# Simple Guide to the Successful Implementation of Business Intelligence

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In order to grow and increase revenue, companies always look for ways to enhance business strategy and processes. Business intelligence implementation can be one of the most effective solutions.

## Why Is It Important to Implement Business Intelligence?

Business intelligence (BI) is a combination of processes, technologies, and tools that transform raw data into meaningful insights to support data-driven decision-making. The data used in BI may include customer behavior, purchasing patterns, operational metrics, financial data, and other business information.

While analyzing this data, you can personalize services, find new approaches to increase sales, identify trends and support forecasting, and many more things, pushing your business to a new level.

## Business Intelligence (BI) Implementation Steps

So, how to implement business intelligence and empower your business with BI opportunities? Here is our step-by-step guide to successful business intelligence implementation.

### Step 1: Business Intelligence Implementation Plan

Thorough preparation and planning are the keys to a successful BI implementation. This step implies a range of important decisions to be made and actions to be taken:

#### Defining goals

The first question to be asked is “What goals do you want to achieve?” It can be expanding to new markets, increasing the level of customer satisfaction, growing revenue, and anything else. At the same time, you form a list of requirements for reaching these objectives.

#### Setting KPIs

In order to estimate results and track progress, there is a need to define  KPIs (key performance indicators). They have to be measurable and clear as well as in line with your goals.

#### Assigning a team

The next step is assigning a team of your employees who will be fully immersed in the process and responsible for certain fields of work. It is important to provide everyone with maximum information and ensure they know exactly what to do. Later, this team will also help you to educate and train all the other employees.

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## Step 2: Choosing a Vendor and a Software Solution

One of the main business intelligence implementation challenges is finding an appropriate software solution and a vendor. Depending on your business goals and specifications, you can either choose from a variety of ready-made BI solutions or build your own custom system with the functionality focused on your business needs.

As soon as you decide on the type of your future software, make a list of key features it has to provide. After that, it is time to explore the BI software market. If there is a chance to get free trials or demos, do not hesitate to take this advantage. Once you have made your final decision about the software and vendor, it is time to start the implementation process.

## Step 3: Business Intelligence Implementation Process

Being well-planned and properly organized, the process of business intelligence implementation can be smooth and simple. Here are the crucial actions to take:

### Cleaning data

To deliver accurate and effective results of future analysis, the data has to be clean It means that you have to correct or delete everything that is inconsistent, inaccurate, and not up-to-date. Make sure missing values are handled appropriately based on the data type and business context (e.g., NULL values, "N/A", statistical imputation, or other approved methods).

### Data governance

Establishing data governance policies helps ensure data quality, security, and compliance throughout the BI implementation. Clearly defining data ownership, access permissions, and business rules improves trust in analytics and decision-making.

### Making adjustments

BI solutions should be scalable and adaptable as business requirements evolve. That is why the advice here is to prioritize implementing the highest-value features first and adjust the rest on the go. Such an approach will not only accelerate implementation but also help you make the adjustments even more accurate and business-focused.

### Training employees

Teaching your staff is one of the critical success factors of business intelligence implementation, and it is definitely not the easiest one. Since people often tend to reject and resist novelties, it is better to begin with educating them. Explain to them the reasons to implement business intelligence and help them adapt to new things by training and mentoring.

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## Step 4: Reaping the Benefits

When all the main tasks are completed, it is time to take full advantage of business intelligence: analyze data and use the insights to support forecasting, optimize business processes, and refine business strategy. You can also find new opportunities for your business and set new goals as well as redefine the existing ones. It will be easy to readjust the software in accordance with updated objectives.

To sum up, here are the key points of business intelligence implementation:

| Planning | Choose software | Implementation process | Getting benefits |
|---|---|---|---|
| • Define goals<br>• Set KPIs<br>• Assign a team | • List required feature<br>• Use demos and trials<br>• Choose vendor and software | • Clean data<br>• Make adjustments<br>• Train employees | • Apply the result<br>• Redefine goals<br>• Try new approaches |

# The Important Features and Key Components of Business Intelligence

Now we want to highlight some of the key components and features to look for when choosing a BI solution.

### Data integration

One of the core features of BI software is data integration tools or ETL/ELT (Extract, Transform, Load / Extract, Load, Transform) tools. They process raw data from different sources (like ERP, CRM, external sources, etc.) before loading it into a centralized data repository, such as a data warehouse, data lake, or lakehouse, where it is prepared for analysis.

### Semantic layer

A semantic layer provides consistent business definitions for metrics, KPIs, and dimensions across the organization. It helps ensure that different teams use the same data definitions and consistently interpret reports.

### Interactive dashboards

Having dashboards with up-to-date or near real-time data that reflects all the changes in business conditions will help a lot in streamlining analytics and decision-making as well as provide more flexibility in responding to the changes.

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### Reporting tools

Good BI software solutions cover sophisticated report features that allow users to create reports quickly and easily (e.g., using a drag-and-drop interface).

### Data analytics

Professional data specialists are essential for business intelligence implementation, but it is also a good idea to empower them with additional help by delegating a part of the work to the software. This will not only accelerate the process and decrease the risk of mistakes but also allow your employees to spend working time on other important tasks.

### AI-powered analytics

Many modern BI platforms include AI capabilities that help users discover patterns, detect anomalies, generate automated insights, and ask questions using natural language. These features make analytics more accessible and accelerate decision-making.

### Security

Since BI solutions handle business-critical and confidential information, they must ensure a high level of security. In addition to protecting data from external threats, they should support role-based access control, audit logging, and compliance with relevant security and privacy standards.

### Customization

Even though the core BI software features remain approximately the same, each company needs the capability to customize them: add or exclude filters, adjust search and other parameters, etc.

### Self-service

Self-service BI features enable business users to create reports and dashboards independently without relying on IT for every request, while maintaining consistent data definitions and governance across the organization.

## Bottom Line

Following a clear business intelligence implementation roadmap is one of the keys to improving business strategy effectiveness as well as growing revenue and the level of customer satisfaction. It can bring value to companies of any size and across multiple industries: from retail to banking.

If you are ready to empower your company with business intelligence capabilities and are looking for a partner to implement it, SCAND is here to help.

Feel free to contact us and ask any questions: info@scand.com

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