Vlamis Process and Maturity Model: BI Project Best Practices

Collaborate 2013

Presentation 798
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> **Brian Terry**
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Presentation Agenda

- Introductions

- Vlamis Maturity Model Overview

- Context/Prospective/Roles

- Maturity Levels

- Getting to the Next Level

- Tools

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Vlamis Software Solutions

- Vlamis Software founded in 1992 in Kansas City, Missouri
- Developed more than 200 Oracle BI systems
- Specializes in ORACLE-based:
  - Data Warehousing
  - Business Intelligence
  - Design and integrated BI and DW solutions
  - Training and mentoring
- Expert presenter at major Oracle conferences
- www.vlamis.com (blog, papers, newsletters, services)
- Developer for IRI (former owners of Oracle OLAP)
- Co-author of book "Oracle Essbase & Oracle OLAP"
- Beta tester for OBIEE 11g
- Reseller for Simba and Nokia map data for OBIEE
- HOL Coordinator for BIWA Summit 2013
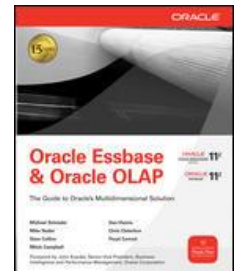
Brian Terry

- Senior Consultant for Vlamis Software Solutions

- 30 Years in a variety of technical hardware and software roles

- Speaker at Oracle Conferences

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Definition: CMM (Capability Maturity Model **---** *from wikipedia.org)*

(paraphrased)

- Tool for objectively assessing the ability of processes to perform a specified software project…

-Later generalized to address Business Processes

Definition: VMM (Vlamis Maturity Model)

- CMM levels and objectives and measurements specifically tailored for Business Intelligence activities and systems

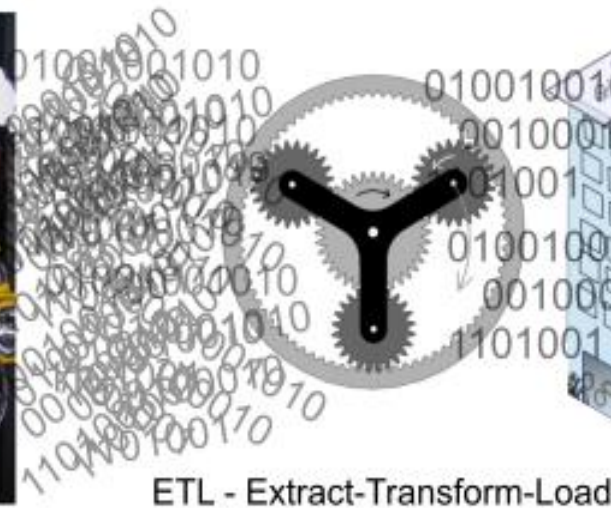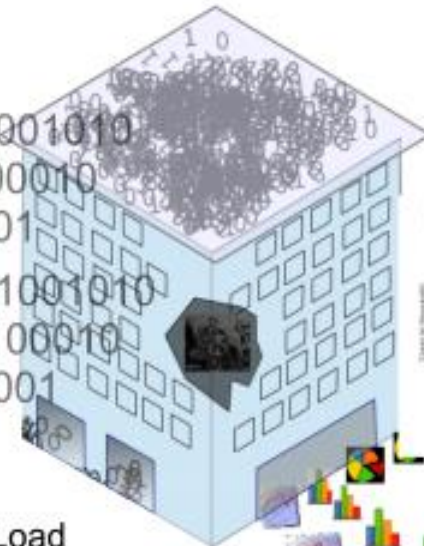Data Warehouse
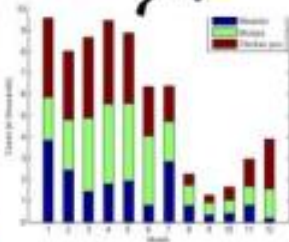Optimized for Queries

ah HAA!!!

