data landscape and insulate users from increased complexity and change.

The most critical aspect is the ability to meet these diverse needs in an integrated and intuitive way—without having to introduce separate products or modules to execute specific tasks throughout the process. This integration is depicted on the following page as the modern analytic workflow. The diagram highlights the five key capabilities that must flow seamlessly in order for the three personas depicted in the center to effectively leverage the platform.

Figure 2. Modern self-service-oriented, business-led analytic workflow

According to Gartner, the BI and analytics platform market passed the tipping point in 2016 as the market for modern products is experiencing healthy growth while the traditional segment of the market is declining with little to no net new investment. IT leaders should capitalize on this market shift and seize the opportunity to redefine their role in BI and analytics as a far more strategic one that is critical to the future success of the organization. Adopting a collaborative approach to recast the foundational aspects of the BI program and truly support self–service is the key to changing the perception of IT from a producer to a strategic partner and enabler for the organization.

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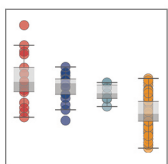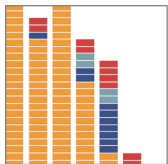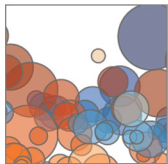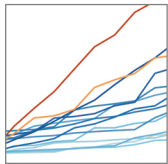
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