How to Successfully Onboard a New Business Intelligence and Reporting Application

Why Do You Need an Onboarding Roadmap?

The right business intelligence and reporting software can significantly enhance business outcomes by giving decision makers greater visibility and insight into sales and operational performance. But getting your whole team psyched up to use and get the most value out of a new reporting application may not always be easy. New software onboarding helps you succeed in that.

What is Onboarding?

Onboarding is the phase that you as a customer go through between making the decision to use new software and being a fully set up user of this software, knowing exactly how to extract the most value from it.

Topics in this guide describe the traits of a quality onboarding program:

Onboarding Fundamentals & Important Preparation Questions

What are the Benefits of a Structured Onboarding Approach?

There are many reasons why a business would want to structure and optimize their application onboarding processes:

1. To ensure high data quality. Otherwise, the application won't be used.
2. To train and engage users.
3. To vet your current business data.
4. To create momentum with the new reporting solution, garnering high usage once the onboarding is complete.

How Does Onboarding Work?

With business analytics and reporting software, modern onboarding starts with understanding you as a customer – your current situation, current setup, your priorities, what you want to achieve with the new software, and your definition of success.

Having measurable success criteria is ideal and should be achievable during the onboarding process. Some of the first questions to ask yourself either before you make your software selection or begin your onboarding process are listed to the right.

Based on that information, the vendor's software onboarding team should customize a project plan to guide you through the migration and implementation phase. As the software offering evolves and changes over time, and as new features are released, good onboarding should also make sure that these features get used and that clients benefit from them.

Questions to Ask Before Selecting an Application & Starting Its Onboarding

Q. Why are we doing this? Is it to improve visibility to business performance? To have the ability to analyze and report on information across the enterprise? To give analysts and others self-service access to business data with minimum IT intervention? Or to improve the accuracy of data used for your business reporting?

Q. How are we going to validate the data? Using our current reporting system? Manually? With Excel?

Q. What are we looking to achieve? A system that's trustworthy to use to help manage part or all of the business? To replace your current business analysis and reporting system? To reduce data manipulation in Excel for reporting? Or to leverage totally vetted data in your Power BI visualizations?

Q. Who will make data corrections and set up new users once it's live? Your IT team? Your vendor?

Iterative Approach to the Success of a New Reporting Solution

Silvon’s Professional Onboarding Program

At Silvon, a professional Onboarding program is available for all new customers. With the help of an Onboarding Specialist, our customers receive guidance all the way from how to properly configure our analytics and reporting application, to team training.

Our personalized approach to onboarding is based on a proven roadmap that covers each one of the following steps:

1. Creating your company’s onboarding success plan, then making sure you achieve each step.
2. Setting up the application.
3. Importing and transforming the data into useful information.
4. Validating the newly imported data.
5. Configuring integrations with other apps; for example, linking our analytic application with an advanced data visualization tool like Power BI or spreadsheet application like Excel.
6. Creating and/or customizing the solution’s built-in analytic templates and reports.
7. Conducting training sessions for users and/or in-house trainers.

Use an Iterative Approach That Accounts for Growth & Change

The onboarding process for a data analysis and reporting solution should employ an iterative approach that can be easily replicated whenever new data is made available to the application, when new features are added by the vendor to the application itself, or when new users in your business are introduced to the solution.

Organizing for Success: Critical Steps for a Comprehensive Onboarding Initiative

In working with more than 2,000 businesses over the years, Silvon has found the steps shown here to be most beneficial in helping our clients organize a successful onboarding initiative using this approach. Details about each step are provided in the remaining pages of this guide.

1

Identify the Onboarding Team
This includes individuals from your business and from the vendor's organization who will be involved in defining and orchestrating the onboarding program.

2

Define the Data Scope of the Onboarding Project
Once the scope of onboarding has been defined and communicated with the vendor, the vendor should create a prototype of their solution for you, mapping in a subset of your data for initial testing and actual use.

