



***Assessing Business  
Intelligence  
Operations***  
***by Dorothy Miller***



### **Module 0. About the Course (9 min)**

### **Module 1. Introduction (41 min)**

- *Introduction*
  - What is it?
  - What to Assess?
  - Conditions and Approach
- *Why Conduct a BI Operations Assessment?*
  - Understand BI Operations and Products
  - Gain Control and Improve Operations
  - Decrease Costs and Create a Better Product
  - Assess Potential Risks and Rewards
  - Program Protocols and Principles
- *Business Intelligence Capability Maturity Model for Assessment (BI-CMM/A)*
  - Objectives and Goals
  - Key Assessment Areas and Features
  - Measurement Factors
  - Measurement Rulers
  - Assessment Process
- *Discussion*
  - Exercise and Exercise Review
  -

### **Module 2. Assessment Concepts, Tools And Practices (57 min)**

- *Introduction*
  - Business Intelligence
  - Information Application Categories
  - What will be Assessed?
  - Capability Maturity Models
- *What to Assess?*
  - Key Assessment Areas
  - Audit Wheels
  - Data Integration Platform
  - Analytics Platform
  - Data
  - Meta Data
  - Business Intelligence Engine
  - Technical Infrastructure
  - Non-Technical Infrastructure
  - Development Methodology
- *Performance Measurement: Key Performance Indicators*
  - Measurement Factors
  - Key Performance Indicators In-Depth
- *Measurement Rulers*
  - Concepts
  - Organization Levels
- *The Assessment Process*
  - How to Implement a BI Operations Assessment?
  - Select BI Component
  - Select Key Assessment Feature
  - Select KPI's



## BI-02: Assessing Business Intelligence Operations

- Rate KPI's for Key Assessment Feature
- Rate All Key Assessment Features
- Rate All Components of BI Operations
- Organization Rating/Ranking
- *Discussion*
  - Exercise and Exercise Review

### **Module 3. The Assessment Program (49 min)**

- *Overview*
- *Tips and Guidelines*
- *Step 1. Obtain Agreement for Assessment*
- *Step 2. Select a Leader and Team*
- *Step 3. Plan Assessment*
  - Begin Planning Process
  - Create Umbrella Plan
  - Plan the Pilot Assessment
  - Use an Iterative Approach
- *Step 4. Conduct the Assessment: The process*
  - Key Assessment Areas Review
  - The Assessment Process
    - A. Assess the BI Components
    - B. Rate the Key Assessment Features
    - C. Rate the Key Assessment Area
    - D. Rate & Rank the BI Operations
  - Step 4 Example
    - Review the Platform Architecture
    - Rate the Platform Architecture
    - Rating Process and Tools Review
    - Selecting 'Correct' KPI's
    - Rate Key Assessment Features
    - Rate Key Assessment Areas
    - Three Part Ratings
- *Step 5. Compile Results*
- *Step 6. Rank Organization*
  - Rate the Organization
  - Rank the Organization
- *Step 7. Communicate Results*
  - Communications
  - Curve of BI Excellence
  - Results Summary
- *Discussion*
  - Exercise and Exercise Review

### **Module 4. Case Study (67 min)**

- *Introduction*
  - Case Study Focus
  - Student Goals
- *Background*
  - Subject: Harrison House
  - What We Know



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- Assumptions
- *Start Up*
  - Sponsors & Goals
  - Time and Resource Allocation
  - Preliminary Activities
  - What We Need to Know
  - Scope of Assessment
- *Choosing Pilot Assessment Target*
  - How to Choose the Pilot
  - Objectives of the Pilot
  - Pilot for Harrison House
- *Planning the Pilot*
  - Steps
  - What is Included?
  - Pilot Goals
  - Final Requirements
  - Communications Topics
  - Activities, Tasks and Schedule
- *Conducting the Assessment*
  - Logistics
  - Initial Actions
  - Define Key Assessment Features
  - Planned Actions
  - Tips and Suggestions
- *Scorecarding*
  - Using the Scorecards
  - Assessing Data Stewardship
  - Assessing the Other KAFs
- *Rating the Pilot Targets*
  - Data Stewardship Rating
  - Rating the Other KAFs
  - Rating Data
  - Review

### **Module 5. Case Study Wrap Up (22 min)**

- *Wrap Up & Communications*
  - Presentation Outline
  - Executive Summary
  - Executive Summary Results
  - Next Steps
  - Presentation Overview
  - Presentation Sections
  - Presentation Details
  - Other Topics
  - Conclusions and Next Steps
- *Course Summary*
- *Additional Support*