ETL - Extract-Transform-Load

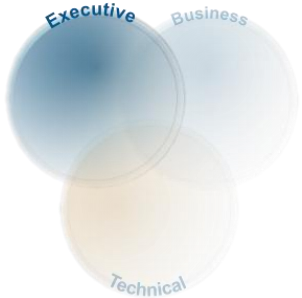Operational Systems
Optimized for High Transaction
Rates --NOT Queries

Executive

- Provides high level vision
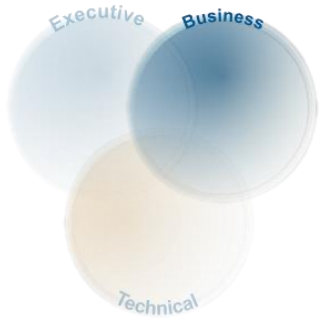
- Helps define high level data summarization and presentation aspects

- Sets direction

- Approves funding

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Business

- Understands data
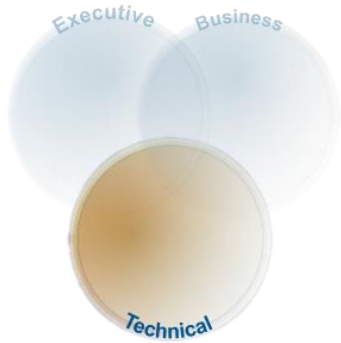 - Relationships
  - Summarizations and Aggregations

- Understands business process

- Lays out the design / plans for the effort

- Builds the reports and analyses

- Defines and participates in the verification process

Technical

- Understands the data sources

- Builds the infrastructure

- Enforces standards

- Works closely with the business participants to ensure goals are being met

Roles

Management
Normally leads a specific department or business units, but sometimes responsibilities can cross multiple areas of the organization.
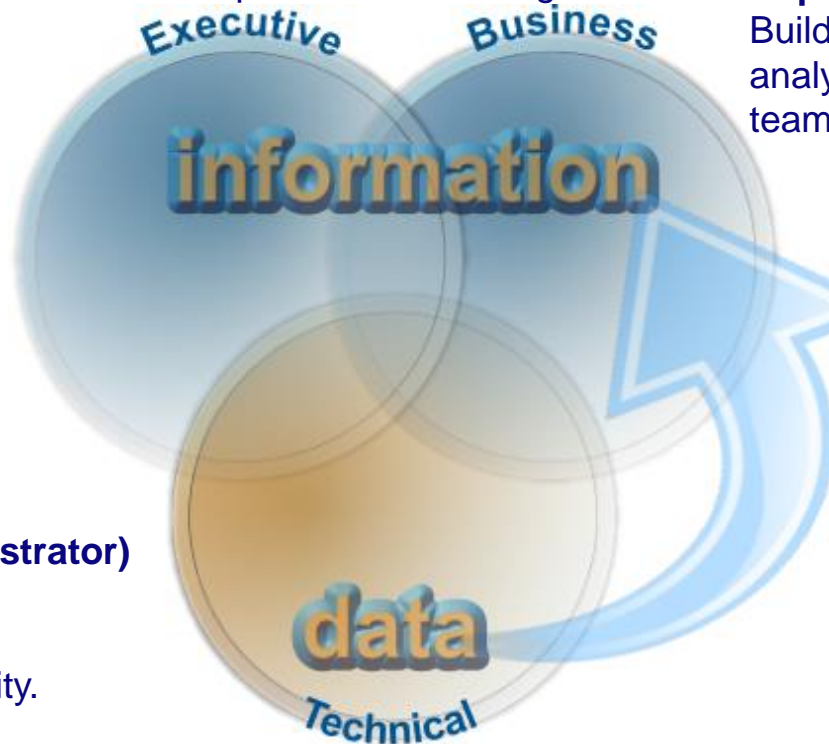
Super User/Analyst
Builds the reports, uses the system for analysis, provides feedback to technical team.

Executive Sponsors
Upper level management that have a vested interested in the success of the project.

Project Management
Build and monitor the project plans to mitigate the risks and avoid delays .

Data Architect
Builds the data model and metadata.

DBA (Database Administrator)
Responsible for general database performance, maintenance, and security.

Executive   Business

information

data

Technical

ETL (Extract Transform Load)
Responsible for taking the data from the source systems then converts/transforms the data so it can loaded into the data warehouse.

