The FRA²ME Methodology

Six Simple Ways to Solve BI User Adoption
Introduction

Data rules the world. The sheer volume of data continues to grow to overwhelming proportions, thanks in great part to ongoing developments in e-commerce, the Internet of Things (IoT) and big data. Trying to manage and gain insight from all that information is a constant challenge for businesses. The investments organizations have made in business intelligence (BI) have been significant, and have evolved considerably over time as BI leaders have learned which tools, programs and platforms work best for their needs.

How well organizations collect, analyze and apply data to “real world,” day-to-day business requirements has been an evolutionary journey as well. Yet today, just a relatively small percentage of companies consider their BI programs a success. Many continue to struggle with how to best adapt to changes in the business and evolving system needs.

Unfortunately, many organizations are not making the most of their BI investments. And that generally comes down to one simple reason: they cannot get the business to actually use the BI programs that have been put in place.

For as long as BI has existed, the complaint has been consistent — organizations make significant investments in high-performing platforms, yet the solution is shunned by the people it was intended to help. End users cannot find information quickly — or at all. The information they do find is not relevant. Their expectations are that BI systems will work as effortlessly as popular search engines and social media, which yield results within seconds of a query. When that doesn’t happen, users drift away, the system goes stale, and what the organization built becomes irrelevant. BI projects fail for a variety of reasons, and generally not because the tool itself is bad. To alleviate the user adoption issue, Protiviti has devised a simple, six-step process that can easily be put in place to ensure organizations will be enabled to make optimum use of their data. The FRA²ME methodology adds the foundational elements organizations need to ensure that end-user adoption is not lost in the hubbub of building a state-of-the-art BI solution.

Getting the right information, to the right people, at the right time, is intrinsically valuable to any organization. The return on investment (ROI) is not in how the organization drives the BI program, but how effortlessly it can achieve a “nirvana-like” state where collaboration really happens. With that goal in mind, we start every project from a technology-agnostic standpoint, but with a focus on how to design, align and build systems that will deliver that uber-collaborative environment.
The FRA²ME Methodology

FRA²ME is a unique methodology that provides systematic and repeatable best practices around increasing end-user adoption. It is exclusive to Protiviti, allowing every client to maximize their BI investment, turning business users into advocates and dramatically growing the adoption of BI throughout their organizations. The FRA²ME methodology focuses on the importance of understanding end-user workflows and use cases to drive relevance, in turn ensuring usefulness and adoption of BI.

While technologies change over time due to improvements in underlying processing speed, decreasing costs in computing power and storage, and new paradigms in both information availability and information consumption, the core tenets of the FRA²ME methodology remain applicable and easily adapt and benefit from continual technological advances.

The FRA²ME acronym represents Foundation, Relevancy, Agility, Advocacy, Monitoring/Measuring and Education:

- **Foundation.** Laying a solid foundation starts with a highly optimized system performing at its best. From an optimized data warehouse to data quality, governance and security, creating a BI program that is trustworthy, performs well and is accessible when and where the end user needs it, is essential to user adoption. Strong foundational elements such as governance, speed and reliability create trust in the data among users.

The FRA²ME foundation issues impact all BI projects:

- **Security**
- **Performance**
- **Stability**
- **Data Governance**

- **Relevancy.** Focus all initiatives on use cases and outcomes.

The FRA²ME relevancy issues focus all initiatives on:

- **Personas**
- **Analytic Models**
- **Smart Workflows**
- **Situational**

- **Agility.** Projects delivered in 12-week increments.

The FRA²ME agility issues focus all initiatives on:

- **Responsive to Requests**
- **Agile or Rapid Approach**
- **Center of Excellence (CoE)-Initiated Outreach**

- **Advocacy.** Coordinated advocacy promotes brand.

The FRA²ME advocacy issues ensure:

- **Naming and Branding**
- **Promotion/Social**
- **Relevant, Stable and Agile Systems Promote Advocacy**

- **Monitoring/Measuring.** High-volume content drives future enhancements and detail.

