



# Successfully Implementing SSBI

ANDREW BITTERMANN

# Agenda

- ▶ Why Self-Service?
- ▶ Key Takeaways
- ▶ Thinking Comprehensively
  - ▶ SSBI Program Mindmap
  - ▶ Data Management
  - ▶ Keys for Adoption
- ▶ Considerations for Advanced Analytics
- ▶ Getting Started

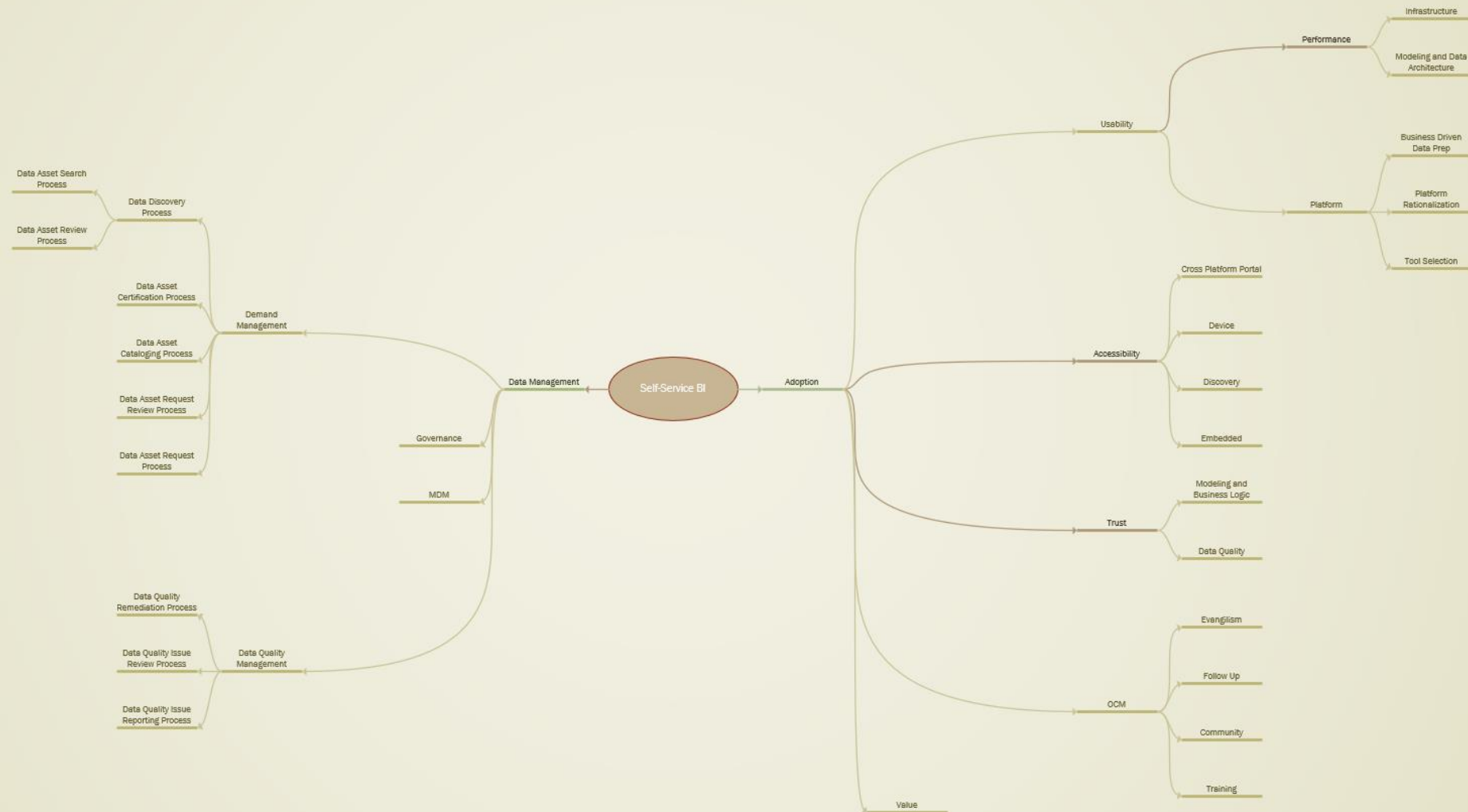
# Why Self-Service?

- ▶ Growing need for self-service as a force multiplier
- ▶ Proliferation of self-service tools
- ▶ Move from reporting to a discovery and data interrogation paradigm
- ▶ Adoption of bimodal BI
- ▶ Changing nature of accessibility
- ▶ Evolution of the IT/business relationship

# Key Takeaways

- ▶ Think of SSBI programs comprehensively
  - ▶ This is not a purely technical challenge
  - ▶ Develop your own mind map
- ▶ Focus on data management and adoption
  - ▶ Do not underestimate the need for organizational change management
  - ▶ Acknowledge and address where your data management is immature
  - ▶ Think about challenges to adoption and your organizational culture
- ▶ Embrace bimodal BI
  - ▶ Establish workflows that define handoffs
  - ▶ Understand your current assets and how to build and manage new ones
  - ▶ Balance democratization with governance
- ▶ Look for ways to enable SSAA alongside SSBI in your planning

