



Insights:

How to Choose a Business  
Intelligence Tool that is  
Right for YOU!

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# How to Choose a Business Intelligence Tool that is Right for YOU

## Introduction

If you are reading this paper, then I would like to welcome you to the wonderful world of Business Intelligence. The term Business Intelligence, or BI, can have many meanings and be a very broadly used term. Gartner defines Business Intelligence as an umbrella term that includes the applications, infrastructure and tools, and the best practices that enable access to and analysis of information to improve and optimize decisions and performance.



In this paper, I will cover some areas of BI that you want to think about while you are in the process of shopping for and/or implementing a BI Tool. If you have already implemented a tool, don't worry, you will still find valuable information here as the scope of this paper will cover a wide variety of BI topics. I will tell you a bit about myself so that you can understand where my point of view comes from and the mindset with which I approach BI. Back when I started in BI over 13 years ago, I worked for a consulting organization. I was put in charge of assembling a reporting

system involving many disparate data sources that all needed to roll up nicely into one singular monthly report for the CEO. At the time this was no small feat. I wish I had the tools back then that are available in the marketplace today. I would have looked like a rock star, but the past is the past. I have also worked in the consulting industry implementing many BI systems for organizations large and small, both in the commercial space and in the public sector. The past eight years I have worked for several BI software vendors wearing many different hats from consulting to sales. As you can see, I have been exposed to just about all the sides of BI and I feel like I have valuable insight to share with all of you when evaluating a BI Solution.

First, I would like to say, rest easy knowing that you are not alone in your search for the perfect BI tool. The BI industry is massive and growing at an exponential rate. It is estimated that the BI market will be worth roughly \$26 Billion by 2021, growing at a rate of about 8% - 9% between 2016 and 2021. That should give you an idea of how large the industry is and give you the sense that it is here to stay. Data is growing at an alarming rate and if you haven't already implemented some form of BI, then you are already behind the curve.

A true BI vendor, in my opinion, should have a solution for all the topics I break down below. If not, then be careful. You do not want to piece together a solution by stitching together different

products from different companies. Sure, you can do it, but from my experience it creates many more integration headaches than buying a complete solution from one vendor. I often like to use the example of a car. When assembling a car, you can purchase all the parts from different vendors and assemble your own “custom” car. You can get an engine from company A, a body and frame from company B, some wheels and tires from company C, and then maybe even have some parts fabricated from a variety of other specialist companies. In the end, you will have a very unique car, which is not necessarily a good thing. What do you do when you have an issue with a combination of the parts? What if the car won’t start? Who do you go to? Now, if you had purchased a car from a company like Chevrolet, Ford, or Honda you can go to them to for all of your problems. They have built the car from the ground up and will be able to fix it for you. The same holds true for a BI solution. Having a unique solution is not necessarily a good thing, and in fact I would consider it the opposite. Having a product that was built from the ground up, and is designed to work as one cohesive unit, is far greater than a solution that you have pieced together to fit your needs. By considering all the factors below, you will be better prepared to find the BI tool that truly meets your needs and enables your company to make effective and proactive decisions.

## The Vendor

Let’s first take the company selling a BI tool into consideration and see how their solution got to where it currently is in the marketplace. Being in the industry for over a decade now, I can tell you that there is a general recommendation I have when choosing a vendor. I have found, through experience, that the products with the least amount of issues from installation through implementation are often the ones that have been developed and evolved organically in a company. Has the company built their solution from the ground up or is their solution composed of a variety of products obtained through acquisition and then dissected and reassembled to fit together? The solutions that have been developed organically often have far fewer issues. So, what I suggest to you is to do a bit of research on the solution and see how the company’s BI product came to be. Steer away from those vendors who have pieced their solution together via acquisition. Trust me, you will thank me in the long run.



Another factor to consider regarding the vendor is the actual size of their organization. A larger company does not always mean that they have a better product or that they are better at supporting their customers. I have worked in both large and small organizations and I can tell you that a smaller company is my preferred BI vendor for several reasons. For starters, a smaller company is more agile. They are more likely to listen to what YOU have to say. They can turn around and fix issues, add features, and even build out that enhancement you requested. The larger a corporation tends to become, the greater their struggle is with agility due to the sheer size of their team and their product. Another reason I prefer a smaller sized vendor is that I have

seen first-hand how large vs. small companies handle feedback coming from individuals out in the field. It is necessary to evaluate if the company is able to incorporate client feedback into the product itself. I can tell you that 9 times out of 10 the smaller vendor wins on this front because of that agility advantage. What this means to you as a customer is that at the end of the day, your voice is more likely to be heard and action is more likely to be taken with a smaller and more agile vendor.