The FRA²ME monitoring/measuring issues ensure:

- **Continually Monitor**
  - Performance
  - Downtime
  - Usage

- **Education.** Continued education on how and where to use BI.

The FRA²ME education issues ensure:

- **Contextual**
- **Situational**
- **Use Case-Driven**
- **Video Content**

These foundational elements are key to the FRA²ME methodology:

- **Performance.** If queries are slow or interactions laborious, end users will not use the solution — or they might download data to Excel or purchase their own “rogue” solutions.

- **Stability.** If the solution is not enterprise-ready, fault-tolerant or “bulletproof,” the user community will resist. Outages, connectivity issues and browser incompatibility all have disproportionately negative effects on end-user acceptance.
— **Security.** Lack of a security strategy or incomplete security capabilities leads to the potential for inappropriate information distribution or the inability to provide information to the broadest audience.

— **Governance.** Lack of trust in the data provided is the quickest way to destroy end-user adoption. Questioning the data or arguing over whose data or report is the most accurate are common results of a lack of governance and central control of the information. Adherence to governance principles and an architecture that supports this are paramount to end-user adoption and achieving informational insights.

- **Relevancy.** The FRA²ME methodology incorporates three key components (analytic models, personas, smart workflows) to achieve relevancy, which becomes the core of the scoping, design and user community cadence, driving new and ongoing delivery efforts. Here is where we really focus on the business user, the use case and the desired outcome. The final solution put in place must be relevant for the purpose it was built to serve. Simply put, the user community will use the BI system if it is useful. The challenge is ensuring BI remains relevant to a user community with continually changing needs. We work very hard to make sure we understand the business issues and what a user’s “day in the life” looks like so that when the solution is deployed, it is relevant and useful. Adding BI to the decision-making process when and where applicable significantly increases relevancy.

- **Agility.** Business today does not reward the hesitant. We have worked with organizations who were looking to grow through acquisition, expand into new geographies, introduce new products and pursue other initiatives. They all had one important commonality: the cadence of change. We have learned that organizations need to build, adapt and perform outreach to achieve that nirvana state of collaboration. Then do it again — and again. Creating an agile, responsive solution is key to driving user support.

In some contexts, agility refers to the approach and operating rhythm of the BI team with respect to the end-user community and having the technological framework to support it. With an eye to the cadence of change, continuous improvement should be delivered incrementally to support end-user engagement. The technology required to support an agile BI team must be agile, too. Modern solutions that enable end-user driven content and the capabilities enabled through in-memory computing have significantly improved our ability to deliver rapid solutions that still adhere to foundational concepts like governance and security.

- **Advocacy.** Develop “raving fans” for the organization’s solutions. If a solution is foundationally sound, quick, responsive, governed, secure and relevant, advocacy happens. Picture a scenario in which users say, “I can’t imagine my life before this solution,” or “I can’t imagine living without this solution.” It is important to note that promoting and branding a solution also play an important role in achieving advocacy. One client wisely branded their new BI system to complement their very popular consumer brand and almost immediately increased user loyalty.

- **Monitoring/Measuring.** Keeping an eye on user activity and data usage is essential to establishing a positive track record for reliable data; that, in turn, builds the trust of business users. Determining which report is being used or which dashboard is regarded as most reliable provides an opportunity to continue to dig deeper into the organization’s needs, and to evolve and create more relevant solutions as the business grows.
Most organizations are working hard to maximize the efficient use of data in a world where information overload prevails. In a June 2017 white paper, The Zettabyte Era: Trends and Analysis, Cisco predicts that annual global IP traffic alone will reach 3.3 zettabytes (ZB) per year by 2021, or 278 exabytes (EB) per month. That is in line with predictions from research firm IDC (a premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology market), which in 2014 shared its prediction that the “Digital Universe,” which totaled just 4.4 ZB of data in 2013, will grow to 44 ZB by 2020 and to 180 ZB by 2025. Those are mind-boggling numbers. And these projections underscore the need for organizations to manage their data effectively now so that they are prepared to handle the data growth that lies ahead.

