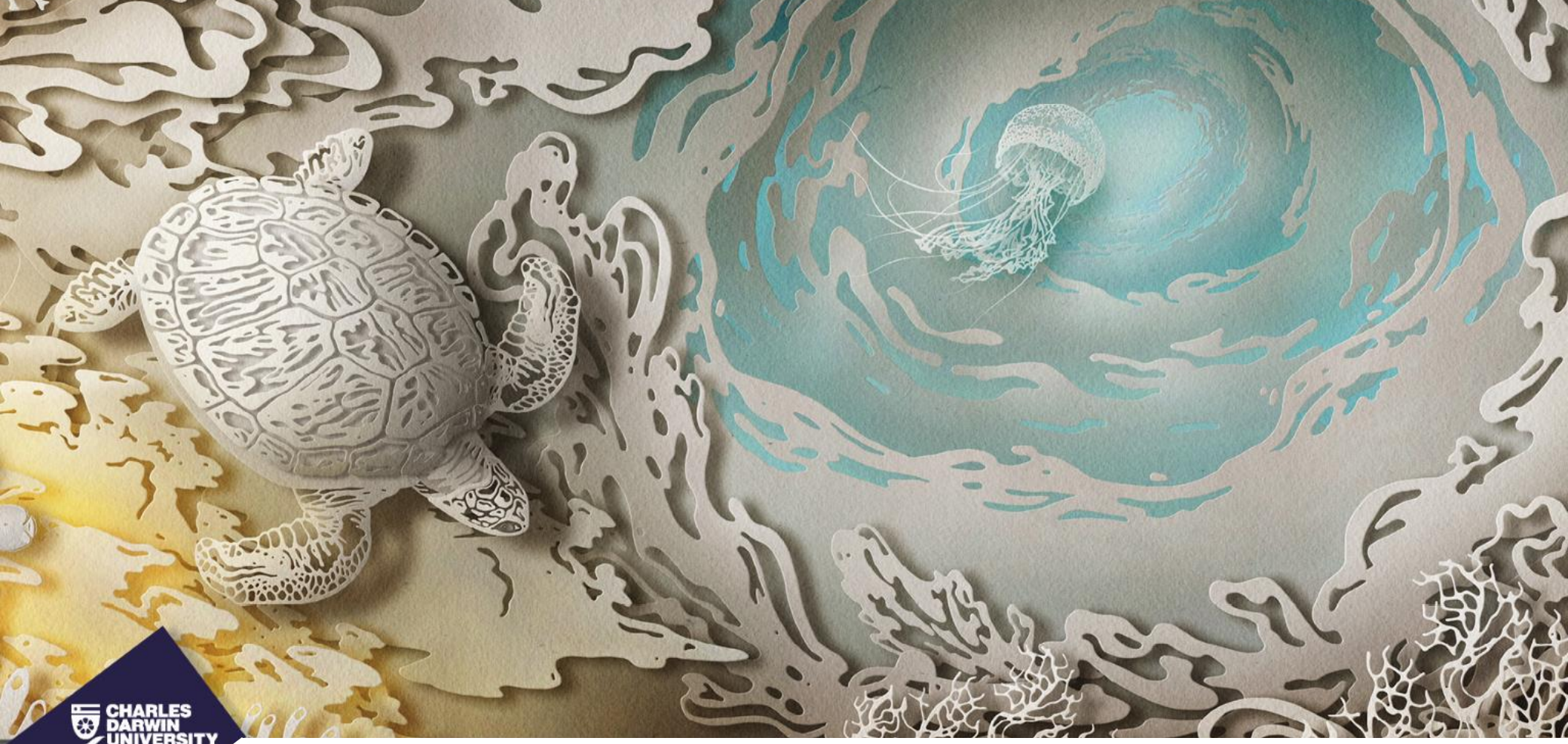

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CDU's BI & DW Journey

Lessons Learned

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Introductions

Penny Szybiak

Director Planning and Performance

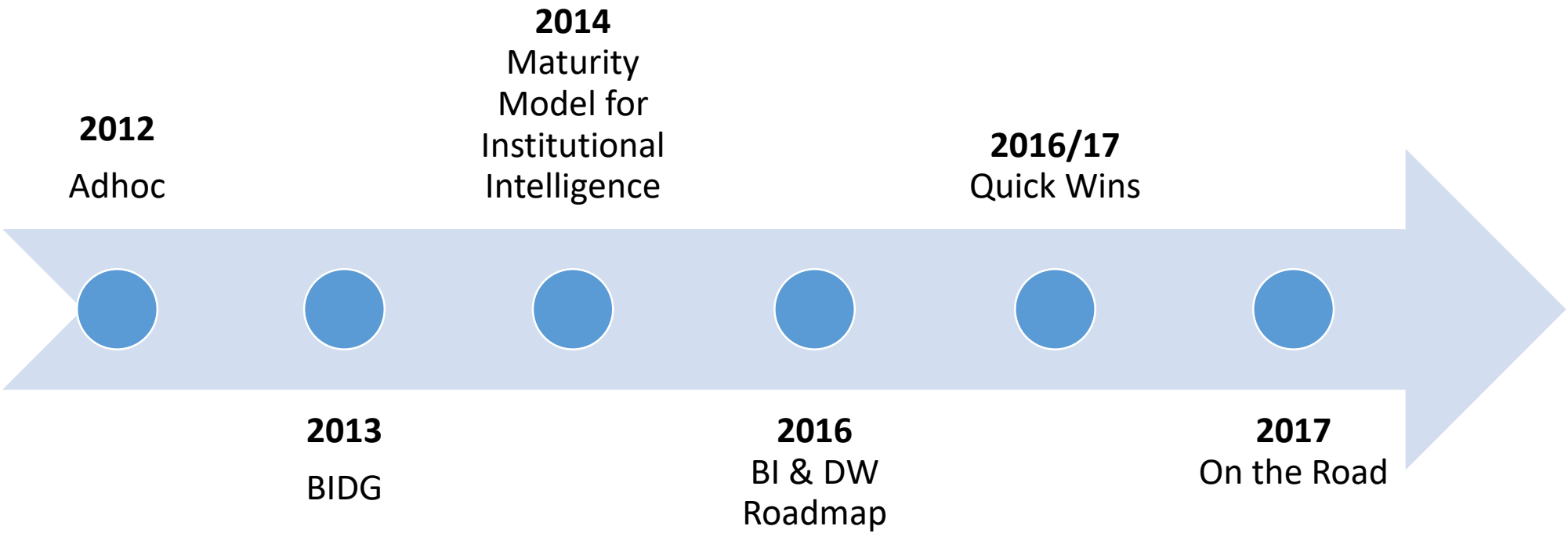
Charles Darwin University

James Mitchell

Principal Consultant

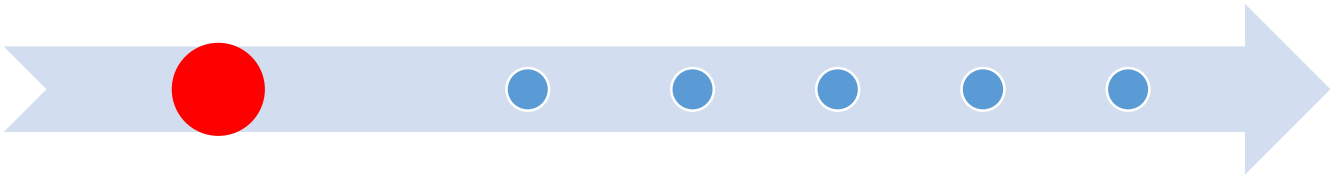
Altis Consulting

Our Journey

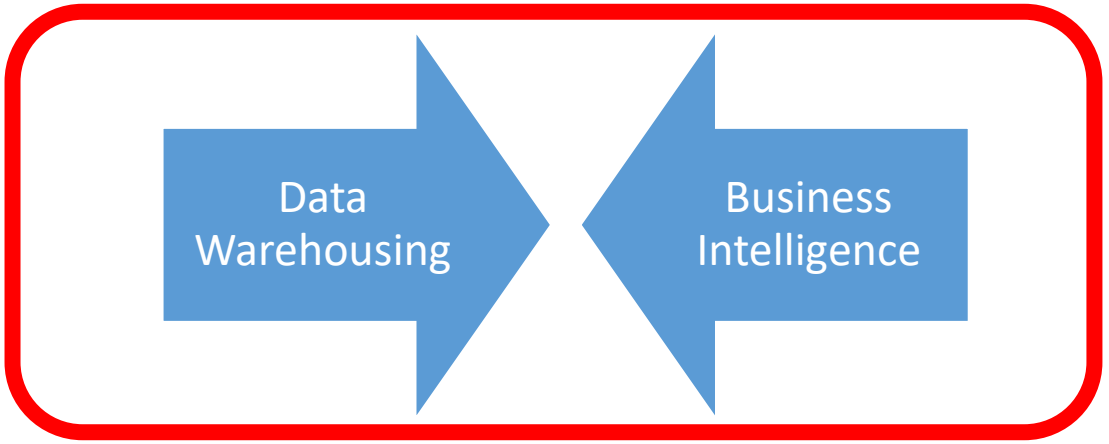

2012
Adhoc
2013
BIDG
2014
Maturity Model for Institutional Intelligence
2016
BI & DW Roadmap
2016/17
Quick Wins
2017
On the Road

2012

Adhoc



- **Impetus Business Intelligence:** Automate the load planning model, led by Planning
- **Impetus Data Warehouse:** Reduce duplication of data capture, led by IT
- No data governance



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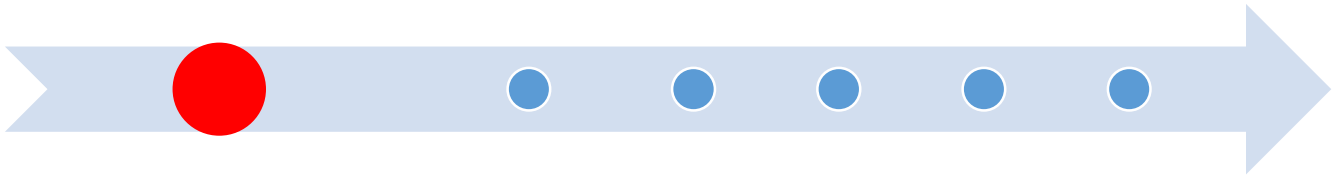
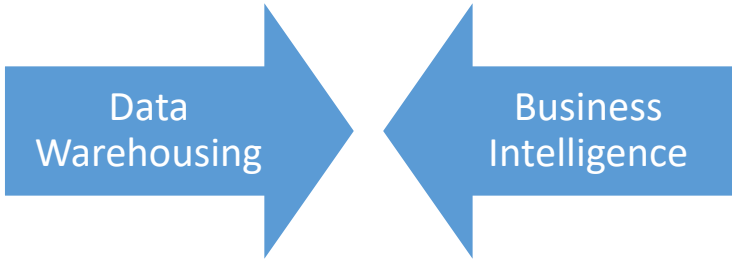
2012

Adhoc

What we learned?



- Lack of clearly defined and common vision meant development work was not complimentary.
- BI had delivered end user reports that were still using excel extracts to populate data, increased demand for reporting without automation efficiencies.
- Data Warehouse developed into an integration platform with data that wasn't useful for BI reporting.



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2013

BIDG

- We formed the
  “Business Intelligence and Data Governance Committee”

- Who: executive leaders (DVC / PVC / Executive Directors)

- Aim:
  - Prioritise development of BI and DW
  - Approve data usage – breakdown data silos for BI and DW leaders

2013

BIDG

What we learned?

- Lack of clearly defined and common vision meant there was no agreement on prioritisation or data access.
- Turf wars between BIDG members about what was in or out of scope and who had authority.

