

10 THINGS TO CONSIDER ON YOUR ROAD TO SELF- SERVICE ANALYTICS

The concept of “Self-Service Analytics” has become a staple addition to nearly all enterprise architecture roadmaps. Moving from traditional Business Intelligence to a more end-user focused world can be challenging. Whether you’re already set to implement a solution or are just thinking about where to begin, we’ve collected some considerations to help you be more successful, and avoid some nasty pitfalls.

1 ANALYTICS VISION

Choose the right tool for the job

Traditional BI has relied on Business being able to translate their requirements into a format IT can understand. This disconnect has led to a frustration on both parts, where business users are not satisfied with the given tools, and IT being overwhelmed with reporting requests.

With the introduction of end user focused analytics, and a plethora of tools to choose from, it is important to identify what sort of platform will make your future business more successful.

Before you adopt any new technology, make sure that it complements the needs and capabilities of your department and business. This should be driven by the top level of your business – senior managers and members of the Board. In order to become a truly data-driven organization, a full buy-in from leadership is required.

KEY TOPICS:

- Know where you are headed
- Top-level leadership buy-in
- Know what you are buying

2 USERS

Define your data consumers

Even the most advanced Analytical platforms are of little use if end users aren't experienced enough or receive adequate training. An important step to enabling end users to be effective is defining what sort of user groups exist in your organization.

For simplification, we can identify five different analytical user groups, depending on their type of data consumption:

- Decision maker
- Analyst
- Data consumer
- Developer
- IT

These groups have very different requirements and abilities when it comes to self-service analytics, but are all equally important in driving adoption of a data-driven culture.

In order to truly understand what sort of analytical requirements your users need, you have to talk to them. Set up interviews with business and IT users from all over your organization to identify how they work and what bottlenecks exist in their daily work.

KEY TOPICS:

- Identify user groups
- Talk with your end users
- Map out requirements for analytics

3 CONNECTIVITY

Load data or connect live

When creating an environment for self-service analytics, an important question to ask is how will end users be connecting to their data? In the old Business Intelligence world, data is created in ERP and loaded nightly into your Data Warehouse solution.

In the modern era of self-service analytics, this approach cannot keep up with the analytics demand of the business users, and needs to be closer and closer to real-time reporting.

Take for example SAP BW: The traditional approach to data warehousing presents several challenges for a self-service way of working. Connecting through the application layer is slow with most tools and in most cases requires data to be loaded out of the data warehouse. With earlier version of BW, this requires the 'OpenHub' license, which can be costly.

With SAP BW powered by HANA, connecting directly to the database allows the end users to run analytical queries against the database directly, bypassing the application layer. This query pushdown allows on-demand reporting, and will all business users to access to data immediately.

If you aren't running your Data Warehouse on HANA, it might be a good idea to revisit your roadmap and think about when an upgrade to HANA is feasible. This however shouldn't deter you from implementing a self-service analytics platform.

KEY TOPICS:

- Understand time horizons in your data
- Decide how end users will be allowed to connect to source systems
- Review your DW roadmap

4 SECURITY

Authentication and authorization

Just as with any type of Business Intelligence solution, data security is important in order to allow access to data to the right people.

With the advent of GDPR and other regulatory requirements, administration and control of your data is paramount. Your self-service analytics platform should also be able to leverage the existing security model and authentication services, instead of requiring them to be rebuilt in the tool.

Services such as single sign-on through Active Directory, SAML or other IDP solutions should be supported out-of-the-box.

KEY TOPICS:

- Review your authorization model
- Make sure your current security model can be used

5 IMPLEMENTATION

Pick the low hanging fruits

Implementing a self-service analytics platform should be straight forward. In order to get the fastest results, identifying quick wins that bring the most benefits to end users are the best ways to cement self-service analytics as part of your organization's BI offering.

Are your end users struggling with large amounts of Excel reports and combining the data from these files to create daily or weekly reports? These types of scenarios are ideal in identifying the benefits of more self-service analytics tools.

Pick a small group of users who have the same analytical challenges and introduce self-service analytics to them. Expand the user base gradually to allow for a smooth implementation process.

