



Self Service Business Intelligence

A Fool with a Tool is Still a Fool

All of us want to be empowered in our jobs and in our lives. As a society, we have become overwhelmingly enabled to do our own thing. We generate billions of online transactions instead of driving to the store. We wiped out most of the travel agency industry with sites like Expedia and Travelocity. We do most of our banking online or through a smart phone app.

In a ground-breaking report in 2012, Forrester Research analyst, Boris Evelson, said simply, "BI is unlike any other enterprise software in that exhibits a paradox: The more BI requirements you implement, the more new ones pile up. Relying too heavily on IT-centric BI support models is not sustainable."

It makes sense that business users would want to do their own analytics and business intelligence (BI) without a lot of IT intervention and support? But how is it going out in the real world? I recently asked for some self-service BI success stories through several active LinkedIn™ Groups, and the responses were interesting and high volume. My report from this informal discussion is below. Practitioner quotes are used with permission.

Simple Seems to Work Best

There was a consistent theme to many respondents. Overall success seemed to come from IT groups that provided often-used report data through tools like Excel PowerPivot and SSAS, even with large datasets. IT intervention was reported to be minimal. With careful forethought and analysis tables were built properly and managers could create and share meaningful reports and analysis to address business needs and objectives. When IT works carefully in conjunction in an early design phase, some tools have proven to be very valuable for daily reporting.

There's probably a word of caution here. Words like "easy to use," "intuitive," "user friendly," and "simple" are very subjective. Users of most large corporations span a generation or two. What is very exciting and seemingly powerful to an older generation may see boring and limiting to younger users raised on drag-and-drop GUI interfaces and the latest social media platforms. Keep that in mind as you construct and roll out Self Service technologies and build training programs.

Gregory Seemann had an interesting and simple success story, “The best Self Service BI enabler I have seen was when we put data source connections to all of our cubes into a SharePoint site and called it the ‘Data Connection Library.’ As silly as it sounds it was a great success. People now had an easy way to browse and one click connect to any cube to which they had permissions.”

Still a Team Effort

While some of the tools and concepts can be rather easily taught to business users, underlying those tools are data structures with many dimensions, metrics, and key performance indicators (KPIs)—all coupled with data warehouses and data marts. But those platforms typically cannot be modified or enhanced without IT intervention. Several people indicated that they were not aware of any tools that would let users have that much power and autonomy without IT involvement.

Traditional enterprise applications start out in design by trying to clarify exactly what the application needs to do. With BI requirements, when the design starts the answer is often much more nebulous. Why? Because the end user wants “everything” and typically cannot begin to estimate what we’ll want later on as analysis goes deeper and deeper.

I thought Andreas Krupp offered a great response: “When I think of Self Service BI, I try to implement jointly with the business users, a series of reports that will trigger when something needs to be done (a problem solved, the next step taken in a process, a decision taken). But as much I tried to anticipate the needs of the business... it always remained a “moving target,” which is the reason why I believe for Self Service BI to be successful, you always need the business, IT and analysts working closely together.”

Some Perspective on New Technologies

There is no doubt that Self Service BI is getting a lot of attention. There are more and more tools in the market. Some of the newer products come with much improved visualization services and leverage in-memory models. But remember, because we’re talking “self-serve” the tools need to be easy to use and intuitive. You want those users to be excited about exploring and mining new information with these new tools. Try to find tools and platforms that feel somewhat familiar or that are logical.

Another reader had a very interesting view that I liked. “Business users have been doing Self Service BI for a long time. The heavy duty stuff in SAS and the less intense stuff in the spreadsheet of the day. When I hear Self Service BI, it means specifically the ability of

end users to visualize data without IT assistance—think PowerView, Tableau, and Qlikview. The business users that have always been doing Self Service BI over the years think it's just another tool for their toolbox. The business users that haven't been doing their own BI think it's just IT trying to dump IT work back on the business.”

The Right Business User Profile

In articles our organization has written, we have documented well the fact that successful BI professionals need to follow a set of guiding principles. No matter how self service BI can become, BI professionals and their customers need to work well together and realize it will always be a team effort. Some of those guiding principles include things like having a passion for data and a proper data foundation, improving your communication skills, digging deep into issues until they make sense, and learning how to find the hard answers.

Gregory Seemann had some additional good insights: “As ‘BI professionals,’ our job is to follow programmatic models and standards to achieve usable information that helps people or other pieces of software make decisions. Once we ‘package and distribute’ that information, Self Service BI is not a product, but an action by the end users. The mathematical business managers, the good accounting staff, and the forecasters seem to be the best ‘self servers.’ A good BI professional will just help you along and make sure your results are accurate.”

Work hard to find all the right people and build the right team.

The Challenges

Many discussed the fact that they had seen more failures than successes.

Bill Ryan expressed it this way: “In the hands of experienced, knowledgeable folks, [self service BI is] great stuff and it works. But on the whole, what I've personally seen is a whole lot of ‘*BI sounds cool - I want it in my title,*’ coupled with people who don't have the knowledge or experience to do much.”

Chances for failure abound. BI requirements change constantly and quickly. BI methodologies are different than standard application development. Tools help but they don't solve everything. IT management and business management don't always agree on principles, technologies, and schedules. The list goes on and on.

But like any good challenge, Self Service BI can become an important part of a business strategy.

Summary

In the 2012 Forrester Report, it was stated: “Forrester by no means advocates that firms transfer complex, mission-critical, enterprise wide BI applications — especially those that carry external exposure or other operational risk — into the hands of non-IT professionals. However, anecdotal evidence leads us to believe that with the proper BI application portfolio classification, no more than 20% of all BI applications should fall into this restricted category. We maintain that in an ideal BI environment, 80% of all BI requirements should be carried out by the business users themselves.”

Whether you agree with this analysis or not, it raises some interesting issues as to the need for more rigorous development so that business users can be empowered with better analytics.

One fun LinkedIn response I received—and amazingly enough it was the last post on the topic, came from Patrick Taels from Belgium. He said: “I would say this to Self Service BI: A fool with a tool is still a fool! By the way this does not only count for BI.”

Well said, Patrick!

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