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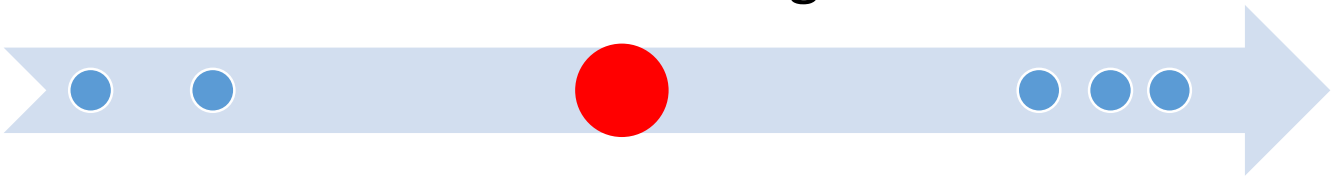
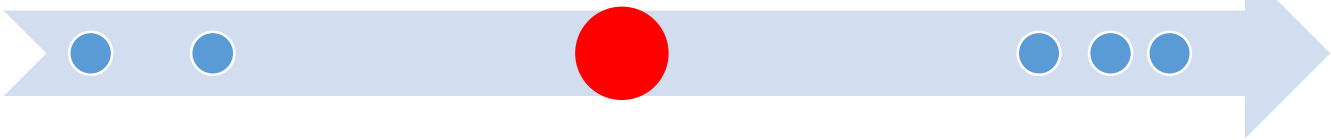
2014 Maturity Model for Institutional Intelligence



- First attempt at developing a roadmap used
  "Maturity Model for Institutional Intelligence v 1.0"
  from Oficina de Cooperación Universitaria

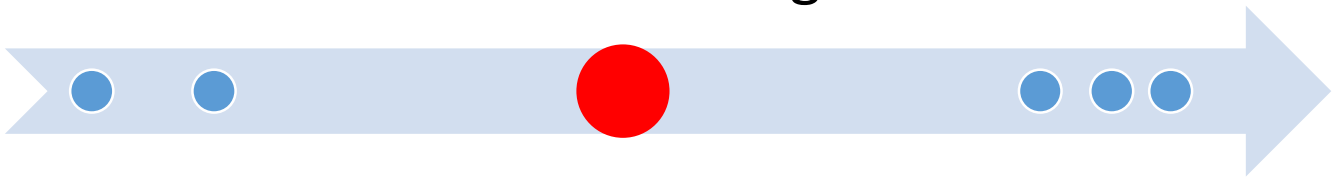
- Attempted to ask BIDG to define:
  - Current, Desired 1 year and 5 year desired states

2014 Maturity Model for Institutional Intelligence



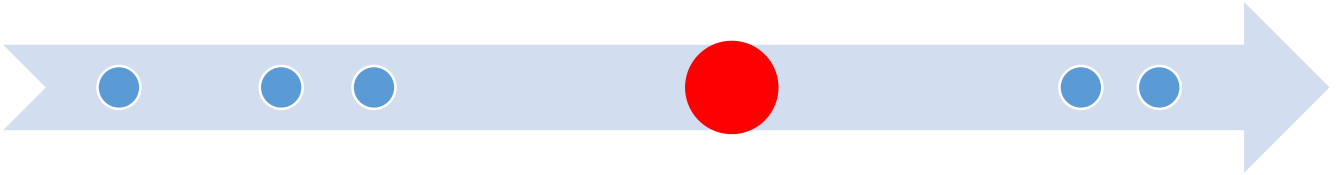
		LEVELS				
		ABSENT	INITIAL	EXPANDED	CONSOLIDATED	INSTITUTIONALIZED
		1	2	3	4	5
DIMENSIONS	I2 TEAM	ABSENT	LOCAL	GLOBAL VIRTUAL	GLOBAL FULL TIME	COMPETENCY CENTER
	SCOPE	NONE / UNKNOWN	SPECIALIZED	MULTIPLE	GENERALIZED	FULL
	SBU ROLE	UNAWARE	AWARE	PARTICIPANTS	SUPPORTING	DATA STEWARDS
	DATA PRODUCTS	NONE / UNKNOWN	LIMITED	EXPANDED	MAJORITY	COMPLETE
	USER COVERAGE	NONE / UNKNOWN	LIMITED	EXPANDED	MAJORITY	UNIVERSAL
	USERS ENGAGEMENT	UNAWARE	AWARE	CUSTOMERS	DRIVERS	CO-OWNERS
	DATA MANAGEMENT	UNAWARE	AWARE	MANAGED	SUPPORTED	ENFORCED
	BUSINESS VALUE	SCARCE	OPTIONAL	INTERESTING	NECESSARY	CRITICAL
	STRATEGIC SUPPORT	FREE FLOATING	LOCALLY EMBEDDED	PROJECT FOOTING	SUSTAINABLE SERVICE	INTERDEPENDENT WITH STRATEGY

2014 Maturity Model for Institutional Intelligence



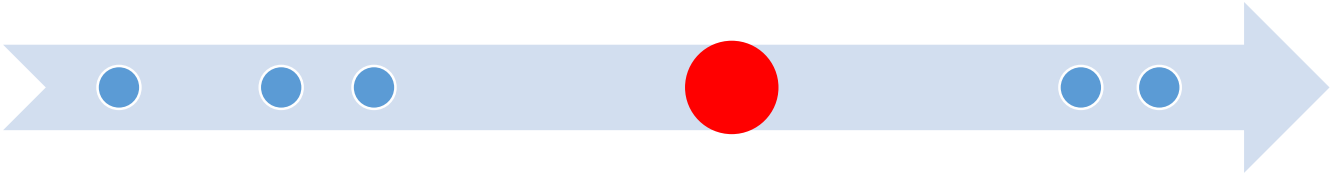
What we learned?

- Lack of independent arbitrator meant the turf wars continued.
- Infographics versus Bespoke Business Case Development versus Business Intelligence – “Sherlock Holmes”
- The BIDG still didn’t have a clear understanding of what we were talking about….needed to educate them about BI.



2016
BI & DW Roadmap

- At the AAIR Forum, in Perth, in 2013 Altis Presented with USQ about their journey.
- At the AAIR Forum, in New Zealand, in 2015 I shared my frustrations with Chris from Altis.
- In 2016 Altis engaged to help CDU develop its roadmap.



