

Tools & Templates



Project Management

- Project Management Database

Communications

- Communications Template

Strategy

Requirements

Design

Development

Deployment

- [Strategy Map](#)
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- [Business Unit Requirements](#)
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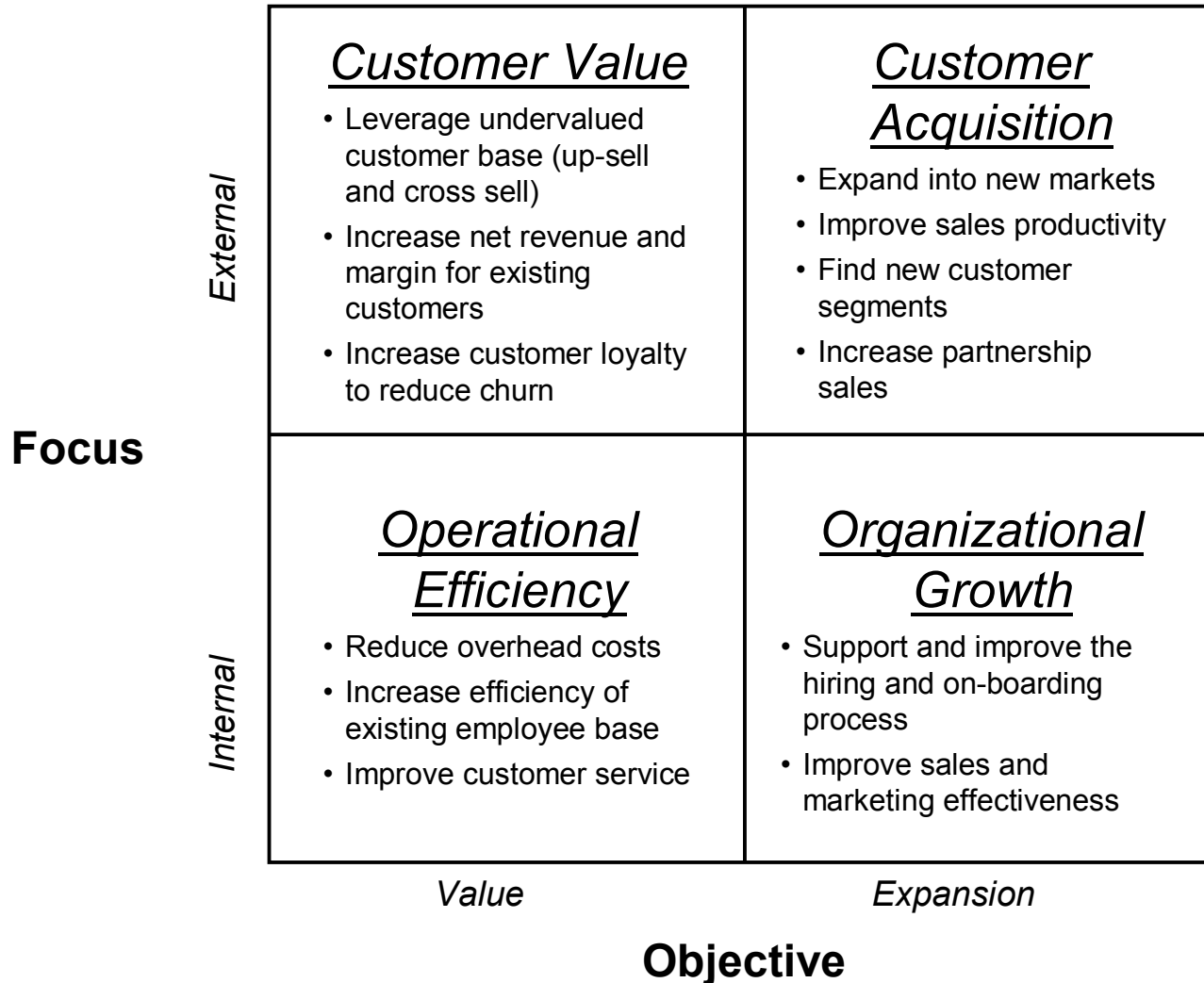
- Logical Data Model
- ETL Design
- Business Intelligence Design
- Data Architecture
- Test Plan

- Physical Data Model
- ETL Code
- Business Intelligence Code
- Meta Data Repository
- Test Results

- Service Level Metrics

Strategy Map

The following outlines a top down approach to defining the data integration strategy. The “Focus” applies to internal vs. external to the organization. The “Objective” highlights value vs expansion with respect to corporate go-to market strategy.