## Implementation Type

You have a few different options when it comes to how you want to roll out your BI solution. The choice you make will depend upon the existing resources available to you, as well as the overall company direction. The traditional implementation involves using on-premise software where you install, develop, and maintain your own environment. This typically offers more flexibility for you and provides you with complete control over your solution. This type of implementation does however demand time from your technical resources, which may already be spread thin. The other option you have is to pursue a hosted solution, which is where the industry seems to be trending. You will hear “cloud, cloud, cloud” just about any time you speak with a vendor these days. All this means is that they are providing their software to you as a service (SaaS), and they are doing all the heavy lifting like installation, backup, recovery, upgrades, etc. This is great because now you will have the time to work on the day-to-day business activities you would rather focus on. There is obviously a cost associated with the cloud solution, but the choice is up to you. There are pros and cons of both.

## Data Sources

What type of data do you need to analyze? Is all your data centrally located in one data warehouse, or do you have it spread across a variety of different databases and business applications like HR, Finance, Time-Tracking, Payroll, etc.? Is all of your data located on-premise or do you also have cloud applications like a Talent Management system or maybe even your CRM system? Many organizations that I have come across recently have a fairly good mix of data sources. Having a BI solution that can connect to both on-premise and cloud applications is very important. Although you may not realize it now, or think that you may never go cloud, chances are in the future you may and you will want that flexibility.



Another data source consideration is the frequency at which you need access to your information. Do you have data that needs to be live and refreshed up to the second? Is it paramount that your order management system shows real-time, on-hand quantities when you run a report? Do you need to know your current financial numbers in the middle of the day or is day old data sufficient? In some instances, live data is a

MUST and in other cases you can wait for the nightly or weekly data feed to trickle in and update your system. Having a tool that can provide both capabilities, without needing to buy additional software to integrate or pay a huge expense to implement, is a very nice feature / function of a BI solution.

The last topic here that I will touch on is self-service. Would you like to provide your end users with the option to upload their own data files for reporting? This may sound like a scary concept to some, but wouldn't it be nice to allow end users to mash up some of their own local data with curated data you have provided to quickly satisfy reporting needs without bringing in IT to do the work? This self-service data mash up capability is certainly a feature I look for in any BI solution I want to implement.

## Ease of Use

This is perhaps one of the most important factors that I think should be considered when implementing a new solution. How easy is the tool to use? If even the most feature rich tool on the market is too complicated for your users to adopt, there is a good chance your implementation is dead before you even know it. User adoption is key. If the end users have an easy to use, intuitive, and visually pleasing tool, the usage numbers will go up and that is what we want at the end of the day, isn't it? Providing the data to the business so that the company can go on with work as usual without skipping a beat is the end goal here. BI should not be disruptive to the business. It should be a tool that helps end users rather than frustrate them. My advice is to go through a trial process with the software vendor before you buy their product. Make sure you have vetted the solution technically and that it is something you think your team can get behind as a solution for the business.

When taking the "ease of use" concept one step deeper, I think you also want to take a look at the data-modeling component of a proposed solution. Do you have the knowledge and resources in-house for a proper data modeling exercise? Chances are that you have a DBA that can assist with this, but some tools are easier than others to model, and this is an area I would certainly explore in a solution I want to implement.

## Reporting & Dashboarding

Now, to the topic you have been waiting for, Reporting and Dashboarding. So, this is really the crux of BI to most users. How quickly and easily can you create a report and then share that data? This is the number one question I hear from customers when they are evaluating a BI solution. Common BI features across solutions include the ability to have business terms used instead of database terms, dragging and dropping attributes and metrics onto a report,



easily creating report parameters to filter down the results, and then publishing your results to consumers and sharing with others. However, not all products were created equally in this arena. I have seen many times people choose a less feature equipped product purely because it was simple, clean, and served the purposes they were looking for. My recommendation here is to not get caught up with all the bells and whistles of a tool, but to focus in on those capabilities that matter most to you. Then you can see how easy your day-to-day interaction with the tool will be when using those capabilities. I will circle back to my earlier point here, which is again, ease of use. An easy to use analytic tool has a much higher rate of adoption and success within an organization.