3

Schedule a Kickoff Meeting
A kickoff meeting between the Customer and Vendor teams will help to ensure that both sides are on the same page relative to the scope of the onboarding program.

4

Make Sure You Have All the Data You Need
In this stage, you'll determine if you have the right data to feed the data model of your vendor's solution to support your current and/or desired reports.

5

Configure & Integrate the New Reporting Application with Existing Systems & Data Sources
This typically includes the remote installation of the reporting software on your hardware or in the cloud, as well as integrating the reporting solution to your ERP's current and historical Sales or other business data previously defined in the data scope.

6

Validate The Data
There are certain strategies you can use in validating your data for the reporting solution. Your vendor should provide guidance to you during this step.

7

Final Steps Before "Go Live"
As you're getting ready to go-live, various final steps will need to be addressed, including setting up your security measures, defining users who will have access to the application, and conducting user training.

8

Success
As experience has shown, this stage isn't always an immediate success. Look at this last implementation phase as the time for smoothing out the rough corners and fixing any issues that might come up.

Customer & Vendor Dynamics: Identifying the Onboarding Team

The emphasis here is on the plural. While most companies assign a single sponsor or champion, the onboarding team should include the following individuals from both sides of the house to ensure a successful rollout of a new business analysis and reporting application. All kick-off, review and sign-off meetings should include this core team, at the very least.

Customer Side

- The **main champion or executive sponsor** representing the business side of the Customer's organization.
- The **functional owner or administrator** (understands, clarifies, and confirms the onboarding project scope).
- The **technical champion** (represents IT, systems or infrastructure teams and validates the integration of the new software with current-state or future-state architectures).

Vendor Side

- The **executive sponsor from the software vendor** (this could be the CEO, Sales VP, Operations VP) who has the technical and industry domain expertise required to satisfy the Customer's reporting needs.
- The **customer success specialist** (introduces the right resources at the right times and works to align expectations for the successful adoption of new software).
- The **lead services and support resource** (the hands-on technical expert who, ideally, also understands the industry and business processes involved).

Understand Stakeholder Reporting & Data Needs Prior to Onboarding Kickoff

Define the Data Scope of the Onboarding Program

To ensure the success of your reporting application and avoid potential issues, here are some best practices for defining the scope of data to be used:

Understand Business Objectives - Start by thoroughly understanding the business objectives and goals that the reporting application is meant to support. What insights or decisions are stakeholders looking to derive from the data? This will help you determine what data is essential.

Engage with Stakeholders - Collaborate with business stakeholders, including end-users, managers, and subject matter experts, to gather their requirements and expectations. Their input is crucial in defining the scope and ensuring that the application meets their reporting needs.

Suggestion From Silvon's Onboarding Team

Try to understand how many different reports your business analysts and others are using. When you have this information, see what needs to be replicated in the new system and what can be left out. Then, you can determine what data you'll need and where it needs to be sourced from, along with how much history you'll want.

Schedule a Kickoff Meeting

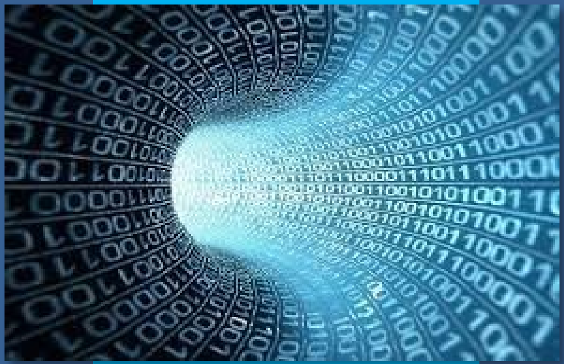
During the kickoff meeting, all steps of the onboarding process should be reviewed between the customer and vendor teams. This includes the scope of data to be used in the first iteration of the new reporting system, an overview of all phases of the onboarding project (including data mapping, system configuration and integration, data validation and correction, user onboarding and ongoing monitoring and support).

