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ENABLE OUTCOME DRIVEN SELF-SERVICE BUSINESS INTELLIGENCE

Actionable insights are needed across the commercial ecosystem, and enabling integrated and real-time insights is essential to drive business decisions, aided with intuitive visualization. In today's fast-paced environment, the winners are those able to leverage business intelligence (BI) to make smarter decisions, faster than the competition.

However, in too many organizations, decisions are still based on a legacy system, rather than BI. It is due to the organizations' inability to keep up with the demand for new information and analytics. One of the most effective ways to satisfy this demand is to set up a modern self-service BI (SSBI) environment.

BI is an essential tool for understanding every aspect of an organization and for making better decisions. As the industry is evolving and critical decision are being made at every level, employees in an organization, from business users to data scientists, requires access to accurate and meaningful insight.

The insight once reserved for those on a need-to-know basis should now be available to all who need it in the form of SSBI. In this new world, everyone can be a decision-maker.

SSBI presents an environment where business users can access and create BI content themselves without reliance on IT. It extends the scope and reaches of BI applications to address a much wider range of business challenges and needs. At the same time, this extension supports the need for a personalized and collaborative decision-making environment.

Business users become more self-sufficient with a BI environment that is more usable and consumable. And it is these two themes, usability, and consumable, that play crucial roles in a fully functioning SSBI environment.

To be successful, this needs to be about much more than granting BI access to everyone on the business team. Before opening information access to the masses, it is important to consider some important steps to ensure

structure, control, and governance, and ultimately drive the best outcomes for your SSBI initiatives.



Over the past decade we have worked with over 100 life sciences companies in the commercial insight and operations space, helping them accelerate their journey from data to insights to operational impact. Based on these engagements and our learnings, we have created this strategic 5 step guide on how to enable outcome-driven SSBI.

We believe that for any successful SSBI initiative, the following steps should be considered:

- Step 1: Take time to evaluate a BI tool that is right for your organization
- Step 2: Carefully consider your approach to content creation, management, access, and distribution
- Step 3: Understand your users and their accessibility
- Step 4: Establish strong process governance
- Step 5: Start small and scale-out with success

STEP 1:

TAKE TIME TO EVALUATE A BI TOOL THAT IS RIGHT FOR YOUR ORGANIZATION

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Selecting a BI tool that is right for your organization is critical to the success of your SSBI initiative. There are so many tools available on the market today with a wide range of features and capabilities. But you must focus in on what is important to your organization, keeping in mind the future.

This evaluation process should start with gathering and prioritizing your various SSBI requirements, as well as determining the business use cases you need to support. Non-functional requirements should not be overlooked, as the visualization and accessibility of the tool are critical to user adoption.

Although industry analyst product reviews can be a good source of introductory research, particularly if you aren't familiar with the overall market, these reviews are often oriented towards highlighting the tool with the most features. You should instead select the BI tool that is the best fit for your use cases, is within your budget, and can be comfortably implemented with the resources and skills you have available. Further, it should have the capability to realize the full potential of data insight while optimizing cost.



“Not all BI tools are the same. It was important for us to consider what we needed to be successful and not get blindsided by all the fancy stuff!

Head of Commercial IT, Top 10 Global Pharma

To simplify this process, you should consider classifying the features and functions into must-haves, nice-to-haves, and will-not-use:

- **Must-haves:** This classification should be unambiguous. In other words, if the product doesn't have this feature, it should be eliminated from further consideration.
- **Nice-to-haves:** Although nice-to-have features are not required, they are often the differentiators in selecting a tool.
- **Will-not-use:** Many BI tools have a laundry list of features that your company may never use. Isolate this upfront and do not waste valuable time reviewing these aspects during the evaluation process.

Make sure you have your eyes open when evaluating product features. Although a vendor may state that they have a feature that meets your requirement, be very clear in asking how this feature will be delivered. For example, are any of the following required:

- Custom coding?
- The purchase of an add-on product from a third party?
- A specific product edition, such as an enterprise versus a basic edition?

Some of these conditions may require additional implementation time and expense. To ensure objective evaluation and to avoid any surprises, you should determine how to identify these and factor the additional time and expense into your comparison.

CAREFULLY CONSIDER YOUR APPROACH TO CONTENT CREATION, MANAGEMENT, ACCESS AND DISTRIBUTION

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Your BI content sits at the heart of your SSBI implementation. The creation, management, access, and distribution of it is very important, and the choices around this need to be made carefully and in consideration of your key business use cases.

