TEAMWORK MAKES THE DREAM WORK:
Building Organizational Consensus for a Business Intelligence Platform
As you consider BI platforms for your organization’s upcoming BI project, you’re likely thinking about the planning necessary to choose the right solution. For most organizations, one of the main stumbling blocks in the selection process is building consensus—because BI platforms and the projects they power are always a committee decision! And you should be asking yourself a few critical questions to set the stage:

1. How do I ensure that all stakeholders (either team members or customers) can use this solution to achieve their unique reporting, analytics, and BI needs?
2. How do I define the high priority KPIs my BI solution should track?
3. How do I ensure I have access to all of the data sources I need, mashup this data to reveal actionable insights, and filter out the noise to measure only what matters?

Now, you don’t have to have all the answers! The best BI Champions are honest about what they know and what they don’t know. A BI platform that provides maximum value to your organization is selected and implemented with the buy-in of 3 key groups of organizational stakeholders.

**BUSINESS USERS**

These are the people who will look at your dashboards on a daily basis to make business decisions. From these users, you will learn the business requirements your BI solution should address to create actionable insights.

**BUSINESS ANALYSTS**

The future power users of your BI solution! They are the kings/queens of Excel and Macros, they know the data types you’ll be working with, and will inform the process of transforming business requirements into KPIs. Your solution will affect their day to day work in a big way.

**DATA ENGINEERS**

The data heroes—they live for complex data! They know how big your data is, where it’s stored, and how to bring it all together to create a data model and data pipeline that will power your final BI solution to give your business users the actionable insights they need.

But before you set off on your mission to connect with these stakeholders, let’s identify the three key principles that will get you in the right mindset for the assessment and selection process.
3 KEY MINDSET SHIFTS BEFORE YOU PURCHASE A BI PLATFORM

1 Understand the most important questions

Do the foundational work up front to ensure your final dashboards answer the most important questions your stakeholders want to answer—you want them to actually use the dashboards you create! There are top-priority business areas and questions your stakeholders want the data to answer, and you must map out these areas and questions to set your overriding goals and stay on track (we'll explore how to approach these foundations in Step 1). Keep in mind—this project should expand to include other business areas and answer increasingly granular questions as you make progress on your first priorities. But you can't build on an initial plan that doesn't exist.

2 Serve the business

This is a very common trap: it's critical to define your organization’s BI goals before planning your metrics—not the other way around! To ensure that your BI platform supports your long-term goal of maximum BI value, you must lead this project with your goals in mind rather than planning and prioritizing metrics & dashboards based on the data that’s already available. The metrics need to fit the business—never the other way around.

3 Measure only metrics that spark action

You have mountains of data. But not all data is equally important, and just because you can measure it, doesn't mean you should. The only data you should plan to measure is the data that will help your stakeholders make decisions and changes in the best interest of the organization. Nothing more, nothing less. Of course, you shouldn’t erase any data. But just because it’s there doesn’t mean your stakeholders need to visualize it in a dashboard.

EXAMPLE

Your sales team leaders want to monitor the company’s general revenue status closely, but your current analytics tools segment revenue by their source: online, physical, and resale. With a modern BI platform, you can mashup this data to see general revenue. Just because it’s segmented now doesn’t mean it has to be segmented in your final dashboards.
The following three steps share tips, tricks, and best practices for building organizational consensus around a BI platform with each of your three stakeholders. These exercises are designed to help you start the conversations that need to happen as early as possible to ensure you attend BI software demos with the information you need to accurately assess vendor capabilities for your unique use case.

In the following pages, we’ll explore:

**STEP 1:**
BI Reconnaissance
Stakeholders: Business Users + Business Analysts

**STEP 2:**
High-Level Design
Stakeholders: Business Analysts

**STEP 3:**
Dashboard Planning
Stakeholders: Business Analysts + Data Engineers
STEP ONE: BI RECONNAISSANCE WITH YOUR BUSINESS USERS & ANALYSTS

The Requirements Gathering Step is an exercise in listening and diplomacy. Think of this step as your BI reconnaissance mission—it is your mission to identify, define, and condense all business requirements from all business users to ensure the business decisions you need your BI platform to inform are included in the final dashboards.

Who makes decisions in your organization? Who reports to who? Who is responsible for creating analytics reports today? What are the data sources those people are pulling from?

A top-down approach to requirements gathering is traditionally recommended—but it’s crucial to start at the top and not to neglect the boots on the ground. The best intel is produced from cross-departmental and cross-level workshops, focus groups, and surveys.

An executive knows the business questions they want their BI solution to answer. On-the-ground-managers are more familiar with how those questions are currently being answered (or the pain points involved in currently answering them incompletely). And team members tasked with crunching numbers or generating reports to answer what they can with what they have? Your business analysts know the data you have to work with better than anyone!
BUSINESS REQUIREMENTS RECON: THE QUESTIONS

Define the business needs:
1. Who is going to use these dashboards?
2. What are the dashboards’ business needs? (Summarizing/analyzing/monitoring)
3. When will the dashboards be used?
4. Where will the dashboards be available for maximum adoption and visibility?
5. How timely must the data be?
6. How do you want the dashboards to change the way you work?
7. What kinds of decisions should the dashboards help you make?

Describe success and set KPIs:
1. Describe success: what is your desired business end result?
2. Which KPIs represent this business end result?

Identify causes and effects:
1. What behaviors or activities will drive the desired business success?
2. What are the expected intrinsic outcomes?

