

Relations between Project Management, Business Intelligence and Negotiation

Not all projects are created equal, and the same can be said for project managers.

Let's start with the first statement. Managing a business intelligence (BI) project for negotiation is considerably different from managing a traditional software development project due to the melding of wide-ranging business requirements with various software and hardware technologies. In addition, traditional software development projects adhere to a development methodology that logically progresses in a serial manner until completion, while BI projects require an iterative approach that begins in development and continues through implementation as new information requirements are addressed and the business evolves. BI projects also require the project team to have greater interaction with a broader constituency, ranging from other IT professionals who are responsible for the information systems that capture or create data to business analysts and executives who need to access it to negotiate.

To be successful in the field of BI, a project team needs members with an understanding of and appreciation for the information needs of the user community as well as the technologies. In certain cases, this requires subject-matter-specific expertise about a business process or function, such as supply chain or finance. Of course, having in-depth knowledge of essential technologies such as data integration, dimensional modeling or enterprise reporting and analysis is a must as well. Leading a BI project to its successful implementation requires many skills and traits that range from common project management abilities to unique knowledge and experience.

The Characteristics

The people behind the projects are the fundamental drivers of success. They must possess a wide range of skills in order to be effective project managers. Over the years, I have worked on numerous BI projects in a variety of roles ranging from business analyst to technical architect and project manager. In addition, I have had the pleasure of working with several outstanding BI project managers such as Glenn Drayer, Denise LeGault, Josh Raysman and Damon Bowman as a project advisor or an engagement manager. I have also worked with a few BI project managers who were ineffective leaders or inexperienced with BI technologies; the names of the "guilty" are best left unsaid. Unfortunately, these projects floundered until a change in leadership was executed. My experiences with both successful and unsuccessful project managers has left a

lasting impression when it comes to deciding what approaches to take - or not - when leading a BI project.

From these collective experiences, I have distilled my appreciation and observations of those characteristics that distinguish outstanding BI project managers from their peers. This is not intended to be an all-inclusive list of the skills and characteristics for project managers, but rather to focus on those characteristics that differentiate outstanding BI project managers.

Knowledgeable

Beyond firmly understanding the principles of project management, a BI project manager must be knowledgeable about the business and technical aspects of the project. Outstanding BI project managers continuously stay informed of advancements in the field of BI.

Risk is posed when an individual who is not knowledgeable about BI technologies or the subject matter is in the leadership role. If a person cannot knowledgeably manage a team, the staffing situation contradicts the primary goal of achieving results. This is also unfair to the project team, which can suffer from a lack of guidance.

Outstanding BI project managers have an understanding of technical architectures and the differences between the corporate information factory and dimensional warehousing. They also have an understanding of the subject matter and the corresponding business processes and functions that will be addressed by the project. Their business and technical knowledge helps them advise and challenge their technical architects and business leads in order to formulate and design a solution that satisfies the information needs of the business community. In essence, they have the ability to provide guidance in any area of the project.

Lastly, an outstanding BI project manager recognizes what he or she knows - or doesn't. With this understanding, he or she seeks guidance and assistance from other individuals who can contribute to the success of the project and help to mitigate knowledge gaps involving business requirements or BI technology.

Experienced

Not much can compare to having practical experience as a project manager or working on a BI project. Being book smart or knowledgeable about project management or BI development methodologies is great from a theoretical perspective. However, when in the middle of the development phase of a BI project, having previous experience helps the project manager to identify, react to

and resolve items before they become issues. These can range from technical challenges such as creating a data model to satisfy business requirements, to changes in business requirements that arise because users have gained a better understanding of what you are trying to build for them and are now able to articulate their needs. Ideally, a project manager has served in various capacities and roles on previous BI initiatives.

In addition to practical experience working on BI projects, an effective project manager must manage the scope of the project and its budget. Scope creep is a common occurrence on a BI project. This requires project managers to actively monitor tasks, deliverables and each project team member's time and expenses. By actively managing these items, he or she can determine the impact of a change request, thereby mitigating project overruns and managing the project sponsors' expectations.

Leadership Skills

Not everyone possesses the leadership skills or qualities that are needed to manage a BI project. An outstanding project manager must be able to inspire people and garner respect, not just among the project team members, but also among the sponsors and representatives from the user community. This requires the project manager to manage the expectations of both his or her direct reports as well as his or her supervisors, which establishes rapport and helps to create accountability for everyone involved.

The project manager must build a team of individuals that possess different skills but complementary values. Developing a cross-functional team has its challenges because members have different backgrounds and come from different disciplines. This requires the project manager to unite members for the common good of the team and the success of the project.

The project manager must also be well versed in conflict management and the art of negotiation, because these skills come into play more often than expected. Yet oddly, many managers remain only lightly trained in these capacities, if at all.

Organizational Skills

As with all outstanding project managers, good BI project managers are very organized and adhere to the guiding principles of project management. This requires them to develop and submit for approval a formal project plan that encapsulates deliverables, tasks, timelines and budget.

Once the project plan has been approved, the project manager actively monitors the progress of the project as compared to plan. One way to communicate the status of the project is to hold weekly status meetings that include all project team members, the project sponsor and the project steering committee. By conducting these regularly scheduled meetings, all involved individuals are informed of progress made and outstanding issues.

Communication Skills

To be an effective leader, an individual also must be a great communicator. An outstanding BI project manager conveys his or her messages and ideas in an articulate manner that resonates with the target audience. This requires superb writing abilities and verbal communication skills. Imagine working for an individual who is a poor communicator. In addition to dealing with the frustration of not understanding what is expected, the lack of clear communication poses significant risk to the success of a BI project. Clear and concise communication is required in order to garner support for the solution by the user community.

The success of a BI project directly corresponds to the effective usage of the solution. If users do not understand how to use the solution or the benefits that it provides to them, why should they change their behavior and daily activities? Effective communication is essential to managing expectations, educating users and encouraging individuals to embrace the BI solution.

Personal Traits

From my perspective, there are a few personal traits that distinguish good project managers from outstanding ones. First, there is honesty and the desire to be forthright in communications. The outstanding project manager understands the balance between being brutally honest to reinforce a position on an issue and being tactful so as to not damage relationships with other individuals. Honesty fosters trust and respect from the project team and the sponsors.

Second, outstanding BI project managers are positive in their disposition. This is different from being an optimist. An optimist always hopes for the best despite the reality of the situation, and he or she may not appreciate or discover issues until it is too late. On the other hand, a positive disposition includes a healthy amount of skepticism and an understanding of the realities of the situation.

Third, outstanding BI project managers are very perceptive and can identify areas of concern before they become issues. While perception is influenced by experience, the ability to recognize and address

these items greatly reduces project risk and keeps the project moving forward.

What it Takes

Outstanding BI project managers possess numerous characteristics that are fostered from their educational background and continuous professional education, and are influenced from previous experiences. The common characteristics of an outstanding BI project manager are those traits that distinguish them from their peers. The outcome of a BI project rests with the project manager and his/her ability to navigate the political currents of the organization with the support of the project sponsor and steering committee while creating an information solution from disparate technologies and diverse business requirements.