2016
BI & DW Roadmap

- Altis brought 3 key things to the table that we'd been missing
  - Expertise
  - Credibility
  - Independence

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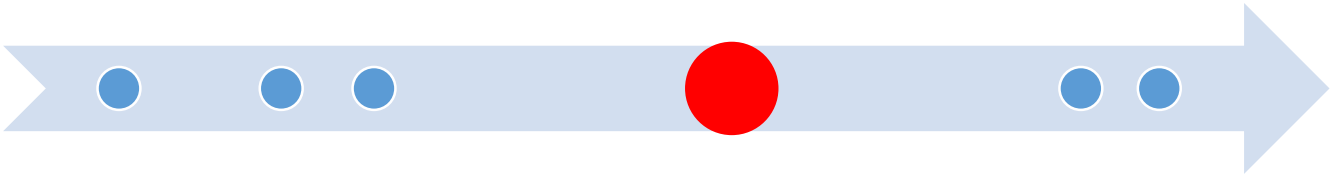

2016

BI & DW Roadmap

Widespread **data driven decision making culture**
supported by **active DW/BI ownership**
allowing for development of **trustworthy results**
that promote a **common understanding**
delivered from **a single source of truth**.

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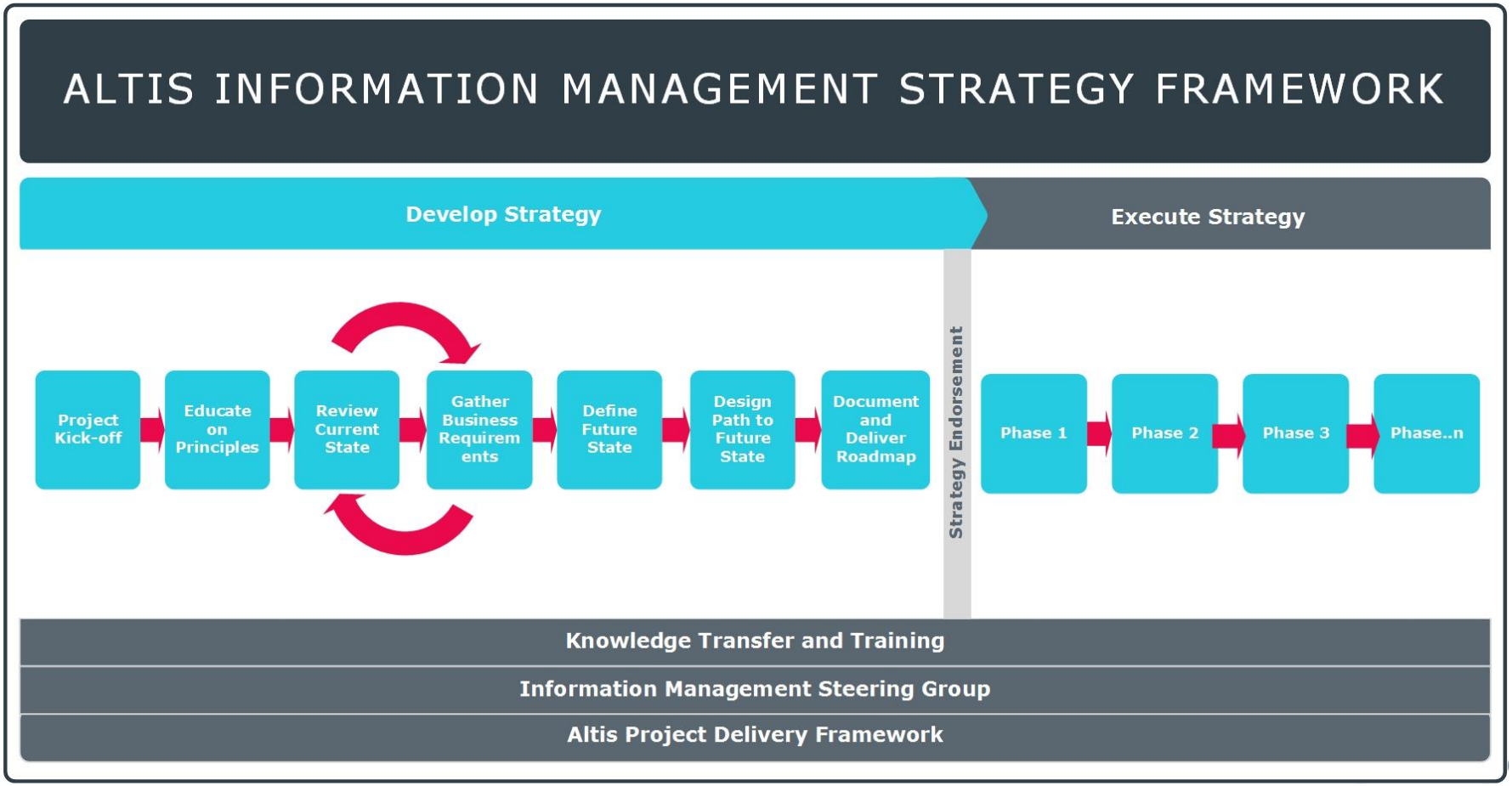
2016
BI & DW Roadmap



