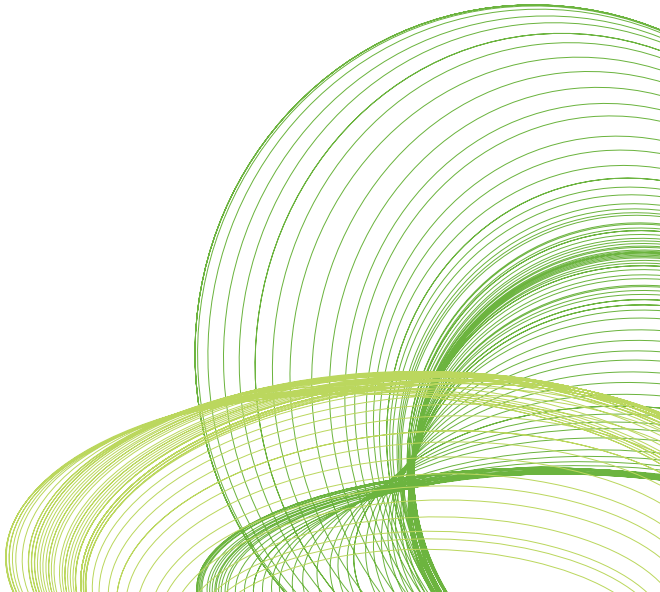
QlikView

THE GROWTH OF A QLIKVIEW DEPLOYMENT IN THE ENTERPRISE: AN OVERVIEW

A QlikView White Paper



May 2013

qlikview.com

The Growth of a QlikView Deployment in the Enterprise: An Overview

From Few to Many: Typical Growth of QlikView in an Organization

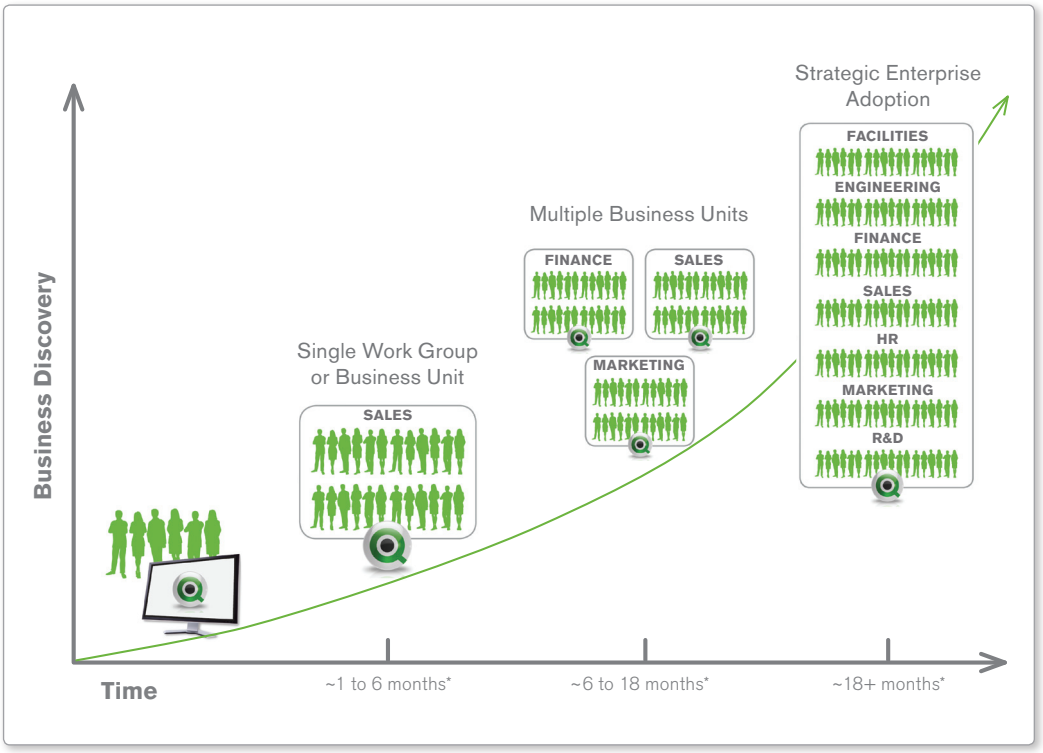
1. Starting small, with rapid adoption
2. IT's evolving role
3. Building a QlikView Center of Excellence
4. Governance and control: the role of QlikView Expressor
5. Adapt by embracing critical success factors as you grow

