

## Developing a Strategic BI Roadmap

### Business Overview

Our client, a Fortune 500 Manufacturing company (“F5MC”) has over 100,000 employees delivering product and services across the world. One division of F5MC is responsible for the global supply chain, managing the movement of raw materials and finished goods from point of origin to point of consumption across the globe.

### Business Challenge

The F5MC organization identified that their current state Business Intelligence systems were expensive, inefficient, and inadequate to satisfy time-driven and data-driven business analysis and decisions. Their environment had been pieced together over time and geography and was characterized by:

- Multiple technologies, each serving narrow business needs, with complex and disparate interfaces
- Inconsistent data and Key Process Indicator (KPI) definitions, nomenclature, and handling
- Limited access, insufficient detail and difficult (often manual) aggregation and consolidation
- Regional, not global, information
- Multiple instances of the same data, creating inconsistent reporting and a highly “user dependent” view of the data
- Unclear priorities and ownership

In addition, the organization recognized that the migration to a standard Enterprise Business Intelligence platform could save significant costs by reducing the number of systems and by improving the accuracy of, and access to, information relevant to making timely business decisions.

Having recognized the opportunity to gain significant advantage by implementing an Enterprise BI solution, F5MC was unable to articulate a phased, prioritized approach to implementing such a solution that would deliver incremental value, minimize rework, and align with their emerging Enterprise Resource Planning (ERP) roadmap. And, they were unsure that their people had the organizational and process maturity to implement and use such a system. So, they asked LPA to do a strategy review and build a BI Reporting Roadmap to get them to a standard Enterprise BI platform.

## Solution

LPA consultants analyzed F5MC's current business intelligence processes and systems using our **Business Intelligence Rationalization** methodology. Employing a principle-based rationalization approach, LPA conducted interviews with F5MC business leaders from across the world as well as with the F5MC Information Management team members who support them.

LPA started by identifying with F5MC management the principles that would drive the creation of the roadmap. Examples of such principles include such items as "Missing Capabilities First", "Highest Cost First", "Required for System Retirement First" and more (See associated **LPA Business Intelligence Rationalization** whitepaper for more information on guiding principles).

Having identified the guiding principles we continued by interviewing the business and technical leaders to characterize the current BI solutions in place and the gaps that existed within them:

- costs (both hard dollars and soft),
- business subject areas represented,
- data feeds and sources (both current and needed),
- toolsets (both Business Intelligence and Database platforms),
- required BI capabilities (such as ad hoc reporting, operational reporting, OLAP functionality, etc.), and
- user communities (including multi-language and multi-currency support needs)

Using the information gained in the interviews, and by applying the driving principles provided by F5MC management, LPA expressed a logical, step-wise collection of transitions for migrating from the over 12 separate formal Business Intelligence platforms and multiple informal (desktop) BI systems and technologies to a single Enterprise technology.

## Results

LPA delivered a Rationalization analysis that included a BI maturity assessment of the F5MC organization, an analysis of our findings vs. the rationalization principles, a current state summary, a discussion of examined alternatives, our recommendations, a description of the first three transitions toward their final solution, and a recommended governance structure for the BI platform. This was all integrated and consistent with their 5-year business strategy.

F5MC has successfully started down the path of implementing the roadmap, step-by-step. They have documented over \$2M of savings directly from BI Tool licensing costs and BI Projects that were not on the resulting roadmap.