Establishing Roles and Responsibilities in a BI Implementation

Attention must be paid at the beginning of the project. Assembling the correct set of roles with the correct set of skills is a paramount step when executing a successful BI implementation.

Intro
BI implementation projects are best served by a cross functional team with resources from both the business and IT communities, as well as those who can straddle each (see “Hybrid roles” below). It is common for the same person to fill multiple roles on the team. Exact roles are defined and resources are chosen based on the project’s magnitude and scope, as well as the individual’s availability, capacity and experience. The following list is a complete set of roles needed to implement a full scale BI project.

We should stress that not every role discussed below is needed in every BI project. Decisions about which roles are needed in your particular project will be made after further engagement. In addition, some decisions about which specific roles are chosen and who best to fill them (your company or the provider of the BI services) are evident from the outset, while others will become evident in the first phases of the project – this is indicated where possible in the list below.
BUSINESS ROLES

BI Project Sponsor
Ideally an executive level individual who understands the importance of the BI project, has compelling business motivation and can help drive results. This person will be the project’s ultimate client and its strongest advocate. Not involved day to day, but providing oversight, direction and momentum.

Business Driver
When the sponsor is too far removed from the project team, a business driver is helpful. The driver typically becomes responsible for the less strategic BI responsibilities. This role is usually filled by a middle manager, but possessing the same characteristics as the sponsor.

Business Lead
Should be a well-respected person who is highly involved in the project – communicating with the project manager constantly. Sometimes the business driver fills this role.

Business Owners
Without business users, a BI project is an academic technical exercise. The business owner role needs to be filled by enthusiastic fans of the BI project who are also subject matter experts in their fields. Each set of business users from within the organization that will be using the BI tool (finance, operations, HR, etc.) should appoint a business owner. Business user involvement is critical and care should be taken to keep them involved from the very beginning of the project.
**Project Manager**
Our experience is that project managers are most effective when they come from the IT organization – technical skills being critical to understanding the level of effort and time demands of data warehousing tasks. Communication and PM skills are critical, as well as a comfort level around senior executives.

**Data Architect**
Responsible for designing the ETL process and building the structure (dimensional model) that the data will end up in after it goes through the ETL process. Also ties together the required technical functionality for the BI project. Multiple skills are needed: expertise in dimensional modeling is required, as well as a deep sensitivity to the requirements of the business. Also needed is expertise with ETL functions, e.g. SQL Server Integration Services, and experience in conducting ETL tasks. Hardware infrastructure and supporting software skills are also necessary.

**Database Administrator**
On call to provide general database support to the BI delivery team.

**Data Warehouse Developer**
Takes direction from the ETL architect and directly builds ETL functions. Expertise and experience in ETL are needed but that can vary depending on which ETL tool(s) are used.
**HYBRID ROLES**

(Might come from either IT or the business – they should be technical resources who understand the business, or business resources who understand technology)

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**Business Analyst**
Responsible for determining business needs and translating them into architectural, data and BI application requirements.

**Subject Matter Expert(s)**
A subject matter expert is someone who understands what the data means, how it is used and where data inconsistencies are lurking. Needs enough specific knowledge to define requirements, set success criteria and validate deliverables. Faulty data is often caused by breakdowns in process, so this person truly needs to understand people, process and methodology and how those things translate into data used for analysis. In some cases, this person can become the go-to resource for ad hoc analysis. The number of subject matter experts your implementation team needs will be determined by the number of user groups from within the organization that will be using the BI tool (finance, operations, HR, etc.).

**BI Application Designer**
Responsible for designing the initial reporting templates and dashboards in the front end applications. They need a combined enthusiasm for data visualization, user experience design and for reporting applications. Typically become the source for ongoing front end BI application support.

**Business lead**
Mid to senior level resource who understands both the business and the technical side well enough to communicate between the two, understand the issues of each and make decisions on various courses of action.

**Services Delivery Manager (BI Delivery Team)**
Has accountability for overall success of BI project. Staffs and manages vendor delivery team. Also manages communications with the organization – usually working with product sponsor and business drivers to do so. For more on the roles involved in a BI project and how they assist with overall data quality, download our white paper, “A New Twist on Data Governance from Jet Reports.”
For more on the roles involved in a BI project and how they assist with overall data quality, download our white paper “Eliminating BI Failure: 4 Steps to Avoid Improper Data Governance”

To learn more about establishing roles and responsibilities in a BI implementation visit us online today at: www.jetreports.com

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