# Think Comprehensively



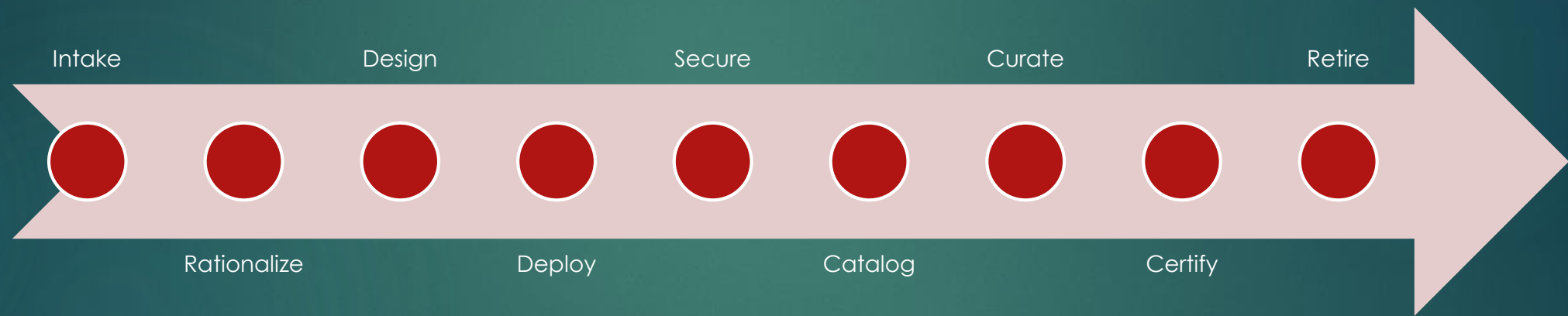


# Data Management

# Principles for Data Asset Development

- ▶ Enable discovery and awareness of existing assets
- ▶ Avoid redundant or unnecessary asset creation
- ▶ Embrace bimodal BI
  - ▶ Support non-IT data asset development
  - ▶ Build a process that supports both the business and IT's needs
  - ▶ Bring non-sanctioned assets of value into the fold
- ▶ Enable the larger community to develop and curate metadata
- ▶ Enable social commentary on data assets
- ▶ Develop a shared vernacular for curation levels

# Data Asset Development Lifecycle





# Right-Sized Governance

- ▶ SSBI will identify data quality issues and sourcing questions
- ▶ Remediation and proper sourcing are necessary for analysis to be meaningful
- ▶ Governance, data quality management (DQM), and some mastering of data can be right-sized
- ▶ Look for opportunities to curate business metadata
- ▶ Deploy a business glossary with the implemented solution

# BI Development Lifecycle Considerations

- ▶ SSBI will identify data quality issues and sourcing questions – plan DQM and remediation activities as part of your lifecycles
- ▶ Think iteratively
  - ▶ Deliver value iteratively
  - ▶ Grow your model incrementally
  - ▶ Expose your solution in layers
- ▶ Evangelize and promote
- ▶ Up an over to break siloes

# Adoption

# Keys Principles

- ▶ There must be value (3 levels of “so what?”)
- ▶ Do not forget the importance of organizational change management
- ▶ Performance and trust are the most lethal killers of adoption
- ▶ Plan for onion accessibility
- ▶ Usability – platform selection and rationalization

# Organizational Change Management

- ▶ Start small
- ▶ Create evangelists
- ▶ Create and cultivate a community
- ▶ Think up and over
- ▶ Think onion accessibility
- ▶ Embrace technology platforms that enable accessibility
  - ▶ Discovery
  - ▶ Community curation of metadata
  - ▶ Mechanisms to request access
  - ▶ Role of embedded

# Platform Considerations

- ▶ Design for reusable semantic layer
- ▶ Determine when tool consolidation / rationalization is worth it
- ▶ Understand users have their favorite tools
- ▶ Enable data discovery to minimize one-off and tool-proprietary business layer logic
- ▶ Beware of the increasing robustness of BI tools
- ▶ Consider cross-platform portal technologies
- ▶ Look for opportunities to embed analytics

# Considerations for Advanced Analytics

- ▶ Some of the same concepts apply...
  - ▶ Data asset awareness, discovery, curation
  - ▶ Data asset access request or creation
  - ▶ Iterative development
  - ▶ Similar overall lifecycle – Discover, Analyze, Model, Deploy
  - ▶ Some overlap in tooling
- ▶ Some do not...
  - ▶ Different nature of deliverables
  - ▶ Different nature for deployment and use
  - ▶ Different nature of models themselves and model management
  - ▶ Different considerations for performance
  - ▶ Different considerations for concurrency
- ▶ Look for ways to enable both SSBI and SSAA - consider SSAA in your SSBI planning

# Where To Start

- ▶ Inventory current information needs
  - ▶ Identify critical use cases with real ROI
  - ▶ Inventory current assets (people, tools, data)
  - ▶ Consider a data marketplace or cataloging platform
- ▶ Conduct a maturity assessment of your data management program
  - ▶ Identify gaps and opportunities for maturation
  - ▶ Create a roadmap focused on iterative delivery
- ▶ Get sponsorship
  - ▶ Identify an executive sponsor
  - ▶ Identify champions
- ▶ Seed a self-service community group





Questions?



# Thank you!

ANDREW BITTERMANN

[HTTPS://WWW.LINKEDIN.COM/IN/ANDREWBITTERMANN/](https://www.linkedin.com/in/andrewbittermann/)