

Business is nothing but collaborative, so why isn't business intelligence?

Business, by its very nature, is collaborative. And yet business intelligence (BI), the ultimate goal-enabler, is not often robbing the organisation of its corporate memory around decision-making.

By [Gustav Piater](#) 24 Oct 2018



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To overcome this, leading BI tools and platforms are adopting social media-style communication and collaboration to improve outputs through better engagement and promoting knowledge retention and decision-making lineage.

Naked BI

Traditional BI limits itself to the numbers and charts, with scant regard for their context and actual intent for making decisions and acting on this.

Users need to be able to put their thought processes and motivations into reports, dashboards and analyses, through comments, annotations or even collaborative votes. They should be able to choose how and when to be notified of new reports and even alerted when certain parameters they have chosen and set-up, are exceeded. In short, they should not be forced to leave the BI platform for the privilege of collaborating around its outcomes.

Not being able to do this, ultimately, means the organisation cannot build up corporate memory around decision-making, which leads to ineffective knowledge induction programmes, poor knowledge retention when even low-level staff leaves, and a debatable success of even the best knowledge-driven projects.

Collaborative BI

What, then, are some of the features that will promote organisational participation in BI and enable centralisation of knowledge?

Due to the rampant success and huge adoption of social media, its unique style of communication and collaboration has spilled over onto enterprise software platforms, enhancing their user experience, increasing uptake, promoting knowledge retention and improving outputs through better engagement.

BI, too, has integrated social messaging, collaboration and workflow into its processes, and in the process became more of a platform custodian for organisational memory by enabling constant capturing of corporate knowledge.

Collaborative features that should form part of your BI platform:

- Report annotations
- Exception notifications and alerts
- Messaging
- Comment streams
- Media support (video, articles, weblink)
- Voting and polling
- Task management
- Timelines

But hang on, isn't that the job of CRM?

Reporting with collaborative functionality sounds a lot like CRM. But because CRM is opportunity/customer-centric, its scope is confined to the customer experience (CX) – that is, the sales, marketing, support and service funnel.

Beyond that realm, there is still a need for market insight and analysis, to drive business strategy, and it is this need that BI serves. For example, how much did we sell? What opportunities and challenges exist in an unstable, competitive market? In providing these insights, BI's broad reach into a market and industry data, as well as competitor performance, lends itself to the production of comprehensive strategic reports, whereas CRM's focus is much narrower.

Because BI is further strengthened in reading multiple data sources, it can add value to CRM platforms by analysing extra data sources including social media trends, Internet of Things logs and other unstructured and big data universes. In turn, however, BI needs to emulate the collaborative strength of CRM platforms.

Let's see how all that plays out

Most organisations can relate to the following typical 'insight life cycle', which explains the benefits of CRM-style collaboration in BI.

On Monday morning, an executive might receive an exception-based prompt that something is wrong – regional store performance is down. Through dashboards and analysis, he's able to get to the root of the problem, and through task-management functionality, set tasks for various team members to react and fix things.

Sales-wise, the company may face political uncertainty – globally – and in response, it may want to poll sales reps to advise of proper resolutions at an executive level.

As the BI team puts the monthly execo storyboard together, decisions further need to be made regarding expenditure, and again a poll comes in handy based on profit and loss reports.

Lastly, during an audit or investigation, questions might be asked about the reasons for certain decisions. Here, the organisation can look back on not just the numbers but the many contextual conversations around them, explaining the enterprise's reasoning to regulators and auditors.

Searchable corporate context

In the final analysis, it is clear that BI with collaborative functionality provides fully-searchable, auditable organisational context to financial decisions from a wide spread of information sources – in one place.

Value this vital element of the enterprise application framework!

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