Building for Success: the QlikView Project Methodology

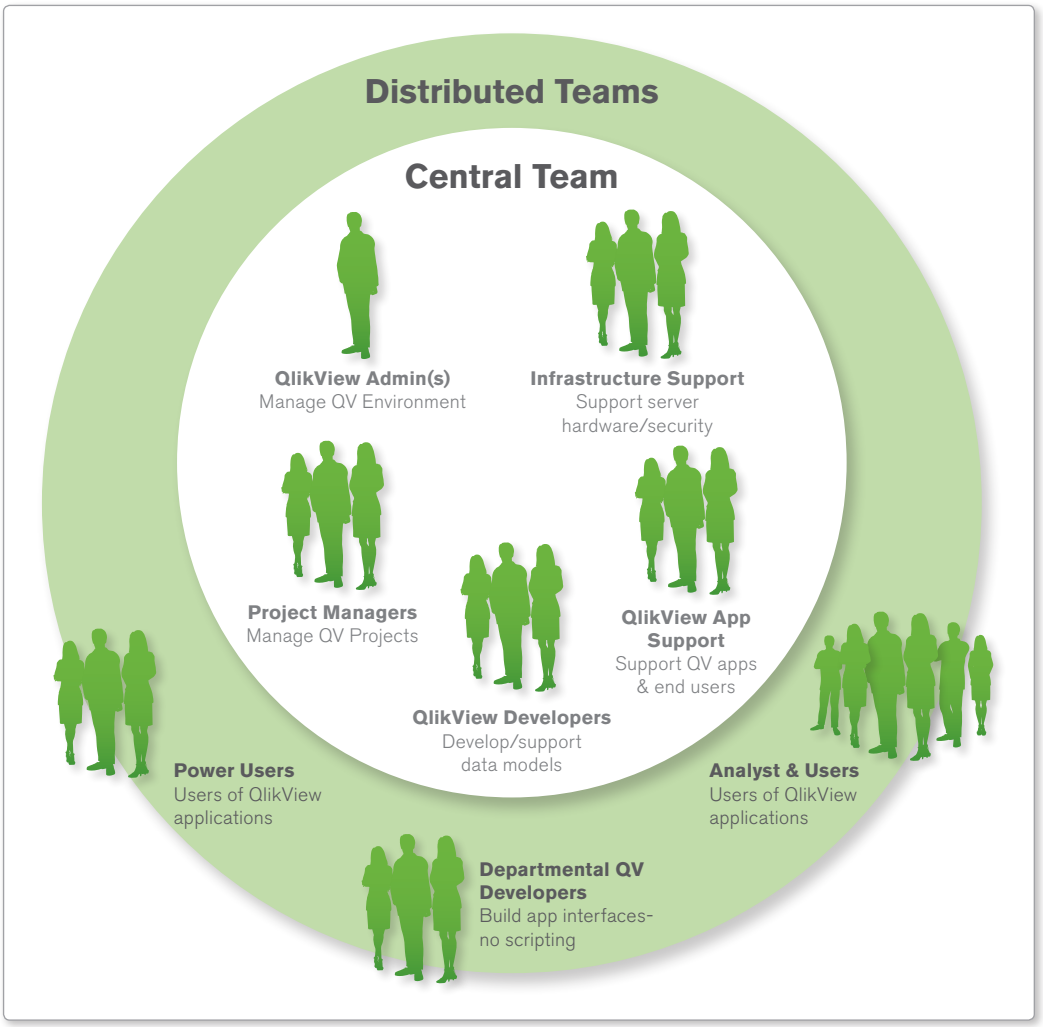
From Few to Many: Typical Growth of QlikView in an Organization

QlikView deployments typically start by solving a specific business problem, thus quickly proving its value and then soon, often within just 6 months, many other business users and business departments are requesting their own apps and licenses. This is a repeated pattern globally across QlikView's customer base.

