

How to run a BI project?

But what about success?

What is this about?

- Look at approaches to projects
- Unpinned by management techniques
- Aided by best practices

What is this about?



Also about an unsung hero...

...or how an old guy in a loud shirt can helps us

How is this going to work?

Slide-uments?

How is this going to work?

Speakers should

respect

the way the **brain** works

Either your
audience
reads...



How is this going to work?

Speakers should

respect

the way **brain works**



... or your
audience
hears you

How is this going to work?



Don't make
your audience **do both**

Either your
audience
reads...



... or your
audience
hears you

How is this going to work?

This is about me talking...

Who am I?



@jonmead



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9 Apr 2010 ... Thursday, June 25th, 2009 by **Jon Mead** ... Saturday, May 31st, 2008 by **Jon Mead**. If your ETL process fails, for whatever reason, ...
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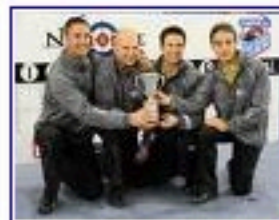
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Should you believe me?

- Not Prince 2 certified
- Not a Scrum Master
- This is not a technical project manager piece
- I see this in a number of organisations
- I see this over a number of years
- I did a Software Engineering degree

What is a project?

- Requirements
- Resources
 - People
 - Software
 - Hardware
- Time

But what about failure?

Wikipedia

1. Unrealistic or unarticulated project goals
2. Inaccurate estimates of needed resources
3. Badly defined system requirements
4. Poor reporting of the project's status
5. Unmanaged risks
6. Poor communication among customers, developers, and users
7. Use of immature technology
8. Inability to handle the project's complexity
9. Sloppy development practices
10. Poor project management
11. Stakeholder politics
12. Commercial pressures

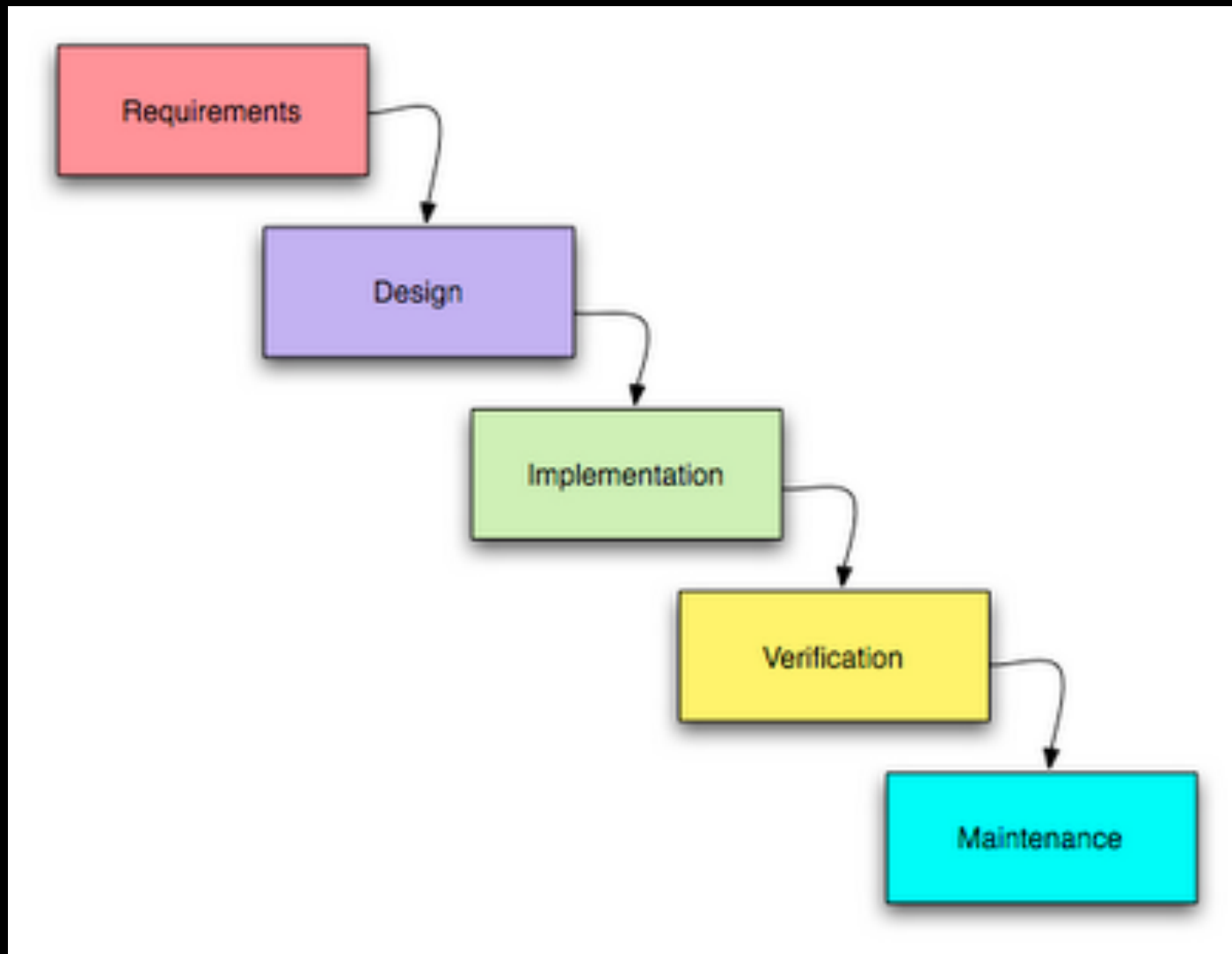
So people have
Methodologies...

