

TDWI RESEARCH

TDWI BEST PRACTICES REPORT

THIRD QUARTER 2011

EXECUTIVE SUMMARY

SELF-SERVICE BUSINESS INTELLIGENCE

Empowering Users to Generate Insights

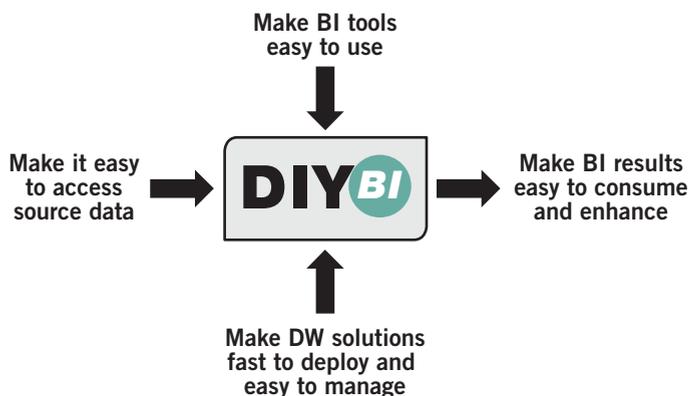
By Claudia Imhoff and Colin White

Executive Summary

In today's economic environment, organizations must use business intelligence (BI) to make smarter, faster decisions. The business case for BI is well established. Access to BI is what gives companies their competitive edge and allows them to discover new business opportunities. Yet, in too many organizations, decisions are still not based on business intelligence because of the inability to keep up with demand for information and analytics. IT has been stripped down to the barest numbers, even while information workers are demanding more control and faster access to BI and business data.

To satisfy this demand and accelerate time to value, one approach involves setting up an environment in which the information workers can create and access specific sets of BI reports, queries, and analytics themselves—with minimal IT intervention—in a self-service BI (SS BI) environment. Information workers become more self-sufficient by having an environment that is easy to use and supplies information that is easy to consume. It is these two themes—ease of use and information consumability—that play crucial roles in a fully functioning SS BI environment.

Self-service BI is defined as the facilities within the BI environment that enable BI users to become more self-reliant and less dependent on the IT organization. These facilities focus on four main *objectives*: easy access to source data for reporting and analysis, easy-to-use BI tools and improved support for data analysis, fast-to-deploy and easy-to-manage data warehouse options such as appliances and cloud computing, and simpler and customizable end-user interfaces.



This report describes the technological underpinnings of these four objectives in great detail while recognizing that there are two opposing forces at work—the need for IT to control the creation and distribution of BI assets and the demand from information workers to have freedom and flexibility without requiring IT help. Companies seeking to implement self-service BI must reach a middle ground in which information workers have free access to data, analytics, and BI components while IT has oversight into the SS BI environment to observe its utilization. This gives the information workers the independence and self-determination they need to answer questions and make decisions while giving IT the ability to monitor the SS BI environment and apply governance and security measures where necessary. For guidance, this report provides practical recommendations to ensure a successful SS BI environment.

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Research Methodology and Demographics

Report Scope. This report is designed for business and technical executives who are responsible for planning and implementing business intelligence (BI) environments. The report is essentially a catalog of the many new technologies and techniques that have arisen for self-service BI in recent years. Its goal is to help data warehouse professionals and their business sponsors understand what's now available, as well as the business and technology use cases for which the new options are best suited.

Research Methodology. Most of the market statistics presented in this report are based on a research survey. In March 2011, TDWI sent an invitation via e-mail to the data management professionals in its database, asking them to complete an Internet-based survey. The invitation was also distributed via Web sites, newsletters, and conferences from TDWI and other firms. The survey drew complete responses from 625 survey respondents. From these, we excluded respondents who identified themselves as academics or vendor employees, leaving the responses of 587 respondents as the core data sample for this report.

Survey Demographics. The majority of survey respondents are corporate IT professionals (58%), with the remainder consisting of consultants (23%) or business sponsors/users (19%). We asked consultants to fill out the survey with a recent client in mind.

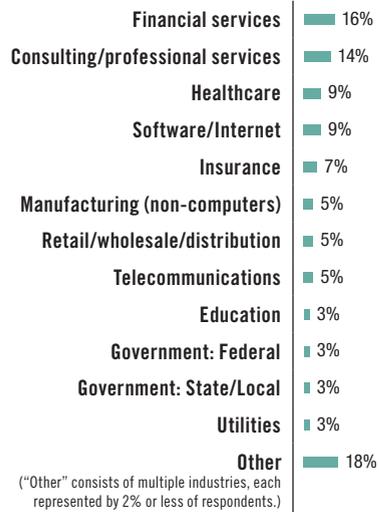
Financial services (16%) and consulting (14%) industries dominate the respondent population, followed by healthcare (9%), software (9%), insurance (7%), manufacturing (5%), retail/wholesale/distribution (5%), telecommunications (5%), and miscellaneous other industries. Most survey respondents reside in the United States (53%) or Europe (20%). Most respondents are from a fairly even distribution for all sizes of companies and other organizations.

