

Cultural Differences in Business Intelligence

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Over Easter, we visited Paris. Over dinner one evening, somewhere between fromage and dessert, it struck me how different a night out in Paris is to a night out in London. The 2 cities may be close together, but the French do things differently to the English

Which reminded me a bit of law firms: how does a BI consultant deal with different cultures and different requirements?

Making One Size Fit All

For most law firms, there will be a broad range of legal practices and processes. The challenge for the BI consultant is to incorporate all these requirements into one BI delivery.

Take a Corporate panel agreement for a big client group, for instance. When do the annual rebates start to kick in? Are we anywhere near that yet? How do we check that all the matters are correctly set up to reflect this?

Then there's the Real Estate practice. How much Stamp Duty has the client paid this year? Is there a dormant trust balance? How many Land Registry searches have been done?

What about Litigation? Which Counsels have fees outstanding? If the cases go on for years, is it realistic to expect the WIP & Debt Lockup to be similar to a monthly billing practice?

One of the biggest BI challenges is reconciling all the above business scenarios into one data model and one set of visual reports. So how do we do it? Do we ask the lawyers themselves...?

You're the Expert

As they never tire of telling us, lawyers are experts. But – and this is important – they are *legal* experts. What they most definitely are not are *data* experts. Beware any lawyer (for there are many) who starts a meeting with the phrase "I've done a drawing of how it needs to look".

Here's how it needs to work: the lawyer states the requirements; the BI consultant develops the solution. Despite what people love to tell you, BI is not easy. Your job is to translate legal data into useful information.

Otherwise you end up with a pie chart that has 28 separate segments, a lawyer scratching his head because he can't make head nor tail of it and a report that nobody ever uses.

So, does this mean we have to talk to all the separate practices? Surely 2 or 3 partners will suffice? They know what goes on in the whole firm, don't they? Don't they?

World View vs. User View

Every lawyer believes that their practice is the most important in the firm. We know that. A Litigation partner once said to me “But they don’t *matter*” when I mentioned that I had to consider other practices too. (I’m pretty sure my mouth dropped open when I heard that, but I’m also sure that the other partners would have said the same thing!)

So how do we tread this line? Is it possible to accommodate all data requirements into one model and still provide relevant, useful information to everyone?

Well, the answer is yes, although it does require a bit of customisation and sleight of hand.

One of the most popular ways of delivering different requirements through one BI portal is through personalised dashboards: when a Litigation partner logs in, they see a different dashboard to the Corporate partner.

- Litigation will see outstanding Counsel invoices and breakdowns of Work vs. Budget by Phase, Task or Activity
- Corporate panel partners will see billings and discount levels, together with an indication of the projected discount for the panel year

Great, so that’s all done. You’ve nailed down your data model, the ETL is working nicely, the dashboards are all personalised and the partners are happy. So we’re all done?

Oh, I forgot to mention something...

Expect Change

“We’re buying a new business. They don’t enter time, they don’t have hourly billing rates and they’re measured on tasks, activities and turnover”.

Ah, that hourly rate billing model isn’t going to work anymore. How do we incorporate that into the BI delivery and still maintain current functionality?

Yes, change is a constant. Even in law firms, where it sometimes feels like time has stood still since 1900, change can be relied upon. In the current economic climate, combinations, mergers and takeovers are part of the game. So, you need your BI data model to be flexible and easily changeable.

What Now?

Good BI isn’t just about delivering today’s requirements. It’s about anticipating future changes and working out how to incorporate these too. The best BI consultants accept this, build for it and even expect it. The last thing any BI stakeholder wants to hear is “We can’t deliver this. That wasn’t part of the original requirements!”

Change will happen. Whether it’s moving offices, merging practices, changing billing models or merging GL codes, a BI system has to handle it gracefully and with the minimum amount of fuss. And, after all, aren’t these changes what makes life interesting?

Vive la différence !



About DW Reporting

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