Methodology

- Waterfall
- Agile
- Spiral Model

Waterfall

(Winston Royce)



Agile

Agile

- Embrace change
- Develop software in short amounts of time
- Multiple development cycles
- Emphasis on face-to-face communication

Agile Principles

- Communication
- Feedback
- Simplicity
- Courage
- Respect

In practice

- Storyboards
- Scrums
 - People standing up in meetings
- Sprints
- Backlog

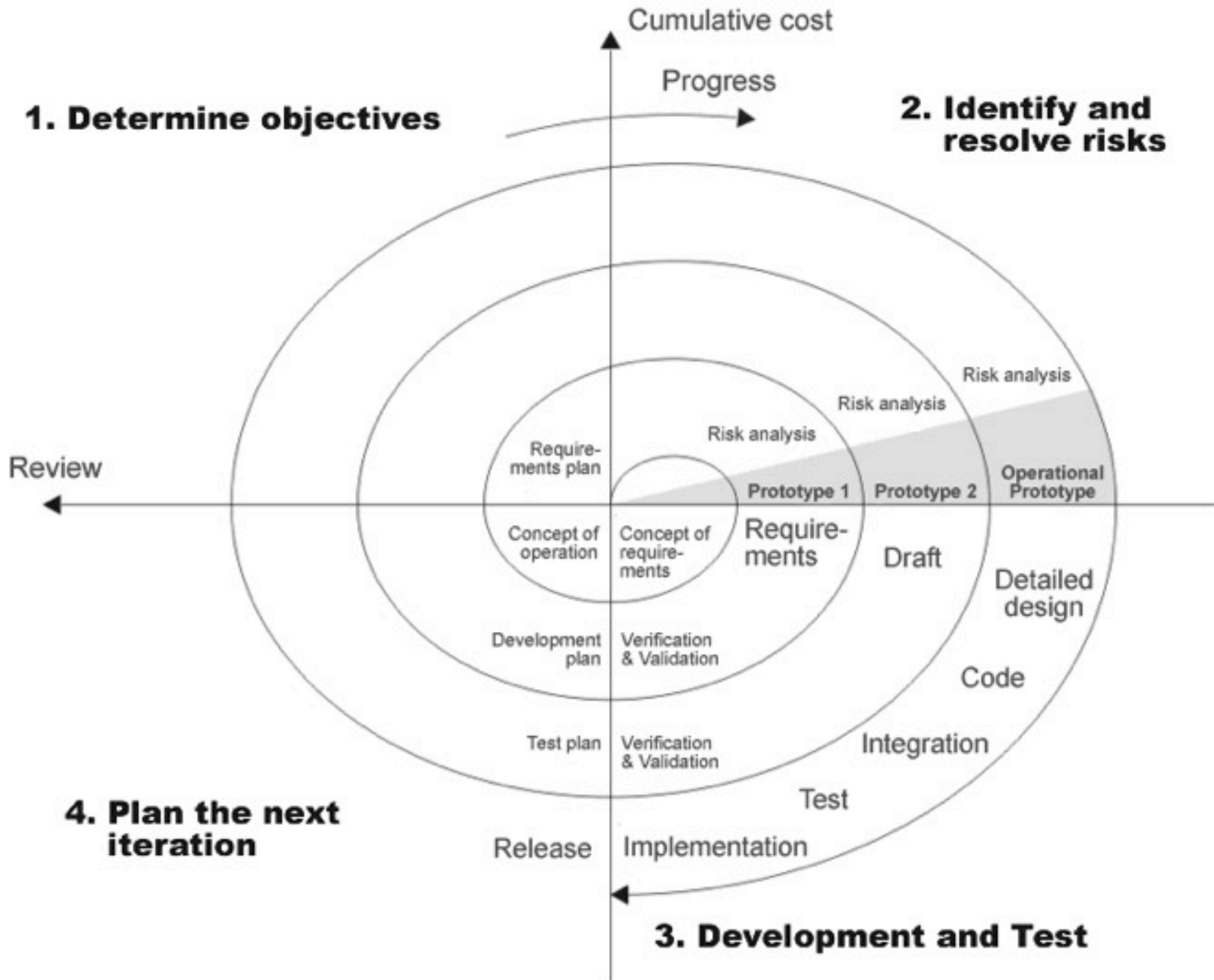
Good or bad?

- Do people adhere to it too rigidly?
- Does it suit Business Intelligence?

Spiral Model



Friday, 10 December 2010





Friday, 10 December 2010

But before we even
start...

