

The 3 Pillars of Effective BI Governance

For enterprise Business Intelligence (BI) deployments to be successful, it is critical that a governance layer is established on not only the data being captured, but the analytics that are being delivered to business users. Without a comprehensive governance layer, users lose trust in both the analytics and the BI team, and establishing a solid ROI on BI spend becomes impossible. This whitepaper covers the critical aspects of implementing BI governance across the organization.

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Two Sides to BI Governance

Organizations are putting a lot of focus on data governance as part of their overall data strategy, but whilst that is important, it is only part of the puzzle when implementing an overall governance strategy.

Business users do not consume data directly, they get it delivered via Business Intelligence (BI) tools. To have an effective governance strategy, organizations need to marry data governance with BI governance, ensuring that the content that gets delivered to end users, has the same level of scrutiny as the data it contains.

Do I Have an Effective BI Governance Strategy?

BI governance is often associated with securing BI reports and dashboards. Security is only one indicator though, there are a number of indicators that define whether or not an effective BI governance strategy is in place.



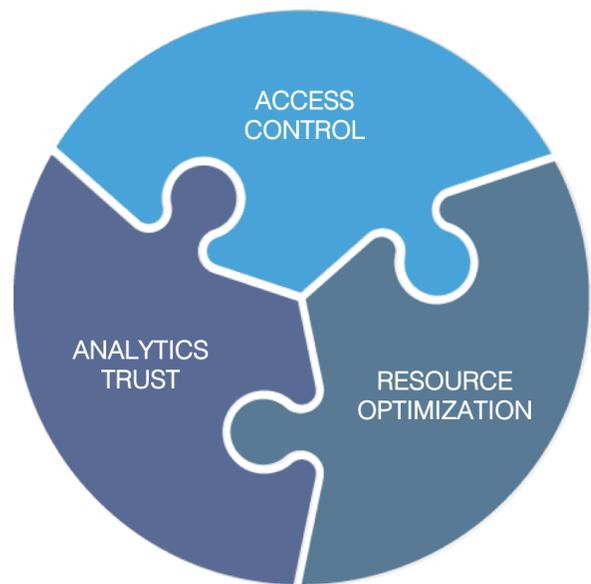
1. Content is secure, but not hidden.
2. BI platforms are not cluttered.
3. Users have high trust in BI.
4. BI tools are highly utilized.
5. BI teams are not continually fighting fires.

The BI Governance Challenge

BI Governance is difficult in most organizations. BI has become a victim of its own success, with a proliferation of tools and content, and an overwhelming number of dashboards and reports that business users

have access to. Each tool has differing capabilities as it relates to the critical aspects of governance, such as discoverability, certification, and usage tracking, meaning an effective governance strategy cannot be achieved by working with these tools in a silo. A unified approach is needed that pulls every BI asset together into a single, unified, and governed framework.

Three Pillars of Effective BI Governance



1. Access Control

Access control in a governed environment is about achieving a balance between security and discoverability.

Applying security is critical to ensure that sensitive information does not fall into unauthorized hands, but at the same time, appropriate content needs to be made discoverable, so that users who do not have access to it, can request access if they need it.

The right balance of security and discoverability presents users with enough information about discoverable content to allow them to determine whether they need to request access, but not so much as to divulge

sensitive information to a yet unauthorized user.

Without effective discoverability, users are not aware of what reports and dashboards exist. When they need information that they don't have access to, they put in requests for new reports, and the BI team ends up wasting time creating duplicative content, and cluttering the BI environment.

User Roles & Access Control

The key to establishing a balance between security and discoverability in a heterogeneous environment, is to clearly define persona-based user roles.

For each user persona, the different content types required to support the users' journey, across all the different BI tools that are available, need to be aligned, and a compelling and accessible experience for the various different types of content needs to be curated.

Each type of content, for each persona, needs to also have a functional map, that defines how that persona type can interact with it. For example, can that persona download the data, can they share it with other users, can they collaborate around it.

Implementing Content Accessibility in a Governed Environment

Having accessible content requires it to be organized in a consistent way. Ensuring relevant reports and dashboards for each persona, along with content that has been deemed discoverable, can easily be found, requires four key things:

1. Users have a single place to access and search for all content, regardless of underlying tool.
2. A standardized approach to tagging and documenting content, so that it can easily

be found, and interpreted correctly by any user accessing it.

3. A certification process, that ensures content goes through a testing and QA workflow distinguishing it as something that users know they can trust.
4. A way of marking content types as discoverable, that persists security, but that provides enough information to the user to deem whether it is useful to them or not.

2. Resource Optimization

Three types of resources need to be optimized in well governed environment:

BI Team

In the absence of effective BI Tool governance, resource allocation often takes the "squeaky wheel gets the grease mode". This usually takes the form of BI teams jumping from crisis to crisis, fire-fighting issues, with resource allocation going to the business groups that are screaming the loudest.

This reactive approach to BI invariably results in poor resource allocation decisions, incomplete solutions, duplicative content and work that goes into dashboards and reports that get used for a short time and then quickly fall into obsolescence.

Your BI team needs be allocated thoughtfully across projects and initiatives in a way that truly maximizes value for the business.

BI Content

In an ungoverned environment, BI content balloons. Obsolete and duplicative content, sits alongside content that's in development, and content that is considered in production. Most BI environments quickly become a mess.

BI content needs to be managed through a lifecycle. As businesses change and evolve, the content that is deemed useful at any point in time changes. Providing only the useful content to users, and removing the clutter is critical in keeping high engagement with BI.