1. **Starting small, with rapid adoption.** Whether starting with just one free personal user license or with a 50-user deployment, QlikView's presence in an organization often starts small. Business departments gain almost instantaneous value with very little lead time and IT groups begin to see the early benefits of reduced requests for new reports and queries. Because of the immediate business value it brings, demand for QlikView typically surges.



2. **IT's evolving role.** IT organizations, upon realizing the impact that QlikView brings for the business function they support and the improved analytics service levels, begin to fully embrace QlikView's Business Discovery approach to provide Business Intelligence and analytics. In addition to just hosting QlikView and providing infrastructure support, IT groups typically contain QlikView developers who develop applications together with colleagues in the Lines of Business. Because of the self-service nature of QlikView, the number of personnel needed is typically much smaller than similar BI projects. IT can now begin to apply control over security, higher availability, governance and so on. In the graphic below depicting a Self Service model, IT groups can provide many of the personnel within the Central Team.



Self-service model incorporating centralized QlikView experts within IT

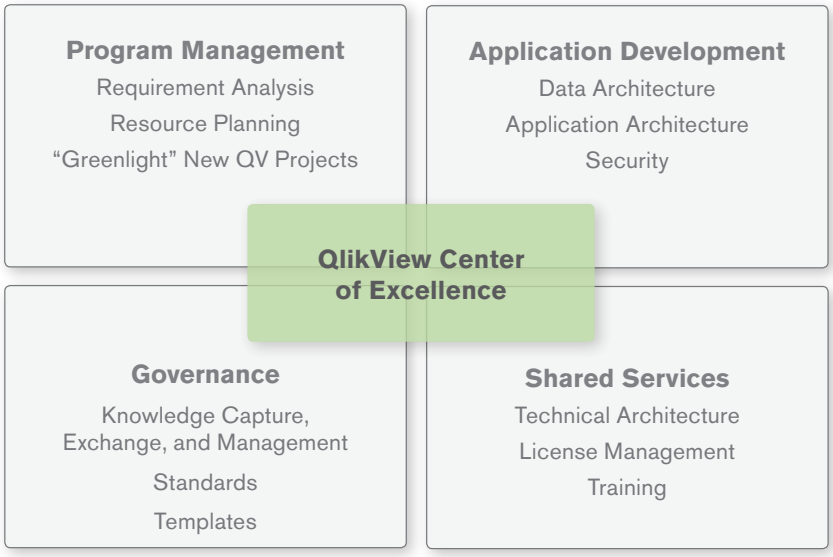
QLIKVIEW CENTER OF EXCELLENCE.

The QV CoE mission is about enabling IT and business users to solve specific business problems and share knowledge and analysis among individuals, groups, and organizations. It also:

- Creates an accessible Business Discovery Platform
- Fulfils the promise of Business Discovery by providing discipline at the core while maintaining flexibility at the edges
- Enables you to organize QlikView in the way that fits your own business operations

3. **Building a QlikView Center of Excellence.** As QlikView deployments continue to grow, it is often desirable to build out a centralized group from both IT and business functions to define and apply best practices and governance standards for the entire organization. As the graphic below shows, QlikView Centers of Excellence (QV CoE) combine the strategic role and governance of program management offices, business expertise of subject matter experts, and the technical knowledge of systems personnel.

