



BIAS
Business Intelligence
and Strategy Ltd

Project Methodology

Version 1.2 (18 Aug 2006)

Introduction

The project methodology followed by Business Intelligence And Strategy Limited (BIAS) has been developed from our own hands-on experience, after years of implementing business solutions across a wide range of industries.

We have incorporated best practices from the business intelligence industry and applied them to our model. This included the project methodology adopted by QlikTech themselves, called SAFE.

Taking this knowledge and applying it to QlikView made us look at the world in a different way. Our process is simple, uncomplicated, and designed to provide business benefit as fast as possible. Whilst appearing as a linear process, steps may be re-ordered according to customer needs, or omitted entirely.

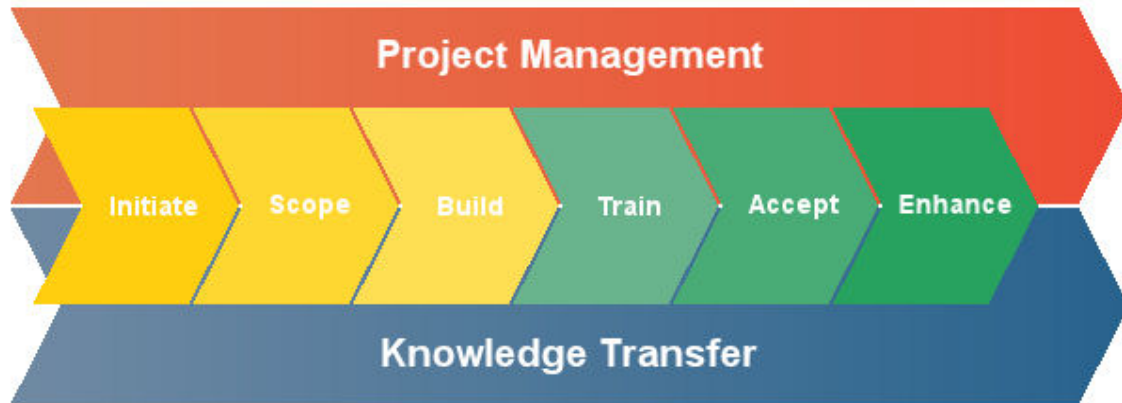
This document identifies each phase, and the steps involved. We expect a high level of customer engagement in the process, and deliver outstanding solutions in return.

Above all, we are focussed on delivering business benefit quickly, and enabling a rapid transfer of knowledge from our consultants to the customer.



The Process

The process contains six broad phases, along with two supporting foundations.



Essential to the entire process, these foundations are Project Management and Knowledge Transfer. BIAS aim to pass our knowledge to the customer as quickly as possible, allowing users to become rapidly self-sufficient. This promotes strong user adoption, and improved project benefits.

We work closely with the customer, integrating with the project team as we build a partnership for solution delivery.

The process and project delivery is intended to transform customer data into relevant information for business decision making. We extract and enhance the data, providing confidence in it, and the analysis. We provide business insight.





Initiate

During the initiation phase of the project, roles and responsibilities are defined for both BIAS and the customer. A project manager is appointed on both sides, and key personnel such as the project sponsor, business analyst, developer(s), and trainer(s) are identified.

The project deliverables are also defined during this phase. This should clearly show the number and type of reports, or analysis documents required. What the purpose of the project is, and what goals should be achieved. Ultimately it should identify a measure of success.

Where appropriate, business issues are also identified at this point.

Finally, certain logistical questions are answered: the infrastructure the solution will reside on; which particular delivery platforms will be used, and the number of users in each environment.

More often than not, this phase leads immediately into a detailed scoping discussion.





Scope

This is where the customer requirements are identified. We do not take a traditional approach to scoping a solution. Taking our lead from QlikView itself, we challenge current thinking and linear processes; aiming to optimise the final solution for business need and QlikView performance.

At this point, we need to understand the bigger picture, so that decisions made for small tactical solutions, do not conflict with longer-term, more strategic ambitions.

Detail is paramount. We analyse the data sources; the metadata supporting those sources; and security both around the sources and in the final application. Availability of these data elements will be critical to the development and ongoing relevancy of the reporting.

During scoping we discuss testing, and advise the customer to develop a product or solution test plan that can be used against each release of the solution. We also like to test and approve the infrastructure that the solution will sit on. Due to the large volumes of data QlikView can handle, testing the performance of report creation and report use is critical to the project's success.

