



# Ten Questions

## to ask your Data Warehousing Consulting Partner

### Finding the Consultant That's Right for You

A recent META Group survey of data warehousing projects found that the primary differentiator between successful and unsuccessful projects was consultant usage. Highly successful projects averaged 50 percent of the project team derived from external sources, while on less successful projects no more than 20 percent of the team was made up of consultants. It's no wonder that more enterprises are turning to outside consultants and systems integrators to help them with their data warehousing initiatives.

### Not All Consultants Are Created Equal

However, not all data warehousing service providers are created equal. The data warehousing services landscape has many players in it, which range from the large full-service consultancies, the professional services arms of software and hardware vendors, through to the niche specialist data warehousing consultancies.

Given the array of professional services options, it can be difficult to decide which consultant is right for you. To that end, we present a list of the most important questions to ask when evaluating a data warehousing service provider.

Whether you are in the process of selecting a new consultant or assessing the performance of your current consultant, these questions can help you determine whether a service provider will be able to provide the best quality of service for your full lifecycle data warehousing needs.

#### QUESTION # 1: Can you help me build a case for funding?

In the current economy, more enterprises are requiring strong business cases and/or ROI projections before funding any type of IT project. Business Intelligence initiatives in particular have been subject to harsh budgetary scrutiny, especially where the memories of past project failures linger among management. Data warehousing project managers must for this reason be prepared to offer formal justifications and defensible ROI estimates for data warehousing initiatives. If your project is not yet funded, your consultant should have the skills necessary to help you make the case for your project and obtain support and funding from management. Ask your service provider about how it would work with you as a partner to get a data warehousing initiative funded. Such a plan should clarify project objectives, costs, and timelines while identifying and quantifying expected business benefits. Depending on the scope of the proposed project, a consultant should be able to complete a plan with one or two people in the space of one to two weeks.

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### QUESTION # 2: Can you help me develop a meta data strategy?

Enterprises are slowly beginning to understand the importance of having a meta data strategy. A good meta data strategy helps to ensure user confidence in the data warehouse, improve data quality, and enable impact analysis. However, very few enterprises have taken steps toward actually implementing a meta data solution. Meta data is a purely technical concept, and therefore difficult to sell to business management.

Additionally, most enterprises simply don't know how to begin developing a meta data strategy—it's a complex problem with no easy, packaged solution. In fact, the complexity of the problem makes meta data a good choice for a consulting engagement. A good consultant should be able to set you on the road to a solution by choosing a practical starting point. Some consultants advocate grandiose, untested strategies for getting a handle on your meta data, which may have you heading down an extremely complicated path right from the start. The key to success is a meta data solution that is implemented in practical and measurable steps and customised to your needs.

Make sure that the consultant has had previous experience working with meta data and that they have demonstrated success in these engagements. The consultant should be aware of the tools available to help implement a meta data solution but should also be willing to combine these tools with custom development to arrive at the right solution.

### QUESTION # 3: Can you help me develop a data quality strategy?

Data quality is similar to meta data in that many enterprises realise its importance but have not taken the steps necessary to begin improving the quality of their data. Data quality, like meta data, is often seen as a nebulous problem with no easy solution. However, as enterprises begin to understand that poor data quality has sabotaged a number of their data warehousing efforts, they are turning to consultants to help them address the issue. A good consultant can help you implement the basic technology, processes, and organisation necessary to provide a foundation for improving data quality. This calls for a consultant who is not only skilled in the technology, but also in the business processes and organisational changes necessary to achieve data quality. Once again, a consultant should direct you to a practical starting point and help you prioritise areas for focus instead of suggesting a massive enterprise-wide overhaul right from the start. In short, meta data and data quality offer a true test of a consultant's skill—if the consultant has a clear vision for and experience in implementing solutions for these important issues, they are ahead of the game.

### QUESTION # 4: Do you have a methodology?

A methodology provides a repeatable roadmap specifically for implementing successful projects, leading to faster implementation times and a greater chance of success. A methodology also ensures internal consistency for an enterprise, so that all employees follow the same procedures and speak the same language.



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Ask your data warehousing service provider if it has a proprietary methodology, or if it follows one of the several commercially available methodologies. If the methodology is proprietary, make sure that the consultant is willing to leave a copy behind to use for future data warehousing projects.

In terms of desirable methodology characteristics, look for a methodology that is specific to data warehousing and that has been developed and tested in real-world situations. Generic methodologies created to support all types of IT efforts do not address the special concerns of data warehousing projects. The methodology should also clearly define phases, activities, and deliverables and support iterative development. Make sure the methodology can be adapted to fit a variety of project types and sizes, from assessments to full-scale enterprise development efforts.

### QUESTION # 5: Can you help me leverage best practices?

Best practice knowledge is one of the most valuable assets a consultant can bring to the table. You'll want to find out how your service provider develops project best practices and shares that knowledge among its employees. Formalised best practices documents, guidelines, or databases are especially helpful. In any case, make sure that the consultant has a plan for sharing best practice with your employees so that they can be used in future data warehousing endeavours.