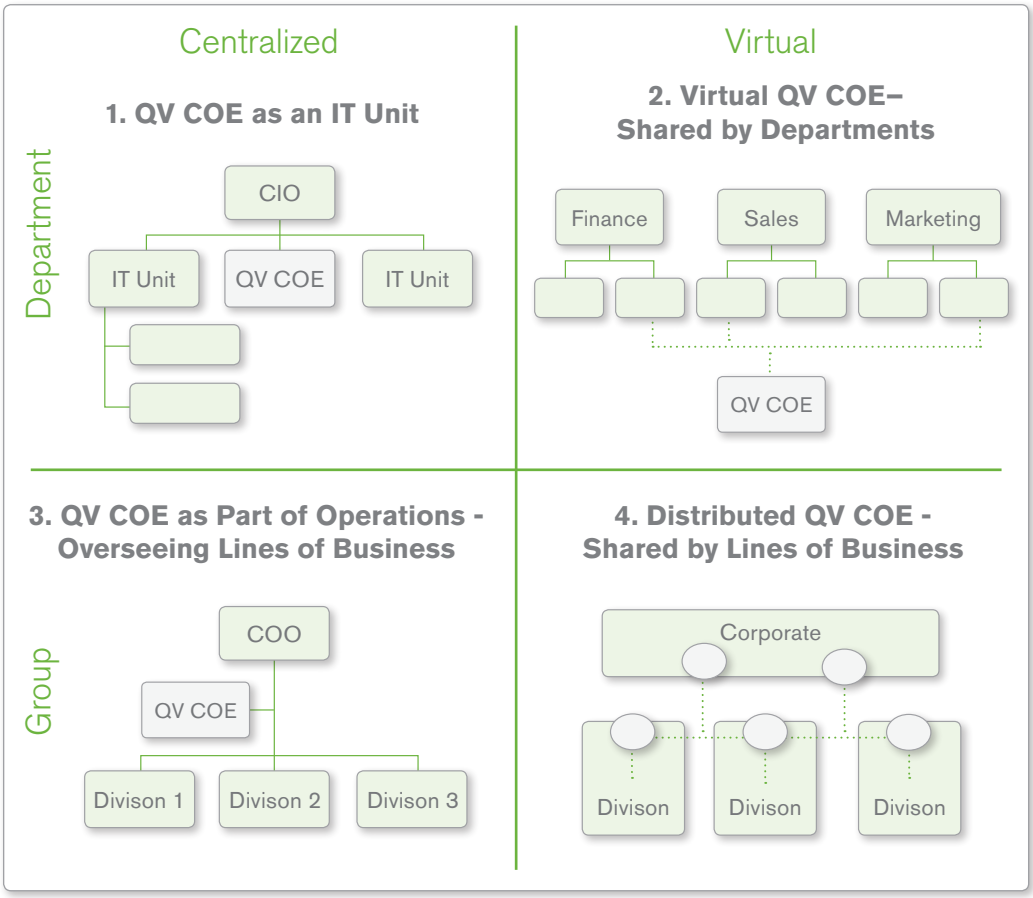
   It is the role of the QV CoE to champion the QlikView technologies and define standards, as well as the business alignment, project prioritization, management and skills issues associated with significant Business Discovery projects.



