Aperio CI's 5 Point Plan

Avoiding "Shiny New Toy" BI Warehouse Mistakes

When we talk with senior executives of telecom, media and other companies about their strategy for Business Intelligence data warehouses, we often hear the following:

- *"We bought the brochure, and now we can't make it work."*
- *"The supplier told us a lot of stuff was out-of-the-box, but there wasn't much there."*
- *"They made it sound easy, and we fell for it."*
- *"We should have attached their presentation to the contract."*

What they're really saying is this: *"We got so wrapped up in the tools and the technology that we forgot the fundamentals of supplier review and selection."*

The antidote to the techno-rapture problem is a return to the basics of product and supplier evaluation. Given that reference fraud, slide-ware and smoke-and-mirrors features and functions is rampant in the BI space, we adopted a 5 step process that we use with our clients to prevent the very expensive mistakes we've seen in the industry.

Step 1 - Document Everything, with particular emphasis on key elements

We always collect all supplier presentations, marketing materials, brochures, emails and other information related to their proposed product/solution. We draw out the key attributes, those elements that are vitally important to the project and those that influence our purchase decision (Materially Significant Items - MSI). For each attribute, we document its delivery status as promised by the vendor (out-of-the-box, some customization, lots of customization, built-from-scratch).

Step 2 - Confirm Everything in Writing

We review all the documentation we've collected and the MSI list with the supplier to verify the claims and promises made by the supplier. At the end of the review, we ask the supplier to confirm our understanding in writing.

Step 3, 4 and 5 - Verify, Verify, Verify

Step 3 verification calls for proof by example. If a supplier says that a given feature or function exists, let them demonstrate that capability, preferably by using the customer's own data.

Step 4 verification calls for proof by reference. For many complex features and functions, a demonstration may not be possible. In such cases, a detailed review of the MSI list with a supplier reference may help. However, the review should be as complete as possible, analyzing all required features and functions, with particular emphasis on the level of effort necessary to customize the system.

Step 5 verification calls for proof by contractual agreement. We recommend asking the supplier to include the entire MSI list in an addendum that is clearly labeled "Supplier Representations that were Materially Significant in our purchase decision".

+1 631-468-4000
email: Info@AperioCI.com
www.AperioCI.com