A consultant's talent pool has a big impact on the kind of best practice knowledge it possesses; ask your service provider about the experience levels of its personnel, both in terms of technology and business processes. Ideally, best practice should be developed both for specific tools and for overall data warehousing technology areas and implementation types.

### QUESTION # 6: Are you financially stable?

Given the recent difficulties faced by IT services firms, including several highprofile bankruptcies, it is crucial for buyers to assess a consultant's financial stability. Is the firm's revenue growing or at least remaining stable? Is the firm profitable? What financial resources does it have available to meet future expenses? It does not matter if the consultant is not publicly listed but if this is the case ask them to share basic financial information with you.

Financial instability could negatively impact the quality of a consultant's work on your projects if personnel are distracted by internal concerns or shifted around in response to cost-cutting actions. It might also be important to you to have a consultant that you know will be available to assist with future projects. Assessing a vendor's viability is an important step in making a decision that you can be comfortable with.

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### QUESTION # 7: What is your project staffing approach?

One of the most important areas to investigate is the pool of personnel a consultant has available to work on your projects. You will obviously want to understand the kinds of skills the service provider's billable employees possess, in terms of tools, technologies, and processes. Data warehousing project teams require a diverse array of skills, from requirements analysis to architecture development to end-user mentoring and training, so you need to make sure that a consultant can fill all of these roles if necessary.

It's also important to understand how the consultant trains and develops its personnel. Are its employees encouraged to achieve certifications and expand their skill sets? The service provider should make employee resumes available to you and arrange for interviews as requested so that you can adequately assess the abilities of proposed team members.

Apart from looking at the skill set of its employees as a whole, you will also want to understand the mix of staff a consultant will dedicate to your project. Make sure that there will be a good balance between experienced practitioners and lower level personnel. Beware of the larger consultants who offer to provide you with a lot of staff at low rates; they are probably filling up the project with people who don't have deep data warehousing experience. In the long run, it may be more cost-effective to go with a team of more experienced staff from a specialist consultancy, even if it means paying higher rates. Finally, ask the consultant about its plan for dealing with staff attrition. You need to make sure that if a member of your project team leaves there will be another qualified person available to replace him or her.

### QUESTION # 8: What is your level of project management expertise?

In addition to achieving the proper staffing mix, you will want to make sure that your consultant has experience managing projects, especially large and/or complex engagements. Project management skills are just as important as technical skills in determining success. Make sure that the project manager the consultant assigns to your project has experience overseeing the type of effort you are undertaking, and that the consultant emphasises change management and people management as well as technical excellence. Also ask the consultant whether it has any formalised tools and/or processes in place to help ensure project success.

A formal quality assurance programme ensures that your project will receive the benefit of the consulting firm's collective project management experience, and that you will have an avenue of recourse to resolve any problems that arise. A consultant with a solid project management approach will be able to rapidly spot trouble areas and solve project issues.

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### QUESTION # 9: How will you transfer knowledge to my employees?

It's important that after a project is completed, the consultant transfers the necessary skills and knowledge to your employees to enable them to maintain the implementation. Ask the consultant what kind of training they offer and what sort of training facilities they have access to. Also ask about the kinds of documentation the consultant will provide at the end of the engagement.

Informal knowledge transfer can be just as important as training classes and documentation. What is the consultant's strategy for working with your employees during the engagement, including day-to-day mentoring as well as regularly scheduled meetings? Make sure that knowledge transfer is included in the consultant's methodology and that the consultant provides some insight into their previous experience in effecting knowledge transfer. As enterprises increasingly turn to consultants to help them with their data warehousing initiatives, it's important that they have a process for selecting and evaluating these service partners. Gartner Group estimates that the vast majorities of enterprises spend 30 percent more on evaluation activities than needed, and still select the wrong service provider half the time. The questions provided in this white paper are a good starting point to help enterprises identify the data warehousing consultant that is right for them.

### QUESTION # 10: What is your expertise in my industry?

Industry expertise is growing in importance as a criterion for selecting IT services providers. For data warehousing projects, vertical expertise ensures that a consultant is familiar with the business processes, decision support needs, and regulatory environment of companies in your industry. Industry expertise also relates to technical concerns. Some industries have unique data types or sources of clinical data types and sources. Many companies also use industry-specific software packages that may need to be integrated with a data warehouse.

Perhaps most importantly, a consultant with vertical expertise understands the types of innovations and best practices that are being implemented in other companies across your industry, and can use that knowledge to help you become more competitive. To gauge a consultant's degree of industry expertise, you should ask for examples of its project experience in your industry, check its references, and request any case studies, white papers, or other forms of intellectual capital that demonstrate its industry expertise.

If you require further information on choosing a data warehouse consultancy or have any queries around your systems please do not hesitate to contact our offices on **0845 124 9495** alternatively contact us via email: **[contactus@it-performs.com](mailto:contactus@it-performs.com)**