QlikView Center of Excellence

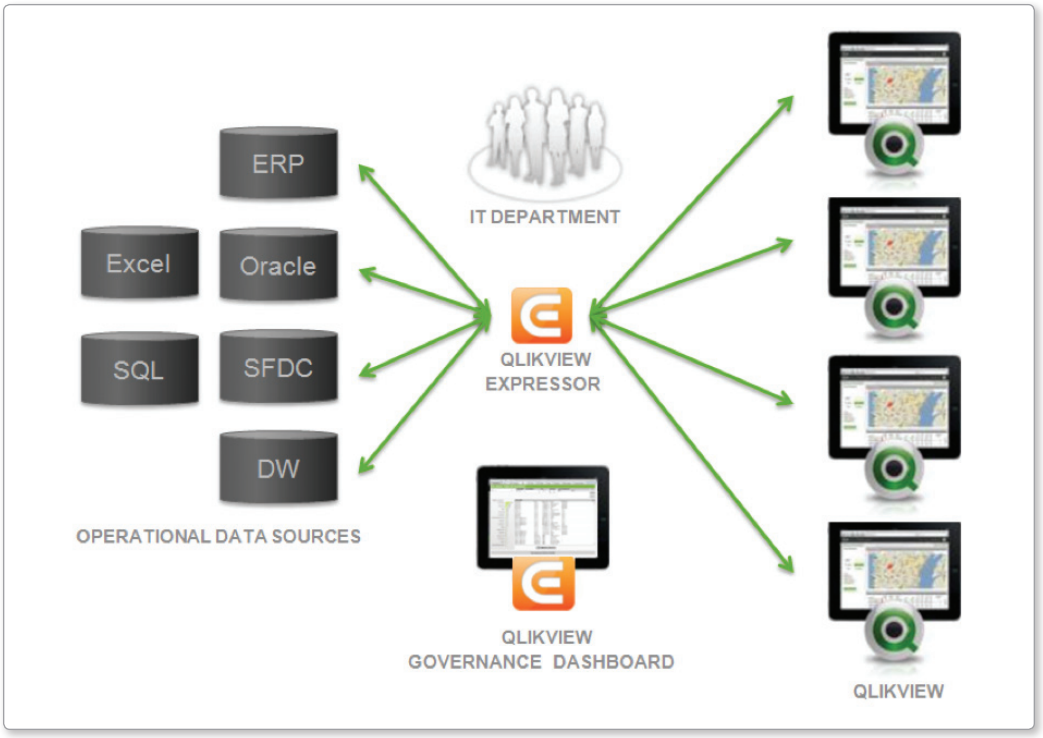
- Governance Benefits: Maintaining standardized and accepted best practices is desirable not just for IT groups who are supporting a QlikView deployment, business functions benefit greatly from having things such as:
  - Consistent look-and-feel of QlikView applications
  - Knowledge sharing of design and implementation best practices
  - Standardized and consistent business rules and definitions
  - High quality and up-to-date data

As the graphic below shows, there are many different successful models for building a QV CoE, whether it is a formal part of the IT group or an informal cross-functional team.



Different Approaches to QlikView Centers of Excellence

4. **Governance and Control - The role of QlikView Expressor.** Both IT groups and business functions recognize the importance of having accurate data that adheres to strict security and usage standards. With QlikView Expressor, business users get their critical data and apps, and have the flexibility to re-use and re-assemble at will, while ensuring the data they are using follow IT governance guidelines, giving the business users the confidence and trust they need in their data. The QlikView Governance Dashboard ensures that QlikView deployments are efficiently maintained by providing insight into data and business rules usage, data lineage and impact analysis of changing data sources.



QlikView Expressor and the Governance Dashboard

5. **Adapt by Embracing Critical Success Factors As You Grow.** Enterprise initiatives are inherently different than localized, departmental implementations. Historically, QlikView has excelled at delivering rapid value with solutions in a short timeframe. However, enterprise software implementation initiatives are more complex, requiring more robust governance and standardization across platforms, business functions, and geographies. As a result, the amount of planning and rigor required to ensure success increases significantly.

   Organizations that approach enterprise-scale QlikView initiatives with foresight and proper planning can achieve the best of both worlds – rapid value deployed quickly, while maintaining an enterprise-wide standard for discovering business insight, using disparate data systems with proper governance and scope.

QLIKVIEW IMPLEMENTATION CRITICAL SUCCESS FACTORS

1. Executive Sponsorship
2. An Imperative for Business Discovery
3. Align Business and IT Organizations
4. Achieve Quick Wins With QlikView Users
5. Develop a Strategic Roadmap
6. Develop an Appropriate Engagement Model for Delivery
7. Maintain Relationships With QlikView Account Team
8. Use a Methodology Aligned With QlikView Project Methodology
9. Leverage Out-Of-The-Box Functionality and Minimize Customization Whenever Possible
10. Create a Clearly Defined User Training Strategy

1. Executive Sponsorship

The enterprise initiative should have an empowered, visible executive sponsor that is the internal champion for the QlikView Program. The sponsor provides the support and guidance for stakeholders within the enterprise, ensuring the organization has direction on its Business Discovery journey. This individual has budgetary oversight assuring adequate resources are deployed to ensure a successful result.