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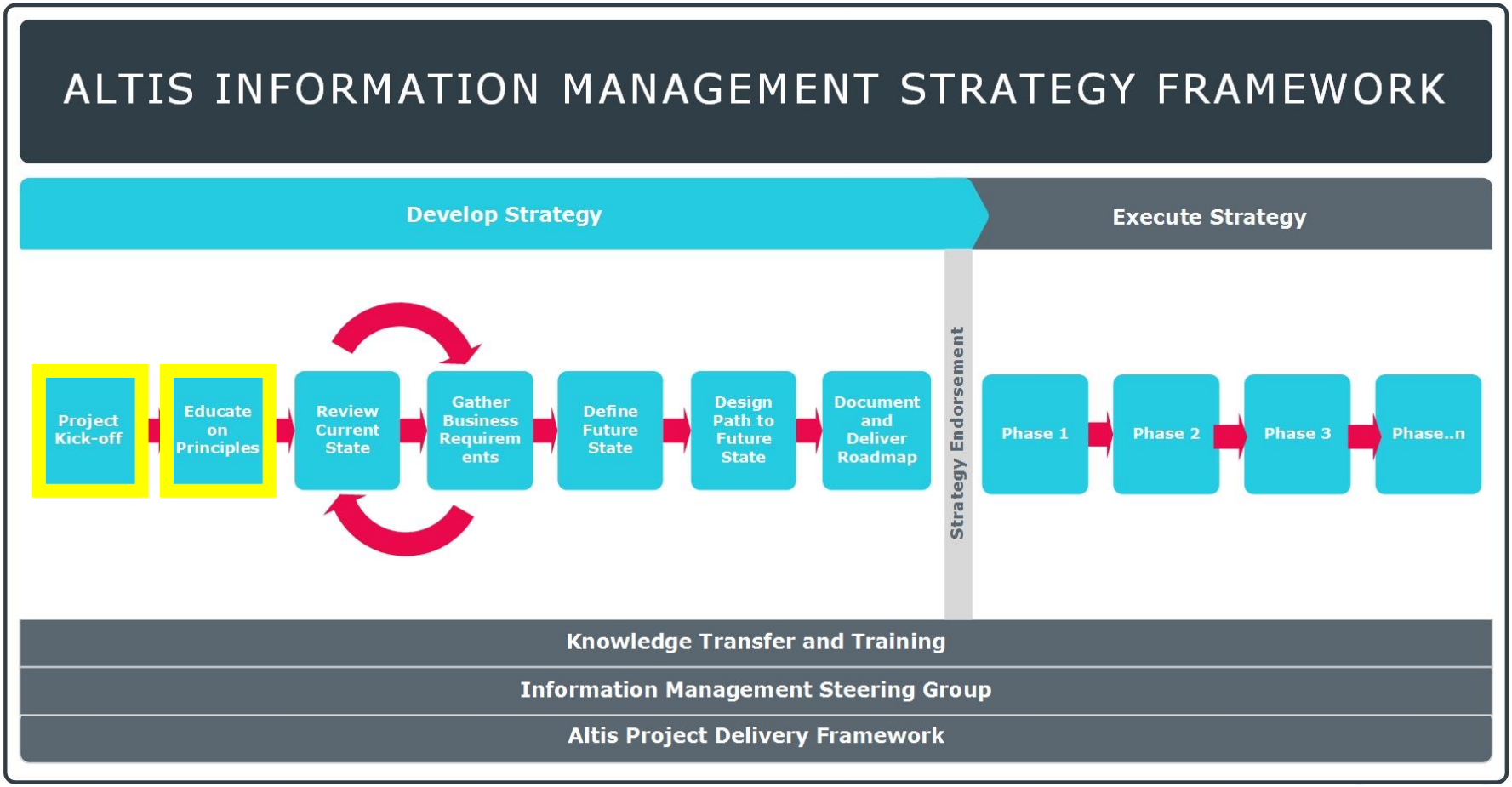
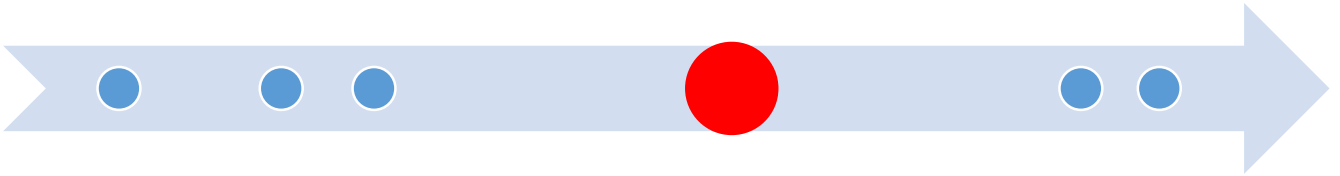
2016
BI & DW Roadmap





