Category

Data & AI

# Self-Service Analytics & BI Adoption Playbook

A staged rollout model that gets business users self-sufficient in BI tools without spawning conflicting metric definitions across the company.

- Practitioner
- Intermediate
- Template Included


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## Overview

Roll out self-service BI without either extreme: locked-down tools nobody uses, or open tools that spawn forty conflicting versions of revenue. Stage adoption with the Crawl-Walk-Run-Fly curve.

### How many metrics should we certify to start?

Ten to fifteen is the right range — enough to cover the questions asked most frequently of the central analytics team, small enough that governance can reach real agreement on each definition within a few weeks rather than getting stuck in endless debate.

### We already have hundreds of shadow reports in the wild — do we need to purge them all before starting?

No. Run the usage audit to separate the reports that are actually relied on from the ones nobody opens, retire the abandoned ones quickly, and prioritize reconciling the small number of high-traffic reports that conflict with your soon-to-be-certified metrics.

### What's the real difference between "self-service" and "self-service with governance"?

Pure self-service gives everyone build access with no shared foundation, which is what produces conflicting numbers. Governed self-service — this playbook's approach — gives everyone build access on top of a certified, agreed-upon layer of core metrics, so people can still explore freely without redefining the basics each time.

How do we decide the right cadence for office hours?

Weekly, at a fixed day and time, works for most organizations during the first two quarters of a rollout; it can drop to biweekly once a business unit reaches Run stage and questions taper off naturally.

Is this playbook tied to a specific BI tool?

No — the maturity curve, certification process, and office-hours model apply regardless of which BI platform you've licensed. The specific hands-on training content in the Walk and Run workshops is the only part that needs to be tool-specific.

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