

A Non-Invasive Approach to BI Governance

Metric Insights recently partnered with Robert (Bob) S. Seiner on a webinar discussing a non-invasive approach to BI Governance. Seiner is the President and Principal of KIK Consulting & Educational Services (KIKconsulting.com) and the Publisher of The Data Administration Newsletter (TDAN.com).

Bob is a thought-leader in the fields of data governance and metadata management. KIK (which stands for “knowledge is king”) offers consulting, mentoring and educational services focused on Non-Invasive Data Governance, data stewardship, data management and metadata management solutions. Bob is the author of the industry’s top selling book on data governance – Non-Invasive Data Governance: The Path of Least Resistance and Greatest Success (Technics Publications 2014) and has hosted the popular monthly webinar series on data governance called Real-World Data Governance (w/ Dataversity) since 2012. Bob recently accepted the position of an Adjunct Instructor for the Carnegie Mellon University Heinz College CDataO post-graduate program.



KIK Consulting is celebrating its 20th year in business while TDAN.com has been actively published for close to 25 years. In this paper, Bob shares his views and opinions on Data and BI Governance.

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What is Data Governance & How does it compare to BI Governance

There are a lot of labels given to data governance. There is big data governance, master data governance, customer data governance, artificial intelligence (AI) data governance (learned of that one last week), business intelligence (BI) data governance, Non-Invasive Data Governance™ ... among others. In all but the last example, the labels describe the data that is being governed. Non-invasive describes the approach that is taken to apply governance to data across the organization. It is debatable whether these labels are required.

In my book (literally), data governance is the execution and enforcement of authority over the management of data. That data can be big or small, master or domain-specific, or can focus on the data related to a specific data discipline. It is up to you whether you call it data governance or one of the other names I provided.

Non-invasive data governance describes how data governance is applied. To be non-invasive means to recognize data stewards for their relationship to data rather than assigning people to be data stewards. The latter immediately feels like it is threatening, and new and over-and-above somebody's existing responsibilities. To be non-invasive means to promote governance as something that is already happening but that needs to be formalized to become more efficient and effective. For more information about comparing approaches to data governance, please [check out this article](#).

“Non-invasive describes how data governance is applied.”

BI Governance, though, is something different. Notice the exclusion of the word “data” from the name. BI data governance focuses on the governance of BI data while BI governance focuses on the many aspects of a business intelligence or analytical environment. Along with my friends at Metric Insights, we shared many of these aspects of the BI landscape, governed through their solution, in this [recent webinar](#).

Before I provide a summary of a collection of strategies, processes, and tools governed through the Metric Insight's solution, I want to quickly describe the difference between a governed BI environment and an ungoverned BI environment. Remember that by using the term BI governance, I am not only specifically focusing on just the data. I will put BI data governance to the side for the rest of this whitepaper (you can find many articles on data governance in my publication) and focus on the governance of the BI environment.

Governed BI Versus Ungoverned BI

If we consider my earlier definition of governance (“execution and enforcement of authority”), a governed BI ecosystem is a series of components where formal accountability is recognized, and responsibility is executed and enforced according to a formal plan. Therefore, an ungoverned BI environment is exactly the opposite, where there is a lack of formal accountability and responsibilities and informal and not necessarily enforced. Governed BI environments provide productive, measurable, and repeatable business intelligence. Ungoverned BI environments are less likely to provide the expected results.

Metrics Insights breaks the governance of BI into two categories. The categories are shown in the diagram below and the last section of this paper addresses each of the actions required under each of the categories. Before I provide that information, I will simplify the differences between governed and ungoverned BI environments.

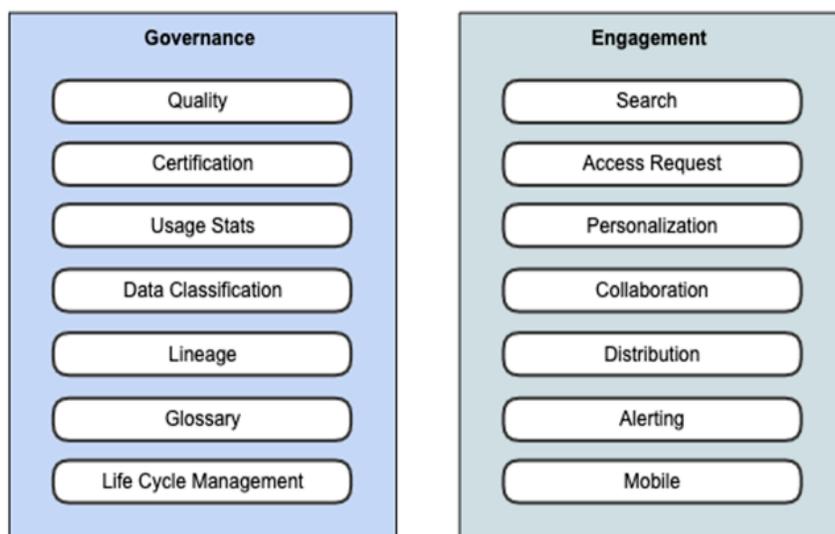


Figure 1: Categories and Actions Associated with BI Governance

In a governed BI Environment:

- Formal governance is applied, in a non-threatening and non-invasive manner, to each of the categories and actions. Alternatives to a non-invasive approach include the command-and-control (over-and-above) approach and the traditional (Field of Dreams “if you build it, they will come) approach.
- Formal accountability, through detailed roles and responsibilities, for each of the categories and associated actions is paramount to building and sustaining a successful BI environment. Accountability is enforced through job performance and evaluation.
- Formal communications and messaging, associated with the governance of BI, focuses on orienting people to the concepts of governing BI, onboarding people into their specific roles and accountabilities, and ongoing communications that demonstrates the value and benefits of the governed environment.

“Ungoverned BI environments are less likely to provide the expected results”

In the Metric Insights and KIK Consulting webinar, we focused on governing BI tools and their capabilities through a set of business intelligence activities and outcomes. The following is a brief summary of some of the main points made in the webinar – focused on applying my [Non-Invasive Data Governance](#) approach to Metric Insights’ BI governance actions.

Actions of Governing the Tools and Their Capabilities

1. **Quality** – The quality of the data will not improve on its own. The tool will assist in the process while requiring a resolute governing effort to utilize the tool effectively and engage the appropriate stewards.
2. **Certification** – Certification requires governed standards and a governed evaluation process that will result in effective and trusted data.
3. **Usage Stats** – Tracking tool usage and relating usage to the business value being added by the tool and the governed (versus ungoverned) environment, is critical to building confidence in data and governance process.
4. **Data Classification** – Classification of data is a significant action associated with BI. Data stakeholders must know how the data is classified and understand how the data can be handled according to classification. This is a job of Data Governance.
5. **Lineage** – People need to know where the data they require for their job comes from. The tool collecting the lineage metadata and the process required to validate the metadata is a part of BI governance.
6. **Glossary** – Business terminology and the organizational quest for common business language starts with a business glossary. Glossaries require accountability for the definition, production and use of business language, which must be a part of BI governance.
7. **Lifecycle Management** – The entire BI lifecycle, including all action associated with defining, producing, using, and retiring data, must be governed. A BI governance tools is the perfect place to govern the BI data lifecycle.

Actions of Governing Business Intelligence Activities and Outcomes

The following was discussed in the webinar related to the actions of governing BI activities and the outcomes of BI activities and actions.

1. **Search** – Search is a critical function of a BI governance tool. Providing a marketplace where people can find data is critical to BI governance success.
2. **Access Request** – The ability to request access, and track access requests, is also a critical function of BI governance.
3. **Personalization** – Personalization of the BI governance tool interface and functionality is critical to successful
4. **Collaboration** – The governance of BI requires that the people managing the data work together to share best practices and insight. Collaboration through a BI catalog tool is important.
5. **Alerting** – BI catalog tools must provide appropriate proper notices and warnings to people that align with governed BI business data rules.
6. **Distribution** – The distribution of BI data is critical to successful return on investment (ROI) from BI initiatives. BI tools assist in the governance of data distribution.
7. **Mobile** – Delivering important metadata about BI data to people wherever they are and whenever they require access is an important criterion for any BI governance tool.

More about Metric Insights:

A lack of BI governance in organizations leads to cluttered BI platforms, low usage, and lack of trust by end-users. Metric Insights' Enterprise BI Portal enables BI governance, providing analysts a way of documenting, categorizing, and certifying their key BI reports and dashboards and publishing them in a centralized portal for users.

For more information regarding <https://www.metricinsights.com/> you can contact info@metricinsights.com or check out some of the resources below:

“A Non-Invasive Approach to BI Governance” webinar with Robert Seiner:

[Webinar](#)

Whitepapers/Datasheets:

[Enterprise BI Portal Overview](#)

[Data Governance vs BI Governance](#)

[The 3 Pillars of Effective BI Governance](#)

[The Practical Guide to BI Governance](#)

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