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Maturity Levels

1 Initial
- Reactive
- Isolated
- Informal
- Unsecured
- Non-Standard
- Inconsistent
- Uncontrolled
- Unstable

2 Gaining Insight
Converging on:
- Consistency
- Requirements
- Business Linkages
- Security
- Discipline
- Formal PM Techniques

5 Optimizing
- Continuous Improvement
- Continuous Feedback to:
  - Business Linkages
  - Variance Measurements
  - Technology

4 Managed
- Measured
- Specified
- Metrics Captured
- Mainstream 'Status'
- Business Process Mapping

3 Defined
- Standardized
- Documented
- Security Applied
- Governance Applied
- Funding Defined
- Consistent Results
- Target Architecture
- Applying Corporate-Standards

defining direction

getting there

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Initial Level – Characteristics

1 Initial

- Reactive
- Isolated
- Informal
- Unsecured
- Non-Standard
- Inconsistent
- Uncontrolled
- Unstable

Risk:
Analytics is dependent on a single person who can be stressed to deliver.

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Gaining Insight – Characteristics

2 Gaining Insight

- Converging on Consistency
- Requirements
- Business Linkages
- Security
- Discipline
- Formal PM Techniques

Risk:
Discrepancies between departments/business areas.

3 Defined

- Standardized
- Documented
- Funding Defined
- Consistent Results
- Target Architecture
- Security Defined
- Governance Defined
- Corporate Standards Defined

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4Managed

- Measured
- Specified
- Metrics Captured
- Mainstream 'Status'
- Business Process Mapping

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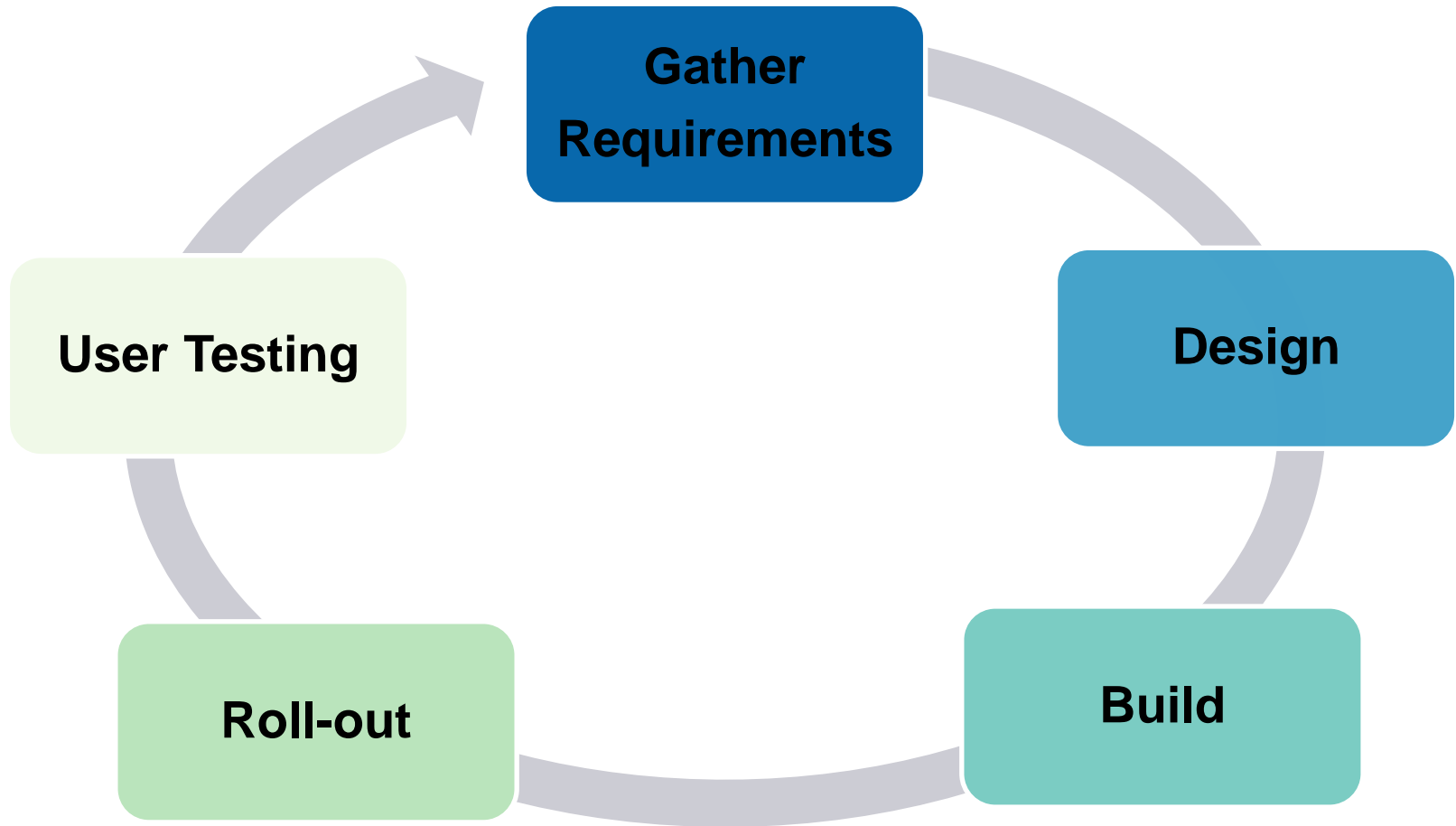# Optimizing – Characteristics

