

Five Key Elements to a Successful Business Intelligence (BI) Solution Implementation

A Business Intelligence (BI) solution can give your organization big wins in the areas of efficiency, productivity and effectiveness (a kind of performance trifecta.) Yet according to a report by Gartner Research Group, 70%-80% of BI projects fail. To ensure your solution will be successful and have high adoption rates across your organization, these five key elements of success must be in place.

1. Clear Communication of Business Needs
2. Activities and Actions that Drive Results
3. Measure, Track and Report
4. Quick Access to Real-Time Data
5. KPIs Displayed to Inform and Motivate

These elements are like the pistons of an engine. If one is misfiring, the entire project is likely to sputter to a halt. So let's look at these success elements in more detail.



#1: Clear Communications

The first step in a BI project is to ensure everyone is in the loop. Clear communication at every level, from strategy and planning, to design and implementation, is essential. All involved should know the answers to two key questions:

- *What are the business needs to be addressed?*
- *What does success look like in terms of fulfilling these needs?*

This critical information should be carefully documented and communicated to all team members. (For more information on how to do this, see our article: [Key Factors to Starting a Successful Dashboard Project.](#))

Why is this so important? It is well-known in organizational psychology that performance declines when people do not understand the mission. To stay on task, team members need to have an appreciation for "why" they are doing what they're doing, as well as a clear picture of the desired result. Solid and clear communications with all stakeholders throughout all phases of the project is the foundation for success.

#2: Fully Understand the Activities and Actions that Drive the Desired Results

Another important element in a BI project is to determine what actions users need to take to consistently achieve objectives. Define the actions as repeatable, predictable and measurable activities that are needed to achieve the desired results. Clearly define and communicate how these actions will be measured and reported on and then tie the actions to real-time data and information.

Take a sales team that sells complex solutions into large organizations, for example. They are tasked with delivering proposals and presentations to qualified prospects as part of the sales process with the goal of closing big deals. The greater the number of proposals and the greater the number of presentations the greater the opportunity to win the deals. The key activities that lead to the desired result of closing and maximizing sales are the number of proposals and presentations. If sales management and the sales team had this information readily available, they would be able to easily monitor all their activity progress and make the necessary adjustments in their activity focus - at the right time - to ensure success.

#3: Measure, Track and Report on Actions and Activities

To understand the third element to BI success, let's look at another example: a large consulting firm managing dozens of complex client projects. For each project, there are numerous players: in-house consultants, project leaders, and implementation and support teams. Each have tasks that must be completed on time to ensure the project is delivered on schedule.

If the desired result is for projects to be done on time so that clients are satisfied, then simply keeping track of when projects are done — the *results* — would not get you very far. You need to track the *activities* that drive those results which, in this case, would be the tasks assigned and completed by members of the project team.

If project managers could measure and track, in real time, the status of each task assigned, they could quickly intervene the moment a task appears to be at risk. More projects would get done on time. More clients would be satisfied.

#4: Quick Access to Real-time Data and Information

To consistently achieve objectives, users need quick access to information so they can see trends, problems and opportunities — the moment they are happening — and act accordingly.

Take the purchasing department of a major retail chain, for example. They are tasked with ensuring each store is optimally stocked. If stores run out of an item because it is selling well, the chain loses opportunities for additional sales. If the purchasing department orders too many of that item, however, the stores may have to sell-off the excess stock at a loss.

The objective, of course, is to order the right amount at the right time. Key data and information is needed to make better decisions faster. Data is needed on the daily sales of each item, in real time, to see the trends. Also, supplier stock, turnaround times, and status of incoming shipments is all key information required on a consistent basis to quickly ensure sales are maximized and inventory levels are balanced.

#5: Ensure KPIs are Displayed to Keep Users Informed, Motivated and on Task

Finally, the fifth element is to ensure organizational goals are translated into specific and meaningful Key Performance Indicators (KPIs) and are presented and readily available to the users. That way, users have a continuous reminder and view of the activities and actions required to achieve their objectives, as well as the real-time data they need to make it happen. KPIs are the metrics used to measure performance and will differ for each company depending on the success factors within and across an organization. One approach to determine KPIs is to list out the critical success factors for your business and then identify which of those has the most influence. For example, a shipping company might list customer satisfaction, warehousing costs, and on-time delivery as critical success factors. However, since on-time delivery impacts the others, increasing customer satisfaction and lowering warehousing costs, it is considered to be a strongly influential KPI. Define and clarify your KPIs as they are the metrics needed for success.

So when making plans to harness the advantages of BI, keep these five elements in mind. They will put your BI project on a solid foundation for success.

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