

Business Intelligence Strategy:

Goals, Choices, and Tradeoffs



- Why a BI strategy is essential for analysts, data teams, and business leaders



- Aligning BI with business goals through deliberate choices and managed tradeoffs



- Applying the course: strategy diagnosis to roadmapping and governance



- Outcomes: assess maturity, define operating models, and create role-specific action plans



What a BI Strategy Is and Where It Sits

- ▶ A long-term blueprint for using data and analytics to achieve business goals
- ▶ BI connects data, analytics, and decision-making across the organization
- ▶ BI strategy is decision-focused; data strategy is infrastructure-focused; analytics strategy adds predictive modeling
- ▶ Success depends on adoption and trust, not tooling alone

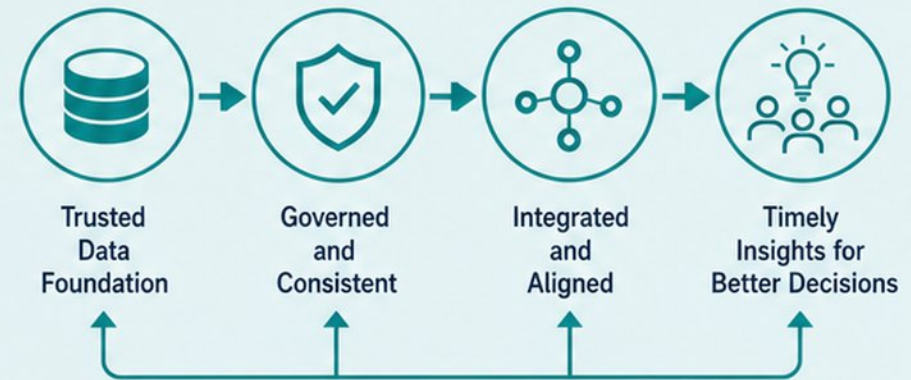


Why BI Strategy Matters: From Fragmented Reports to Decision Support

FROM FRAGMENTED REPORTS



TO COORDINATED DECISION SUPPORT



Conflicting metrics and shadow reports erode trust



Isolated efforts fail without shared definitions



Coordinated BI strategy ensures governed, timely insights



Trusted data foundation enables AI and predictive analytics



Watch for signs you need a BI strategy reset

Core Goals of a BI Strategy



- Improve decision quality and speed at every level



- Increase data accessibility with reliable self-service



- Reduce reporting duplication and metric confusion



- Enable performance management and operational monitoring



- Measure success with program health KPIs, not just outcomes

BI Operating Models: Centralized, Decentralized, or Hybrid



- ✓ - Centralized: control and consistency, at the cost of speed
- ✓ - Decentralized: agility and ownership, at the cost of metric drift
- ✓ - Hybrid: central governance with distributed report creation
- ✓ - Choose based on maturity, regulation, team size, and decision velocity

Strategic Choices: Scope, Prioritization, and Technology



DECISION INVENTORY

- Build a decision inventory: which decisions need better data, who makes them, and how often



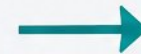
PRIORITIZED BI USE CASES

- Prioritize BI use cases by business impact and readiness



PLATFORM CHOICES

- Select platforms on self-service capability, governance support, and integration