5 Optimizing

- Continuous Improvement
- Continuous Feedback
  - Business Linkage
  - Variance Measurements
  - Technology
  - Performance

Business Intelligence systems continue to evolve as companies' needs change, business changes, available data changes, and technology changes.

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Getting to the Next Level

Gather Requirements → Design → Build → Roll-out → User Testing → (Gather Requirements)

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Roles

Business

- Identify needs and areas for "quick hit" success
- Review recommended technology
- Assist with the design and building of the prototype
- Present to executives the plan and ROI to executives

Technical

- Identify possible source systems
- Recommend technology
- Work with business to design the system

Executive:

- Review plan and ROI
- Compare how plan fits strategic goals of the organization
- Approve funding

1 Initial
Reactive
Isolated
Informal
Unsecured
Non-Standard
Inconsistent
Uncontrolled
Unstable

2 Gaining Insight
Converging on:
Consistency
Requirements
Business
Linkages
Security
Discipline
Formal PM
Techniques

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Roles

Gaining Insight
Converging on:
Consistency
Requirements
Business Linkages
Security
Discipline
Formal PM Techniques

Executive:

- Identify common information across business areas
- Communicate strategic goals of the organization to the team
- Review plan and ROI
- Approve funding

Business

- Work with other business areas to define common metrics and format
- Assist with the design and building of the a initial enterprise business intelligence system
- Present to executives the plan and ROI to executives

Technical

- Identify possible source systems
- Identify possible technology
- Assist with the design and building of the a initial enterprise business intelligence system

Defined
Standardized
Documented
Security Defined
Governance Defined
Funding Defined
Consistent Results
Target Architecture
Applying Corporate-Standards

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Defined – Getting to the Next Level

Roles

Business

- Identify metrics to be measured
- Assist in the verification of metrics
- Assist in identifying and documenting the business process

Technical

- Implement Security and Governance
- Implement Standards
- Capture and verify metrics
- Assist in identifying and documenting the business process

Executive

- Little role to get to the next level unless additional funding is needed

4 Managed
Measured
Specified
Metrics Captured
Mainstream 'Status'
Business Process Mapping

5 Optimizing
Continuous Improvement
Continuous Feedback to:
Business Linkages
Variance Measurements
Technology

Roles

Technical

- Automate business processes
- Tune the hardware/software
- Gather feedback from the user community variance measurements