The speed of deployment of QlikView, and the nature of the iterative development, mean that we rarely write large scoping documents. Having agreed in writing the aims of the project, data sources, and what constitutes success; we prefer to follow a prototyping approach - building and reviewing with the customer over a short period of time.

Before anything can be developed, we require written approval of the scope.





Build

Our developers now build the solution to the outline requirements. This is a fast process, using all the features available within QlikView: data scripting, charts, page objects and complex VB script macros. Where appropriate custom DLL files can also be developed to provide access to proprietary data sources.

Our prototyping cycle means that a version 1.0 release can occur days after the scope is approved. Whilst this may or may not fully fulfil the scope, users can be gaining immediate business benefit from the solution. Further versions are released as available.

Systematically we deploy and release on an ongoing basis. Our developers and QA team are constantly testing the solution to ensure data integrity is maintained. However, it is essential that customers also continue to test releases whilst further development continues. We recommend creating a test plan with simple, through to complex tests, that can be easily repeated as releases are made.



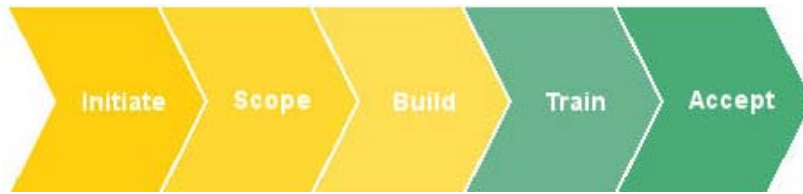


Train

Training is carried out by our QlikView consultants. We prefer a “train the trainer” approach in large implementations, where the customer quickly takes ownership of the system and its use. We provide a short document to guide users in the use of their particular solution. This explains each tab within the application, and details each chart and table display - including where the information is derived from.

Whilst we want our customers to manage their own solutions, we understand the need for support. In addition to the user guide mentioned above, we routinely annotate code for others use in the future. Reference guides are also available: as is more in depth training.





Accept

Once we have built and delivered the solution, we will ask the customer to sign off the project. To aid with this, we will demonstrate how the final solution meets the original scoped criteria, and compare the finished system, to the success measures identified during project initiation.

Whilst sign off normally signifies the end of a project, we find that it is really just the beginning.





Enhance

Once the solution has been in use for a while, users will have become addicted to QlikView. From their first experience they will be thinking of other ways the software can help them manage their business better.

During the enhancement phase, we review the original solution, and discuss other opportunities and enhancements.



Project Management

Project Management

Throughout the entire process, the project is closely managed by us, to ensure the customer's expectations of the solution are met. We work closely with users to meet key dates and milestones; including the system go live date, and payment schedules.

Change management and scope variation is controlled through a specification, review, and acceptance process. Changes are quoted and costed, but are not put into effect until agreement has been received from the customer.

We do not spend days writing large, complex scoping documentation. Due to the speed of our prototyping approach, we prefer to gain a clear understanding of what is required in a solution, and to understand the data sources. We do not document every table, field, or formula unless critical to the end solution. As a result, we require written agreement against a short form report. In whichever way reports are produced now, QlikView will turn the process on its head: do not assume that the way work has always been carried out will be the way it continues.

We are very keen to promote communication between ourselves and our customers. We "over communicate" providing updates and discussions on progress, issues, problems and successes. A large part of this is our project newsletter, where all stakeholders receive regular email communication providing update and project overview.



Knowledge Transfer

Knowledge Transfer

In addition to providing outstanding solutions, our overriding aim is to deliver a rapid knowledge transfer from **our** consultants to **your** staff. This is an ongoing process, which will continue long after the initial project is completed; through review meetings, further training and our support. After an initial training session of no more than three days, users will be equipped to create and manage their own QlikView solutions.

It is our experience that organisations spend 80% of their time gathering data, and only 20% analysing it to make better decisions. We like to turn that statistic on its head, helping users spend 20% of their time gathering data, and 80% analysing it and making decisions.





Free Your Data

This approach may have appeared to be linear. It doesn't have to be. The steps we have identified can be included or omitted; the order changed; the whole process followed to the letter or just in principle.

As long as everyone is committed to the end goal, we can turn the process on its head.