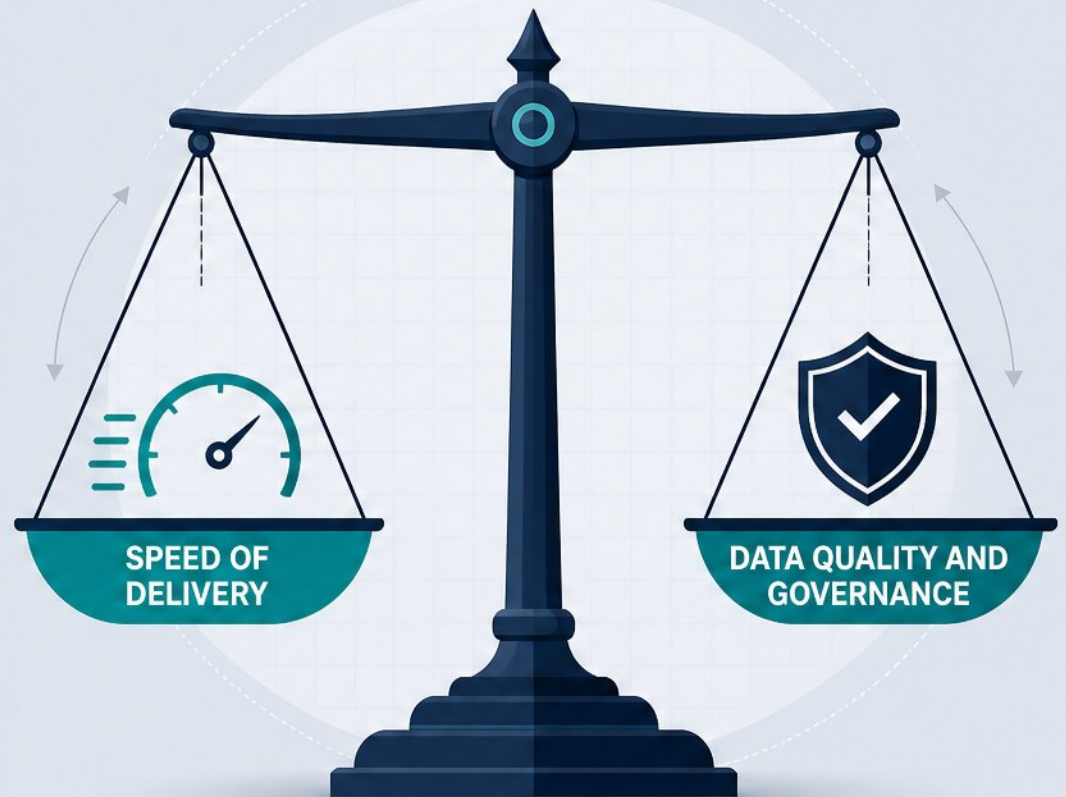
STAFFING CHOICES

- Staffing choices: dedicated BI team, embedded analysts, or business-led analytics

Key Tradeoffs in BI Strategy

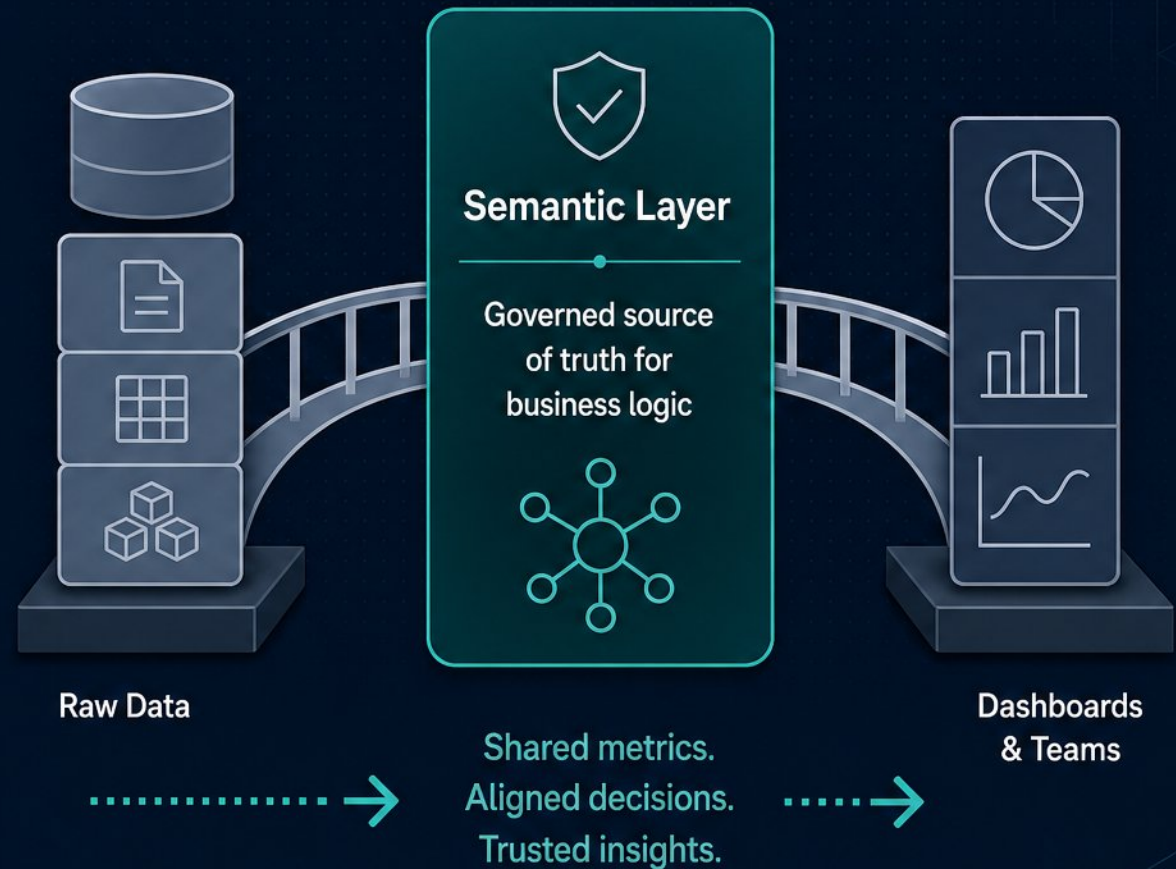


- ▶ Speed of delivery vs. data quality and governance
- ▶ Self-service flexibility vs. standardized metrics
- ▶ Immediate wins vs. long-term data foundation
- ▶ Cost efficiency vs. scalability and performance
- ▶ Frame tradeoffs as deliberate choices, not compromises



Metrics Alignment and the Semantic Layer

- Shared metrics build trust across dashboards and teams
- Semantic layer: governed source of truth for business logic
- Lives in BI tool, warehouse, or headless — each has tradeoffs
- Practical step: start with 3–5 disputed KPIs, define once centrally
- Prioritize consistency over speed; test definitions, not just tables