2. An Imperative for Business Discovery

Every QlikView implementation project should have a clear business case , where the stakeholders understand the expected benefits that will result from implementing QlikView applications. Recurring legacy reports often do not reveal obvious insights that could be obtained from a deeper analysis of the data; QlikView however is able to present stakeholders with urgent and compelling insights to analyze opportunities quickly.

3. Align Business and IT Organizations

QlikView implementations are different in nature from traditional, large Business Intelligence (BI) or transactional and relational enterprise solutions like ERP or CRM. QlikView solutions appeal to business unit organizations because of their simplicity and ease of use, but IT organizations are still essential for integrating QlikView within their unique, complex organizational infrastructure. These organizations sometimes have competing objectives, and these objectives must be managed holistically, with collaboration between business and IT. While the business units are interested in rapid deployment and quick time-to-value on their Business Discovery investment, the IT organization is concerned with governance, technical and process standardization, and the ability to support all applications in the enterprise environment.

4. Achieve Quick Wins with QlikView Users

Enterprise implementation initiatives are complex and time and resource-intensive. QlikView Enterprise programs are no different. Traditional BI solutions require extensive time and resources to develop a new platform, often requiring an enterprise data warehouse, ETL data pipes, and reporting governance standards to be developed. QlikView has demonstrated a track record in the Business Discovery market that substantial results can be achieved much faster than this.

The approach to deploying QlikView solutions to the enterprise can impact how quickly solutions are deployed to users in an impactful way. An implementation roadmap should be developed that strategically phases in solutions to deliver quick, relevant wins to key groups of users. This roadmap may take several months or years to be fully realized, but the entire organization should not have to wait for extended periods before reaping the benefits of Business Discovery.

5. Develop a Strategic Roadmap

A comprehensive plan is needed to execute the strategic vision of Business Discovery. This vision is articulated in the business case imperative. The path to achieving this vision is illustrated in the strategic QlikView Business Discovery roadmap. This is a plan developed for the enterprise's unique competitive situation, its organizational strengths, and its constraints. It may involve a sequence of projects for various business units that are deployed sequentially according to available resources and the organization's maturity for embracing Business Discovery. It may provide Business Discovery capabilities in some business functions much earlier in some areas than others.

6. Develop an Appropriate Engagement Model for Delivery

Leverage QlikView Consulting Services and/or partner consultants effectively. Any enterprise seeking to implement QlikView solutions needs assistance from the software vendor and/or partner community in order to capitalize on their expertise. Unfortunately, a common misperception with large enterprises with matured and established IT organizations is to try to implement QlikView solutions entirely on their own. QlikView Consulting Services and partner consultants have unique skills and experiences to help avoid common pitfalls.

7. Maintain Relationships with Your QlikView Account Team

The QlikView team is an extension of your enterprise's resources that has a vested interest and shared objectives in the success of your initiative. Use these people to your benefit.

- QlikView Account Executive – A single point of contact as your organization's QlikView advocate to ensure customer satisfaction
- QlikView Consulting Services Practice Director or QlikView Partner – A partner in delivery. This individual works with your team to ensure that you have a clear roadmap for success, establish an appropriate engagement model for implementing solutions, and collaboratively solve resource problems when skill and capacity are critical for your needs.

- QlikView Support Manager – Guides your enterprise application support team to ensure that they have adequate skills, processes, and resources to maintain your QlikView applications.

8. Use an Implementation Methodology that Fully Aligns With Principles in the QlikView Project Methodology Framework

QlikView implementations are similar to other enterprise software deployment initiatives in that they are complex and inherently risky. However, QlikView has developed a distinctive approach to ensure that unique requirements and recommended practices are followed to mitigate complexity and risk. As a result, the QlikView Project Methodology (QPM – see next section) framework is available to help guide your project – either as a stand-alone, turnkey approach or as a supplemental guide that integrates into your preferred corporate implementation methodology.

