information management

Become a More Effective BI Change Agent

By John Huffman and Todd Nash

My colleague John and I went out for dinner and a drink after work one day recently, and we got to talking about ghosts of bosses past who inspired us with their leadership and management skills.

Neither of us earned our management positions the old-fashioned way through a family inheritance (John and I both agree our career paths up the executive management ladder can be best described as "writing straight with crooked lines"), but we do chalk up our most successful work to positive lessons we learned by observing and modeling our executive styles after our most effective mentors and BI stakeholder client partners.

This conversation carried over into a strategy session with other BI management professionals the following morning. We wondered whether or not differing senior level management techniques within the BI industry could have a demonstrable impact on productivity, project outcomes and, ultimately, individual success or failure. During that meeting, we were able to identify a number of distinct, common leadership principles, or habits, if you will, of high-level executives who time and again achieve stellar results in their work.

A Path to Success — Start on the Right Foot

There are, in fact, quantifiable leadership principles executives can follow to make an individual's path to success much more assured. Successful BI leaders are those men and women who deliberately evolve solutions and establish leadership approaches, within a team setting, to most effectively promote and enable change to support business analytical needs.

First and foremost, in order to accomplish these objectives, the most effective BI leaders set up priorities and goals with their team, focusing on the following six key components of business intelligence management:

- **Vision and Strategy:** mission statement, driving principles and alignment to corporate strategy, roadmap (1, 3, 5 year)

- **Governance:** portfolio/project, data, and architectural governance
- **Organization:** center of excellence, capabilities, enablement, process and procedures
- **Business Stakeholders:** goals, business justification, value measurement, metrics, adoption
- **Data Assets:** data architecture, data movement and integration, data quality and compliance
- **Technical Architecture:** software, servers (infrastructure), storage, network, scalability/extensibility

All of these components will compete for an individual's time. We've witnessed the most insightful BI executives among us develop what could be called a highly intuitive leadership sensibility, focusing on the best means and methods for everyone to effectively do their jobs.

Traits and Attributes of Successful BI Change Agents

Many of the leadership attributes we classified would cross over most professional service industry lines, by virtue of basic

common sense and the human factor we all bring to our work. Some leaders we've worked with come by these skills naturally; others who have more reticent personalities, for example, may have to consciously work at developing these capabilities.

Managing Executive Stakeholders

The best BI executives remember that the goal is to effectively partner with other executive stakeholders to ensure a common understanding of key data and analytical business problems. The most important virtue toward this end is an ability to listen. In our experience, client stakeholders generally spot insincerity a mile away, recognizing whether you're genuinely motivated to understand their needs or simply a hammer looking for the proverbial nail.

We've found that successful BI executives also position themselves as executive peers, recognizing that engaging executive stakeholders on this level ensures parity and mutual respect. Good BI leaders also ensure they interact at the appropriate level based on their audience, and foster executive relationships to build political capital for future benefit. We've learned that building trusted adviser relationships invariably helps circumvent or expedite resolution of future challenges.

Really effective BI executives understand that stakeholders appreciate the most practical solution that offers the best return on their investment, and thus work in concert with their teams to build solutions that are commensurate with business value. These executives also understand that business process transformation initiatives will almost always encounter unexpected events. When these occur, they prepare and bring solutions to the table, not just problems. They don't try to deflect or dodge accountability; instead they own and resolve these issues within a transparent setting.

Managing your Team

During our meeting, many of us recalled projects that, in retrospect, seemed to be especially rewarding experiences. In each of these cases, we identified one generous common trait among the executives leading the work: They checked their egos at the door. They intentionally surrounded themselves with like-minded, team-oriented people with the right skill sets and experience. Leaders who possess this attribute understand that they are hiring people and paying them well for their expertise, and don't feel they have to know more than their team members or be the expert on every subject. They know it's more critical that their teams view them as generalists who are focused on how all the pieces ultimately need to fit together to support business objectives.

If you don't want the title of a data modeler, don't take over the data modeler's work. Many of us could recall past instances of severe micromanagement syndrome on the part of a manager/executive. Effective leaders understand that skills-based delegation can be essential to successful results. Assigning appropriate tasks to qualified people gives your team the trust, space, time and resources to complete them. This will help ensure you'll have the time to concentrate on the right priorities.

Staying above the fray is also an important aspect of delegation. Serve only as a point of escalation to resolve issues or obstacles. Share successes and ensure that team members get the appropriate recognition. This allows your team to stay focused and demonstrates your commitment and role in making everyone successful. In tandem with these concepts, avoid making yourself more visible by putting down others. We've noticed that high-level professionals who are self-confident and secure in their positions don't need to engage in negative bullying behavior— it almost always backfires, and it's just not nice.

Leveraging Professional Partners

When working with professional service partners, it's important to rely on these partners to deliver their expertise for which they were contracted. We've found that wasting political capital managing across tech companies also tends to waste valuable time and resources.

Ask for help when you need it. Build strategic, long-term relationships that complement your internal team and resources to achieve overall objectives. Transactional interactions are often suboptimal and can even increase costs in the long run, so make sure both parties understand what will make each successful. This type of interaction builds trust and loyalty, as well as an incentive for partners to invest in a collaborative relationship rather than just looking at what each can get out of it.

Similar to managing your own team, delegate the right projects or tasks and give your consultant partners the trust, space, time and resources to complete them. Hold your consultant partners accountable for their work; after all, this is what you're paying them for. Also, focus on your internal customers to minimize potential obstacles to success. Become engaged at the right time and at the proper level versus spending too much time reviewing individual resumes or deep diving into day-to-day operational activities.

Pulling It All Together

In the business intelligence arena, a truly skilled BI leader is able to foster professional relationships and build an effective team with appropriate decision support architecture,

driving innovation and change that will effectively support the business community and corporate strategy. As part of this mission, he or she must also balance software, process standards and discipline with flexibility to adjust to changing market and technology trends.

On a broader level, most of us know when we're working with a strong, transformational leader. They seem to instinctively know how to motivate others, step in when it's necessary, and leave well enough alone when appropriate. These people also have the ability to inject a much-needed human factor to their working relationships, respecting and valuing everyone's contribution toward common goals.

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