Data Quality and Governance Tradeoffs



Data quality dimensions:
accuracy, completeness,
consistency, timeliness



Governance embedded early:
ownership, access, validation
standards



Governed self-service:
balancing access
with control



Signals of over-governance:
slow insights, shadow IT,
user friction



Signals of under-governance:
metric drift, report sprawl,
trust erosion

GOVERNANCE GATE
Control and Standards



SELF-SERVICE ACCESS
Trusted and Empowered



Roadmapping BI Capabilities Without Overbuilding



- Sequence capabilities by business value and readiness



- Deliver minimum viable BI capabilities for early impact



- Invest in data modeling and cataloging when scale demands it



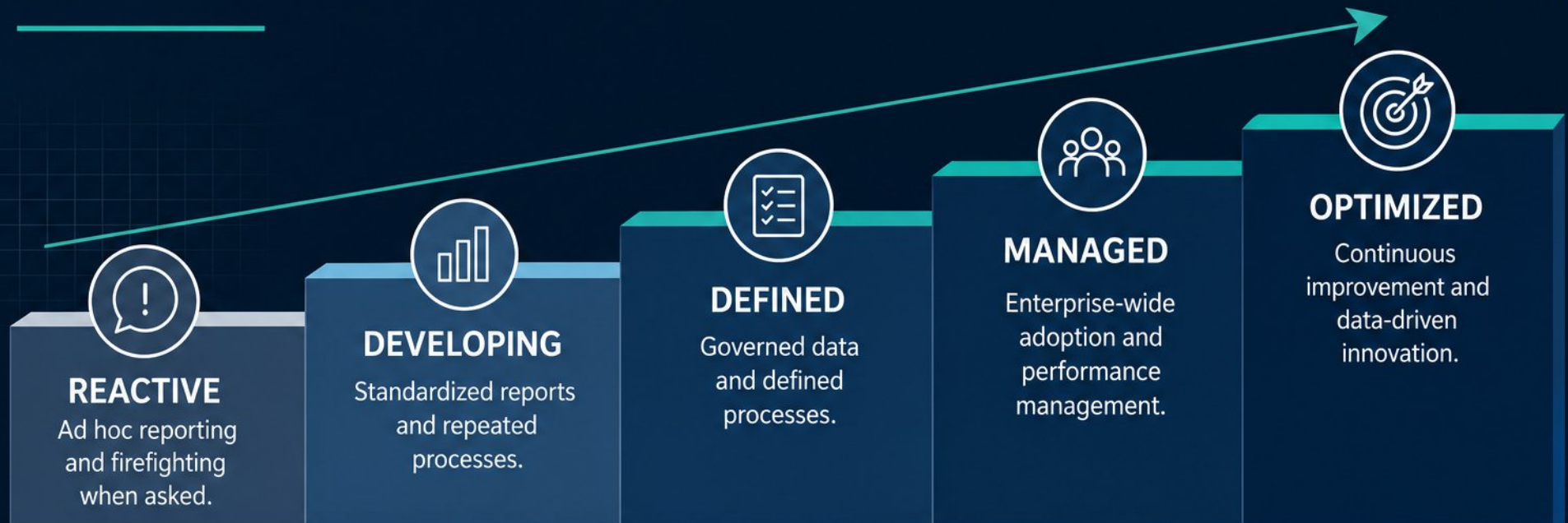
- Avoid dashboard sprawl by tracking adoption and retiring unused reports

START: MINIMUM
VIALE BI

OUTCOME:
BUSINESS VALUE
THROUGH ADOPTED
BI CAPABILITIES

AVOID:
OVERBUILDING
AND UNUSED
INFRASTRUCTURE

BI Maturity Models and Phased Delivery



- Five maturity levels: reactive, developing, defined, managed, optimized



- Assess current state across infrastructure, governance, adoption, analytics, and decision integration



- Use maturity assessment to prioritize roadmap initiatives



- Phased rollout: pilot, controlled expansion, enterprise operation



PILOT



**CONTROLLED
EXPANSION**



**ENTERPRISE
OPERATION**

Governance, Adoption, and Organizational Change



- Lightweight governance with clear ownership and access rules



- Drive adoption via executive sponsors and champion networks



- Shift from data gatekeeping to user enablement



- Define roles: data owners, stewards, and platform teams



From Strategy to Operating Rhythm



- Translate strategy into repeatable delivery processes



- Balance exploratory analytics with production-grade reporting



- Measure adoption, usage, and data health metrics



- Review and adjust strategy with usage data and feedback



Practical Next Steps for Analysts, Data Teams, and Business Leaders



- ✓ **Analysts:** clarify metrics, cut duplicate reports, document definitions



- ✓ **Data teams:** strengthen foundation, semantic layer, and governance



- ✓ **Business leaders:** prioritize use cases, sponsor adoption, fund enablement



- ✓ **Use this checklist:** align BI to goals, assess maturity, define roadmap

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