Don't be afraid of going with a cloud-platform approach. Infrastructure in the cloud is cost-effective and quick to set up.

KEY TOPICS:

- Talk to your end users
- Discover quick wins
- Go with a cloud-platform for a POC

6 USER ADOPTION

Serve business users with data, not reports

In order to achieve successful user adoption, training is vital from the very beginning. Start off with classroom training sessions and identify individuals who are your 'Champions'. These persons should be key users, as they will inspire other users to adopt your new tool.

For a self-service analytics platform to be adopted by your users, using it should become second nature. There's no use in trying to transition into a data-driven organization if your end users won't be using the tools on a daily basis. To ensure success, create user groups internally who can get together and discuss usability and content creation challenges.

Help your users be successful with self-service analytics by asking your vendor partner to arrange 'clinics' with your end users. Having a third opinion about contents your end users have created is invaluable for iterating and perfecting analytics.

KEY TOPICS:

- Identify champions
- Drive adoption with user groups
- Arrange 'Analytics clinics' internally

7 DATA GOVERNANCE

Avoid data siloes and enable transparency

Do you have reports built on top of your data warehouse data but users are taking it out to Excel for manipulation because they can't trust reports? It's a common problem. Since data is a key element in today's decision making, we should be able to trust that data and its quality. Publishing data sources which have been vetted and 'certified' by key users is important, ensuring high data quality.

To improve the results after adopting a self-service analytics solution, you should first audit your data to discover all data sources used by your end users and whether there are any variants of the 'official' data that are used. In many cases, end users will manipulate data on their own because the tools provided by IT do not meet their needs.

We also want our data to be available anywhere and at any time; be it on our mobile phones or tablets. Choosing a self-service analytics platform that supports analytics on-the-go without any additional investment is a must.

Also, granting end users a sandbox environment parallel to the production data will also help with creating a process of developing and testing reports.

KEY TOPICS:

- Audit your data
- Vet and certify published data sources
- Enable mobile analytics

8 COLLABORATION

Empower users to work together

The traditional 'report factory' way of working is dead. Business users need to be able to get answers from their data without having to wait for IT to give them. And in most cases this leads to misunderstandings and bad decision making.

Have business users create content themselves, since they know best how their business runs. And having a solution that allows for easy collaboration and iteration is the cornerstone of self-service analytics.

Have an open dialog between IT and business. Training both IT and business users on how the new platform and its processes work. Build cross-functional teams of both IT and business users to address needs and share insight. All this goes back to collaboration and sharing.

KEY TOPICS:

- Talk with IT and business
- Encourage collaboration
- Build cross-functional teams

9 SCALABILITY

Start small and scale easily

Scalability is a key part of a successful self-service platform implementation.

When you're choosing what sort of solution to go with, bare in mind: 'scaling up' by migrating over to a more powerful machine is cumbersome and in the end not very fault-tolerant. Having the ability to add additional nodes to your setup and distribute services depending on your users' needs is invaluable. It also gives the IT department peace of mind that the solution can adapt to demand easily.

Get started quickly with cloud platform deployments. They allow for easy scalability, hourly pricing and a plethora of additional services, which you can leverage together with your analytics platform.

KEY TOPICS:

- Scale out, not up
- Go with Cloud for easy scalability

10 BIG DATA

Disparate datasources? How much is a lot?

Hopefully, your organization has already embraced Big Data in some way. If you haven't, it's long overdue. When it comes to Big Data and disparate data sources, remember to keep in mind connectivity of your self-service analytics platform. It should be able to connect to more than just databases – Online services such as Marketo and Salesforce, distributed storage systems like Hadoop HDFS and even simple things as PDFs should all be supported. After all, the more options your end users have, the better.

Also, be wary of limitations regarding data amounts. Self-service analytics and data visualization should be about analyzing large quantities of data from multiple sources with ease, so be critical of any platform that has a cap on the amount of data you can process, store or even display.

KEY TOPICS:

- Capability to connect to multiple data sources
- Process large data volumes
- Check for restrictions on data size

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