From our experience, the following points outline the key choices that you must consider to better control how content is created, managed, and accessed:

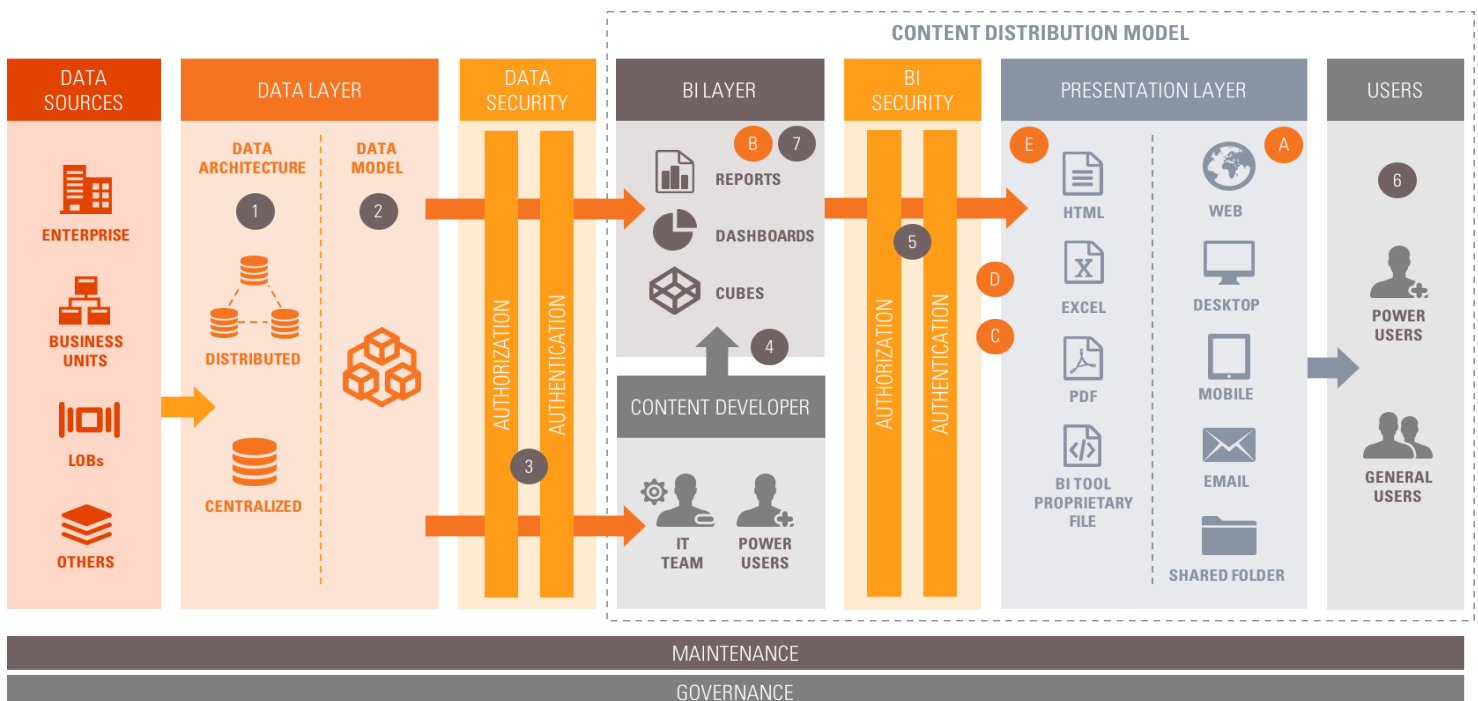
1. Data Architecture: Centralized or distributed?
2. Data Model Design: Cater to one or multiple business units?
3. Data Security: Same data access, group/role, or user-based?
4. Report Rationalization: Yes or No?
5. BI Security: Access to all content, group/role, or user-based?
6. User Types: Power user or general user?
7. Data Access Points: Reports/dashboards, cubes, or DB?

It is also very important to consider the choices related to content distribution, across the following five dimensions:

- A. Mode of Access: Web, desktop client, mobile, email, or shared folder?
- B. Content-Type: Cube, report, or dashboard?
- C. Scheduling: Scheduled or unscheduled/ad-hoc?
- D. Delivery Mechanism: Pull or push?
- E. Output Type: HTML, PDF, Excel, or BI tool proprietary formats?

Diagram below highlights all key touchpoints in the SSBI environment that need to be considered.

Once these decisions have been made, it should be communicated to all stakeholders and business users alike, so that everyone has the same set of expectations from the SSBI platform



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One of the most important steps to take when introducing SSBI into your organization is to identify the target audience that you will enable and divide them into common user groups.