Be open to discussing expectations up front and then work together to align these expectations over the onboarding program to set achievable milestone dates and, more importantly, to effectively manage the scope. This improves planning and prioritization of key resources at milestone dates.

To facilitate this, Silvon provides an implementation methodology checklist for our own team members and members of our customer onboarding teams.

You really should expect this type of support from any reporting solution provider you work with.

Identify Source Data for Your Reporting Solution & Understand Your Data Model



Make Sure You Have All the Data You Need

Before the new software is installed and the data import process begins, be sure you have the data you'll need to feed the data model of your vendor's reporting solution. The data model is a structured representation of the data that is used to support the reporting and analytical needs of an organization.

Key components related to the data you'll be importing – and that you'll ultimately need to supply for the data model of the new software application – include the following:

- **Data Sources** - Data models typically incorporate data from various sources such as databases, spreadsheets, web services, and more. These sources are integrated and transformed to create a unified view of the data.
- **Tables and Entities** - Data is organized into tables or entities, each of which represents a specific aspect of the business, like customers, products, sales, or transactions. These tables define the structure of the data, including the attributes or fields they contain.
- **Relationships** - Data models define how tables are related to one another. These relationships are crucial for joining and aggregating data from different sources to answer specific business questions.
- **Attributes and Measures** - Attributes represent descriptive data elements (e.g., customer names, product descriptions), while measures represent numerical data that can be aggregated (e.g., sales revenue, quantities sold).
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- **Calculations** - Data models can include calculated fields or metrics that derive insights from the raw data. This may involve using mathematical operations, functions, or custom expressions.
- **Hierarchies** - Some data models include hierarchical structures to represent data relationships, such as the hierarchy of product categories or organizational structures.
- **Security** - Data models often include security features to control access to data, ensuring that only authorized users can view or modify specific data.

Integrate Source Data from Designated Sources to the New Reporting Application

Configure & Integrate the New Reporting Application With Existing Systems & Data Sources

Your vendor should offer assistance to you for integrating their application with your ERP and other transaction systems. At Silvon, we offer step-by-step guides and resources to help our customers effectively maneuver their data import and mapping process. Then once the mappings have been created, our customers assume the responsibility of carefully reviewing the mappings before proceeding with the data validation process.

We recommend that you implement a process to supply a small subset of your transactional data (perhaps Sales, Open Orders), as well as your Master File data (like Products, Customers and Sales Reps) to the new reporting application.

This approach provides a great way to establish a reporting environment that can be easily augmented with new data (like Inventory or Procurement info) once the product rollout occurs and is producing good results for you. Many of our customers start this way and eventually evolve their reporting application to support the analysis of data from across the enterprise using many different data sources.

What Source Data is Best for an Initial Reporting Solution Rollout?

- Transactional data from ERP & other core business systems.
- A small subset of frequently used transactional data like Sales and Opens Orders.
- Master File data about what you sell/produce, who sells your products, and who buys them.

Validate & Correct Data in Application Reports Against Your Source Data

Vendor-Guided Preparation for Data Validation

The data validation phase is by far the most critical component of onboarding a new business analysis and reporting solution. During preparation for this phase, the vendor should assist you with the following:

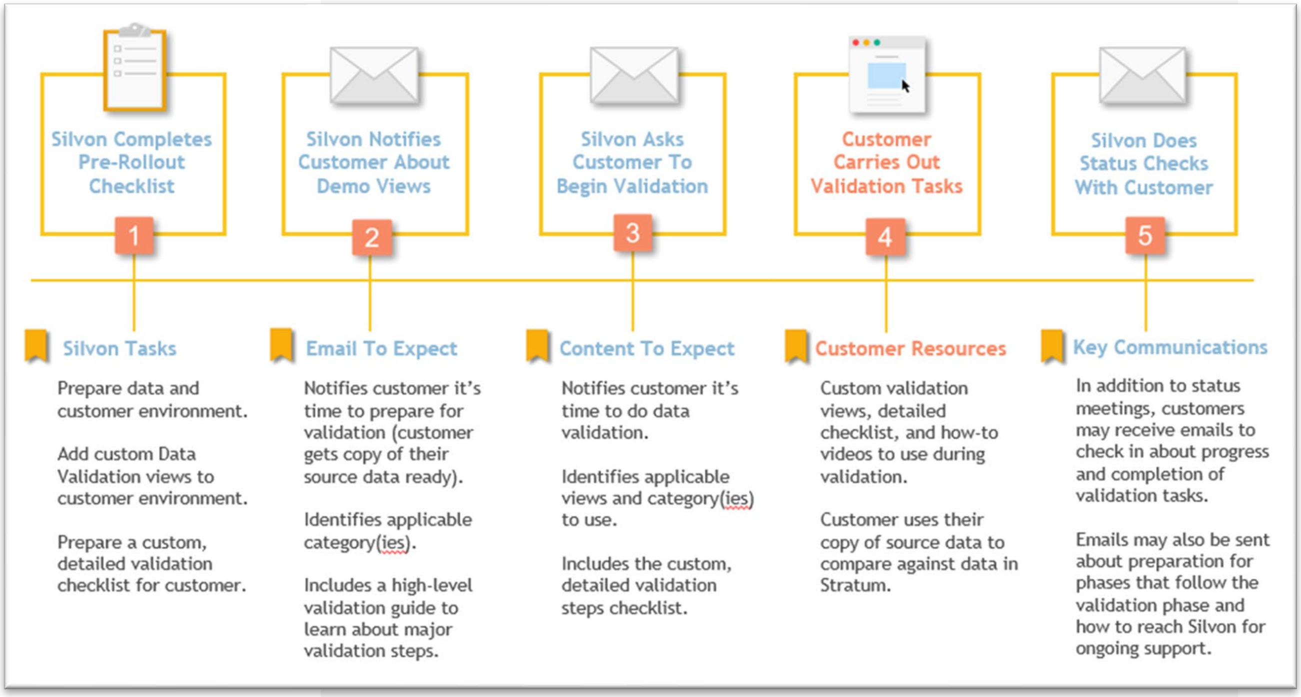
Loading your data into the solution's data repository.

Setting up a nightly refresh of the data instead of reloading all of it daily.

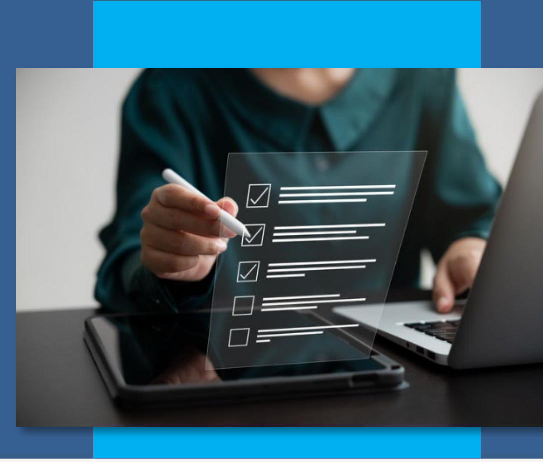
Providing solution access to members of the customer onboarding team so they can validate data for key measures, dimensions, and master data.

Sharing data validation and other resources with you to ensure an effective execution of this important onboarding phase. Ask your vendor if they offer such resources to help facilitate this process. At Silvon, we provide customized validation views that customers can use to vet data in the reporting solution against their source data; helpful guides with links to video examples; and detailed data validation task plans that are unique to each customer's implementation.

