



End Users – Use ‘em or Lose ‘em, Round Two

In November 1996, I wrote an article with this same title that discussed the need to constantly and consistently keep your business community involved in your business intelligence (BI) projects. The article covered a variety of ways to keep the business community involved with the IT project team and supportive of the overall BI effort. In this column, I delve into an aspect not covered in that article, but one that is becoming critically important for the overall success of any BI environment – the BI acceptance group.

In any BI endeavor, there are always “skeptics” or those in the business community that are doubtful the team will ever deliver a product that can be useful to them. These “doubting Thomases” cause serious problems for the IT team, and they can actually undermine any possible success of the project. Therefore, the question becomes: How do you convert a dyed-in-the-wool skeptic to a true believer? Here are some ideas.

Selection of members for the BI acceptance team is the most important first decision. The key is to choose a group of employees who would be most likely to resist change or the new way of analyzing data. These are the staunchest, old-school analysts or “data priests” – the kind of people who are successful in their departments and firmly entrenched in analyzing data their way. Choose seven to 10 of these business community skeptics to test the prototype of the new BI implementation. A larger group of users will become unwieldy.

Second, I recommend that the team consist of multi-department representative skeptics (e.g., people from finance, sales and marketing departments). Personnel from different departments can push the BI environment throughout the corporation and mitigate a lot of the political problems that can doom most projects.

Once chosen, the acceptance team should have a mandatory training or education session that is fast and to the point. I suggest that the team attend a short one- or two-hour Web-based training class before they get their passwords for the system. Obviously, this short course only covers the bare essentials to get them started and to help them understand the fundamental purpose of a BI environment.

The initial training should be followed with more intense training. This consists of two to three days of hands-on training to get the testers thoroughly familiar with the new BI environment – its purpose, what it can do and what it is not intended to do, examples of possible reports and queries, etc.

The education process should be documented as part of the overall BI implementation strategy. Without this formal acknowledgment for training, you may find that you are in the position of showing people how to drive automobiles via a video and then sending them on the way in their cars with no real behind-the-wheel experience!

There are several ways you can convince the team to participate – punishments (testers won’t get their commission payments until they fulfill the acceptance training hurdles), incentives (testers will get an extra incentive for completing the testing) or a demonstration of ultimate value in the system.

My experience has shown that time and again, a demonstration of the value of the implementation to the individual’s job or ultimate performance has worked far better than any incentive or punishment mechanism. In fact, pushing the incentive or punishment can actually backfire on the entire project, causing the skeptics to become even more entrenched in their beliefs because of the “carrot and stick” approach.

Another key to the successful interaction with this group is the IT

implementation team’s ability to respond quickly and early to the group’s suggestions. The IT team builds great credibility by implementing the requested changes within a very short amount of time (e.g., 24 hours). In addition, the final product will be a more efficient and effective system; and, more importantly, the IT team gains more respect from these important, and usually vocal, skeptics.

As a final bit of advice, think about life after acceptance testing. Once the skeptics have been converted to your staunch supporters, how about making them further advocates of the environment by having them become trainers themselves? They could train others within their department or function.

Alternatively, perhaps these people could become the first line of triage for their departments by becoming the “experts” that others in their departments come to for help. They can answer questions about the environment, the data, the access tool or the general philosophy of the environment. This frees the implementation team to continue to do what it should be doing – implementing the next iteration of BI.

By ensuring their ongoing presence and involvement in these projects, you have taken an important step in creating a maintainable and sustainable BI environment. Once convinced of your BI environment’s solid foundation, you will find that these converts are exceptionally loyal, remarkably insightful and always willing to help you and your IT team. You could not ask for better and more vocal supporters of your efforts. As always, I welcome hearing from you about your experiences and ideas in this area.



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