

One-on-One Webcast Series

“How to Empower Users While Maintaining Standards”

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Guest: Kevin Sonsky, Director of BI, Citrix Systems

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SUMMARY

Prior to 2005, Citrix, like many organizations, did not have an enterprise strategy for business intelligence (BI). Each department created its own reports directly from operational systems. Not surprisingly, none of the data tied together, which made running the business difficult.

In 2005, Kevin Sonsky was appointed director of BI at Citrix to bring some order to the data chaos. His charter was to define the vision, strategy, and roadmap for the use of BI throughout Citrix as well as help establish standard definitions for cross-functional data elements.

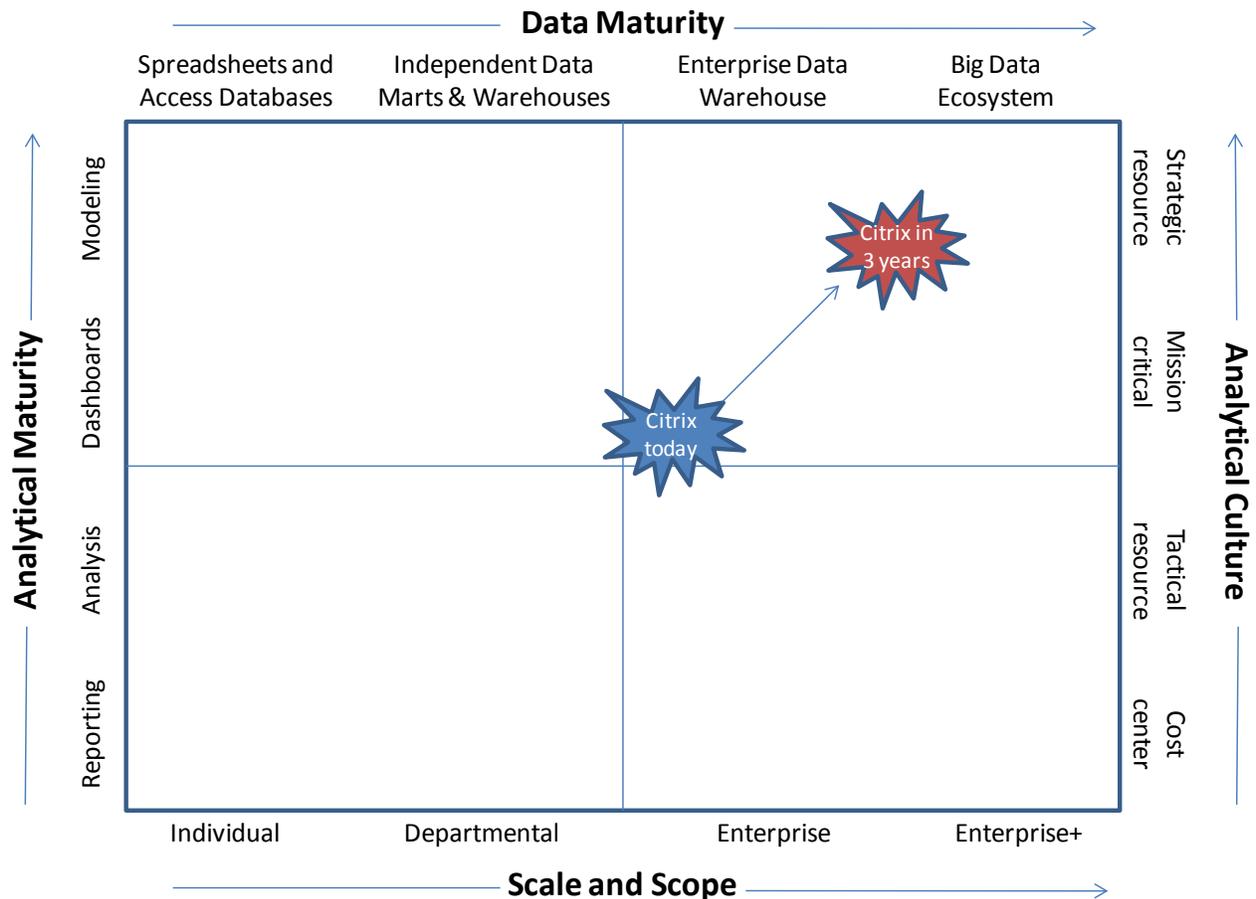
One unique thing about Sonsky's team is that it sits in the finance department, not IT. As a business-oriented BI (BOBI) team, Sonsky's team serves as an intermediary between the business units and the IT department, which builds most of the data structures used by the departments. Sonsky's team provides support, direction, and guidance to departmental report developers and works closely with the IT team to coordinate BI development throughout the company. In particular, the IT team reaches out to Sonsky's BI team to review the reporting implications of any new project. "BI is no longer an after-thought in IT projects," says Sonsky.

One of the goals of the corporate BI team is to empower departments and users to do more reporting and analysis on their own without IT assistance. Ironically, Sonsky says business users require a lot of support before they can use self-service BI tools effectively. "You have to spend time with them, help them build some reports, and make yourself available for follow up questions," says Sonsky.

Although Citrix encourages departments to leverage existing BI tools, they are free to select whatever BI tools they want as long as they adhere to corporate information standards. "In this era of consumerization, we focus on delivering accurate, consistent information and don't worry as much about the tools," says Sonsky.

During the past seven years, Citrix has vastly upgraded its BI capabilities, but Sonsky still sees room for improvement. During the next three years, he'd like to see Citrix move from a report-centric culture to an analytical one that creates predictive models and forecasts. Sonsky also wants to do a better job documenting and publishing information standards so users can more easily access them.

Analytical Maturity Model - Citrix Self-Evaluation



Using the BI Leadership Forum's Analytical Maturity Model, Citrix expects to improve the maturity of its analytical culture, capabilities, and data in the next three years.

Key Takeaways

Based on the lessons learned from Citrix's BI journey, here are recommendations to improve your BI and analytical competency:

1. **Organizational structure.** Create a business-oriented BI (BOBI) team that sits outside IT but works closely with your business units and IT department to coordinate BI development across the company.
2. **Information standards.** A primary job of a BOBI team is to generate consensus on the definition of shared data elements, assign owners for each element, and ensure the standards are applied across the company.
3. **Data governance.** Rather than use a top-down, heavy-handed approach, the BOBI team should create and apply standards on a project-by-project basis or when required to meet a corporate strategy.
4. **Tools standards.** As long as business units adhere to information standards, they should be free to choose and use any BI tool they need. The increase in usage and agility often justifies the increase in license and support costs.
5. **Self service.** Ironically, business users still require one-on-one support before they become proficient at creating their own reports.

About the BI Leadership Forum



The BI Leadership Forum serves the educational needs of BI and analytical directors and their teams. The BI Leadership Forum is located at www.bileadership.com and maintains an active discussion group on LinkedIn.