...it can go wrong

Planning and Estimation

- “An estimate is not a contract”
- Commercial pressures of estimation
- Bottom up or top down?

Detailed Estimation Approach

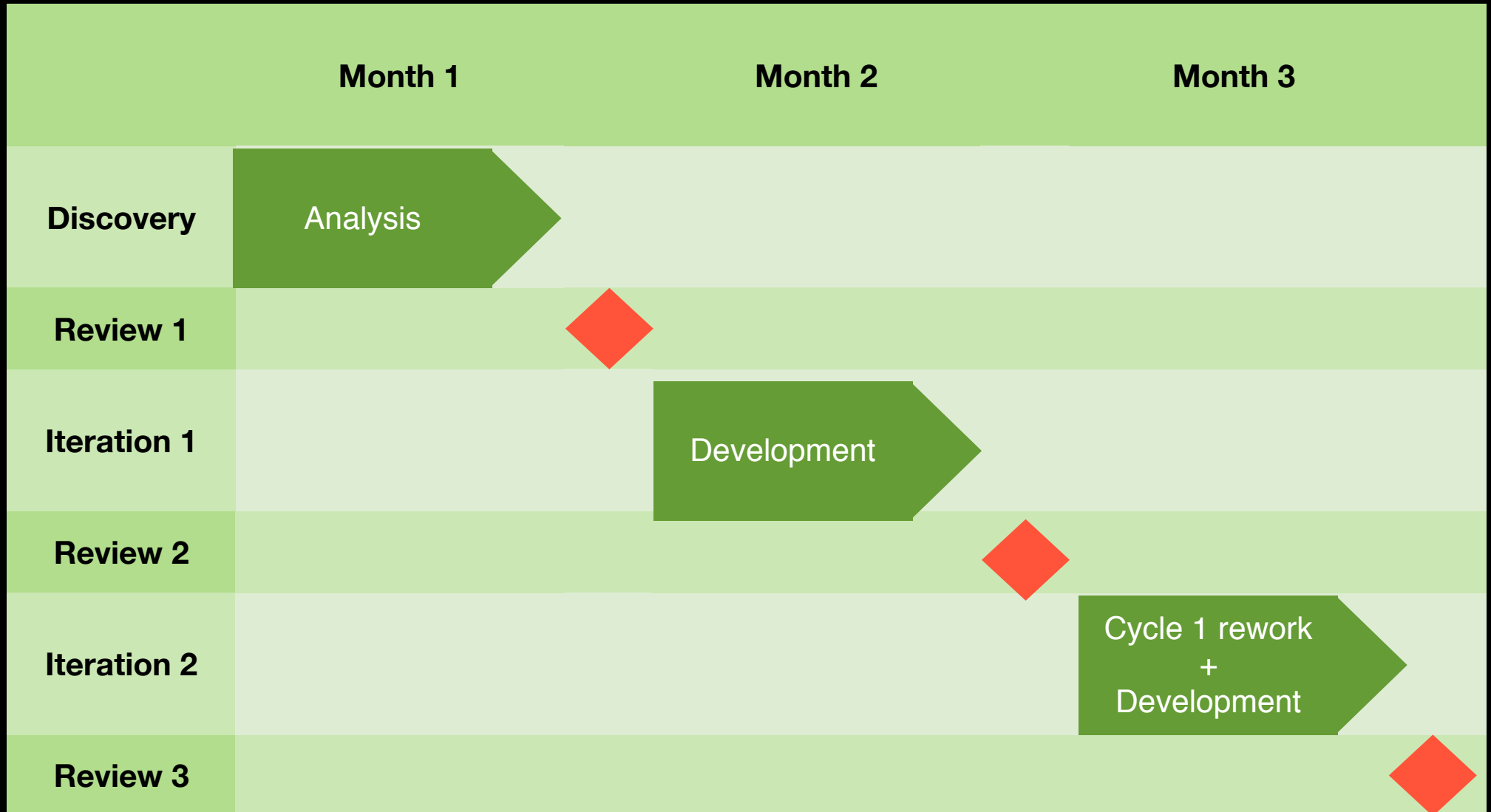
- Choose the team
- Kickoff meeting
- Individual preparation
- Estimation session
- Assemble tasks
- Review results

