



Crossing the Chasm Between IT and Business Teams with New Approaches to Business Intelligence

A QlikView Perspective, from Brad Peterman

Theme

For over a decade, organizations have struggled with a widening gap between IT and the business owner due to shifts in perceptions of what Business Intelligence was meant to be. Delivery of BI has become so complex that IT has been forced to package BI requests into very large projects in order to justify the overhead. IT now in many instances has become undervalued; where highly skilled workers are frustrated in low level reporting and measurement roles, while the business – standing apart - can't access and analyze information fast enough to make strategic decisions. This lack of “go-fast” BI capability has created a chasm that forces BI requestors to either wait in line (potentially for years) at the door of Big BI, or to seek speed in the static and ad-hoc deliverables of a reporting team.

How did we get here and what's the impact for the future of Business Intelligence in today's organizations? A new way of thinking should emerge when considering better approaches to bridge the gap. One that, in the end, will elevate IT, and have the business pulling a seat out for them at the table, to work collaboratively.

This discussion with Brad Peterman, a leading industry technologist, will elaborate how.

Q: Brad, we're here to talk about what you've referred to as the “Great BI Divide”, meaning the chasm between IT and the Business with respect to business intelligence. Can you fill us in on how we got here in the first place?

This “Great Divide” didn't happen overnight. About 10 years ago when BI vendors were starting to consolidate various BI tools and offer their BI suites, they were promising comprehensive BI solutions. And, that's when things really started to change.

There were so many complex moving parts to manage in delivering

dashboards, or analytics solutions, to the end user. The complexity encompassed things like requirement tools, data modeling tools, data quality tools, ETL tools, dimensional database tools, design interfaces, and then servers to deploy on. It only got more chaotic once we entered the OLAP era with things like OLAP tools, metadata layers and object repositories to manage as well.

If you fast forward to today, “Big BI” has emerged and has bloated even further by including separate tools for example to cover reporting, analytics interface, dashboarding, and query caching. The sheer weight of these tools can crush a BI project.

And so IT responded with what they perceived to be a more effective agenda for BI delivery.

Q: So what was IT's perception of this more effective agenda in response to the weight of the Big BI...or should we say “misperception”?

I believe they did three things. They isolated IT skill sets. They increased the time to deliver BI. And, they reduced the scope of the deliverable. Let me expand a little more.

- The first step was that they began to isolate IT skills set for requirements, data modeling, ETL,

database tuning, BI design, and administration. That really increased the technical mastery required to perform each step. It made the scope of each job smaller so it was more manageable within BI projects.

- The second thing was that IT began to create project plans and follow the traditional waterfall methodology. This increased time to deliver BI. And, it gave IT more control over processes so that they could complete a more defined deliverable, one that they could corral where they needed it to go in order to be more successful.
- And the third thing they did was to minimize scope of delivery to the safest, most conformed corporate data; this reduced risk and created a more narrow delivery and more predictable performance for these tools. I think they had the best intentions in mind which was really to increase success rate of big BI projects that were hovering at around a 20-30 percent success rate.

Now, looking back, we see that success rates haven't gone up much, but the time required to deliver Big BI has ballooned, and the number of IT practitioners needed to deliver Big BI has ballooned. At the same time, end user satisfaction has gone down greatly.

So that's pretty much how I think we got here...best intentions perhaps at the get go, but it's had the opposite effect of making BI projects bigger, more complex, certainly far riskier and overall less successful.

Q: What are worst-case ramifications when the chasm between IT and business is so wide? Do you have anecdotes you can share?

Among them, the most unfortunate result is tension and adversity between business groups and IT. The chasm that exists between Big BI and the alternative to Big BI is so great that some business teams don't even know what IT does within BI and vice versa.

Here's the real shame...IT can know a lot about the business and business can know a lot about technology today. When working together, it's a fantastic thing to see. When they are not, neither group is optimizing what each, nor the other, can deliver. I was onsite recently with a client who advised that the business group that was delivering BI to the finance team wasn't even sure what their corporate data sources were as they had so little interaction with their own IT BI team. They were suboptimal as they were not using skills sets of IT and vice versa. And, they were doing too much work in getting data and validating, because they weren't collaborating and getting access to data sources.

