

INSIGHT PAPER

The Tipping Point that Drives the Need for Enterprise Report Management

As companies empower their knowledge workers to become more self-sufficient with data analytics capabilities, they also face the risk of a potential blind spot in their organizations. Modern business intelligence tools are now relatively easy to adopt and deploy to quickly fill any reporting gaps and backlogs that may exist in the organization, despite existing reports, applications, and dashboards. Yet the blind spot this creates is a lack of a unified view of all the reports being produced by the multiple BI/DW reporting tools and applications within the enterprise. Without this visibility, people waste time developing duplicate reports, overspend on software licenses, and risk additional governance challenges that may surface with self-service data analytics.

Self-service reporting tools have become an accepted way for companies to increase the speed and agility of getting more people to work with data, and each tool available has different strengths and appeals to different business groups or user sophistication. These self-service reporting tools are typically purchased by independent business groups with their own smaller budgets rather than under the umbrella of IT's managed software standards. The self-service data analytics culture of a company favors what works best as decided by the people who need to work with the data rather than adhering to a mandate that everyone should work with a standardized tool designed to meet some (but not all) of each user's needs.

In our research, Radiant Advisors has looked into this blind spot and the potential risks that surface as well-intentioned data-driven companies facilitate an environment that supports self-service BI and analytics as well as user preferences to work with tools that suit their needs. One example of this is that companies can be caught off guard if they believe that implementing self-service and modern reporting tools is similar to past enterprise reporting tool implementations. These companies fail to realize the hyper rate of new report creation that is likely as reports are created and published quicker, by an increasing number of self-service business users, and typically with a variety of easily downloaded tools. For a data-driven company, this is not altogether negative when the

proper governance controls are in place. However, the key is to establish visibility over the reporting environment (including the reports and their usage). In order to have this level of visibility, a unified report management hub is necessary.

Radiant Advisors' definition:

A report management hub is a software platform that is independent of report development tools and provides unified visibility of each reporting tool's available reports, their usage and commentary, and allows users to organize reports according to business topics or processes – regardless of which reporting tool created the report.

Report Unification

“Unification” (or abstraction) is a general term for technologies that arise to solve the challenge of needing to manage too much complexity or too many items. When too much of something exists, it eventually becomes ubiquitous and unnoticed by most people who use it. For example, recall that data storage is really thousands of mechanical disk drives or solid-state disk drives that are managed in such a way that people and applications simply access storage mount points or folders such as Dropbox or Google Drive to store their files. Similarly, networks have become software-defined to manage the complexity of their many routers and network switches due to generations of various vendors, models, and standards over time.

Importantly, report unification is not another reporting tool for users, but rather establishes a singular hub that can abstract the complexity from generations of reporting tools and the sheer volume reports in the enterprise. While the average number of reporting tools has rapidly increased, a tipping point is also being reached with self-service tools because of the potential multitude of people newly empowered to develop reports independently. Therefore, the issue is not just with the number of reporting tools in the enterprise, but also the number of people able to create reports each day, week, or month.

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Productivity, Efficiency, and Governance Improvements with a Report Management Hub

Counter to assumptions, as the number of reporting tools, their deployments, and reports generated increases, user productivity actually diminishes. For report consumers, their process begins with a business need for information to make a decision and continues with trying to determine if that report already exists, whether it's trustworthy, and if it is fit for purpose. Redundant reports increase the amount of work in the report users' processes – either requiring more time for report evaluations or compromising the confidence in the reports. Further, with several reporting tools in each business area, report consumers need additional time to discover which reports exist across the various reporting tools – and whether they even have a license to use the ideal tool.

A unified report management hub streamlines this process by providing a single access point with visibility of all reports across the entire reporting environment – including all the various reporting tools. Further, the reports can be preorganized by business function or process for ease of navigation and workflow. To simplify discovery of reports and uncover related reports, the hub should deliver a Google-like search box for keywords and topics. Sophisticated searches take into account previous search results, ratings, and report metadata.

Productivity also increases with a hub that is able to facilitate the collaborative steps in report usage that typically occur through emails, conversations, or messaging channels. For published reports, broad user feedback and communication with the original developer improves the report accuracy and quality over time. Users can also provide basic subjective ratings (such as a five-star system or a “like” indicator) that can be aggregated so that other users can quickly select a useful report without having to ask or find subject matter experts to provide validation of the report.