A set of comprehensive discovery sessions should be carried out with the actual users of the SSBI tool to understand their overall use cases and BI needs in detail. Important questions need to be answered because technology is changing the way we are using BI applications.

Most business users are satisfied with a set of standardized reports and dashboards, and only a select few require the need to perform ad-hoc analysis and true data discovery. It is important to identify these users and group them into general and power user categories.

Once the grouping of users is complete, the next exercise is to define the role-based access that should be granted across both the centralized and distributed business teams.



STEP 3: UNDERSTAND YOUR USERS AND THEIR ACCESSIBILITY

“ It is important to put yourself in the shoes of real users and not assume that everyone has the same analytical skillset as you.

Training Manager, Top 20 Global Pharma ”

In many cases, we find that the centralized tasks sit with the IT team and governance board, whereas the distributed tasks sit with the business units, LOBs, and departments.

The following list is a key set of tasks and activities that need to be considered when making these access control decisions:

- Server administration
- Content governance
- Security management
- Deployment of BI content to the production environment
- BI model/schema development
- Public objects development (if applicable)
- Report/dashboard development
- Cube development

While defining the access control around these key tasks and activities, it is equally important to assign RACI values and determine who will be Responsible, Accountable, Contributing, and Informed.

With the RACI in place, defining who will have read or write privileges across areas such as configuration management, access control, reports, dashboards, and cubes is an important next step

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While an SSBI tool opens insight into the business community with more access, agility, and flexibility, it is important not to overlook the governance needed to ensure scalable, long-term success.

Sending a set of reports to a business user is one thing, but scaling the content creation, management, access, and distribution to an entire organization is at another level.

The lack of governance can cause business teams to lose their trust and confidence in the BI content. This, in turn, leads to poor user adoption and, eventually, failure of the entire SSBI initiative. We can, therefore, not stress enough the importance of establishing a strong governance framework.

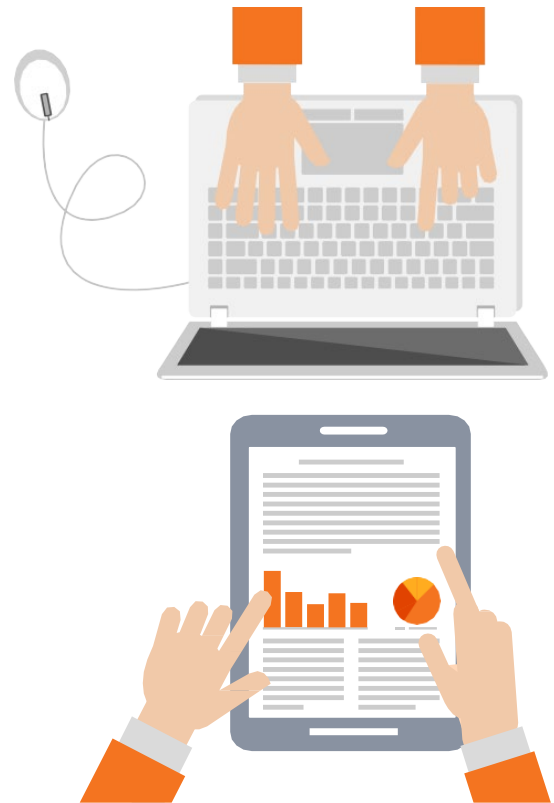
A scalable framework helps in defining and building the overall governance structure. From our experience, 5 key areas should be considered when setting up your governance framework:

1. **Foundation:** What commitment, budget, and time allocation do you require from senior management?
2. **People:** Who will be part of the governance team?
3. **Technology:** Are the tools adhering to organizational enterprise architecture standards?
4. **Process:** Which processes need to be defined for effective user and security management, end-user training, tool usage guidelines, and best practices, content deployment, tool migration, data catalog, and usage policies, etc.?
5. **Accountability:** How to showcase the accountability of various teams to governance leadership?

STEP 4: ESTABLISH STRONG PROCESS GOVERNANCE

“Opening access to business intelligence is the easy part; however, doing it in a controlled and scalable way is where the experience comes in.

Commercial IT Manager, Top 5 European Pharma”



A well-defined model should be put in place to track and monitor what is working and where consolidation can be made. From our experience, we recommend the following four steps:

1. **Configure:** Prepare your initial environment.
2. **Monitor:** Observe and track usage across content.
3. **Identify:** Highlight opportunities for consolidation.
4. **Merge:** Agree and consolidate BI content.