Another common outcome is shadow IT where a business team starts to take on the technical role and you see a pocket of traditional IT skills popping up in business. Sometimes that's not all bad if a federated approach to technical skills is OK with the company, but for a lot of companies that can be very distracting and just adds into the adversity and tension between business and IT. When those shadow groups pop up, you're pretty sure that the spigot is turned off from the IT team for BI requests, and that pretty much indicates to me there's literally going to be no collaboration.

Look, in either scenario, work will still get done...but I see IT has two very separate choices...keep pursuing and delivering on the most labor intensive work on the technical side and specialize those skills sets; or, create business technical roles and elevate the skill sets of everyone. It's the latter group to me that's really on track with the best of breed in new approaches to BI.

Q: Do you think big BI vendors are aware of this crisis and are they failing to meet the challenge it presents?

Yes, I'm seeing in the market that this whole effect of the BI chasm between IT and business and the overall unmet BI needs is not going unnoticed by big BI vendors. They are aware and trying to address it by doing things like in-memory states, and promoting pieces of their tool to deliver BI quicker. The issue with this – and it's a big one – is there are still a number of steps to go through as these tools are built in layers with a lot of complexity. You just can't just peel off a piece and do effective BI. Yes, they have been able to peel off some reporting and data delivery and do a fairly decent job, but that's not big BI.

It's also the 'stuff in the middle' where business users know there's a huge opportunity and they are not getting answers. But, it's not as easy as saying "I have these seven fields I need to see and if you give them to me I'm golden". It's more a statement of "I see the chance to streamline something in our supply chain, for example, because anecdotally I can refer to it when I see delivery time going down and getting worse. There's a correlation and if you can find out why, we

can do great things.” That’s the BI that’s unmet. Big BI teams can’t pinpoint it because they don’t know where it’s going. Tools spinning off to do reporting don’t cover it, or go across data sources and discover.

So, yes, I believe the trend of the BI chasm is known to big BI vendors but they are fumbling how to address it by peeling off a piece or two of their tool suite and saying ‘here, put this in the middle and build a report’, and then walking away.

Q: What business functions or industries are most impacted?

Finance is probably most heavily impacted because of volume and data sources. They are the ones with the most risky projects and a lot of rapidly changing needs given compliance and regulatory needs. It’s a very scary place to put big monolithic BI tools. Sales certainly also has a tendency to change. ERP and CRM tools can greatly impact sales teams, and they have a great need for shadow IT in BI.

From an industry side, retail and banking are two impact areas I’d call out immediately. Again, in the finance community risk and compliance are paramount. For Retail, you have cycles and a natural cadence of risk adverse timelines. You may deliver a few times a year on big BI projects and there’s been a tendency to entrench Big BI.

Q: How have outsourcing and technology specialization impacted BI disciplines?

I am seeing that BI disciplines in the middle of BI delivery chain (ETL, database admin, and to some

extent caching or provisioning of the OLAP layer) are outsourced more and more. It may be that data centers are moving offshore or offsite from headquarters and it’s easy to couple these technology skill sets with the data center. You may start your project together with business users, maybe do requirements or data modeling onsite, but then see either hand off happening where you give the middle of the BI chain to the offshore team and consultants because it’s so labor intensive.

But what that’s encouraged again is to increase the complexity of the BI project and the other issues I’ve been stating here. What you get back is not what you wanted because they reduce risk and scope to increase success rate. And it’s so expensive to go through the process and takes so long that you won’t repeat it; so, the company just marches forward, considering it a success with whatever they have. And the cycle repeats.

Q: Can you expand further on how this “Great Divide” and the emergence of Big BI impacted IT and Business roles in the enterprise?

I’d assess it like this. There were two paths that IT could take when faced with increasing BI demand, decreasing success rates, and escalating risks. They could become even more technical and protect Big BI from doing what most business users wanted it to do (which is fast collaborative BI). Or they could become more business-like and embrace that collaborative fast BI approach even if that meant reducing the labor intensive highly technical roles they built up for so many years.

