

As a BI insider, you know that your program is valuable, but how do you safeguard it from being cut when the budget gets tight? How do you show everyone the value of investing \$10 million to organize all your data? The answer is a strong internal marketing plan that will demonstrate the value to your stakeholders and make them as dedicated to the program as you are.

I have seen good programs lose funding because they can't, or haven't consistently, communicated the value proposition of the program. That's what a marketing plan will do. A marketing plan's function is to organize ideas and plan out all critical steps. A good marketing plan will have six main sections:

1. Alignment with the Corporate Mission
2. Program Objective
3. Communication Plan
4. Competitive Landscape
5. Marketing Activities
6. Project Plan

ALIGNING WITH YOUR CORPORATE MISSION

First of all, you must align your program with the corporate mission. In fact, the corporate mission should inform your project. After all, the BI program was created by the organization to deliver value back to the organization. If your program doesn't represent the organization as a whole then you are handicapped from the start. If you paid someone for a service and didn't receive the service you would likely not go back to that person. Your organization is paying for this service, so make sure that they get what they are paying for.

All of your objectives should be aligned from the highest level (corporate mission to the lowest level (data warehouse content). The reverse is true too; as you release content into your data warehouse the business capabilities should align directly to a corporate mission. If your company has been focusing on releasing a new product to the market, so should your content. For example, if the product is a new car and your data warehouse has existing statistics on vehicle performance, then the next release should allow for additional data specific to customer satisfaction surveys, safety tests, and the like.

When you communicate about the release, make sure that the connection between the corporate strategy and your release is blatant. Start out by saying, "In support of our corporate strategy, the BI team has...."

PROGRAM OBJECTIVE

As we move from the corporate mission to the program objective we will see that each section is more refined and specific to the BI program than the previous section, much like a funnel (see Figure 1)



Figure 1

As with the mission statement, the program objective is an important communication tool. It should tell the reader who, what, and why. For the broader business and IT team working on an individual project, it's an important tool to understanding the program's overall objective.

COMMUNICATION PLAN

If you do nothing else, create the communication plan. While there is value in thinking through the other sections of the plan (to ensure alignment) the communication plan is the primary deliverable. I sometimes use communication plans as separate documents for other projects. For example, I have used a communication plan that is specific to an Enterprise Reporting application; I have also used one for a Data Stewardship program. Any time you will be consistently sending messages out to your customer base, you should create a communication plan for it. Most of the time they are incorporated into a marketing plan, but they can sometimes be a stand-alone deliverable.

This section helps ensure that your communications are consistent and have an appropriate frequency. Don't under-estimate how long communicating takes. While it seems like it would take no time to write an email and send it, you need to ensure that the message is the right one. Very smart people sometimes communicate to an audience in a way that completely loses the message. Have your copy edited by someone in your corporate communications group or your marketing team.

Know your audience, regardless of the content you are communicating about. Spend some time defining your audience in a more detailed way. In the Web world personas are utilized to help inform their development. Personas were created based on observation, customer surveys, focus groups, etc. They are often referred to as "use cases" or "role-based design."

You can start by creating personas based on a standard bell curve of pre-defined personas; such as executives, analysts, power users, etc (see Figure 2). Ideally, you would use personas to help target

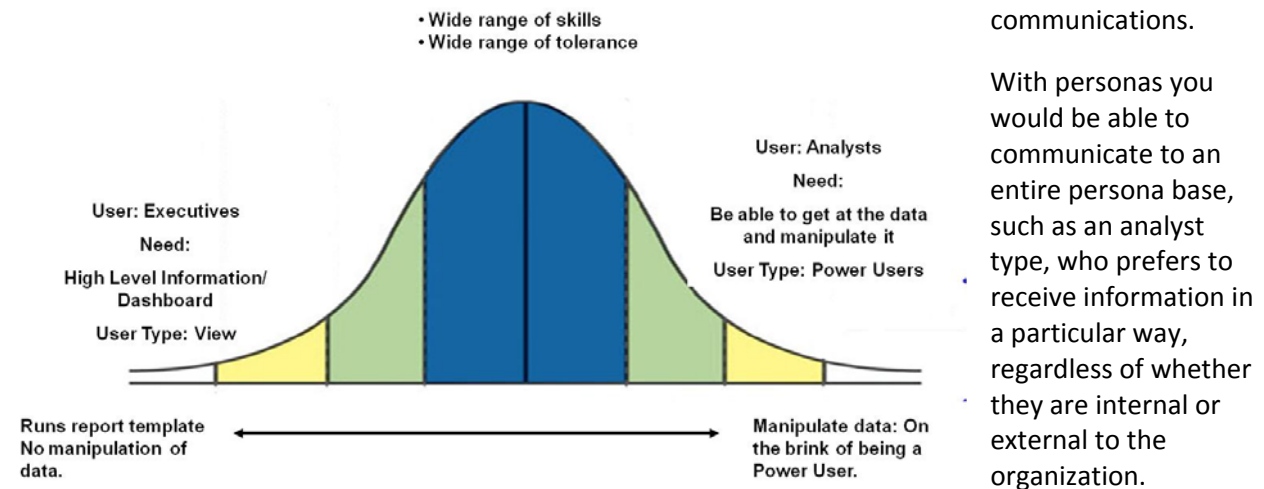


Figure 2. USER CONTINUUM

Obviously, you still need to be careful about how you communicate to an external audience. But knowing your audience at this level of specificity will only help target your communication efforts. If you can't create personas, or don't have time, then just know that you have a variety of people you are communicating to. Try to have varying levels of communications from bulleted lists to very specific explanations (such as release notes).