**Education.** Education plays a critical role in end-user adoption. Training on new solutions should be situational, contextual and personal, which means using the kinds of training tools users relate to best. Whether you choose YouTube videos, tweets about quick wins or power user custom training, you will develop well-informed users who will, in turn, generate the buzz needed to sell solutions across your organization.

### Analytic Models
Beginning with our industry-specific models as a baseline, we collaborate with your executive-level decision-makers and thought leaders to refine existing analytical models.

Additional strategic questions are asked, key metrics are identified, and the components that drive your organization’s success are documented.

### Personas
A representation of the critical “care-abouts” of a customer segment or employee group that have a role in executing an aspect of a company’s business model.

- **Key Characteristics:**
  - Pain points
  - KPIs
  - Desired capabilities

### Smart Workflows
Smart Workflows: Personas + Analytic Models + Technology = Intelligent Workflows

- **Who:** Illustrate the cross-functional or cross-business logical flow of analysis and evaluation.
- **What:** Illustrate the relationship between dashboard and reporting scope.
- **Where:** Navigate between the content, inclusive of drill-down, drill-through and across.

---

**Turning Data Into Insights in a Results-Driven, Agile Environment**
FRA\(^2\)ME helps organizations delineate between information and insights. Insights are actionable, adaptive and help achieve the desired objectives. The emphasis with FRA\(^2\)ME is to produce results-driven BI, while remaining focused on the organization’s ultimate goals.

There are many areas where we have helped clients achieve insight, including:

- **Process optimization** (“How will we anticipate and reduce costs?”)
- **Operational efficiency** (“How can we increase sales and improve customer satisfaction?”)
- **Financial visibility** (“Let us help you better understand and improve profitability.”)
- **Sales effectiveness** (“What steps are needed to increase sales and improve supplier service-level agreements (SLAs)?”)
- **Consumer behavior** (“How can we more effectively engage our customers?” and “What consumer trends are developing in our industry?”)

What is right for one organization may not be appropriate for another, which is why the FRA\(^2\)ME methodology is designed to help businesses quickly pinpoint where to focus. For example, FRA\(^2\)ME helped cut through the distractions of an upcoming initial public offering (IPO) to enable a fast-growing pet food manufacturer to quickly implement a real-time, interactive and highly intuitive dashboard providing visibility across 50 metrics and their related tolerances. The client’s initial concerns about containing costs and maintaining product quality and meeting customer commitments while launching a new manufacturing facility were allayed by this successful implementation. The client saw 100 percent effectiveness in its first 90 days of operation at the new plant.

Another client, a large media company, had little to no visibility into its travel and expense analytics, nor into spend related to vendors and internal customers. It had attempted to deliver the analytics requested by the finance department, but after several attempts, finance decided the solution did not provide what was needed to run the business. The client was spending countless hours manually cabling together data from many applications to try to gain insight into employee spending. The data would never tie together, and there was no access to detailed transactions for root cause analysis. As a result, no one in the organization trusted the data. Protiviti partnered with this client to implement a real-time expense and revenue reporting solution, which provided actionable information and root cause analysis on the fly. Now, the client has insight into expense data at the detailed general ledger (GL) account level for any combination of divisions or departments in near real time. Access to corporate credit card feeds, booking systems, expense submissions and revenues provide a comprehensive view of the travel and expense (T&E) habits of this client’s staff.

Another example: The fourth-largest and fastest-growing optical retailer in the U.S. needed to understand how to best segment and target customers while also determining when and where to open in new markets. That would be a fundamental change in the client’s go-to-market strategy, and the metrics for the future vision were significantly different from its past strategic plan. The company had also grown through mergers and acquisitions, causing challenges with disparate systems. Retrieving transaction and customer data was labor-intensive, and the lack of data uniformity caused a critical trust issue. The FRA\(^2\)ME methodology allowed us to identify how this client could effectively build a trusted data platform and implement customer analysis models that provided greater visibility into customer behavior for targeted sales and marketing campaigns, improved customer retention, and optimized site selection for new stores.