Dashboarding is also a hot topic, which you do not want to pass over. As the saying goes, a picture is worth a thousand words. Visualizations are another way to present data to your users rather than the standard tabular format like the days of old. Having a nice graphical way to present the data, whether it is a chart, graph, or KPI, often helps with user adoption. Also, in my experience, a lot of corporate executives tend to prefer a singular dashboard, giving them a single pane to view what is happening in the company with the ability to dive deeper as needed to get more details on hot items.

The last component I would like to mention on this topic is that of pixel perfect reporting. This is not an area that pertains to everyone out there, but to those who need it, a tool that can provide this capability is extremely valuable. What do I mean by pixel perfect reporting? It has meant a lot of different things over the years, but these days it means that a user can manipulate the size and position of their report components to a very precise level. This is essential for users that require very specific report formats, for example, an invoice that is sent out to a customer or a W-2 for year-end accounting. When there is a template that you need to get data into, this ability to input your data from your curated system into a very precise document is a lifesaver. This isn't for everyone, but it can be very useful for some.

## Distribution

Now that you have created the data, how do you get it out of your BI system? You may ask, why would someone want to do that? There are many use cases for needing to do so. Sometimes there is a need to dump a certain block of files to a shared drive for storage, or a need to go back to a point in time to look at snapshots of the data. There may be users who can't access the BI system but still need access to the data. Having a tool that can export to common formats like Excel, CSV, PDF, HTML, or even a common shared drive is significant. Luckily, most BI tools these days can do this.

Scheduling functionality is also another common BI feature that you will want and expect. The ability to schedule reports and dashboards at a frequency that works for you will save you time in the long run. So, take a deep look at the distribution capabilities of a given solution.

## Data Access

I have often said, and continue to say, that you cannot pry Excel from the lifeless fingers of many users. Users are comfortable with Excel because it works for them. You don't want to be too disruptive to the business, do you? Why not give those die-hard Excel fans the capability to access to all of the curated data and reports natively inside of Excel? Having an Excel plugin capability to retrieve live data from your BI system has eased the worries of many end users I have spoken to over the years.

What other forms of BI have we not covered? We have gone over reports, dashboards, excel integration, distribution and collaboration, but we have not mentioned mobile. We all know how big the mobile industry has become. It appears you cannot escape from being attached to a mobile device anymore. Society has become increasingly on the go and the office has become an ever-expanding idea without bounds. At times, your mobile device may be your only link back to the office and having access to your important information on that device has become a necessity for many organizations. If mobile is important to you then having a platform that supports its content with a native mobile app should also be important to you. A couple of questions you will want to keep in mind are, a) does it support all platforms (iOS, android, windows, etc), and b) is there special development that needs to take place in order to work on a mobile device or can you develop once and deploy everywhere?

## Support

One of the last topics I would like to cover is product support. I recommend doing your due diligence and thoroughly researching all aspects of the customer support a company offers. Ask for customer references and see what their experiences have been with issue resolution, enhancement requests, content creation requests, etc. You want to find out if the vendor has thorough documentation and a support community that you can leverage for further help. Let's be honest, things break no matter what software product you buy. The important thing is how quickly and thoroughly a vendor resolves those issues for you. You can get a good feel for this by talking with others who own the tool and then form your own opinion from that.



## Vision

The last topic here that I want to discuss is the vision of the company. Are they looking forward into industry trends and planning for, if not already implementing, things like Big Data, Data Discovery, Data Visualization, and Predictive Analytics? You may not need something like Big Data right now but I can assure you that it is here to stay and there is a very good chance you may need some aspect of it in the near future. The key concept here is to talk with the vendor to

get a sense of their corporate vision and see if it is in line with where you see your company going.

## Conclusion

In closing, there are many BI vendors out there in the marketplace to choose from. When researching which vendor is the right fit for you, I hope some of the topics covered in this paper are helpful. Remember to match your needs in a solution with capabilities offered by a vendor. The vendor with the most features and functions may not necessarily be the best solution for you. Keep it focused and keep ease of use at the top of your mind.