*Here's an example of a **Data Validation Interactions workflow** that a vendor's onboarding team may follow while guiding your company through the data validation process.*



Validate & Correct Data – Customer Tasks & Tools That Assist Them



Tasks Led by Customer's Onboarding Team

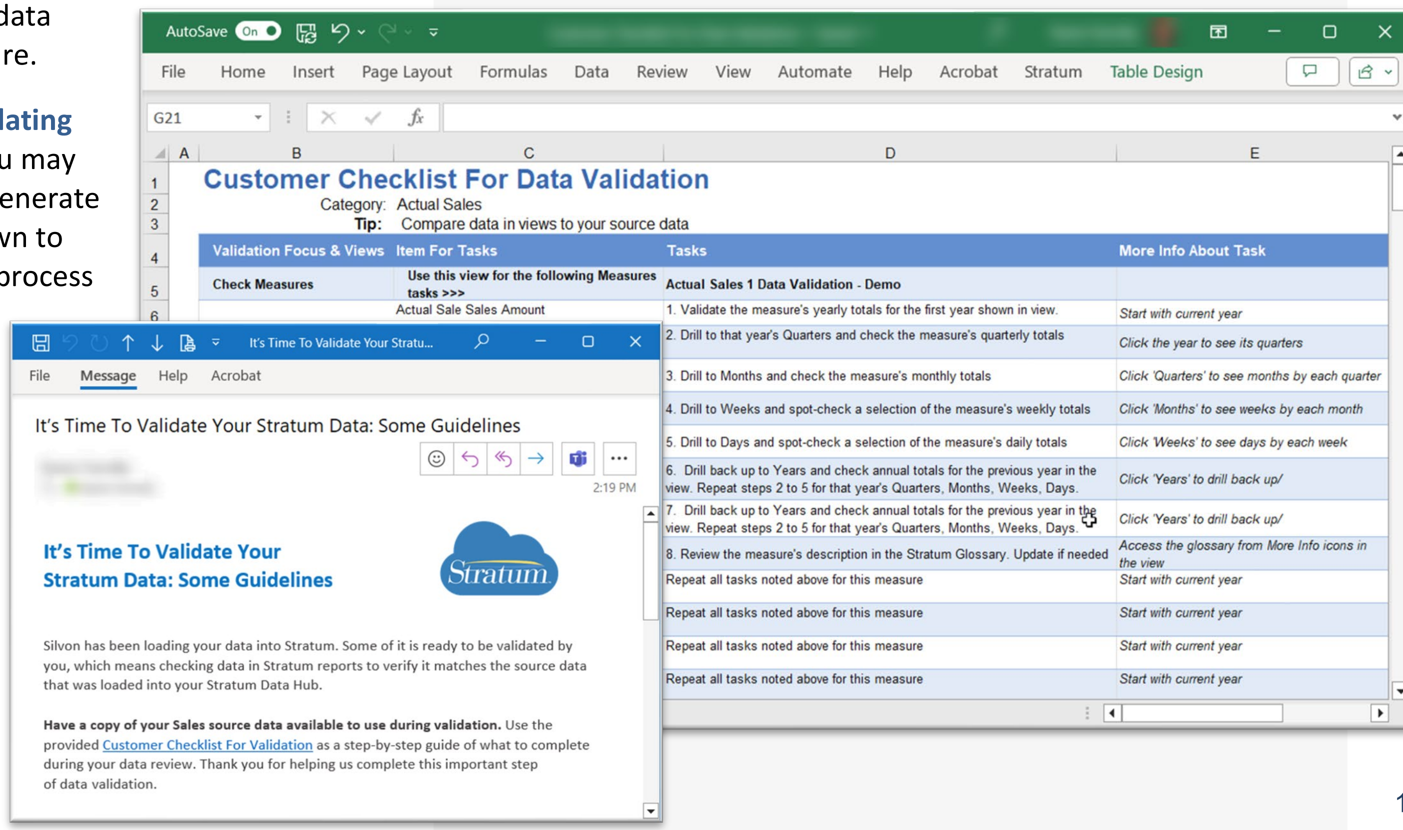
Once the vendor accomplishes initial data validation steps like those listed on the previous page, it's up to the customer onboarding team to handle the following:

Determine who has ownership of the data validation process, both for the initial validation and for new data added to the reporting solution in the future.