Business

- Provide feedback on performance, variance measurements, and accuracy

Executive

- Provide feedback on performance and accuracy
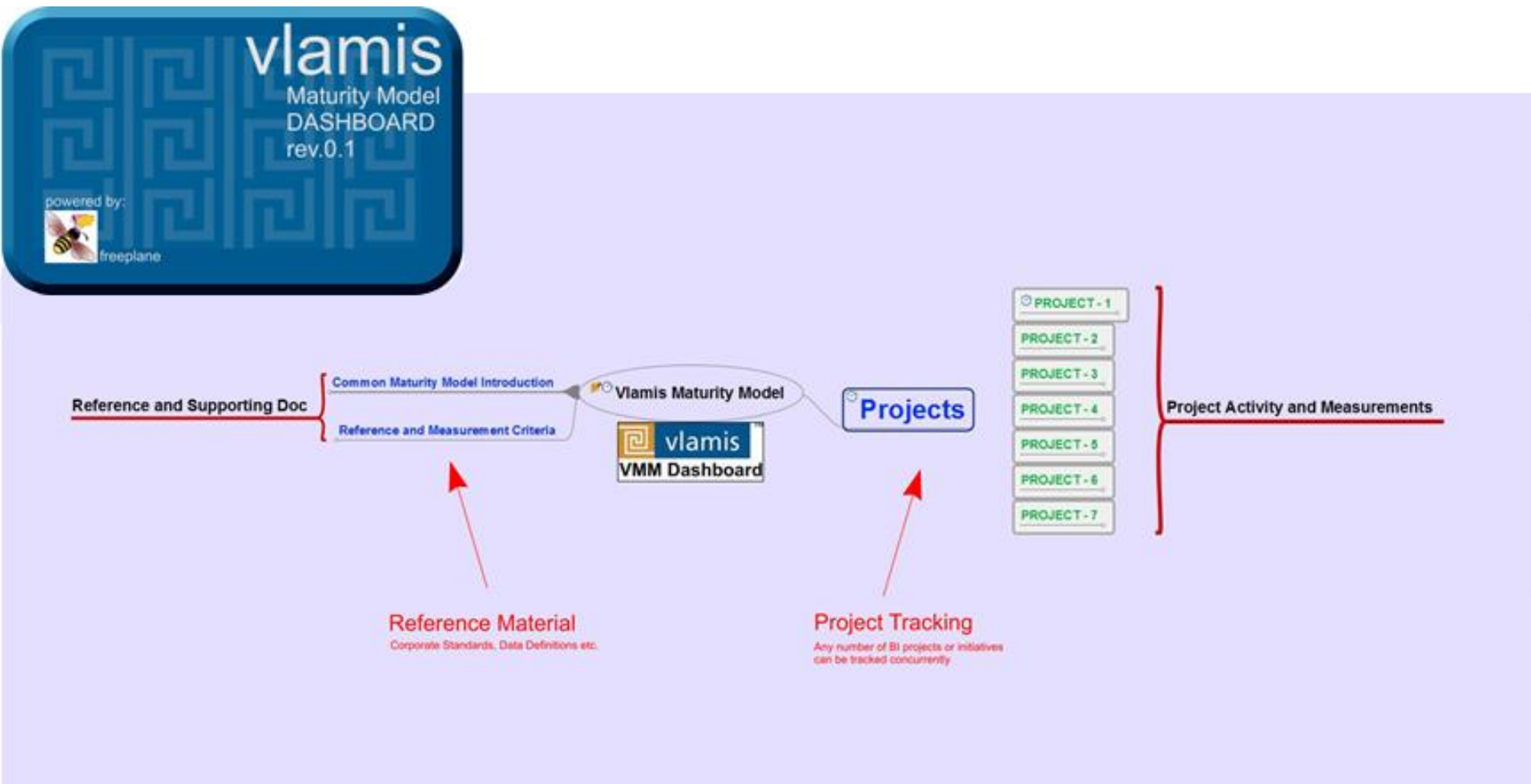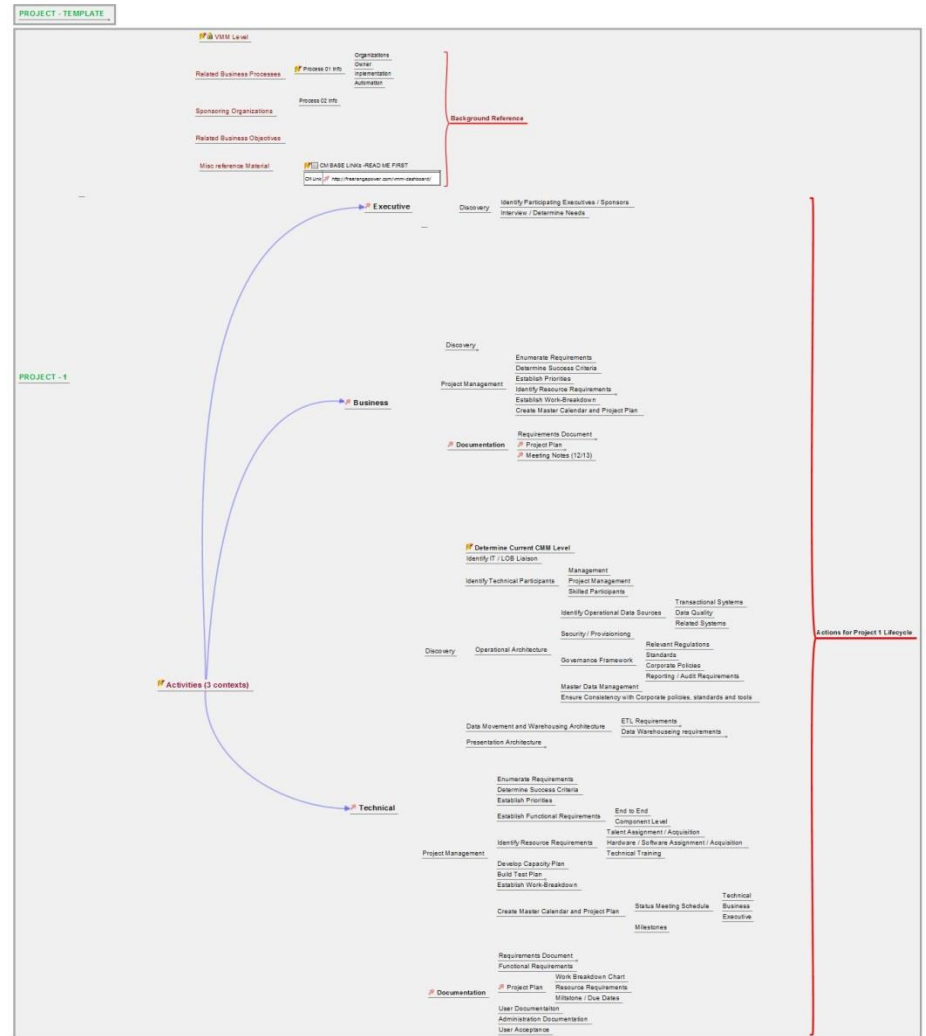- Continue to ensure return on investment