9. Leverage Out-Of-The-Box Functionality and Minimize Customization Whenever Possible

This has been the mantra of enterprise software vendors for years, and the rule holds true for QlikView applications as well. A lot of design, development, and quality assurance effort have been expended to create the application functionality for generally available, packaged software applications. They are created with the intent of using industry's best practices that have been inherently built into software and associated business processes. These solutions are intended to be "configured", using native tools within these applications, to meet business needs.

10. Create A Clearly-Defined User Training Strategy

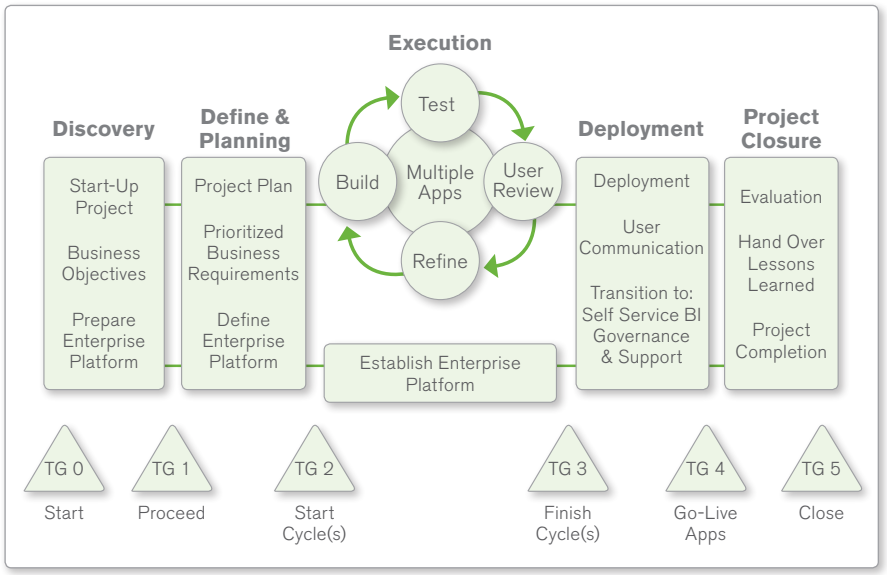
As intuitive as QlikView is to use and to develop applications, it is still recommended that users take professional training to get the desired benefits from QlikView. QlikView Education Services should be consulted to integrate an appropriate training approach into the organization's deployment plans.

QLIKTECH CONSULTING SERVICES.

With expertise and best practices from many Business Discovery implementations, QlikTech Consulting Services can help lay the proper foundation and provide guidance and assistance in implementing QlikView for success. To engage Consulting Services, please contact a QlikTech office close to you http://www.qlikview.com/us/services/consulting-services

Building for Success: The QlikView Project Methodology (QPM)

QlikTech has created an implementation framework that incorporates recommended practices for enterprise initiatives. The QlikView Project Methodology (QPM) is a description of all project management activities, documents and QlikView deliverables in all the phases of a QlikView project life cycle, from start to end. By using this project methodology, a predictable customer experience is assured, and it ensures the best use of QlikView's product capabilities.



The QPM Framework

The QPM Framework consists of five stages in the implementation life cycle: Discovery, Define & Planning, Execution, Deployment, and Project Closure. During the Execution stage, QPM incorporates iterative, rapid development cycles. This allows the QlikView application developers to quickly configure, demonstrate, and incorporate user feedback in order to generate momentum about QlikView solutions.

Within each phase, there are recommended activities, work products, artifacts, and deliverables to be completed. The specific inventory of which of these items should be required is determined by an experienced QlikView project management team that has knowledge of the unique customer needs and circumstances.

Discovery

Start-Up Project

Business Objectives

Prepare Enterprise Platform

1. **Discovery.** Discovery is the preparatory stage in the delivery process. An effective Discovery stage has a smooth transition from pre-sales stages capturing the key inputs including: SIB (Seeing Is Believing) scope and results, KPIs (success metrics), source data and scope, and preliminary solution architecture and business case. The key output of this stage is a high level project plan, and the first review should expect this as completion criteria before moving on to the next stage.

