

## Evolutionary Development Methodology®

### EDM® . . . in a nutshell.

The intent of business intelligence is to improve the organization's performance by injecting true numbers into the Plan-Do-Study-Act (Deming) cycle.

**Knowing how we're doing** is the foundation of all performance monitoring, improvement, and management. Business intelligence revolves around the delivery of actionable information that people can use to *know how they're doing* and *take action* to do better.



The focus of EDM® is to reliably deliver business intelligence products that provide useful actionable information on business processes. EDM® is a business-oriented methodology that includes technology as a necessary enabler, but only for that purpose. System development is one component of EDM®, which encompasses much more than software development.

Organizations have processes. EDM® delivers product in Releases. Each Release typically supports one process in *knowing how we're doing*. An EDM® Release is typically a new piece of functionality, supporting a new area of the enterprise. Each Release is an evolutionary step up in business intelligence capability.

**EDM® is a methodology dedicated to business intelligence.**



EDM® is a spiral methodology and the rhythm of the spirals are tune with the heartbeat of the business. Releases are delivered with a tempo of typically one new chunk of value to the business, every three months. The methodology has spirals within spirals within spirals. The business is always evolving, and EDM® is a never-ending story.

It is based on principles:

- **Evolutionary.** Each chunk of business value provided to the business – each Release – builds upon previous work. Each outer spiral iteration adds new business value to the business.
- **Incremental.** In all respects, EDM development work is step-by-step.
- **Collaborative.** The work is driven by business needs and information consumer requirements, with the business user playing a vital part of the development process.
- **Iterative.** Each inner spiral iteration adds value to the work being delivered.

EDM® is proven. It arose out of much work on prototyping, and was originally created in the late 1980s. Its first iteration was used to evolve system prototypes into production with intense business collaboration. The latest iteration, EDM®, is a complete formal methodology using the same principles, to deliver actionable information to the enterprise. Architecture, technology, and staffing all fall inside the methodology.

It's been used to create greenfield business intelligence programmes in healthcare organisations such as Acute Hospitals, as well as commercial enterprises like We Buy any Car and public bodies such as Cardiff University. It has a successful track record stretching back almost thirty years.

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### The Release Spiral . . . in a nutshell.

The overall goal of the methodology is **to deliver discrete units of business functionality in order of value to the business**. These discrete units are called **Releases**.

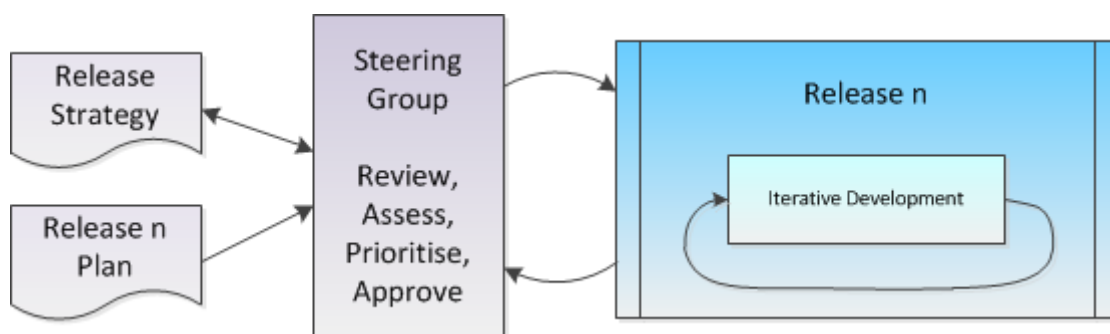
Releases are prioritized by the Steering Group, and are listed in priority sequence in a planning document called the Release Strategy. It is owned by the Steering Group and has an 18-24 month planning horizon.

The Release next in sequence will have a more detailed 3 or 4 page Release Plan presented to the Steering Group for approval. Approval will initiate *Release delivery*.

The progression of Release delivery is the outer spiral of the methodology, and the rhythm is a delivery of a chunk of value to the business roughly every three months. Within each Release, two major activities typically take place. The first is bringing on a new data feed into the data warehouse, and expanding the warehouse to accommodate the new raw data. The second is reporting development for information delivery, and this is done iteratively in close collaboration with information consumers from the business. The rhythm of this inner spiral is faster, with reports being created perhaps weekly.

There are also such things as sub-Releases, or Reporting Releases, where a new set of reporting or analytics is created based on metrics already within the data warehouse.<sup>1</sup> Often this takes place by combining two or more existing sets of data. Should there be staff dedicated to this purpose, then the delivery tempo would typically be monthly.

It is sometimes feasible to accelerate progress by running Releases in parallel. This requires more resources, of course, but value can be delivered faster. A technical assessment of feasibility is usually required, but in general major Releases can always run in parallel with Reporting Releases.



Upon completion of a Release, the Steering Group will re-examine the Release Strategy, and may modify the list as appropriate. This permits executive management the ability to provide 'in-flight' steering to the overall programme.

The enterprise is never locked-in to a large future commitment, with no option to manage change. The go/no-go decision is always available to the Steering Group.

<sup>1</sup> For a full explanation of business intelligence terminology, please see the [Business Intelligence Jargon Buster](#)

## Evolutionary Development Methodology®

### Governance . . . in a nutshell.

**Governance** is "the process of decision-making and the process by which decisions are implemented (or not)". This is from Wikipedia, and is a useful, general definition.

More specifically, **Business Intelligence Governance** refers to the mechanisms and processes by which business intelligence programmes are controlled and directed.

The purpose of the business intelligence programme is to support business processes throughout the enterprise by delivery of the appropriate metrics to assist in management of those processes. The mechanism of delivery is through development of systems that take masses of raw data from the source where they are generated, and through a process of transformation and aggregation, result in refined information . . . on a business process by business process basis.

Business intelligence governance therefore has the following key characteristics:

- It decides what *can* be done, what falls within the business intelligence mandate (or not).
- It decides *when* that shall be done. It prioritises; the Release Strategy is its primary tool.
- It has the responsibility and accountability for delivery of business intelligence.
- It hires and fires the programme manager.

The governance mechanism is the Steering Group. It is a group of stakeholders in the enterprise who jointly have an oversight over business intelligence activities.

It's small . . . so that it is not a talking shop, but a true oversight and management group.

It's senior . . . so that it's an *executive* group, with the power to take decisions and make them stick.

The program sponsor is also the chairwoman. She presides over the group and manages the agenda.



**Governance**

- The Steering Group
- Senior . . . members have *authority*
- Includes programme sponsor
- Includes Release owner(s)
- Owns and manages Release Strategy
- Meets infrequently – perhaps quarterly
- Provides *legitimacy*

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“Delivery is accomplished through a programme of work, broken into small projects called Releases. Each Release represents a unit of business functionality.”. The list of proposed and prioritised Releases is called the Release Strategy. This is the primary management tool of the Steering Group. Reprioritisation of Releases provides for in-flight steering of the programme as a whole.

There could be multiple Releases happening at once, in which cases there will be several Release Owners in the group. Release Owners are the individuals who declare Release success (or not!)

Releases typically happen once per quarter. In the longer term, more frequent oversight is unnecessary, but at the beginning, the Steering Group should meet once a month.

Legitimacy is key. A strong and senior group driving – and *owning* – the programme is an important factor in programme success.