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9 Fatal Flaws to a Microsoft Dynamics Business Intelligence Project

Implementing a business intelligence solution can seem like an arduous, overwhelming undertaking.

Based on our experience here at Jet Reports, of implementing business intelligence at over 1,000 companies, we were able to identify and summarize 9 distinct threats that try to creep into your business plans, but can be overcome so you have a significantly higher chance of success.

This ebook will take you through these 9 fatal flaws so you can understand them and learn how to completely avoid, or at least minimize, them.

Fatal Flaw #1:
If you build it they will come.

Starting a business intelligence project with this mindset implies that the initiative is sponsored by IT, and is led from a technical, data centric perspective.

The fundamental problem with this is that your business intelligence initiative is being led by IT – NOT the business.

THE SOLUTION: Make sure that the project team has significant representation from the business side of the house - from the very inception of planning, to the ongoing maintenance.

Ask yourself: 'Who is going to use the system?' (The answer is never: 'IT') Frankly, unless IT has a business case or a user story of their own that they want to insert here - they are not involved in the consumption of the business intelligence deliverable and should play only a narrow role in its development.

Want a complete list of the roles needed for a business intelligence project and their specific duties? [Click Here!](#)

Fatal Flaw #2:
Your culture of Excel.

Excel – we all love it. It's a fantastic reporting tool. It's also the most used "database" in the world. You know the drill, because admit it – you've done it: extract data from an internal system, load into Excel and manipulate the numbers.

The danger here is obvious – each and every person who does this is going to have a different frame of reference. They have different ways of combining numbers into metrics. They might even have different agendas. In the end, you end up with no data integrity whatsoever. That equals one thing – RISK to the business. Risk that comes from making expensive decisions on faulty information.

THE SOLUTION: The mechanical solution is to build a data warehouse. This will be the place where everybody has come together and agreed on which data you are going to use to manage your business, how that data is going to be combined, which methods you are going to use to calculate things like gross profit and net income – even when you get that data in Excel.

The non-mechanical way to do it is to put a business sponsor on the team who believes in a transparent, fact based approach to management – and who has the clout to cut through cultural barriers and create change.

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Fatal Flaw #3:

Data quality issues.

The problems that cause data quality concerns are ubiquitous and the impact on business intelligence is significant — people won't use BI applications that are founded on irrelevant, incomplete or questionable data.

THE SOLUTION: Establish a process or set of automated controls to identify bad data and block it from entering the data warehouse or business intelligence environment.

Interestingly, a business intelligence environment in and of itself can solve this problem. Nothing will highlight data quality issues like seeing them pop up in a dashboard, and that will give you a solid clue as to how to chase them down.

Want more on data quality? Download our white paper:

▶ **Eliminating BI Failure: 4 Steps to Avoid Improper Data Governance.**

Fatal Flaw #4:
There are way too many options out there.

If you type 'BI Solutions' into Google, go to any related trade show or listen to too many sales guys talk about BI – you will get confused. There are a lot of "answers" out there. How do you know which one is right for you?

THE SOLUTION: The way to fix this is to NOT put the cart before the horse. First evaluate your needs: from a business perspective, from a people perspective and from a technology perspective. Then let that exercise inform the way you go out and search for solutions – and solution providers.