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Exploded Project Map (eye chart)

Demonstration

www.yourproject.com
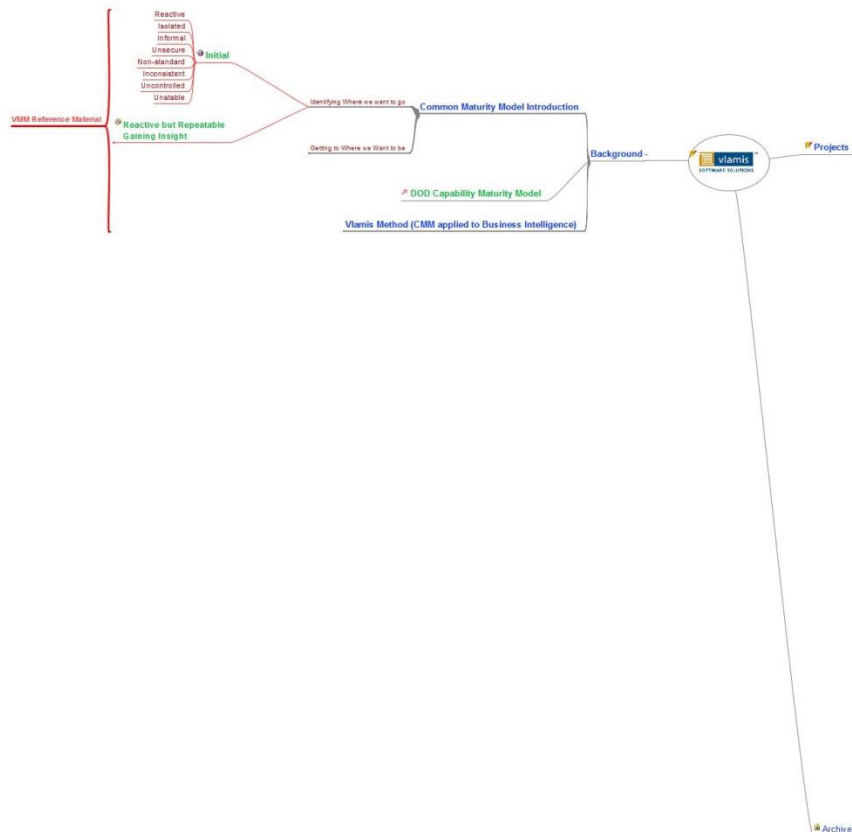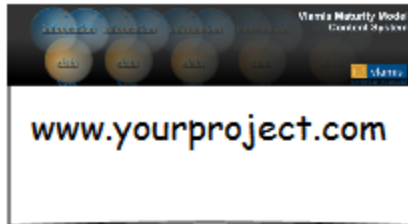
The Mindmap Project Areas have pre-defeined *durable* URL Links directly into respective Executive, Business and Technical Collaboration areas and the Documentation Container