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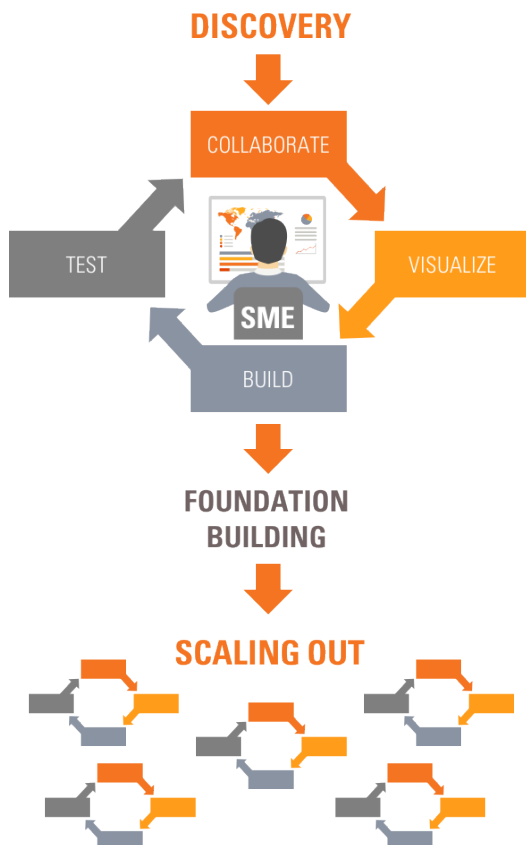
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STEP 5: START SMALL AND SCALE-OUT WITH SUCCESS

Experience has shown that it is very difficult to get everything right the first time around. With so many dimensions to consider, a big bang approach is too risky.

We recommend an agile methodology of scaling out to ensure that the organization has bought into the new SSBI initiative, and you can learn from any mistakes. Our agile execution starts with careful requirements gathering, iterative prototyping, testing, and deployment.

Historically, any new BI initiatives that we have seen follow a big bang or single waterfall approach fail because the organization attempts to deliver enterprise capabilities and functionality without a solid foundation in place. They take on much more scope than they can deliver. It's the classic "over promise and under deliver."



“Crawl, walk, run. Start small, demonstrate value, and then look to scale.”

Head of Field Reporting, Top 10 Global Pharma

When looking at new SSBI initiatives, it is essential to kick off with a modest and achievable start, envisioning enterprise capabilities and functionality, and gradually evolving by delivering capabilities through multiple iterations and phases. Ideally, prioritized to meet the most pressing business needs, even as that business needs change.

The benefit of this approach is that success is realized very quickly and on an incremental basis. It also provides a foundation and structure that promotes economies of scale as future phases take shape. And, perhaps most importantly, it builds momentum for the SSBI initiative and executive support as tangible business value is realized.

Conclusion

From our extensive experience across multiple global cloud BI projects, we truly believe that the steps outlined in this guide will make the difference in the success of your own BI initiatives. Once in place, SSBI can add significant value to the decision-making capabilities of your organization and put insight into the hands of every business user.

Axtria is a global software and data analytics provider to the Life Sciences industry. We combine strong process knowledge of life sciences commercial operations, data analytics, and software. With consulting and cloud-based solutions, we enable life science companies with the digital transformation of their data to insights to operations journey. The result is a future-ready outlook with improvement in sales and marketing effectiveness via data-driven decision making, increase in efficiency, and organization agility.

We welcome an opportunity to demonstrate how Axtria can enable SSBI for your organization using the strategic steps outlined in this guide.



This 5 Step Guide is a part of AIM (Axtria Intel Monitor), which is an engaging series of thought leadership that showcases Axtria’s intelligence on therapy areas, industries and topics relevant to the life sciences.

Over the past decade, we have worked with over 75 clients in the life sciences industry and interacted with their analytics, commercial operations, and commercial IT leaders. Based on these engagements and our learnings, we have created a series of strategic 5 step guides on how to drive commercial excellence.

Contact Us

-  +1-877-9AXTRIA
-  insights@axtria.com
-  www.axtria.com
-  twitter.com/Axtria
-  facebook.com/AxtriaInc/
-  linkedin.com/company/axtria/

Founded in 2010, Axtria is a global provider of cloud software and data analytics to the life sciences industry. We combine industry knowledge, business process, and technology to help our clients make better data-driven decisions.

Axtria’s cloud-based platforms, Axtria DataMAx™, Axtria InsightsMAx™, Axtria SalesIQ™, and Axtria CustomerIQ™ enable customers to efficiently manage data, leverage data science to deliver insights for sales and marketing planning, and manage end-to-end commercial operations. We help customers in the complete journey from Data to Insights to Operations.