Build the dashboard hierarchy and KPI architecture:
1. Which measures represent the intrinsic outcomes?
2. How would you describe your ideal dashboard? Which data would be presented first, second, and third?

Another great strategy for getting your stakeholder talking is the “User Story Method.” Ask them to describe their requirement in these terms, by filling in the blanks:

As a ______ I want to ______, so I can ______.

This method will answer the who, what, and why questions for every requirement.

Open a stakeholder’s mind to what can be achieved by showing them real examples from the Interactive Dashboard Examples Library.
STEP TWO:
HIGH-LEVEL DESIGN WITH BUSINESS ANALYSTS

Once you’ve gathered all the information that you need to fully understand and align with your stakeholders’ business requirements, you can start planning your KPIs and drafting what your BI solution will look like.

During this step, your Business Analyst is your best friend! They will help you navigate how to translate business requirements into KPIs, which KPIs should be grouped together in single dashboards, and which dashboards will feed into other dashboards in your dashboard hierarchy.

Building Your Dashboard Hierarchy & Choosing Your First Dashboard

For the purposes of this exercise, you will start by planning a single dashboard. However, a single dashboard won’t answer all of the business questions your stakeholders require! Create an outline of the different dashboards that you would like to create and define the hierarchy of how these dashboards relate to one another.
Once you’ve drafted your hierarchy, it’s time to choose your first dashboard to tackle. After speaking to all of your stakeholders, you should be well positioned to identify which dashboard or group of dashboards will serve to answer the highest priority business questions.

**PRO-TIP**

It’s not possible to do anything other than start small. Using the example hierarchy above, you’ll notice that the overarching “Adventure Works Cycle” dashboard will pull data from all of the smaller dashboards below it. So you can’t start at the top. If the “Channel Sales & Marketing” dashboard is your highest priority based on stakeholder requirements, sit with your stakeholders to determine which of the 4 sub dashboards they’d like to see first. If they’d like to see a dashboard for “Channel Field Sales” then one of the 4 sub dashboards that feed “Channel Field Sales” will be your first dashboard project.

Building Your ERD (Entity Relationship Diagram)

With your first dashboard identified, it’s time to drill down deeper into the data and data sources you’ll need to include in your data model so this dashboard can display the actionable insights your stakeholders want to see.

For our example, we’ll assume you’re starting with “Western Region,” one of the sub dashboards under “Channel Field Sales.” Which data sets and data sources will you need in your data model to make this dashboard great?

Example 2:
STEP THREE: DASHBOARD PLANNING WITH YOUR BUSINESS ANALYST AND DATA ENGINEER

What does it mean to plan a dashboard? Planning a functional dashboard requires that you translate your KPIs into data requirements. Dashboard planning is the critical step in which you zero in on the data and data sources you will need to visualize the KPIs you require.

In this step, you'll work with your Business Analyst to sketch a preliminary mockup of a single dashboard and you'll make contact with your final stakeholder—your Data Engineer. Because your Business Users can tell you what they want to know, your Business Analysts can inform the KPIs that will answer these questions, but it's your Data Engineer who holds the following crucial knowledge:

1. How big is your data?
2. Where does your data live?
3. What are the formulas you’ll need to connect your disparate data into a single source of truth in your data model to create a solid data pipeline?

In this Step, you will continue translating business goals into KPIs. You'll then translate those KPIs into the formulas and data requirements that will enable you to model your data and connect to your future BI platform.
PLANNING YOUR FIRST DASHBOARD

1. DASHBOARD OUTLINE
   (in collaboration with your Business Analyst)

   It’s time to define dashboard objectives, target audience, beta users, end users, number of concurrent users, calls to action, data update frequency, and project timeline.

   Dashboard Title:
   
   Dashboard Objective:
   Describe a concrete goal that this dashboard should address

   Target Audience:
   • Power Users: The business users who presented the business requirements for this dashboard and will provide feedback throughout the process
   • Beta users: End users who will test the dashboard
   • End users: Groups/individuals who will use the finished dashboard
   • Concurrent users: How many users will be accessing the dashboard concurrently?

2. DASHBOARD MOCKUP
   (in collaboration with your Business Analyst)

   Design your widgets’ visualizations and the dashboard layout. Use the mockup to evaluate the design with the Power Users.

   Call to Action:
   Describe the short-term actions that the end users should take based on this dashboard

   Data Update frequency

   Timeline

PRO-TIP
This can be a doodle! Now is the time to put pen to paper and sketch a preliminary vision of how you want your KPIs displayed in a dashboard format.
3. KPI ARCHITECTURE
(in collaboration with your Data Engineer)

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4. DATA REQUIREMENTS
(in collaboration with your Data Engineer)

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CONCLUSION

Leading a successful BI initiative is an inspiring and challenging project with the potential to bring immense value to your organization. Producing actionable insights for your organization or your customers ensures you get maximum value from your data. And that’s why it’s critical to lay the foundations for a successful BI project in tandem with your BI software assessments.

The best BI software implementations are lead by teams who know their data, understand the unique requirements and challenges associated with their data, and are committed to answering the highest value business questions with strategic data visualization. These teams are obsessed with bringing actionable insights to the surface and empowering their end users to make critical decisions.

By mindfully incorporating three personas, three mindset shifts, and 3 powerful steps into your BI platform selection process, you’re committing to pursuing this dream with the support of a powerful team.

Is your team ready to bring your BI dream to life? Let’s test drive on your own data to explore what’s possible with Sisense.

Book a Test Drive