2016
BI & DW Roadmap

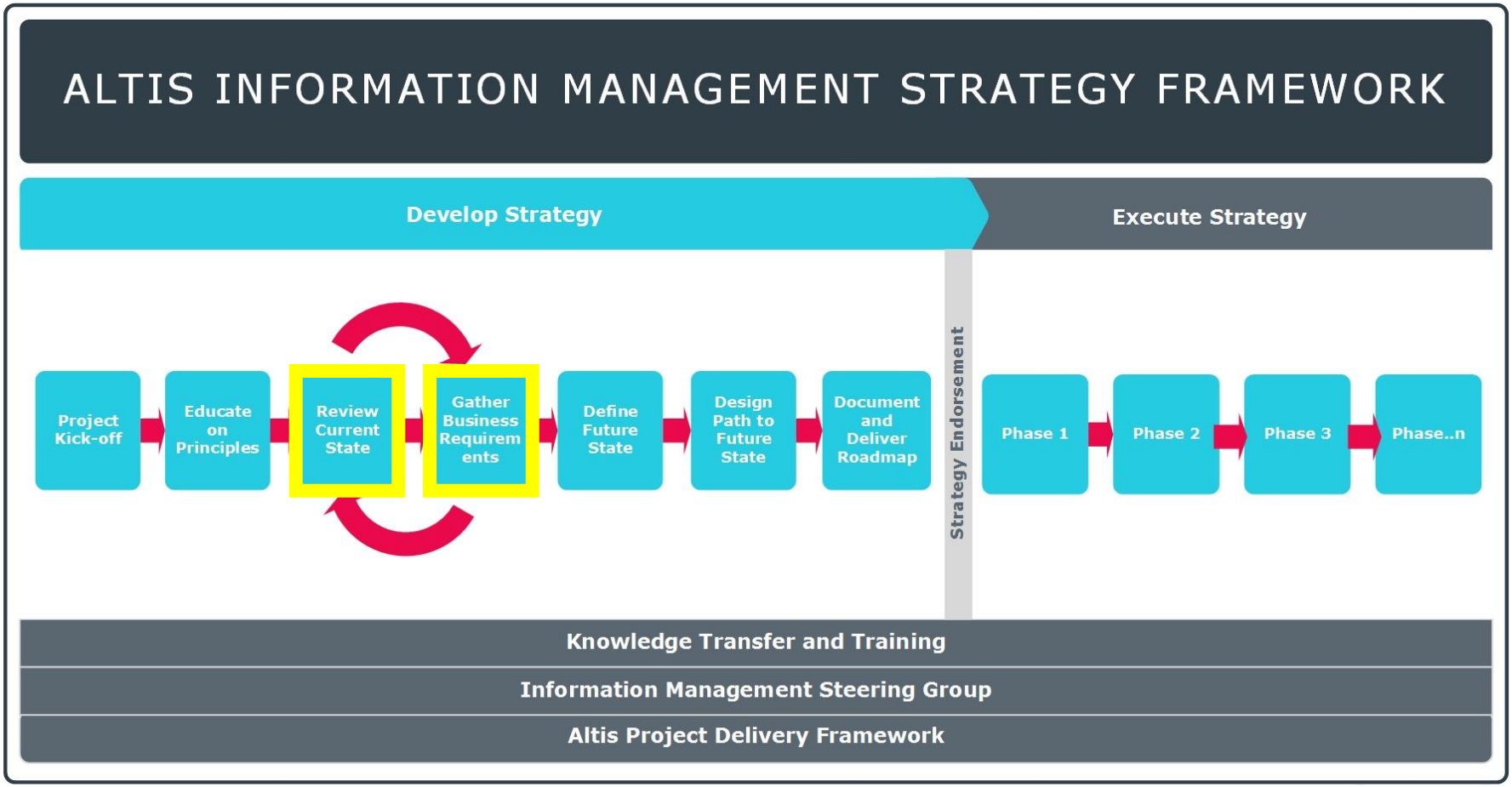
Project Kick-off

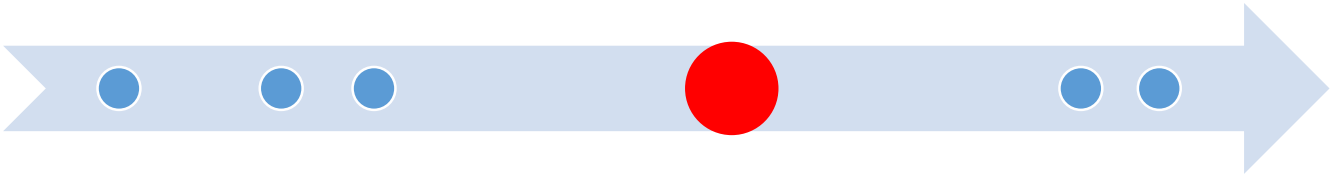
- Attended by the project team and key Stakeholders
- Clarify roles and responsibilities
- Review scope, set and manage expectations

Educate on principles

- Information Management 101 – attended by ~65 staff
- Ongoing process to build knowledge and consensus

2016
BI & DW Roadmap





2016
BI & DW Roadmap

Current State

- ~60 staff members interviewed
- No dedicated teams – the Planning unit was struggling to meet the increasing demand for BI, and IT was focused on integration
- A culture of silos - limited data sharing
- Multiple DW/BI “systems” in place – confusion on where to go, no single front door
- Lack of supporting Data Governance - data stewards, sharing policies, data lineage and business glossary

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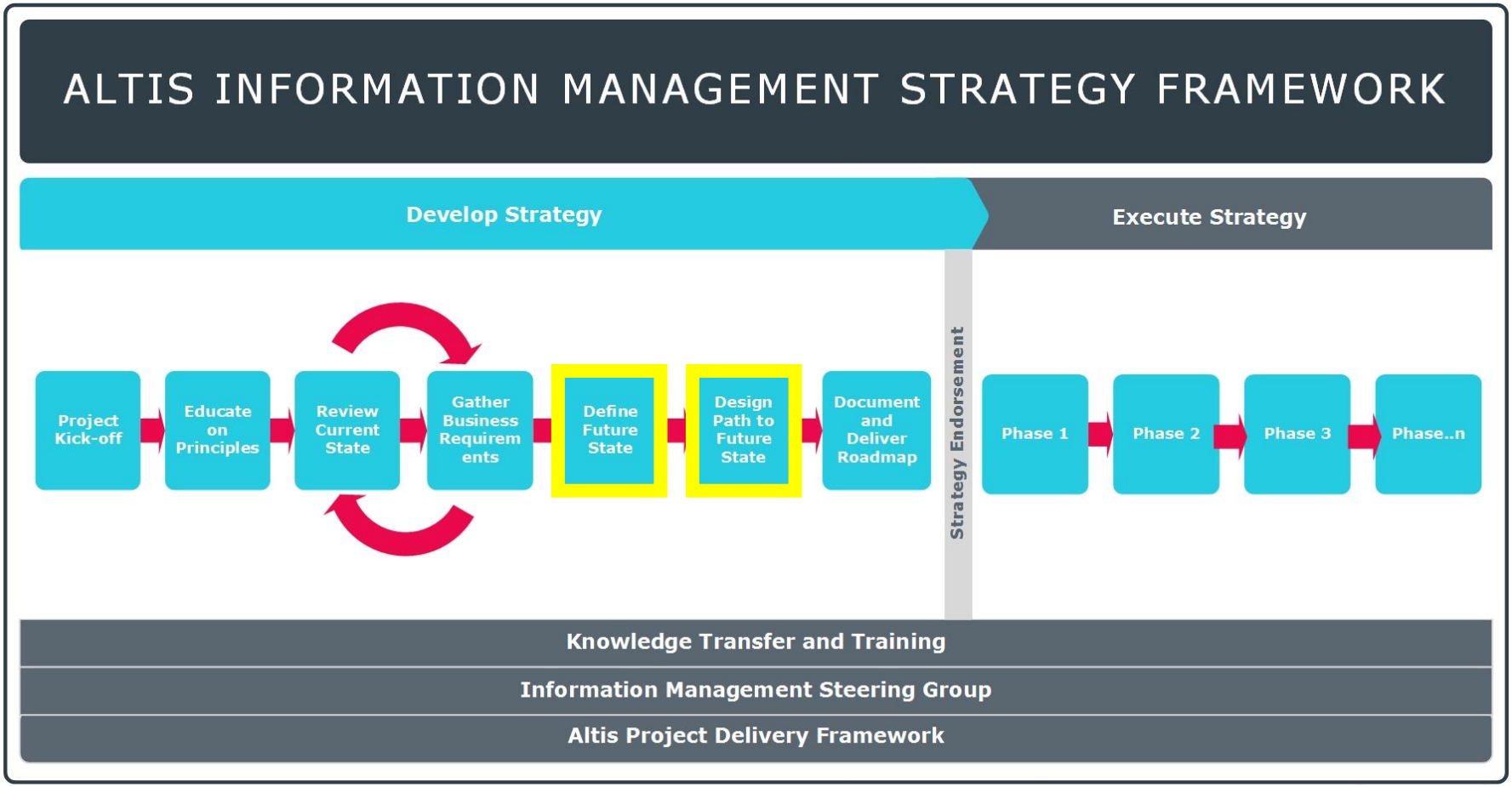
2016
BI & DW Roadmap