Mind Map (VMM Developer Tool)

Project 1 Container

Project 2 Container

Project 3 Container

Calendar

Project Continer (abstracted into a Wordpress Page)

Tech Collab Area

Business Collab Area

Exec Collab Area

Documentation Container:
Project Plans - Meeting Notes
- Presentations - Reference
Material etc.

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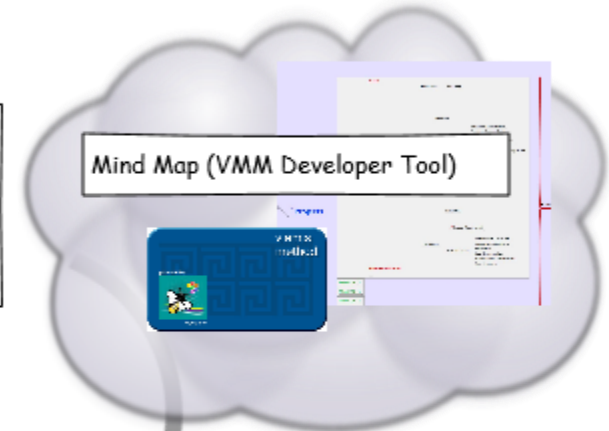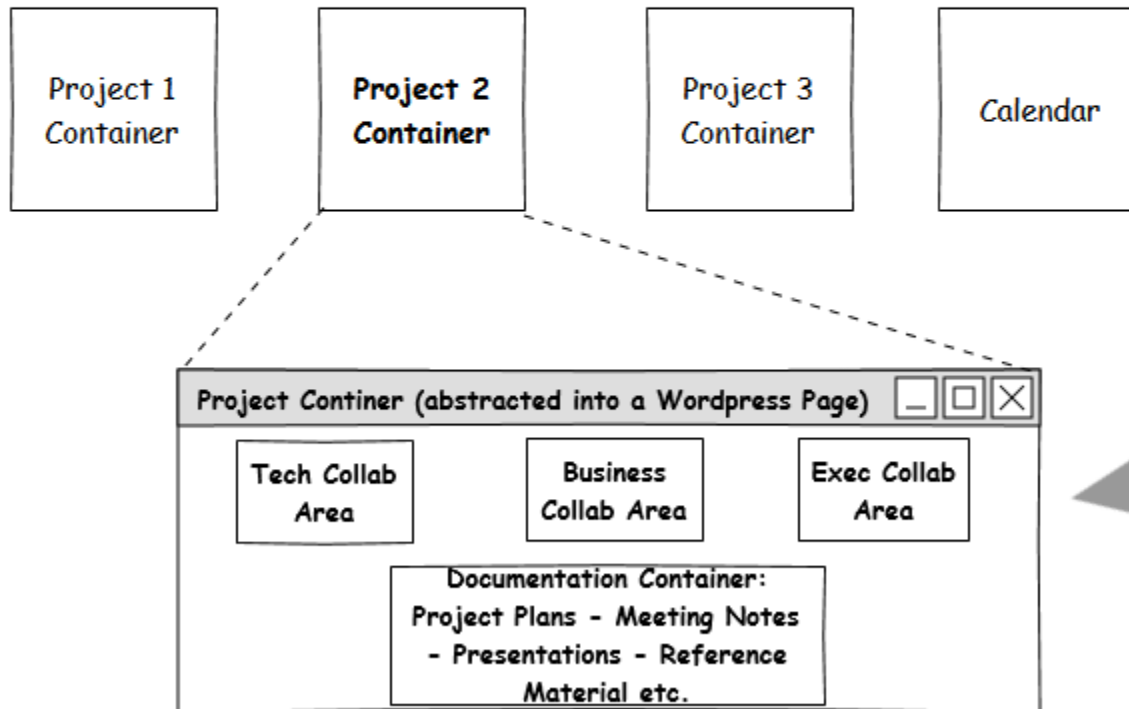
Summary

