

How to Choose a BI Solution Your Company Will Actually Use

What You'll Learn:

When it comes to Business Intelligence, the importance of gaining early internal consensus within your organization is paramount to its success. This guide will take you step-by-step through the process of ensuring your team gives you the knowledge you need to choose the right BI solution and get everyone on board after implementation.

Who Should Read This:

If you are responsible for choosing a Business Intelligence solution and want to make sure it's one that actually gets used - and gives your company value - this guide is for you.

The Importance of Internal Consensus

When you're rolling out a solution as huge, involved and business-critical as a BI solution, you need to get the buy-in from the people who will ultimately use and benefit from it, as early as possible. This includes the business users who may not understand the ins and out of BI technology- and here's a story to help you understand why:

In the 1970s, an Italian non-profit working in a poor riverside village in Zambia discovered that despite having the perfect soil and weather for farming, local families grew nothing themselves.

The volunteers [thought farming was the perfect solution](#) and excitedly set about planting vegetables - though the villagers didn't seem impressed. Just as the vegetables were ready to harvest, 200 hippopotamuses came stomping out of the river, gobbling up all the tomatoes and trampling the plots into oblivion.

"Why didn't you tell us about the hippos?!" the volunteer workers asked.

"You didn't ask," replied the villagers.

The moral of the story and why it so pertinently relates to BI? Whatever BI solution you try to implement,

if you don't understand current challenges, what users want, and what factors shape their daily working processes, you won't get the feedback, enthusiasm and uptake to make your project a success.

This whitepaper discusses the importance of gaining early internal consensus, and takes you through the process step-by-step to make sure your team gives you the knowledge you need to get everyone on board once you implement the chosen [BI solution](#).

Step 1

Do Your Fieldwork - Identify All Key Buyers

Step 2

Translate Feedback into Technology Requirements

Step 3

Get Your Team Stoked About Using It

Step 4

Keep Up the Momentum

Step 1

Do Your Fieldwork - Identify All Key Buyers

The first thing to do? Get out there and meet the village. Figure out who your major stakeholders are - the people who will use the product day to day, and who you hope will get the most benefit out of it.

Be sure to gather what's most important to each party as each may have very different perspectives and areas of interest.

Sit down with them and ask them their aims and pain points. Questions you should ask:

- ▶ What are their primary business and performance goals?
- ▶ Which specific insights would help them do their job better?
- ▶ What [data sources](#) do they use?
- ▶ What currently prevents them getting the analytics they need?
- ▶ Which work processes are slowing them down?
- ▶ What is it about the way they currently generate, access or use data analysis that frustrates or limits them?
- ▶ What level of self-service do they need vs what level of technical skill do they have?



Tip:

On a practical note, it helps to record this in a spreadsheet that outlines the stakeholder's level of responsibility, impact on business growth and how much they will realistically interact with the system. This will help you to prioritize the feedback that has most bearing on your choice of BI platform.

Step 2

Translate Feedback into Technology Requirements

Now that you have a clear idea of what problems your BI system should solve and what factors are at play, you can use this to analyze your available options.

Give the key stakeholders an early voice in the project requirements, vendor sourcing, and even the vendor evaluation processes.

Two things that are especially important here are the scope and [complexity of the data](#) you'll need to use and the level of self-service the solution provides.

Before your team will touch it, you will need to demonstrate that the data and insights they get from the chosen BI solution are 100% accurate and up-to-date. That means selecting a system that integrates seamlessly with every data source you use, can cope with myriad calculation methods and definitions as required, and gives you an easy way to bring all these strands together into a consistent, coherent, workable whole.

Second, there's the level of [self-service](#) you need. It's all very well investing in a powerful back-end solution that handles giant data sets and can provide granular insights, but if it takes a dedicated IT team to do this, it's not much good to your non-techie analysts. You need to make sure first, that there is an intuitive dashboard component that covers all the [KPIs](#) and other insights your colleagues need and second, that they're able to manipulate and generate these dashboards as required, without constantly putting in requests to IT.

Remember, while you may not be able to please everyone, it is crucial to have everyone INCLUDED in the final decision. It will give you an opportunity to hear the warnings or encouragement of different stakeholders experienced in different areas, and at least ensure you consider every foreseeable pro and con before finalizing your BI solution.



Tip:

Get agreement on project goals and delivery timelines with all the teams involved. This will prepare people mentally to get into data mode, as well as set up realistic expectations.

Step 3

Get Your Team Stoked About Using It

Now comes the tricky bit: onboarding. After all, it's no good having a dream solution that ticks every box if it doesn't become embedded into your team's daily workflow.

The key is to keep stakeholders engaged throughout the process.

As soon as you've chosen your new BI solution, you need to go back to those stakeholders you consulted initially, thank them for their input and explain how the platform you selected will address the problems that they described.

Organize demos and training for each team or sector of the business to guide them through using the system. Show them how to interact with the data, run analyses, generate the dashboards they want and interpret the results (here are some [dashboard examples](#)). Explain in detail how these tasks relate to their KPIs and will help them to do their jobs better and faster. Invite questions, feedback and suggestions.

Tip:



Start with a small, engaged cohort of people who can "test run" the product, helping you to iron out any wrinkles and work with your vendor to streamline workflows before you take this to the rest of the organization. The easier you make it to switch to the new system and the faster they see results, the less likely your team are to resist the change or fall back into bad habits.

Step 4

Keep Up the Momentum

Finally, remember that this is a process. As your business evolves, so will your colleagues' BI needs - and that means you need a system in place that develops with you.

For that, you'll need watertight ways to measure success.

If you've followed these steps, you'll already have a clear idea of what each area of the business wants the solution to do for them - which KPIs it should boost on an individual, team and company-wide level. Revisit these at regular intervals to check you're on track.



Tip:

It's important to work with a BI vendor that offers extensive, ongoing support, preferably through a dedicated business development manager. As you find your feet with the new technology, it's invaluable to have an expert on hand who can answer queries, help you to coax out new capabilities from the product and advise you on which updates, features and add-ons will facilitate your team's changing demands.

See what Sisense's top-rated BI platform can do for you:

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