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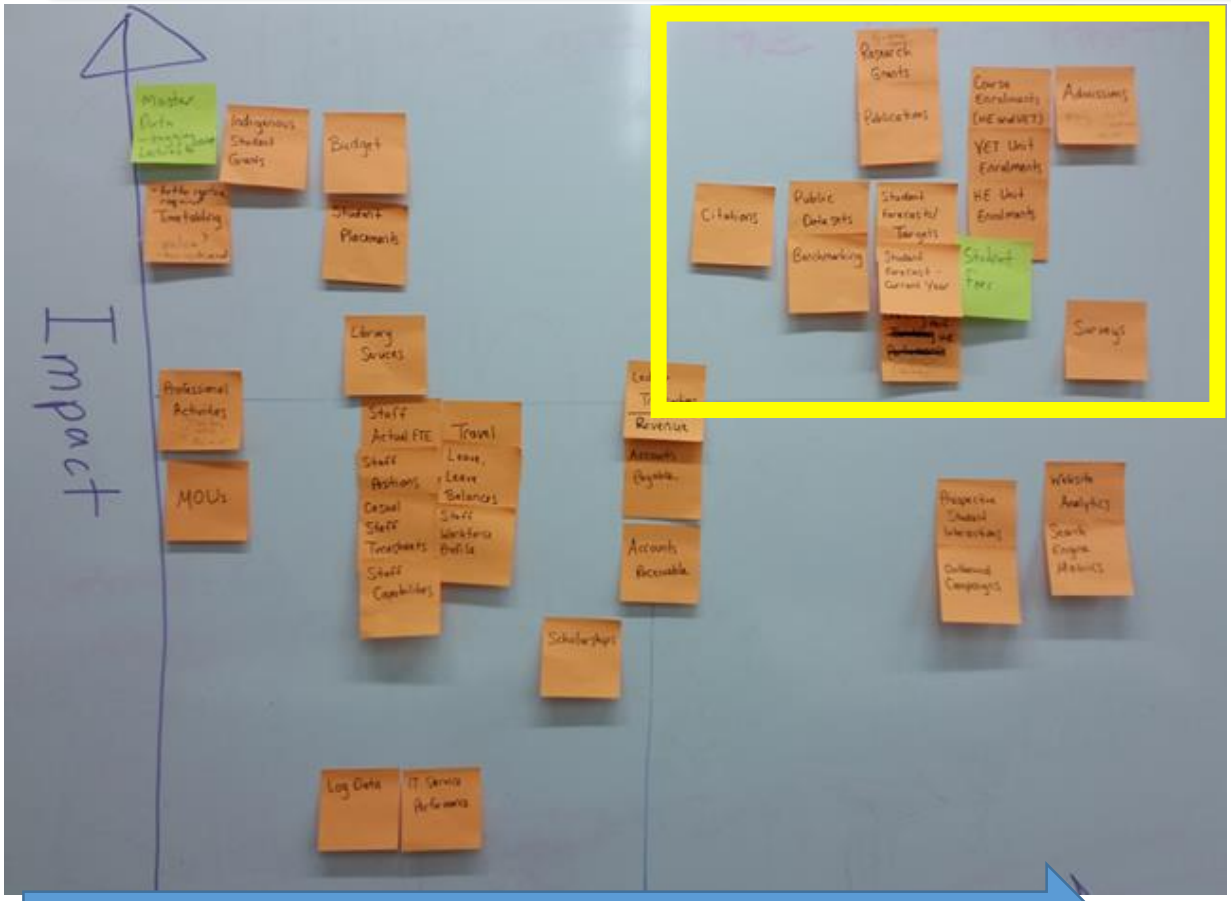
2016
BI & DW Roadmap



