How to Improve Your Business Intelligence

Many health care organizations' business intelligence teams lack the experience, bandwidth and/or big-picture strategic and analytical skills needed to adequately respond to their organizations' heightened needs.

As health care organizations pursue improvements in productivity and clinical outcomes, they are also increasingly turning to business intelligence (BI) systems and staff to provide the data and tools needed to achieve and sustain such gains. The problem is, many organizations' BI teams – tasked with a myriad of urgent and competing internal demands – often lack the experience, bandwidth and/or big-picture strategic and analytical skills needed to adequately respond to their organizations' heightened needs.

That was the dilemma faced by a health maintenance organization (HMO) that had doubled its membership and found its BI team ill-equipped to respond to its growing technology needs. The HMO's experience in recognizing and addressing its BI issues provides a template that other organizations can follow when confronted with similarly pressing BI demands.

The Four R's of Quality BI Performance

The greatest positive emerging from the HMO's BI issues was a wholesale reassessment of its BI team's role, responsibilities, responsiveness and resources. You can call these the four fundamental R's of well-functioning BI team performance:

Role – Rather than being focused on "doing," a well-functioning BI team should also consider itself to be a vital strategic partner in the health care organization's business. Attitudinally and functionally, a BI team needs to operate as a key part of the organization's business team.

The HMO installed a new BI leader who immediately focused on mentoring and developing existing staff, overseeing and assisting with business analysis and reporting functions and defining a strategic path for the team to meet the HMO's organizational strategy. This leadership change quickly stabilized the BI team's performance and enhanced its ability to more effectively respond to internal requests. Your BI team's leadership should be capable of achieving similar performance.

Responsibilities – Instead of simply being "order-takers" and "project fulfillers," well-functioning BI team members should be high-quality strategic and process partners with internal clients. Creating and having in place service level agreements (SLAs) between a BI team and its business clients is crucial for establishing expectations for timing, deliverables and process improvement measurement.

For the HMO, the BI team's new SLAs defined responsibilities for each business team member involved in project requests, performance objectives, documentation and sign-off requirements at milestones. The SLAs also provided project quality measurement standards, project success definitions and internal satisfaction reporting. Do your SLAs provide similar levels of accountability and clarity?

Responsiveness – Delays in responsiveness to client requests are not only inappropriate, they detract from a BI team's professionalism. Established operational guidelines should delineate proper responsiveness for members of your BI team.

For the HMO, improved responsiveness from its BI team was necessary to drive better collaboration and understanding with internal clients, as well as provide more precise project requirements, improved testing outcomes, and decreased project request turn-around times. Key to this improvement was creating a new set of work flows for project requests, requirements gathering, and delivery processes, covering the following process areas:

1. Receipt and prioritization of initial requests from a business team
2. Requirements-gathering, design documentation, and hand-off estimations of requests
3. Developer build, unit test, and peer review processes
4. Change control, review, and re-estimation processes
5. User acceptance testing scenario development and testing documentation processes
6. Deployment processes
7. Stabilization and support processes

Resources – Forward-thinking BI teams provide the right set of resources to their internal clients to achieve optimal collaborative performance. Based on the HMO's BI team experience, consider the following tools to enhance your BI client relationships:

- **Requirements gathering tool** – To help all parties quickly and easily document requirements and record design to those requirements.
- **Requirements gathering tip sheet** – To help business users specify requirements and remind developers of key business questions to ask to more efficiently speak with one another.
- **User acceptance testing (UAT) tool** – To allow business users to document appropriate and repeatable test scenarios for validation and for storage of test and retest results.
- **Level of effort and project estimation tool** – To calculate the total number of business days and hours required for a given project, as well as resource dependencies and the estimated dates for planned hand-offs.

Gain Positive Results

As health care becomes increasingly complex, the need to effectively and correctly organize and analyze clinical, business and operational data also increases. High-quality BI staff and systems provide health care executives, administrators and clinicians with the crucial information that they need to make the right decisions at the right times, pursue timely opportunities and improve their operations.

By focusing on the four R's related to your BI team – role, responsibilities, responsiveness and resources – you can improve your BI work flow processes. In doing so, you will help your BI team work more efficiently and effectively and ensure superior internal customer service.