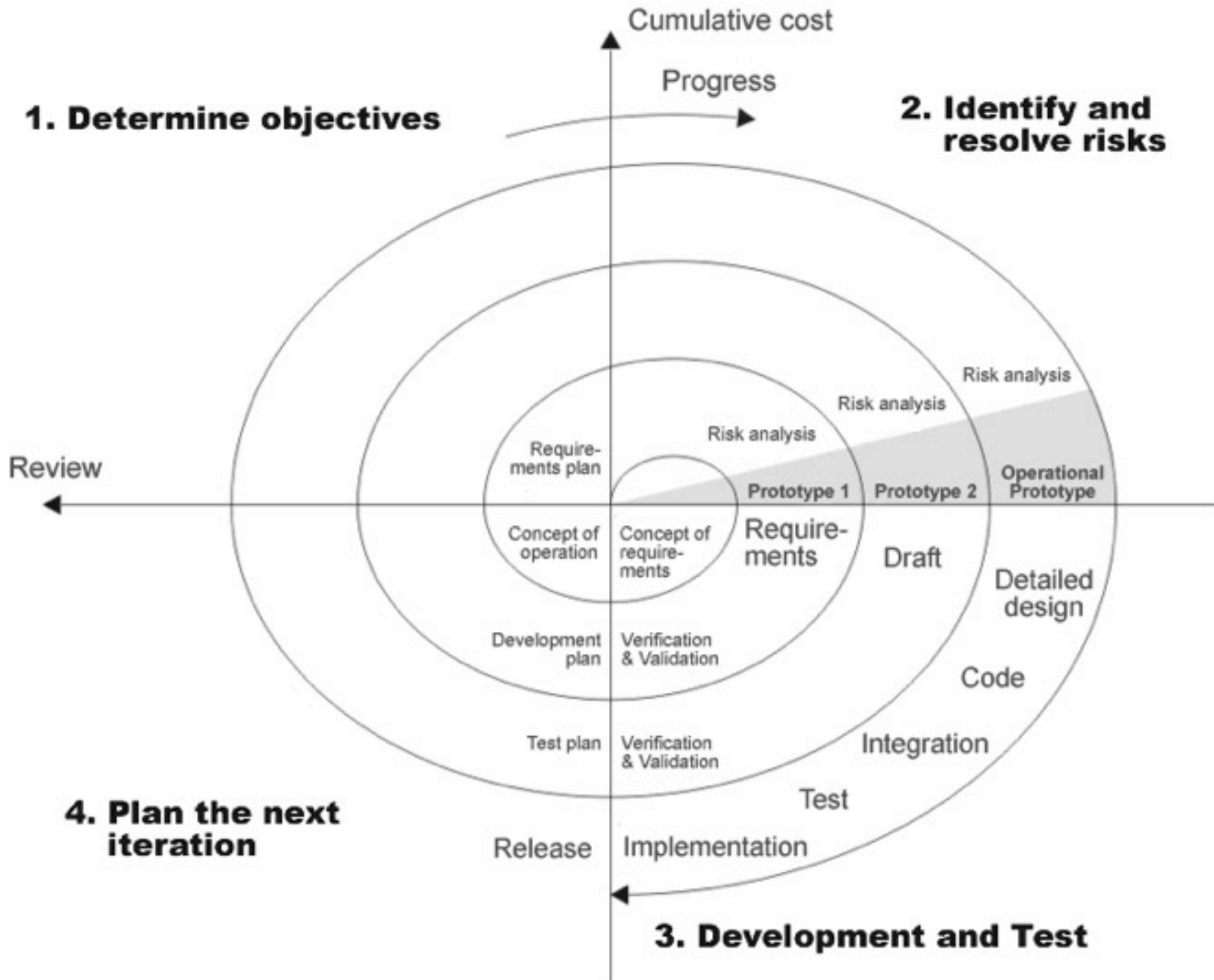
Build a Plan

Stages of a project

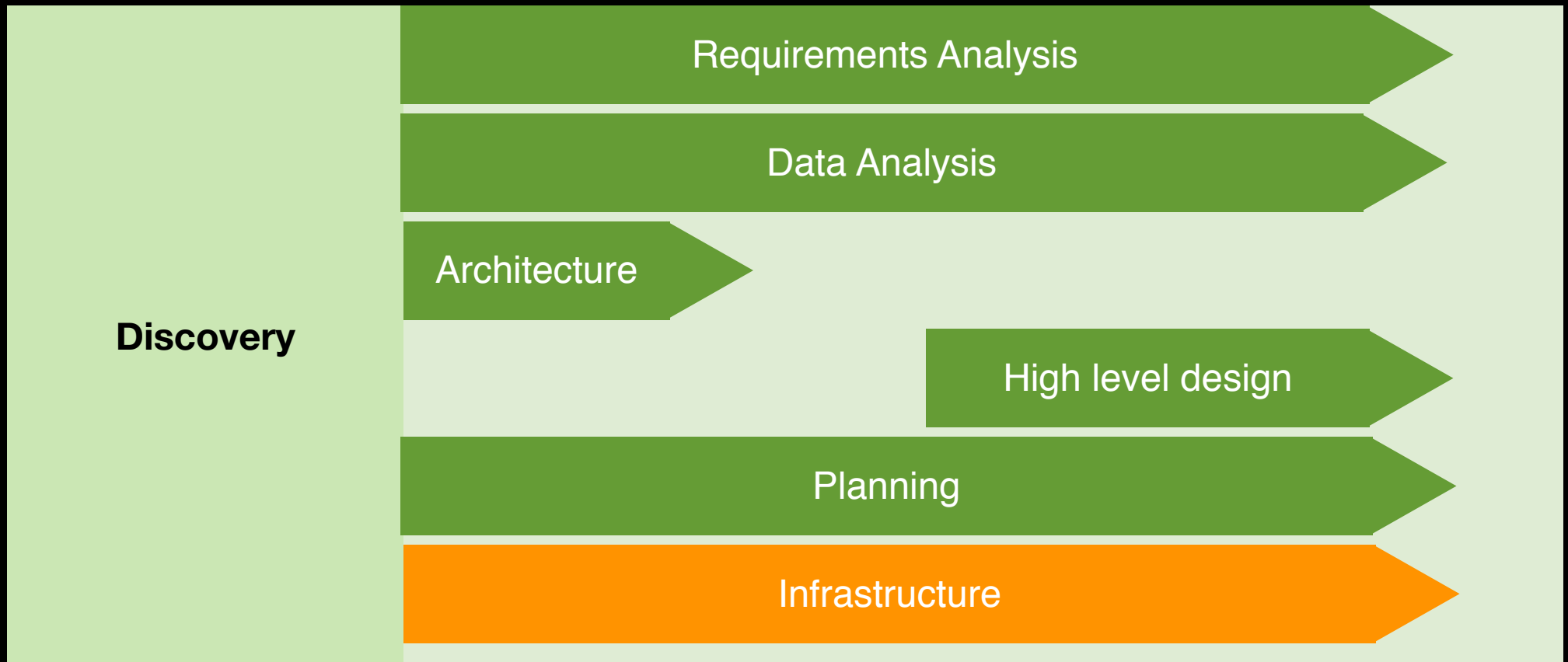
- Requirements Analysis
- Data Analysis
- Design
- ETL build
- OBIEE build
- Testing
- Rework
- Release