Business Case (Sample)

The following is a template for building a business case. The items are examples and are not meant to be an exhaustive list.

Quantitative

- Customer Focused:
 - Increase in net revenue/ margin for existing customers (\$)
 - Increase in customer retention (#)
 - Reduction in customer acquisition costs (\$)
 - Increase in new customers vs. historical performance (#)

- Internally Focused:
 - Increase in employee efficiency (E)
 - Reduction in headcount (#)
 - Increase sharing of information between business units (C)

Qualitative

- Improved reporting across business units facilitating improved teamwork (C)
- Indirect benefits due to increased visibility into operations (C)
- Improvements to partnerships and alliances (C)
- Improved financial reporting (C)
- Improved reporting and distribution efficiencies - more time spent on analysis than report generation (E)

Benefits Legend

\$ - Financial
- Numerical count
C – Communication
E – Efficiency Improvements

Risks & Challenges

The following is a list of common risks and challenges associated with a data integration initiative.

- **Data quality** – source system data issues will have a direct impact on data quality within the integrated repository.
- **Source system integration** - lack of integration between source systems can be a significant obstacle to building an integrated repository.
- **Source system changes** - successful data integration initiatives often require significant changes to source systems, increasing the cost and complexity.
- **In-flight data initiatives** – most companies have one or more data integration initiatives underway, usually at the department or business unit level. Coordination and/or integration is critical with these existing initiatives.
- **Internal experience** – in house experience and/or expertise can be lacking on one or more key areas, increasing likelihood of significant mistakes during the implementation effort.
- **Optimistic estimates** – overly aggressive plans, often driven by business needs, can lead to unrealistic project plans leading to over-budget and late delivery.

Executive Requirements Template (Strategic)



<i>Goal</i> <i>Subject Area</i>	Customer Value	Customer Acquisition	Operational Efficiency	Organizational Growth
Customer				
Product				
Inventory				
Financial				

- Goal – Output of the Strategy Map
- Subject Areas – Business focused data groups, customized based on the type of business
- Goals and Subject Areas can be decomposed into subgroups if more granularity is needed
- Serves as a guide for the business unit requirements definition, by translating strategy map output into actionable project objectives

Business Unit Requirements Template (Tactical)