When a report doesn't meet the users' needs, they will need to create new reports of their own to meet their requirements. If a similar report exists in the enterprise, the collaboration aspect of the hub helps the user identify and communicate with the developer(s) of the other reports for helpful information on data sets used and proper SQL statements. And once a new report is developed, crowdsourced reviews of the report provide feedback about the accuracy, visual correctness, and governance throughout the report's lifecycle. The report developer then places the report in appropriate report groups, and notifications can be sent to make people aware of its existence. Once again, productivity is boosted, and the new report will inevitably improve in quality over time with user feedback and collaboration.

Efficiency increases in the overall management of the enterprise reporting environment as the report management hub reduces the complexity that IT faces with having different reporting tools, their deployments, and different user licenses. A report management hub is the key to collecting report usage data so that an IT manager can perform more accurate analysis efficiently. The primary challenge is to ensure that reporting licenses match the actual report workload in terms of creation and consumption. This is an ongoing challenge in companies where self-service adoption is growing and the business is less likely to standardize on a particular tool. Report usage data from the report management hub assists in tracking license utilization by user and role (report developer or consumer) and reporting tool. Report usage data also helps determine which reporting tool (and its costs) are being utilized most – or redundantly – within a given business area. Armed with this data, managers can guide the decisions for reporting consolidations and license renegotiations.

Governance improves with a single report management hub through holistic report monitoring and the ability to apply a uniform governance process, regardless of reporting tool. Data owners and champions can certify reports and track report usage while being engaged with report development across multiple

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environments to guide their accuracy and clarity and to minimize overlap or redundancy. More importantly, when holistic report monitoring is in place, data and information governance can take less of a “control and enforce” approach, fostering the potential for valuable agility and self-sufficiency required in data-driven cultures. The freedom for users to work with data and develop reports tailored to their specific needs and timing is not inhibited with active report monitoring. Further, the report management hub can enable peer reviews and collaboration for self-governance while data owners can take an active role in guiding report development to further information quality. Finally, governance becomes more efficient as a result of eliminating the noise of redundant and erroneous reports. Though all reports may not need to be governed, all reports should be monitored for governance.

Conclusion

While companies are embracing available BI tools and self-service analytics to speed business impact through a data-driven culture, hidden challenges exist when too many reports are created and the environment becomes overly complex. Visibility across all reports and the entire reporting environment through a report management hub not only mitigates this risk, but also fosters increased productivity, efficiency, and governance with agility.

How to Assess Your Reporting Environment Across the Enterprise

Recognizing the complete breadth of your enterprise reporting environment is important to ascertain the rate that reports are accumulating and the projected increase in development rate. Each type of reporting tool deployment has a unique report development rate that can potentially be orders of magnitude larger than others, and when added up can cause unmanageable report proliferation. To estimate the rate of proliferation, categorize reporting deployments by use case with estimated report generation, then sum up for current and future projections. Consider:

- 1. Application Reporting:** Determine how many essential business applications (from vendors and internal development) include bundled reporting. These are typically a fixed number of reports provided by the vendor or development team, and that number doesn't increase very often.
- 2. DW/BI Reporting:** Tally the reporting environments associated with the existing data warehouse systems or data marts for business reports, dashboards, and analysis capabilities. Typically the teams of DW/BI report developers is a constant number, and these teams deliver sets of new reports as part of BI projects with one or more enterprise BI reporting tool.
- 3. Self-Service BI:** Account for self-service BI tools that have been adopted by business users to independently develop the additional reports they need or to customize existing ones to their needs. These reporting tools are less formal for the business to initially adopt and deliver value that fills known reporting gaps in application reporting and backlog DW/BI reporting.
- 4. Self-Service Data Prep:** Consider modern data prep and analytics tools that empower businesspeople to easily create the data sets needed for additional reports. This category of deployments must be considered due to its ability to empower many people to work with data directly, then send data outputs directly to self-service BI environments for many more businesspeople, business analysts, BI teams and power users, and data scientists to quickly build the reports they desire.

This self-assessment will help you understand the tipping point when a report management hub becomes necessary for productivity and efficiency in your reporting environment.