COMPETITIVE LANDSCAPE

Improving your competitive advantage is often a key deliverable of BI programs. If it isn't a deliverable for yours it's still a good exercise to review what your competition does in their BI programs. You may be able to adopt some ideas or, position yourself to make a competitive difference in the future. If you work in an industry that doesn't have traditional competitors such as government or non-profits, take this opportunity to write a section about what your industry is doing with BI overall. This can help validate investment decisions.

MARKETING ACTIVITIES

This is the central part of the marketing plan. These activities should vary greatly (formal training to informal emails). For example, you have an objective to educate the data stewards on the "The Basics of Data Modeling" you could bring in a trainer to complete that objective. You may also send out a bi-weekly email called "DM Design Tips." They both meet your objective of educating the data stewards on the basics of data modeling, in different approaches.

Include success parameters, even if a little vague. For example, you can list "moderate participation" for something like a BI Book Club. But you should be more specific regarding any activity that is tied to a budget. Use your marketing plan as a litmus test for your activities. If your planned marketing activity doesn't meet one of the program objectives, then you shouldn't do it. For example, if you have a program objective to expand knowledge about business intelligence best practices throughout the organization, your marketing activity should be aimed at education. If your marketing activity is a bake sale, then that does nothing for your education objective.

If you are interested in receiving the Marketing Plan template, contact Laura at lmadsen@lancetsoftware.com

PLAN THE WORK

Take all of the tasks and put them in a project plan. Time them so you don't have all of them happening at the same time, and allocate time to do them all (estimate the work and line up the resources). Some should repeat and others will be a one-time communication. Spread the work around. Even though the BI group is responsible for the communication, make sure you get as much help as reasonably possible. If you have a big project you could spend nearly 40 hours a week just communicating to your user base. Most people don't have that kind of time, so work the plan as much as possible.

WORK THE PLAN

Now that you have completed the marketing plan and written a project plan, you have to determine who is going to help deliver the content. If you work for a company with an internal marketing team, you are fortunate and your work is almost done. Regardless of who helps you, the BI team needs to take the lead on the communications, particularly if you are communicating to your customers. If you have a BICC then set up a BICC email box and make other people authors of emails. Otherwise, be prepared to allow others to communicate as much as they can. It will help you focus on the communications to the executives and customers. If you have others who will be sending out communications, take the time to either create a template or to train them. It's tempting to make the assumption that because someone has a lot of experience they know how to communicate to a user base. You know what they say about assuming? As the BI lead you are accountable for the communication, so emphasize your expectations about how to communicate.

Laura Madsen helps companies understand the value of their data. She has served as director of business intelligence at a pharmacy benefit management company, leading an enterprise-wide business intelligence project from pre-conception to execution. She has started or supported over a dozen companies with their BI Initiatives. She holds a graduate degree in Applied Research, with 10 years of experience in business intelligence. Her current role is Practice Leader at Lancet Software, a boutique BI firm.

THE GOOD, THE BAD & THE UGLY

Be prepared for negative feedback. Data warehousing projects are difficult to keep on the forefront without getting people too excited. If they get too excited they want everything yesterday, so when it takes you six months to deliver content, they get frustrated. (Meanwhile, the BI team feels that the six months was a miracle!) Be prepared for a bad release. Be prompt and forthright in your response. People can see through you if you are trying to spin the message. Here's a personal example:

We were releasing a Java-based applet on top of our enterprise reporting application so users could save their report parameters. It was functionality they had requested emphatically. It took us quite a while to solve for this technically. In the beginning we used focus groups and other feedback loops. But, when we got to developing we put our heads down and tried to get the applet released as quickly as possible. It still took a year. By the time we released the applet, users had become used to the 'old way' of doing things. To add insult to injury, the interface was not very user-intuitive because we were more concerned about functionality. In a colossal case of bad timing, I had left on maternity leave just a few weeks before, so a new person had to deal with the repercussions. The release was a disaster. When I returned, we held a user group meeting and I simply apologized. I made no excuses and requested that if the functionality was not what they wanted we would un-install it and start over. In the end we decided to focus on the GUI and improve some of the functionality, but users eventually came to like the applet. We were forthright and prepared to make a mid-course correction.

So as you look ahead to your next BI program, don't jeopardize its success by skipping over the marketing plan. If you take the time to plan and communicate, the added value of your program will be appreciated by the entire organization.

IMPORTANT POINTS TO REMEMBER

- Align your marketing plan with corporate mission
- Communicate, Communicate, Communicate
- Work the plan
- When something goes wrong be prepared for a mid-course correction