 ▶ **Not sure what questions to ask a potential BI provider? [Review this guide!](#)**
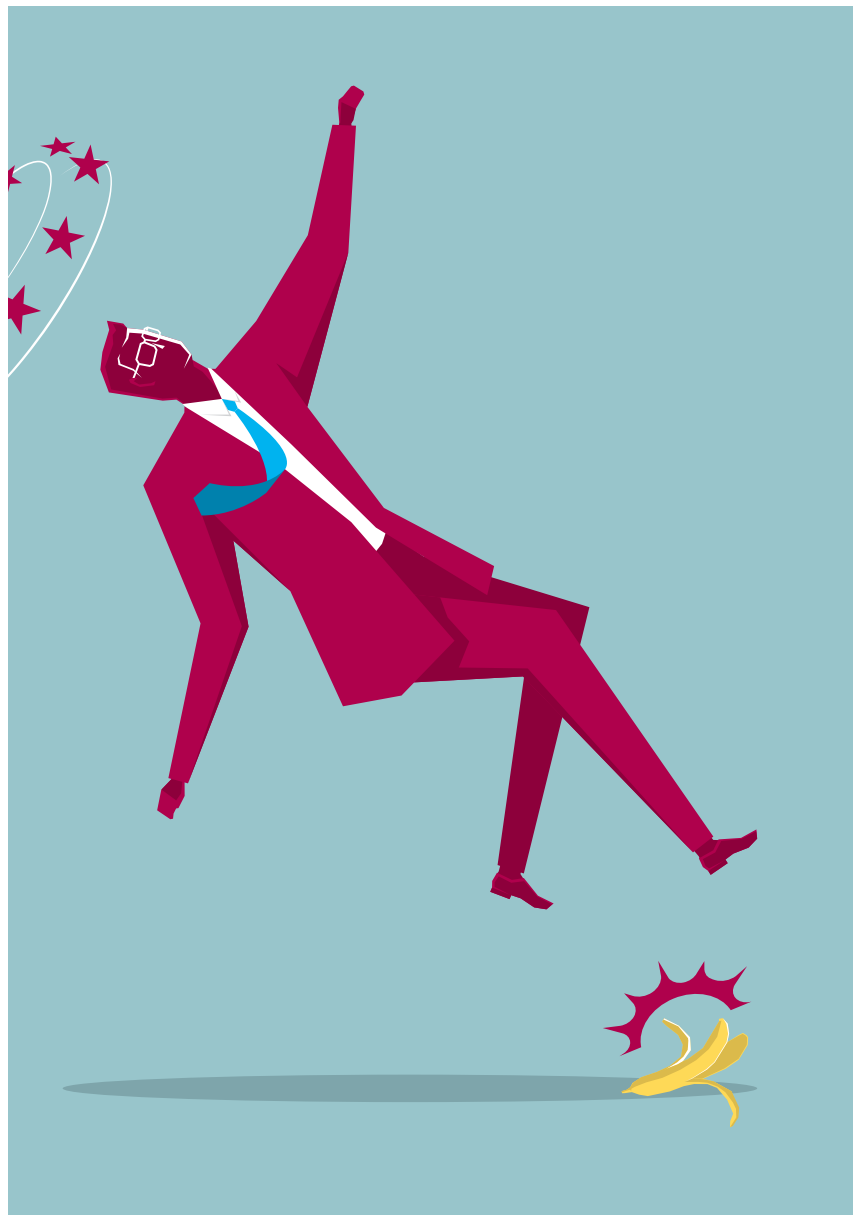
Fatal Flaw #5:

Let's just use our current IT partner to do this.

BI is different from other projects. There really is a little alchemy involved because you are dealing with human beings, their processes and the shifting sands of the business world all mixed together. You can't rely on a company that dabbles in BI projects to make you successful.

THE SOLUTION: You need a specialist – find a firm that is dedicated to building BI environments.

Once you have determined that they have the technical skills and track record to make you successful, don't be shy about evaluating them on 'fit', 'desire' and 'commitment'. Those things are harder to assess, but BI projects tend to go on for a while, so you will be working with these folks for a good period of time – mistakes get costly in that scenario.
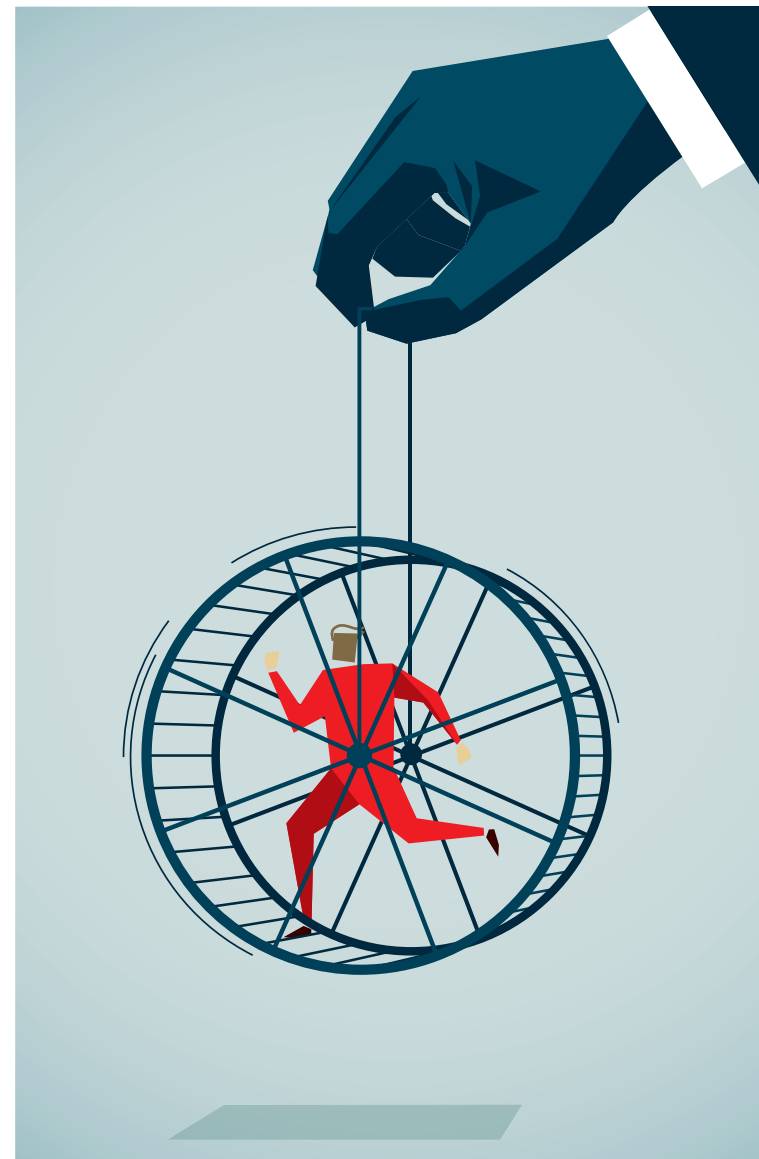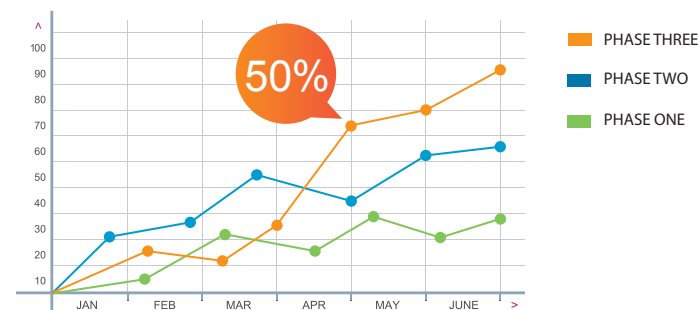
Fatal Flaw #6:
Finally it's perfect.