Magic Quadrant

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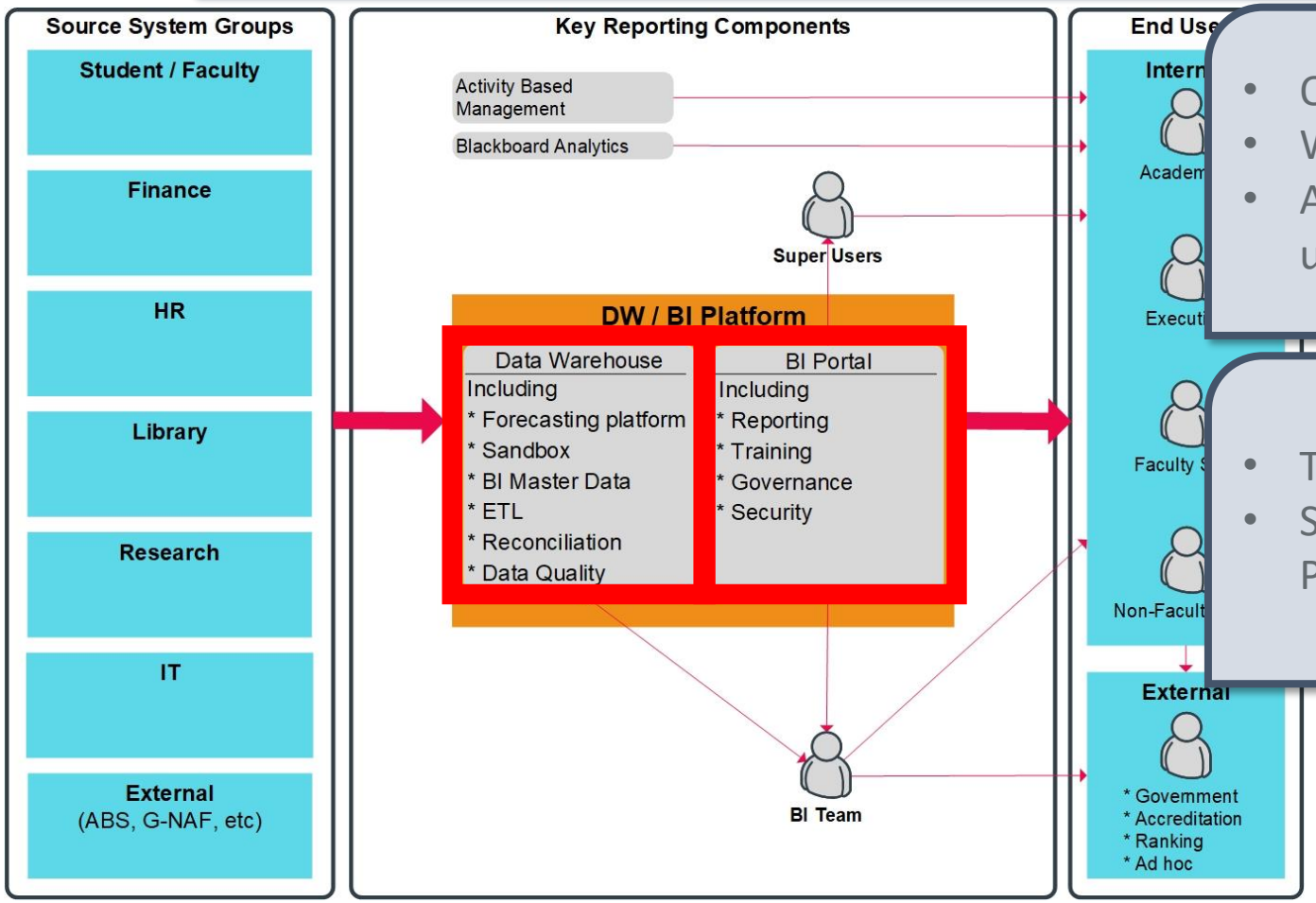
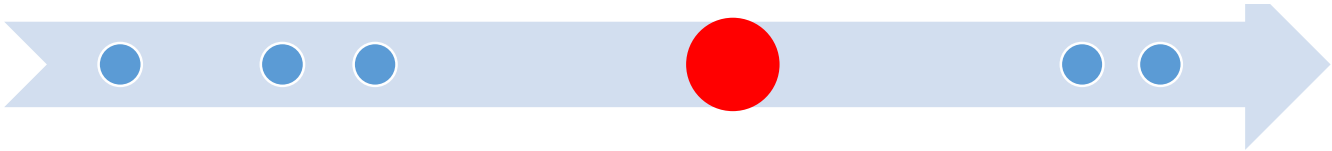
2016
BI & DW Roadmap



- Oracle for the DW
- WhereScape for ETL
- Alteryx for Planning unit

- Tableau for reporting
- SharePoint Online for Portal (coming)

What we learned?



2016

BI & DW Roadmap

- Having an independent expert in the room was critical to achieving the desired outcome.
- Money well spent
- The value of harnessing the vision through the roadmap process has helped with getting resources required for implementation.

2016/17
Quick Wins

- Keeping the momentum going was important
- So was adequately resourcing the roadmap
- Picked off 3 key areas where we could deliver end user reports using existing staging or data warehouse assets which were aligned to early subject areas in the roadmap.

2016/17
Quick Wins

Benefits of Quick Wins

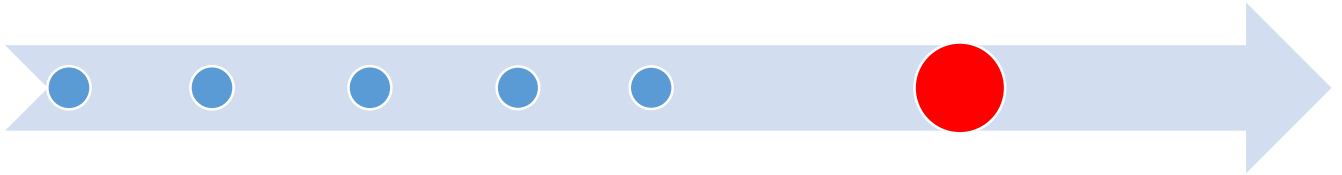
- Demonstrate end user benefit and keep momentum behind project.
- Deliver tangible benefits to end users
- Requirements gathering for reporting requirements of early stages in roadmap.
- Opportunity to build capability in the team before kicking off the roadmap implementation.

What we learned?

2016/17
Quick Wins

- Quick Wins are important, but be sure to articulate that they are precursors to the Roadmap implementation.

- Beware of moving goal posts and stakeholders re-writing history – be sure to showcase your wins.



2017
Roadmap
Phase 1

- Just kicked off our first subject area
- Altis are supporting CDU in the implementation with a phased support model.
- Having Altis involved in the early days will help us to have the independent voice when tackling some of the data sourcing challenges.

Overall Lessons Learned

- Supporting DW/BI delivery with right-sized roadmap, sponsorship, policies, architecture.
- Good relationships between dispersed teams is critical.
- Creating a shared and clearly articulated vision such as a roadmap can help achieve cross team collaboration which negates the need for direct reporting lines. Requires equal commitment parties to the vision (IT and OPP).
- Importance of partnering with external experts.