Stages of a project

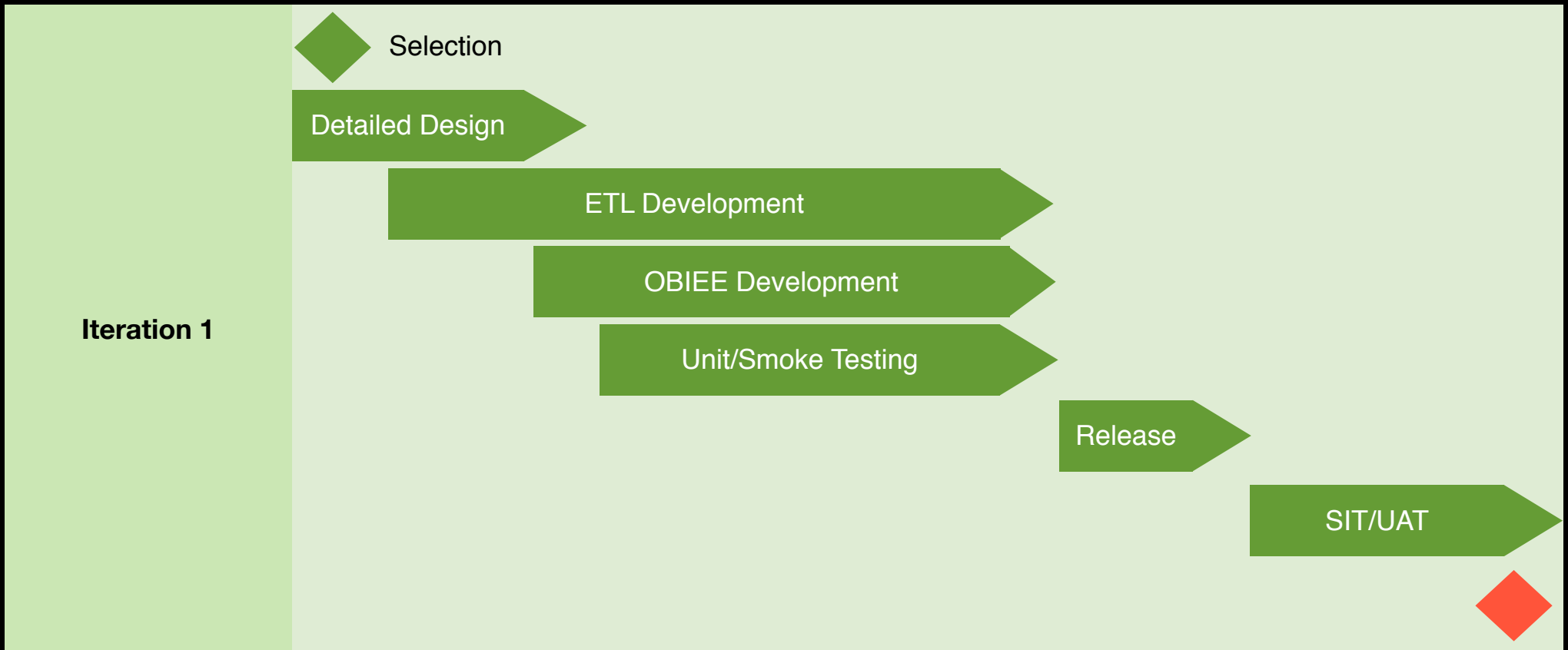




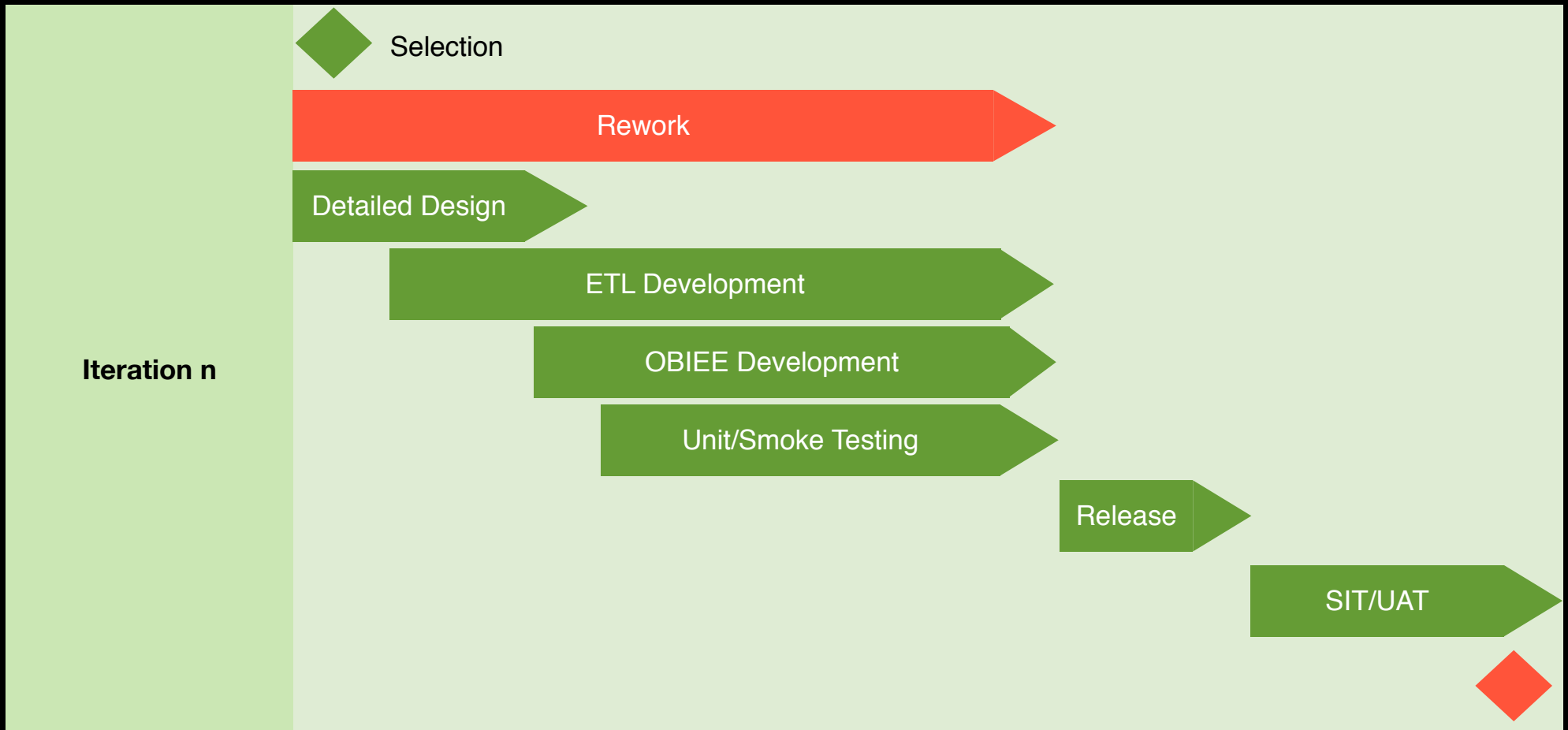
Discovery



Iteration 1



Iteration n



Project Roles

- Project Manager
- Business Analyst
- Data Analyst
- Dimensional Modeller
- ETL Developer
- OBIEE Developer
- Trainer
- Evangelist

Requirements

- Elicit requirements
- Document requirements
- Define acceptance criteria

Data Analysis

- Evaluate availability of source data
- Profile data and assess data quality
- Define error handling rules
- Prototype ETL using SQL Modelling

Design

- Define dimensional model
- Define ETL flow
- Define ETL frequency

ETL build

- Source and Target database objects
- Mapping or Interfaces
- Orchestration layer
- Security

OBIEE build

- Physical mappings
- Logical/business model
- Presentation layer
- Reports, dashboards, alerts, scorecards etc
- Security

Testing

- Unit testing
- Smoke testing
- Integration testing
- User acceptance testing
- Volume testing