A hard truth about BI is that a BI project is never really done.

YES – it can go into a low cost maintenance mode, but your business is never going to stop changing. And since BI is meant to model your business – it has to keep changing too.

Even if the business didn't change, the user will. A Gartner stat: companies can expect their BI project to change by 35% to 50% in the first year after implementation, just due to user feedback.

THE SOLUTION: Manage expectations. Let everybody know how it's going to work. Plan for it. Schedule deliverables against it. Budget for it. Success in BI is a moving target over time.

Fatal Flaw #7:
Just give me a dashboard. Now!

From the outside – even from the inside sometimes – it's hard to understand all the moving parts that need to work together to surface your data. It just doesn't seem like it should be that hard to produce the numbers that people need to do their job.

THE SOLUTION: Again, don't be afraid to set proper expectations on time frames. It's also about being willing to spend the time and money to tolerate the risk of a real BI project.

And a word about pre-built reports, ready for you to use out of the box. If you want dashboards and reports – we can hook our Jet Reports solution up to your internal systems and, no lie, give you pre-built dashboards and reports, from your data, in a couple of hours.

But are those really going to be the only dashboards and reports you ever need? Do they reflect all your business needs? Do they use data from your other systems? Do they have the industry specific KPI's that you need? Do they closely model the way your people need to see your data?

That stuff is really unique to each company and it's important to look at how the solution you are considering accommodates this.

Fatal Flaw #8:

Why is my gross profit figure different from yours?

Everybody has been to that meeting where two finance people show up and, guess what, they have slightly different numbers. The first fifteen minutes is spent arguing about who is right. It's a big time waste and it destroys trust – in the numbers and in each other.

THE SOLUTION: Decide on your company's "version of the truth" and build your data warehouse based on that foundation. At Jet, we always start talking about this concept one step before the data warehouse.

Questions your implementation team should be thinking about:

► How do we want our date hierarchies structured?
► What do we mean by 'sales'?
► How do we segment our product lines for reporting?

'Get into a room, work out your plan, build your spreadsheets, but don't spend TOO much time on it.'

Jack Welch on Strategy.

Fatal Flaw #9:
Strategy? That sounds like overkill…

This could be the biggest flaw of all – failing to devise, and then document, the BI strategy.

BI can be something that really "turns the light on" in your company. Imagine everybody drawing on the same pool of validated and trusted numbers. Everybody focused on the same numerical targets and working with the same KPI's to drive action to improve processes.

It's the power of data, but it doesn't happen by itself. It certainly doesn't happen simply because you installed a piece of software.

THE SOLUTION: Create a strategy document. This sounds hard and laborious, but it doesn't have to be.

No plan survives contact with the enemy, things are going to change. Think of your strategy document as a roadmap. It should be a plan, a reference and a guide. If you make small adjustments along the way, it implies health and growth.

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Get Accurate Reports at Your Fingertips

Now that you know what to avoid in your next BI project, take a break and learn how you can simplify and speed up your reporting processes in the interim!

In our Top 10 Best Practices to Dynamics Reporting, we explore best practices gathered from years of experience to help you improve report accuracy, automate reporting tasks, and cut costs.

Whether you're a spreadsheet expert or new to the reporting world, download this exclusive white paper for advice on how to:

- Make reports more interactive
- Increase report usability
- Tailor reports for your audience
- Prevent unwanted spreadsheet errors

GO TO TOP 10 REPORTING BEST PRACTICES

See How Building Microsoft Dynamics Reports Can Be Easy.

From real-time financial reporting to complete visibility from data warehousing and business intelligence, Jet Report's flexible, easy-to-use products have everything you need to deliver fast, accurate reports.

See for yourself why 11,300 customers from 94 countries trust Jet Reports to manage their Microsoft Dynamics reporting.

WATCH DEMO

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