Effective Business Intelligence

Strategy and Execution

Performance excellence in business depends on high quality, timely data presented in a clear and simple manner to all layers of management.

The emphasis today in management is on performance reporting for decision making, not just the everyday factors but enterprise wide performance factors such as key results indicators and key performance indicators coupled with competitive intelligence interests.

Methods and tools have evolved recently that point to best practices in business intelligence. These accepted methods and tools include management disciplines, dashboards, briefing books and reports to analyze the business.

Business intelligence requires more than just rolling up data for senior managers. Business data must be delivered in a clear and concise manner in context of pressing business issues. If not, managers may be misled and worst they may make decisions based on bad information.

Business intelligence should exist in context of the entire business and leverage best technical practices including the web, data warehousing and information integration. In addition, to make business intelligence real a view to the future including new technologies and architectures must be leveraged for best value.

LEARNING OUTCOMES

The expected learning outcomes include:

- Contrast and compare the characteristics of performance management and business intelligence

- Prepare appropriate reporting requirements using a BI methodology

- Develop analytic workflows that reflect calculating correct and meaningful report values

- Demonstrate how business issues, strategy, measures and business intelligence relate to each other

- Differentiate between the technology for business intelligence and the business needs for reporting

- Demonstrate how to simplify, consolidate the different views of an organization's data

- Explain the meaning of the different terms and jargon used in business intelligence

Learning Benefits

This course is intended to help you define the appropriate direction for your organizations with respect to BI.
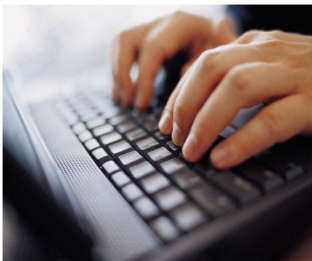
The course includes many exercises for constructing a basic business intelligence system, loading data, creating a dashboard and trying various access paths to generate reports and a simple briefing book.

The expected Learning Benefits that you can apply directly to your job include:

- Prepare a basic analytic workflow

- Define the drill down taxonomy used by managers and staff to display data from a data warehouse

- Consolidate multiple views of data across the organization

- Define a technology architecture perspective suitable for managing the data of business intelligence

- Organize a metadata library for reference and reuse of data definitions material

- Develop a deployment action plan to implement a BI solution

Who Should Attend?

- *CEOs and CFOs*
- *New CIOs,*
- *General Managers*
- *Finance Directors and Managers*
- *Management Consultants*
- *Strategic Development Directors and Managers*
- *Planning Managers*
- *Strategic Planning Directors and Managers*
- *Corporate Planning Directors*
- *Organizational Development Directors and Managers*
- *Business Analysts*
- *Business Development Directors and Managers*

Hand's on exercises and daily exams reinforce learning

The strategic perspective of BI

Key Concepts of BI

- Business Intelligence Yesterday and Today
- Business Measures for Performance
- Business Intelligence Approaches
- A Business Intelligence Methodology
- BI as an Investment Decision

Demonstration – Simple BI Tools

Identifying Business Needs

- Strategy and performance
- The new stakeholders
- Business as the BI driver
- External/Internal BI
- Business and Competitive Intelligence

- Management disciplines

Exercise – Identifying the BI Purpose

Enterprise Performance Management versus BI

- Contrasting the two approaches
- Measures and their long term use
- Non dimensional indicators
- KII, KRI and KPI… what are these?
- The Briefing Book
- Developing Indicators

Exercise – Setting Performance Goals

This course focuses on the business needs for BI and the technology that makes it happen.

Requirements for BI

Requirements for Business Intelligence

- Business Analysis and BI
- Identifying the Measures
- External versus Internal Business Requirements
- Content Requirements
- Delivery Requirements

Exercise – Identifying Corporate Needs and the Business Requirements

Requirements for Business Intelligence System

- Identifying data needs
- Data models for operational data store

- The analytic workflow
- Scoping warehouse size
- Technology considerations
- Integrating data

Exercise: Developing BI System Requirements

BI Transformation – migration from what you have and future issues for planning

- Hardware technology impacts
- Data validity verification
- Security issues
- Layers of ETL
- Technology constraints
- Developing a migration plan

Demonstration – BI Dashboards and Briefing Books

The BI Technology Architectures

Staging Data – Finding and getting data

- The operational data store.
- The analytic data store
- The Extract, Transform and Load concept (ETL)
- Issues in data alignment
- Metadata Issues
- Integrating data and content

Exercise – Determining the Operational Data Store (ODS) data model

The Delivery of Data – The Enterprise Data Warehouse

- Basic Warehouse Structures – More than One Way
- Dimensions versus Facts
- Finding the Facts – Taxonomies, Categorization and Context

- Data Marts and Their Relationship to the AD-S/ODS
- Managing the EDW environment

Exercise – Developing a Drill Down Taxonomy

Accessing the Data—Presenting data to the user

- Presentation guidelines
- The dashboard idea - drilling down to find the problem cause
- Integrating external content
- Signaling techniques
- Data mining ideas
- Interpreting the results
- Enterprise Information Integration – data to external users
- *Exercise – Who Sees the Data?*

Tools and BI Trends

Tools from the Mega vendors

- IBM Concept of BI
- IBM tool suite
- Oracle BI Concept
- Oracle Tools suite
- Microsoft perspective of BI
- Microsoft tool suite
- Issues with mega vendor solutions

Exercise – Which vendor fits?

The independents and shareware

- Microstrategy approach to BI
- Microstrategy toolsuite
- Shareware – Jaspersoft
- Jaspersoft tool suite
- A few other players
- Issues with shareware and independent vendors

Exercise – Choosing a BI tool

Current Trends in BI Architecture

- The impact of BI maturity
- In-Core Memory databases
- The problem with vendors
- Can you do 'best of breed' today?
- Is technology an enabler or constraint?

Final Questions and Wrap

Knowledge Consultants, Inc. is a professional services firm founded in 1984. KCI provides consulting and professional education services. With over 30 courses taught worldwide, KCI provides the opportunity to develop core strengths in the following certification areas:

- Process Management
- IT Management
- Business Performance Management
- Business Analysis
- Analytical Techniques for Business
- Business and IT Architecture

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Meet the Expert—Michael Miller

Mr. Miller is a senior instructor with Knowledge Consultants, Inc. and has over 30 years of IT experience primarily in banking, securities and insurance as well as experience in retail, telecommunication and pharmaceutical industries. He started his career in computer operations, programming and systems design, and then moving on to consulting roles in enterprise architecture and business intelligence. Michael's previous consulting roles include National Director of Enterprise Architecture and Business Intelligence, Executive Consultant CRM COE, and Principal Management Consultant.

He holds four master degrees (Business Administration, Project Management, Telecommunications Management and Information Systems Management) and has done over two years of doctoral work in Knowledge Management.

He is a board member of the Data Management Association – Chicago Chapter, a Certified Business Process Management Professional (ABPMP) and a Certified TOGAF Enterprise Architect. He is presently a Global Information Architect for a major global bank.