

Business Intelligence Quick Start



Step 1 - Discovery

- What are the key decisions in your business?
- What data is critical for making these decisions?
- Review operational metrics, critical performance indicators, benchmarking
- Review your current use of Excel for reporting
- Review of other current reporting and systems used and their limitations



Step 2 – Prototype a Quick Win

- Grab some of your data
- Learn how to assemble a dashboard
- Create your prototype with 3- 5 dashboards for quick wins
- Review and test your dashboards



Step 3 – Technology Choices

- Review your BI technology options
- Extraction and storage of your data
- Data Access / Data Security / Dashboard Sharing
- Resources/skills/ timescale required for different options



Step 4 – Create a Road Map

- Which staff/suppliers/customers/IT providers need to be involved?
- What are the critical business decisions they make?
- What are the systems you want to connect to?
- What frequency of data refreshing is required?



Step 5 – Just Do It!

- You are on the journey to becoming a data driven business
- Keep reviewing and modifying as you see more potential