That’s a scary choice for technical professionals. Some companies chose to entrench further into their perceived safety of Big BI and their more technical projects. For these companies, the business role didn’t change much but IT teams became even more immersed in training/technical work within the specialized roles that they had built up in the Big BI tool suites. The level of collaboration between the business and technical teams diminished as IT became more specialized.

On the flip side, some IT teams chose the latter and created effective BI programs that blended the deliveries of “go fast BI” with more traditional monolithic BI. And for those companies, business folks became slightly more technical. They learned a little more about data sources, certainly a lot about interface design for delivering BI... while IT took on more skilled business roles, as they participated in things like requirements, discovery, and design and scoping with the business users. The new strategic IT roles became really important within those companies and elevated the value of those IT folks greatly.

When I visit companies like this, I see new blended roles springing up like business discovery analyst and analytics specialist. These folks sit right next to the business users and are creating epiphanies that lead to huge BI opportunities every day. Their jobs are more rewarding to them as practitioners, and more rewarded by the company because of their job value. Face it, it’s easier to outsource a purely technical role than to outsource a business technical role.

And that's what these blended IT roles are - creating business technical roles that are elevated in value in the company. I couldn't recommend strongly enough that companies embrace these blended roles as enablers to the success of their Business Intelligence strategy.

Q: How are new approaches in BI able to build the bridge to the strategic middle?

The theme of this new approach is collaboration between business and IT as an absolute. How that manifests itself are things like technical skills/people become immersed in business meetings with the business users mining BI opportunities, questioning 'where do we go next, how do we build what we want to build to expose BI opportunities to our people'. Having IT in the room and being able to take steps even during the meeting, or between meetings,

saying "we are closer, let me show you insight that's locked away" is a tremendous success. This scenario is far more beneficial instead of running off and starting a 9 month project separately, which is what they were doing.

And, when they have the right tools, they can create the Ah Ha Moment in the meeting, and can optimize then and there. They can prototype, do discovery, turn around and create highly reliable and scalable solutions reducing even more steps to achieve the Ah Ha Moments. That's the thing that Big BI vendors can't do by just peeling off the tool and starting over each time.

Q: So you've talked about the possibilities for the enterprise when IT is at the Business table...but what's your take away recommendation for the right approach around which tool to select?

Sure; there are three things I'd like to enforce about the type of solutions I'd recommend that can not only go fast in the middle and cross the chasm, but also deliver in the Big BI space. I wouldn't start a BI project without them.

1. In memory technology, so that scalability is optimized.
2. Associative search, to allow for more rapid discovery, prototyping and Ah Ha Moments that you can't get with big procedural, dimensional BI which requires layers of expertise to even get to one answer.
3. Simplicity...at the same time you are adding in memory and associative search, you can find a solution that strips away complexity and stays simple, despite robust features.

About the Author

Brad Peterman's role at QlikTech is to gather, document and share best practices and techniques for large scale QlikView deployments. He has 20-plus years IT experience which include being the QlikView program owner at a prior employer, Target Corporation. He is passionate about Business Intelligence and helping large, global companies achieve amazing results and create business opportunities under a new BI paradigm, where speed and power are combined with simplicity.

About QlikTech

QlikTech's powerful, accessible business intelligence solution enables organizations to make better and faster decisions. Its QlikView product delivers enterprise-class analytics and search with the simplicity and ease of use of office productivity software. The in-memory associative search technology it pioneered makes calculations in real-time enabling business professionals to gain insight through intuitive data exploration. Unlike traditional business intelligence products, QlikView can deliver value in days or weeks rather than months, years, or not at all. It can be deployed on premise, in the cloud, or on a laptop or mobile device—from a single user to large global enterprises. QlikTech is headquartered in Radnor, Pennsylvania, with offices around the world and a network of over 1,100 partners to serve more than 13,000 customers in over 100 countries worldwide.