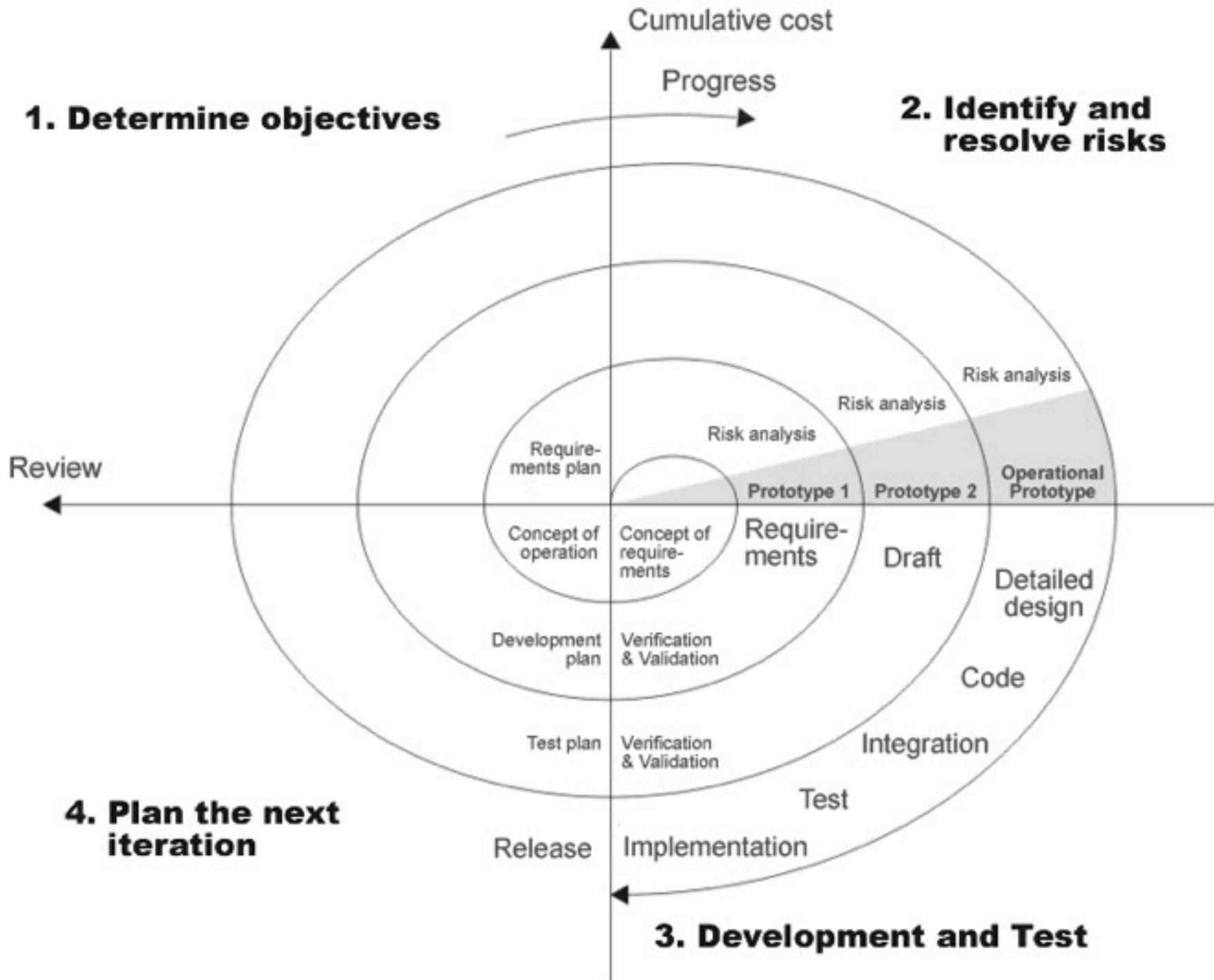
Rework

- See previous steps....

Release

- Automated
- Repeatable

Iterate...