Identify what resources to use when validating data in the new solution. For example, you may decide to use your business systems and generate reports from them that can be filtered down to a data subset to help make the validation process more manageable. Or, you can use Excel spreadsheets that contain all the needed data in a current, valid version. Make use of validation task plans or other tools that your vendor provided to keep on track while checking application data against original source data.

Correct any inaccurate data within the actual data source.

*The samples below are a **Guidelines Email** and **Data Validation Task Plan** that Silvon provided to a customer to help their onboarding team maneuver through a Sales data validation process.*



Final Steps Before The New Application Goes "Live"

Before going live with the new application, you'll need to establish your user security settings, add those individuals who will be able to access the system and then train them to effectively use the new software.

Setting Up User Security

The first step will be setting up security roles so users only see the data you want to present to them. With Silvon's reporting application, security can be set up at the Hierarchy level (for example, a sales rep can be set up so they only see their own territory data. Security can also be set up to hide measures of data (for example, costs can be hidden from non-financial users). User group security can additionally be defined in the same manner if you're interested in defining groups of users who share the same security roles.

Adding Users to the Application

Once security settings are established, User Groups can be created (for example, a Sales User Group can be defined to organize your sales reps). Then users can be set up and added to their respective User Groups. User Profiles can then be updated to include the Security Role mentioned in the previous section. If securing at a User Group level – it can be accomplished at this time as well.

User Onboarding

In addition to setting up your user access (security) levels and adding new users to the application itself, we recommend to our customers that they provide and promote the use of custom views of their already loaded data to all users. It's also very beneficial to provide standard sets of base views for typical types of business analysts. Finally, sharing "Getting Started" and other resources with your users is an absolute must.

Your vendor should be able to guide you through the entire user onboarding process, including administrative tasks to add users, creating those standard and custom views of key data, and supplying a thoughtful amount of resources to help users get started.

Types of User Onboarding Content that Silvon Provides to Customers

- Customized views to guide users in exploring the features and their data within our application.
- Emails to welcome users and share videos about custom views of their data.
- A Getting Started video series.
- On-line help and live, bi-weekly classes that are available on-demand to users immediately afterwards.

Monitoring & Support For Onboarding & Ongoing Application Maintenance

Ongoing Customer Care After Onboarding

While your team becomes acquainted with using the software and after the onboarding program has come to an end, it's important to provide ongoing monitoring and support of the reporting application to ensure that users embrace it with good momentum and that it continues to meet your defined scope as your business evolves.

The vendor's support team and automated support platform should be the leading point of contact for help, questions and issues all the while - supported by the vendor onboarding team, client services group and customer success manager. Be sure to ask your vendor, too, about regular communications programs they may have to help you, such as weekly status meetings, quarterly executive reviews to learn about new features, new release notifications, and educational newsletters.

Once the onboarding is over, see if your vendor provides a methodology for helping you make changes to your onboarded data and other files – even to help you add new data if there are gaps you need to fill.

In Summary

A well-managed onboarding initiative can eliminate so many of the gotcha's typically experienced by companies as they bring a new reporting solution on board. By using an iterative approach, you'll be prepared to handle new features, the addition of new users and the handling of new data from both current and new sources with ease. Plus, having a vendor that not only understands your industry, but the business software you use and the unique features of the vendor's own reporting solution, can help guide you swiftly and effectively versus leaving the entire onus of onboarding on you.

Our best wishes to you with your data analysis and reporting software onboarding journey no matter when you begin it! Reach out to Silvon at info@silvon.com for more info about these topics.

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Silvon helps their clients improve operational-level visibility and subsequently drive a more intelligent – and successful – enterprise. We accomplish this through strong partnerships with our clients and strategic, long-term plans that we jointly create to address their enterprise reporting requirements.