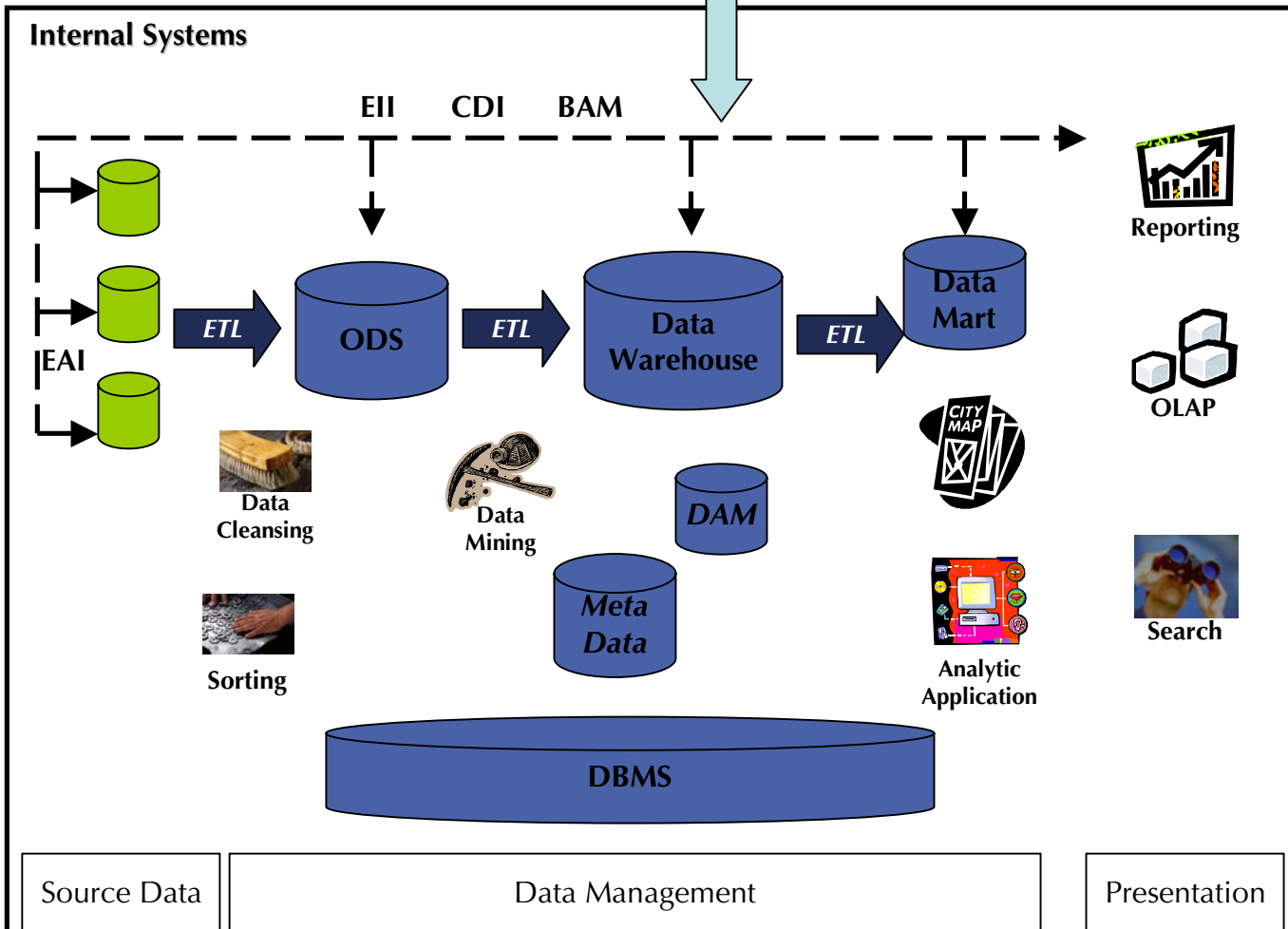
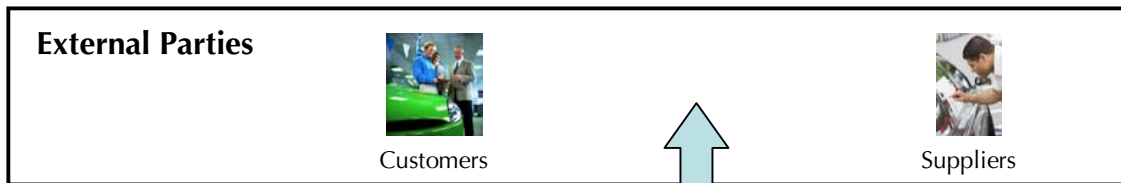


<i>Business Unit</i>	<i>Marketing</i>	<i>Sales</i>	<i>Finance</i>	<i>Operations</i>	<i>IT</i>	<i>Customer Care</i>	<i>Examples</i>
<i>Subject Area</i>							
Customer							
Core Attributes							
Transactions							
Interactions							
Segmentation							
Product							
Inventory							
Shipping							
Returns							
Financial							
Billed Revenue							
Booked Revenue							
Cost							
Margin							

- Business Unit – Corporate functional groups
- Subject Areas – Business focused data groups, with associated subgroups
- Takes input from Executive Requirements and drills down on Subject Areas by Business Units.

Technical Architecture

A conceptual representation to be used as a starting point in defining a customized architecture for your organization.



Roles and Responsibilities

Identifies the 4 primary roles, their associated responsibilities, and their interactions