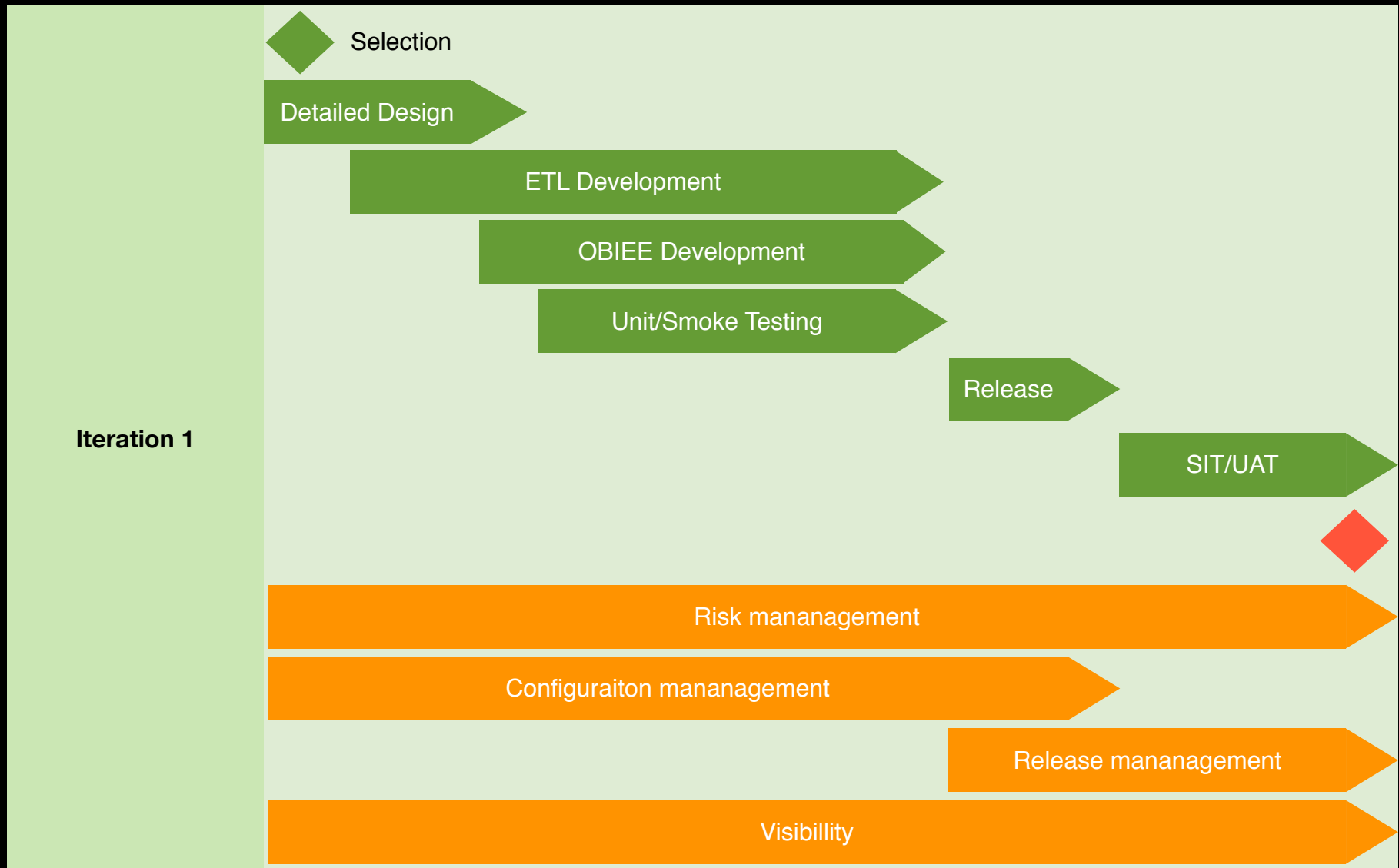


How to ensure success?

Management techniques

- Risk Management
- Configuration Management
- Release Management
- Providing visibility

Management techniques



Risk management

- Capture and register (ACRI logs)
- Communicate
- Ownership
- Assign resources

Configuration Management

Release Management

Visibility

- Adaptive tools
- Visible tasks
- Easy documentation
- Reporting

Best practices

- Involving the business
- Acceptance criteria
- SQL Modelling
- Reporting tool abstraction
- Testing
- Training (post implementation support)

Involving the business

- Involving the business
- Co-location
- What is their role?

We must be able to
identify success

Early definition of acceptance criteria

= early visibility of data
to business

Prototyping

- Evolutionary or throwaway?
- SQL modelling
- Reporting tool abstraction

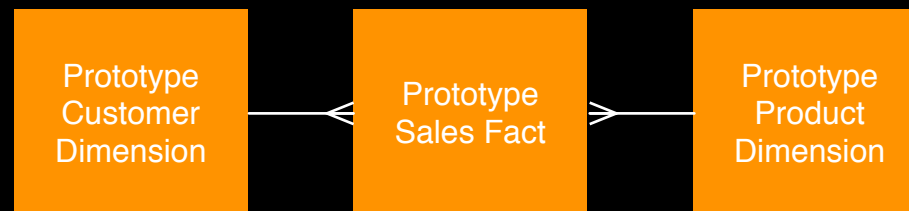
SQL modelling

Reporting tool abstraction

Re-aligning OBIEE physical layer

Presentation Layer

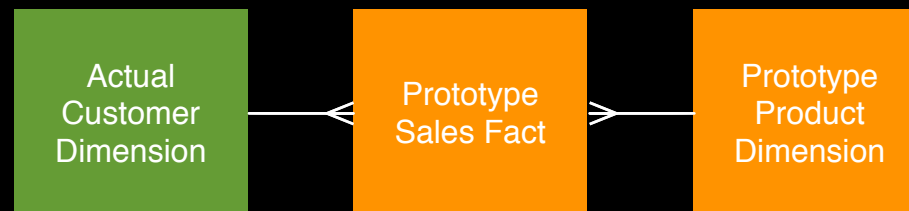
Common Enterprise Information Layer



Re-aligning OBIEE physical layer

Presentation Layer

Common Enterprise Information Layer



Re-aligning OBIEE physical layer

Presentation Layer

Common Enterprise Information Layer



Automated Testing

- Test-driven development
- Automation and smoke testing
- Regression testing
- Volume testing
- Test driven development

Training

- Ensuring developers are up to speed
- Ensuring end-user and tester are up to speed
- Post implementation support

What is this about?



Conclusion

- Look at approaches to projects
- Unpinned by management techniques
- Aided by best practices

Questions?