Other Research Methods. In addition to the survey, the authors conducted numerous telephone interviews with sponsoring vendors and some of their customers. The authors also received product briefings from vendors that offer products and services related to the best practices under discussion.

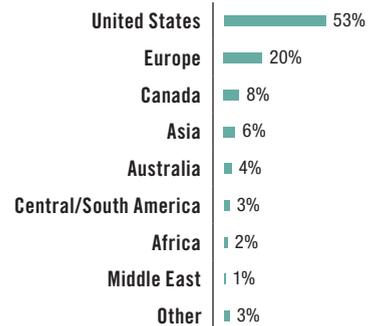
Position



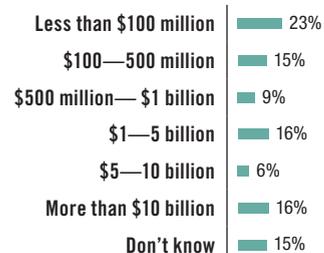
Industry



Geography



Company Size by Revenue



Based on 587 survey respondents.



About the Authors

CLAUDIA IMHOFF, Ph.D., is a popular analyst and dynamic speaker on business intelligence. She is the president of Intelligent Solutions, Inc., a data warehousing and BI consultancy. She has co-authored five books on these topics and writes articles and research papers for technical and business magazines. She is a TDWI Fellow and founded the Boulder BI Brain Trust. You can reach her at cimhoff@intelsols.com.



COLIN WHITE is the founder of BI Research. As an analyst and educator, he is well known for his in-depth knowledge of data management, information integration, and BI technologies and how they can be used for building the smart and agile business. With many years of IT experience, he has consulted for dozens of companies throughout the world and is a frequent speaker at leading IT events. You can reach him at cwhite@bi-research.com.

About TDWI

TDWI, a division of 1105 Media, Inc., is the premier provider of in-depth, high-quality education and research in the business intelligence and data warehousing industry. TDWI is dedicated to educating business and information technology professionals about the best practices, strategies, techniques, and tools required to successfully design, build, maintain, and enhance business intelligence and data warehousing solutions. TDWI also fosters the advancement of business intelligence and data warehousing research and contributes to knowledge transfer and the professional development of its Members. TDWI offers a worldwide Membership program, five major educational conferences, topical educational seminars, role-based training, onsite courses, certification, solution provider partnerships, an awards program for best practices, live Webinars, resourceful publications, an in-depth research program, and a comprehensive Web site: tdwi.org.

About the TDWI Best Practices Reports Series

This series is designed to educate technical and business professionals about new business intelligence technologies, concepts, or approaches that address a significant problem or issue. Research for the reports is conducted via interviews with industry experts and leading-edge user companies and is supplemented by surveys of business intelligence professionals.

To support the program, TDWI seeks vendors that collectively wish to evangelize a new approach to solving business intelligence problems or an emerging technology discipline. By banding together, sponsors can validate a new market niche and educate organizations about alternative solutions to critical business intelligence issues. Please contact TDWI to suggest a topic that meets these requirements.

Acknowledgments

The authors would like to thank the many people who contributed to this report. First, we appreciate the people who responded to our survey. Second, our report sponsors, who diligently reviewed outlines, survey questions, and report drafts. Finally, we would like to recognize TDWI's production team—Jennifer Agee, Michael Boyda, and Denelle Hanlon—for their hard work and support, as well as Philip Russom, TDWI Research Director, for his input and guidance.

Sponsors

Birst, IBM, Infobright, Neutrino Concepts, PivotLink, Quest Software, SAP, SAS, and Tableau Software sponsored the research for this report.

TDWI RESEARCH

TDWI Research provides research and advice for business intelligence and data warehousing professionals worldwide. TDWI Research focuses exclusively on BI/DW issues and teams up with industry thought leaders and practitioners to deliver both broad and deep understanding of the business and technical challenges surrounding the deployment and use of business intelligence and data warehousing solutions. TDWI Research offers in-depth research reports, commentary, inquiry services, and topical conferences as well as strategic planning services to user and vendor organizations.



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