

LAUNCHING A DATA WAREHOUSE PROJECT? SOME LESSONS LEARNED...

Many organizations are embarking on Data Warehouse projects. Why? Data Warehouses hold the promise of new, powerful analytics to help better understand your clients and your business.

Data Warehouses represent an organization's initial foray into business intelligence (BI), utilizing tools such as those from Cognos, Microsoft, IBM and others. Data Warehouses are intended to free transactional systems from analytics. They also facilitate consolidation and integration of data from multiple internal or external data sources, thus generating new understanding from the rich data relationships made possible.

Recently, we have been working with a consortium of four United Ways (Calgary; Lower Mainland, BC; Winnipeg; and Greater Toronto), who have together taken a leadership role in this area within the charitable organization sector, to develop and implement a federated data warehouse.

Here are a few insights from our experience to help you through a Data Warehouse project, whether you are considering launching one or have already begun development:

Many non-profit organizations are starting to see the value in Data Warehouse and business intelligence initiatives.

Start small

It may be tempting to immediately tackle multiple business units, with a range of functionality and BI tools, but it is also quite challenging. There is a greater chance of success if the effort and deliverables are focused on one operation, initially with one or two main sources of data (of course, the broader organizational context should be kept in mind to allow for extension of the application later). This can then be expanded to multiple sources of data for the same operation.

Once the value and benefits have been validated, and there is a sufficient base of experience in the project team, the team can effectively move on to the next business unit.

Avoid the requirements quagmire

The typical requirements gathering process, when

applied to data warehouse projects, can become overwhelming.

While it is fundamentally important to meet with business units and users to understand their needs, attempting to establish data definitions, report specifications and other detailed requirements can be an exceedingly long exercise. This is especially difficult when the project is intended to serve many business units across an organization or several independent organizations operating as a consortium. Users' limited understanding of what is possible or desirable through a data warehouse or with BI only compounds the challenge. Instead, a phased approach to requirements will accelerate the entire project and keep users engaged.

The initial phase may well concentrate on the general business objectives and uses of data, combined with identification of the data sources. This could be limited to just one key, cooperative business unit. In subsequent phases, more detailed requirements may be gathered (while initial development is proceeding) in terms of data definitions, key performance indicators, or report or dashboard specifications.

Prepare for largely invisible development (at least initially)

We might call this the 'development iceberg'. Many information systems development projects can be modularized to deliver chunks of (vertical) functionality to users for testing and acceptance at reasonable intervals.

In contrast, there is much behind-the-scenes (horizontal) development work necessary to develop the data warehouse infrastructure before business units and users see any results. Much of the initial development - and it can be substantial - is hidden from users (the bulk of the iceberg, which is invisible and 'under the water'). Only once the foundation of loaders, staging area, data marts and reporting tools is ready, can reports and dashboards be developed and released to users for testing and acceptance (the small, visible part of the iceberg 'above the water').

Strong communications and planning will help minimize any stakeholder impatience for visible deliverables. We'll share more insights in a future issue. 



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