Each of these companies now has a BI system that is constantly working for change, and each has put a technology infrastructure in place that supports rapid and consistent change.
Navigating the BI Journey

It is not easy creating a results-driven, agile environment. As reliance on data grows and businesses continue to grapple with data management, data governance, security concerns and more, the BI journey becomes one of “always enhancing, always improving.”

Building a finely tuned BI organization using the FRA²ME methodology involves combining an agile, **Trusted Data Platform**, with a scalable and secure **Operational Reporting Platform**, self-service-oriented **Data Visualization**, and **Strategic Reporting** technologies, resulting in a process flow much like this:

As businesses consider their BI goals and objectives, they should factor into the equation whether they are structured as a “data up” or “business down” entity. If the former, and data is at the wheel, beware: a “data up” environment can be “agile prohibitive” — meaning the data itself can be an organization’s own worst enemy, as the organization is held back by its inability to reasonably manage the sheer volume of its information.

A healthy, profitable company is in a constant state of change. And the cadence of change, at least from a BI perspective, is this: build, adapt, outreach. Build the solution that is best for current needs and resources (hopefully, using the FRA²ME methodology as a guide). Adapt the solution and adapt the organization, as monitoring and measuring will define how well the solution is working. And never forget the outreach: developing those advocates or “raving fans” who drive user adoption at the grassroots level, or where the rubber meets the road. Repeat as often as necessary: Build. Adapt. Outreach.

Along the way, organizations should not lose sight of the governance and security issues that face the company and industry. Like the data itself, both governance and security requirements are continually evolving, requiring diligence to ensure compliance and avoid a costly, reputation-killing breach or hack. Do not discount the fact that challenges are equally likely to come from internal and external sources. Education, a key feature in the FRA²ME methodology, can go a long way toward helping organizations to avoid both compliance and security failures.

With the six pillars of the FRA²ME methodology as a North Star, charting a course to BI nirvana can easily be realized. How will a leader know the organization has accomplished its goal? When end users exclaim, “I don’t know how I’d do my job without this.” Ah, the sweet sound of success.
ABOUT PROTIVITI

Protiviti is a global consulting firm that delivers deep expertise, objective insights, a tailored approach and unparalleled collaboration to help leaders confidently face the future. Protiviti and our independently owned Member Firms provide consulting solutions in finance, technology, operations, data, analytics, governance, risk and internal audit to our clients through our network of more than 70 offices in over 20 countries.

We have served more than 60 percent of Fortune 1000® and 35 percent of Fortune Global 500® companies. We also work with smaller, growing companies, including those looking to go public, as well as with government agencies. Protiviti is a wholly owned subsidiary of Robert Half (NYSE: RHI). Founded in 1948, Robert Half is a member of the S&P 500 index.

ABOUT PROTIVITI’S DATA MANAGEMENT AND ADVANCED ANALYTICS PRACTICE

The Data Management and Advanced Analytics Practice at Protiviti helps companies harness their data to make intelligent business decisions that drive performance and growth while managing risks. We deliver customized solutions in the areas of data strategy, advanced modeling and analytics. We help clients face the future with confidence by sharing leading practices, building meaningful relationships and delivering excellence.

CONTACTS

Shaheen Dil  
Managing Director  
+1.212.603.8378  
shaheen.dil@protiviti.com

Steve Freeman  
Managing Director  
+1.678.569.1156  
steve.freeman@protiviti.com

Brian Jordan  
Managing Director  
+1.617.330.4826  
brian.jordan@protiviti.com

Don Loden  
Managing Director  
+1.678.348.5497  
don.loden@protiviti.com

Jeremy Stierwalt  
Director  
+1.312.931.8713  
jeremy.stierwalt@protiviti.com

protiviti.com