BI Licenses

Software licenses for BI tools are big-ticket line items in most IT budgets. It is not uncommon to see less than 50% utilization of those licenses over time.

Justification of spend is critical in a governed environment and required for allocation of future budgets.

License utilization needs to be reviewed regularly at the user and group level to understand where and why licenses are not being used.

A process is needed to engage with those groups to drive engagement, or deprovision unused licenses.

The ROI of Resource Optimization

Creating a good ROI for BI spend is achieved by optimizing the 3 areas of the BI team, BI content and BI licenses.



Optimizing Resources in a Governed BI Environment

Optimizing resources in a governed BI environment requires three components:

1. Usage tracking, at all touchpoints, for BI content to fully understand which reports and dashboards are currently useful.
2. Automated promotion or deprecation of content based on usage patterns.
3. Tracking of BI tools licenses, with processes for provisioning, deprovisioning, upgrading and downgrading of licenses.

3. Analytics Trust

Data and BI processes are not 100% perfect all the time. Trust is lost with business users, not because things are not perfect, but because there is a lack of communication around issues. When business users are the ones reporting the problems, they rapidly lose trust in not only the BI content, but the team creating that content.

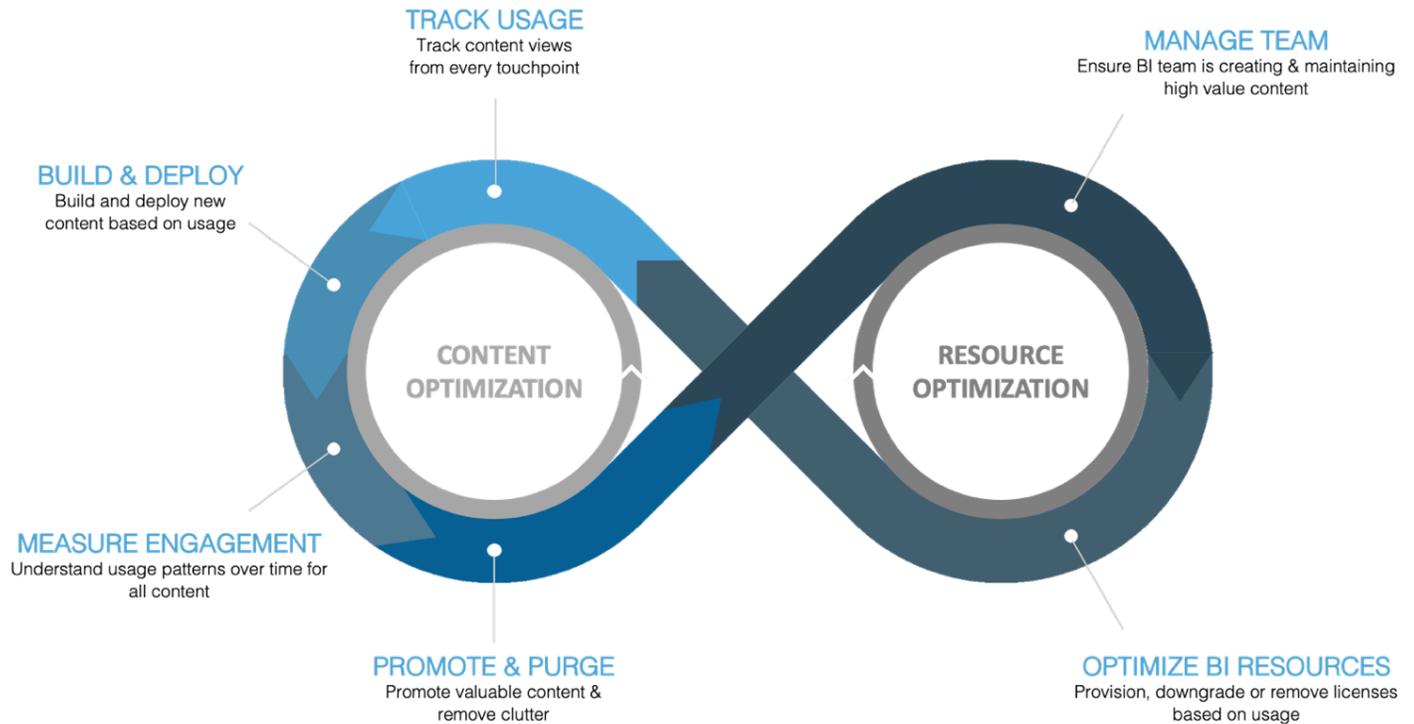
A lack of trust, causes low engagement, and takes a long time to gain back.

Maintaining Trust is a Governed BI Environment

A governed environment ensures that there is transparency around any issues that occur by implementing three practices:

1. Automated data quality checks that track IT and business metrics, alerting BI teams to unusual events that show up prior to data being published to business users.
2. Effective communication channels to business users when issues occur.
3. Targeted communications ensuring only the users that are affected are notified.

The BI Governance Lifecycle



BI governance is an ongoing process and lifecycle. Establishing this process via a BI Portal like Metric Insights, enables you to:

1. Continually track usage of your BI content at every touchpoint (online, mobile, email, collaboration tools, embedded in other applications) by user and user group.
2. Build and deploy content based on usage of existing content in a way that maintains security and promotes discoverability.
3. Measure engagement over time with content by the different types of users in the organization.
4. Promote or purge content to de-clutter your BI environment.
5. Understand how content usage relates to utilization of BI tool licenses and provision, downgrade or de-provision licenses in a way that ensures maximum ROI.

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