- Properly identify the maturity of your organizations business intelligence

- Different areas of your organization can be at different levels

- Have a methodology in place

- Get the key players involved early on and keep them involved throughout the process

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Oracle Test Drive

- Free to try out Oracle BI
- Go to www.vlamis.com/testdrive-registration/
- Runs off of Amazon AWS
- Hands-on Labs based on Collaborate 2012 HOLs
- Test Drives for:
  - Oracle BI
  - BI Publisher
  - Microsoft Excel against Oracle OLAP
  - Oracle Data Mining
  - Map Views in OBIEE
- Once sign up, you have private instance for 5 hours
- Available now

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Back by popular demand:
What's New in Oracle BI 11.1.1.7 BIWA TechCast with *live demonstration*

Topic Overview

- Major new release with lots of features (tick of tick-tock cycle)
- New data visualizations and wizard
- New hierarchical column and group display choices
- Freeze headers/scroll bars for tables and pivot tables
- New dashboard layout options for multiple resolutions and mobile
- New dashboard and analyses templating, printing, and saving capabilities
- New Navigation Trail capabilities (bread crumbs)
- Integration with Endeca search engine
- New BI Mobile capabilities and features
- New BI Publisher layout enhancements, integration with dashboards, and data model features
- View and manipulate BI content in SmartView in Excel
- Enhanced export capabilities to MS Office and Excel
- New Hadoop integration with Native HiveQL
- Extended Essbase capabilities with OBI
- New Oracle R Enterprise (ORE) integration and capabilities
- Exalytics enhancements
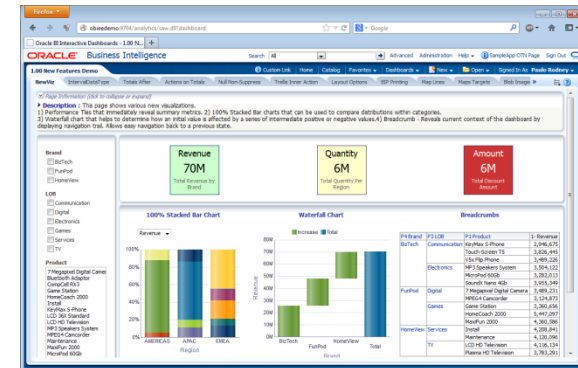
- See **http://tinyurl.com/BIWA-april18** f or more information and to register
- **April 18, 2013 at 11am Central time**

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Vlamis Collaborate Presentations

Presenter	Session	Time	Title
Tim Vlamis	OAUG	Mon 2:30 – 3:30	12633 Data Visualization Best Practices in Oracle Business Intelligence Applications
Tim Vlamis	IOUG	Tues 2:00 – 3:00	726 Advanced Dashboard Design in OBI 11g
Dan Vlamis	IOUG	Wed 8:15 – 9:15	915 Using Map Views and Geospatial Analytics in OBI 11g
Dan Vlamis	IOUG	Wed 3:00 – 4:00	785 Blazing BI: The Analytic Options to the Oracle Database
Chris Claterbos	IOUG	Wed 4:15 – 5:15	732 Advanced OLAP: Making the Hard Stuff Easy
Cathye Pendley	IOUG	Wed 4:15 – 5:15	798 Vlamis Process and Maturity Model: BI Project Best Practices
Chris Claterbos	OAUG	Thurs 12:15 – 1:15	12837 Mobile BI: Using When and Where You Need It

Wrapping Up

Please Fill out the Evaluation Form:
This is Session # **798**

Link to Vlamis Collaborate 2013 Papers and Presentations

Thank you !

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