Self-Service BI: Beyond The Hype

MicroStrategy Professional Services

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Self-service business intelligence, or SSBI, is the trendy topic-of-the-day in the BI industry. In fact, it’s one of the main reasons Gartner revisited and redefined its Magic Quadrant for this industry. There are a number of TDWI blogs written on SSBI, and some of them openly suggest that SSBI is a myth.

At MicroStrategy, however, we know that SSBI can be achieved and can be successful at enterprise scale. There are certain challenges that organizations face when embarking on the journey to SSBI, including handling misconceptions around even the most elementary of SSBI concepts. This white paper aims to address the three most common misconceptions, address fallacies, and put forward a clear roadmap to help your business achieve SSBI implementation with MicroStrategy.

Myth #1: data visualization = self-service

Self-service is often misunderstood as being confined only to data visualization. But the scope of self-service analytics goes far beyond this limited functionality. At MicroStrategy World 2016, we asked our audience to share what self-service meant to them and their respective organizations. Here is what they had to say:

What does self-service mean to you?

- **30%** User empowerment and independence
- **29%** Business agility
- **23%** Faster time to market
- **10%** Customized data and reporting
- **8%** No IT involvement

*Audience poll from MicroStrategy World 2016*
None of the respondents mentioned data visualization as their interpretation of self-service. Most of the responses we received focused on business agility and delivering a faster time to market for analytics. In our experience helping MicroStrategy customers plan and implement self-service models, we have often observed that businesses being able to create their own reports is only a cursory reason for SSBI. Empowering their business with such functionality is usually associated with larger organizational goals like optimizing IT costs or improving productivity of a certain group, etc.

When we asked the same respondents the slightly different question of “what are the top reasons organizations should consider self-service,” they responded as follows:

**Why self-service?**

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>21%</td>
<td>Being able to answer business questions quickly</td>
</tr>
<tr>
<td>20%</td>
<td>Faster time to market</td>
</tr>
<tr>
<td>15%</td>
<td>Ever changing business needs</td>
</tr>
<tr>
<td>14%</td>
<td>Reduce dependency on IT</td>
</tr>
<tr>
<td>13%</td>
<td>Provide visual exploration of data</td>
</tr>
<tr>
<td>11%</td>
<td>Inability of IT to meet business demand</td>
</tr>
<tr>
<td>5%</td>
<td>Reusability</td>
</tr>
<tr>
<td>2%</td>
<td>Big data creates this need</td>
</tr>
<tr>
<td>1%</td>
<td>Because it is the latest trend</td>
</tr>
</tbody>
</table>

_Audience poll from MicroStrategy World 2016_

This audience poll further helps to debunk the theory that self-service is all about data visualization. The major reason organizations move towards self-service models for analytics is to be able to bring agility and speed to their analytics efforts.

**Myth #2: self-service means no IT involvement**

A recent quote from TechTarget may be the best way to describe why self-service without IT is a myth:

“Self-service business intelligence (SSBI) is an approach to data analytics that enables business users to access and work with corporate information without the IT department’s involvement *(except, of course, to set up the data warehouse and data marts underpinning the business intelligence (BI) system and deploy the self-service query and reporting tools).*”

_TechTarget: Self-Service Business Intelligence (BI), February 2016_
So why then is self-service likened to an absence of IT involvement? When we ask our customers, it’s apparent that they do not want to wait for IT to fulfill their analytics requests. It usually takes an IT department too long to provide answers to what business people are seeking. By the time IT gets back with an answer, the requirements or parameters have often changed, or the answer is no longer needed.

Usually when business users say “no IT,” they do not realize the amount of work that goes into data preparation, gathering, consolidation, etc. Sometimes there are business-facing IT groups that can do some data preparation for their users, but in most cases, you may want to get IT involved for consistent, enterprise-wide data warehousing or data collection efforts.

In a typical BI environment, the skills required for advanced analytics and performance tuning are provided by IT. This is an important requirement that often gets overlooked in the early stages of a self-service deployment. If these skills are provided by IT, then consider the myth debunked.

One final point on this myth is that most infrastructure and security policies fall under the IT umbrella. So for full self-service functionality, some amount of involvement from these groups is expected.

**Myth #3: SSBI doesn’t require governance**

In our experience, organizations that have implemented self-service without giving any consideration to governance are often faced with the common challenge of “reporting chaos.” Reporting chaos, in simple terms, is when end users create reports and metrics that are not consistent with corporate definitions.

Governance is often considered taboo in the world of self-service; that is truly surprising given the preponderance of evidence showing that reporting chaos occurs without governance in self-service.

Before confronting this myth, it is important to define “governance” in the context of self-service. At the very least, it encompasses the following:

1. **Data governance** – what type of data, data security, data definitions, etc.

2. **Business metrics governance** – are the business metrics defined uniformly across all SSBI? Which business group owns what metric definitions, etc.

3. **Security** – who gets access to what in SSBI?

4. **Infrastructure governance** – what underlying systems and assets are in place?

The absence of governance results in reporting chaos. For example, multiple users may create multiple reports with metrics that are called the same name but don’t necessarily use the same definition, like quantity, time and price; there could be five different reports conveying the same analysis; or there may be thousands of objects created that get used one time and then never revisited. Often there’s a lack of control over who has access to what in this self-service environment. The list goes on and on…

If any of this sounds familiar to you, chances are some of the above components of governance are missing in your set-up.
The spectrum of self-service and the six levers of decision making

“Self-service” is a broad term. It is important to determine where on its spectrum one’s team should exist. What are the considerations for making this decision and what’s a good way to determine the approach? MicroStrategy Professional Services has created the following guide to help our customers determine which model best suits their needs and strengths. The spectrum of self-service and the six levers of decision making are detailed below:

**Spectrum of self-service**

Our approach is to ask our customers a series of questions to help assess where on the spectrum works well for their company, based on objectives, goals, skills available, tools, strategies, etc. In general, our experience has led us to pursue one of three distinct models based on the six levers outlined above.

**Self-service implementation snapshot**

![Self-service implementation snapshot](image-url)
As you can see, based on your goals, you can achieve the necessary balance between IT and business, decide what your data strategy will be in the SSBI environment, what kind of content will be created by each of these broader groups, and how the environment will be governed. There is no one singular way of being “right” and in the case of SSBI, “right” truly is relative to your goals and resources.

**Partner with us on your journey to SSBI**

We have seen cases of self-service implementations that have resulted in less than successful results, frustrated business users, overwhelmed IT departments, and reporting chaos. At MicroStrategy World 2016, 1 out of 3 respondents to our survey said they were going to start over again on their efforts to set up self-service. Our proven approach and strong track record of success can help you avoid common pitfalls and guide your business down the right path.

**The journey to SSBI**

70% of respondents have already implemented some aspect of self-service

but 1/3 failed and had to start all over again

*Audience poll from MicroStrategy World 2016*

**Getting started**

With the right understanding of what SSBI is, the degree of IT involvement, and the importance of governance, you can use it to best serve your business. It’s important to look beyond the misperceptions and to be mindful of common hazards and pitfalls. Don’t let your self-service initiatives fall flat with improper execution. When implemented correctly, it’s one of the best investments your business can make. Whether you already have some type of self-service implemented, or are just getting started, MicroStrategy Professional Services is here to help you every step of the way.

Contact your Sales Representative or email: Services@microstrategy.com to continue the conversation so that you can take your business to the next level.