

Design Tip #91 Marketing the DW/BI System

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Marketing is often dismissed by technical folks. When someone says "oh, you must be from marketing," it's rarely meant as a complement. This is because we don't really understand what marketing is and why it's important. In this design tip, we'll review classic marketing concepts and explore how we can apply them to the DW/BI system.

It might be more palatable to think of marketing as education. Marketers educate consumers about product features and benefits, while generating awareness of a need for those features and benefits. Marketing gets a bad name when it's used to convince consumers of a need that isn't real, or sell a product that doesn't deliver its claimed features and benefits. But that is a different article. Really great marketing, when effectively focused on the value delivered, is hugely important.

Before you start creating your marketing program, you should have a clear understanding of your key messages: what are the mission, vision, and value of your DW/BI system? Marketing 101 has focused on the four Ps, Product, Price, Placement, and Promotion, for at least the last 30 years or so.* We'll look at each of these factors in the context of the DW/BI system and direct you to additional information where it is available.

Product

As far as the business community is concerned, the DW/BI products are the information needed for decision making and the BI applications and portal through which the information is delivered. Our products must excel in the following five areas:

- Value – meet the business needs identified in the business requirements process
- Functionality – product must work well
- Quality – data and calculations have to be right
- Interface – be as easy as possible to use and look good
- Performance – work in a reasonable timeframe as defined by the users

Price

Most users don't pay for the DW/BI system directly. The price they pay is the effort it takes to get the information from the DW/BI system compared to other alternatives. There is an upfront cost of learning how to use the BI tool or the BI applications, and an ongoing cost of finding the right report or building the right query for a particular information need. You must lower the price as much as possible by first creating excellent products that are as easy to use as possible. Then offer a full set of training, support and documentation, including directly accessible business metadata, on an ongoing basis.

Placement

In consumer goods, placement is obvious: the product has to be on the store shelf or the customer can't buy it. For us, placement means our customers are able to find the information they need when they need it. In other words, you must build a navigation structure for the BI applications that makes sense to the business folks. Additionally, tools like search, report metadata descriptions and categories, and personalization capabilities can be extremely helpful. For additional information, see Design Tip #58: BI Portal and my February 2006 Intelligent Enterprise article, "Standard Reports: Basics for Business Users" at www.kimballgroup.com.

Promotion

Every customer contact you have is a marketing opportunity. TV ads are not an option, not counting YouTube, but you do have several promotion channels:

- BI applications – These are what people use the most. Names are important: having a good acronym for the DW/BI system can leave a good impression. Every report and application should have a footer indicating that it came from the DW/BI system and a logo in one of the upper corners. Ultimately, if you create a good product, the name and logo will become marks of quality – your brand.
- BI portal – This is the main entry point for the DW/BI system. It has to meet the same requirements as the BI applications.
- Regular communications – Know who your stakeholders are and which communications vehicle works best for each. Your ongoing communications plan will include status reports, executive briefings, and user newsletters. Consider webcasts on specific topics if that's an option in your organization.
- Meetings, events, and training – Any public meeting where you can get a few minutes on the agenda is a good thing. Briefly mention a recent successful business use, remind people of the nature and purpose of the DW/BI system, and tell them about any upcoming plans or events. Host your own events, like User Forum meetings, every six to nine months or so.

Ongoing marketing is a key element of every successful DW/BI system. The more you keep people informed about the value you provide them, the more they will support your efforts.

* A fifth P, People, is sometimes included. In recent years, there's been a push to replace the Marketing 4 Ps with 4 Cs: Customer solution, Customer cost, Convenience and Communication.