Key Outcomes of Stage 1

- Defined Initial Goals and Scope
- Identified Stakeholders
- Identified Business Requirements
- Defined Data Requirements
- Defined Infrastructure Requirements
- High Level Project Plan

Define & Planning

Project Plan

Prioritized Business Requirements

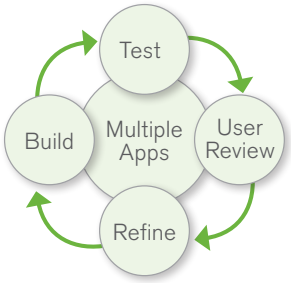
Define Enterprise Platform

2. **Define & Planning.** This is the stage in which the project is outlined, solutions are defined, and preparations are made for a successful project. Inputs are the requirements document and the high level project plan. Primary outputs of this stage are a detailed project plan and a solution design document. Upon successful completion of this project stage, a governance structure will be in place, the project team structure will be defined, a project implementation methodology is agreed upon, technical plans are in place (infrastructure, data sources and acquisition, application design), the project scope will be bounded, time and resource constraints should be understood, and the project risks should be well understood and mitigated.

Key Outcomes of Stage 2

- Defined Project Organization
- Defined Project Approach
- Defined and Planned QlikView Application Solutions
- Defined QlikView Data Model and Data Load Strategy
- Defined and Planned QlikView Infrastructure
- Detailed Project Plan and Test Plans Ready

Execution



3. **Execution.** This is the stage in which the project is executed and the solution is prepared to be deployed to users. Inputs are the detailed project plan and any referenced artifacts. Key outputs for inspection in the third stage review include the Deployment Plan, application readiness as demonstrated by test results, and an enterprise-ready application platform.

   This stage uniquely leverages QlikView's rapid development capabilities by introducing Agile development cycles that allow implementation teams to iteratively refine requirements – build – test – review – repeat. This approach generates actionable feedback, excitement, and momentum in near-real time, and as a result, this drives much of the positive customer experience that users have with QlikView applications.

   Upon successful completion of this project stage, dedicated development and test environments are functional, representative data can be seen by application testers, the data model has been validated with the customer architecture, a roadmap for deployment is apparent, and project acceptance criteria have been identified. By time the implementation team reaches this point, all project risks should be well understood and mitigated.

Key Outcomes of Stage 3

- Development & Test Environments Ready
- Data Loads Ready
- Data Model Ready
- Applications Ready; Test Results Complete
- Security Model & Production Environment Ready
- Deployment Plan Ready

Deployment

4. **Deployment.** This is the stage in which the solution developed and tested in the execution stage is formally handed over to and accepted by the (business) customer, consisting of users. Inputs include the deployment plan and any referenced documents. The primary output is the transfer of the project results and responsibility to the recipient organization(s). A final decision on deployment is made at this stage.

Key Outcomes of Stage 4

- Move Applications from Test to Production
- Hand Over to Customer Organization
- Production Readiness Check
- Plan Production Support Activities
- Support Onboarding
- User Communication and Training

5. **Project Closure.** This is the stage in which experiences made in the project are documented and lessons learned are transferred to the organization. All outstanding issues are taken care of and the project is formally closed. Inputs include all project documents and artifacts. The output is the project's final report that is submitted to the executive sponsor and stakeholders for the fifth and final stage review.

Key Outcomes of Stage 5

- Lessons Learned Ready
- Start Support Process & QlikView Maintenance
- Start Discovery Stage for Next Project
- Final Report on Achievement of Objectives
- Project Signed Off by Project Sponsor
- Close Project Budget

Upon successful completion of this stage, users are supported in production; the final report, key deliverables and work products have been archived for future re-use. Furthermore, the historical benefits and lessons learned have been recorded for continuous improvement on future initiatives, the project sponsor has accepted and signed off the project, project financials are closed out and accounted for. By the end of this stage and the project, there is no more risk – only issues that have been carried into production.

End Notes

[1] http://searchbusinessanalytics.techtarget.com/feature/Dont-let-calls-for-mobile-BI-tools-drown-out-the-business-case