

# Pentaho Solution Architecture Workshop

## BEST PRACTICES AND EXPERTISE FOR CREATING A VISION AND IMPLEMENTATION BLUEPRINT FOR YOUR BUSINESS ANALYTICS SOLUTION

Providing Business Analytics solutions in today's environment of big and diverse data can be a challenge. Technologies are evolving everyday and solutions require computing competencies in addition to traditional DW/BI skills. Pentaho provides an ideal solution for companies looking to expand their analytics capabilities to include these new big data types and sources, and gain from Pentaho's experts who have successfully deployed many production solutions for financial, healthcare, advertising, publishing, and technology industries.

The Pentaho Solution Workshop ("Workshop") is facilitated sessions with Pentaho Architects and Experts that enables collaboration by bringing together diverse needs and requirements from multiple stakeholders and converging them into a holistic solution to address a business problem or opportunity. The Workshop is results-oriented, with the goal to create a shared vision, solution architecture and implementation blueprint for a Business Analytics solution. The end-result is a process that aligns expectations and stakeholder requirements to improve the overall quality of the solution designed and reduce development costs.

## Typical 4-Day Workshop Outline

### DAY 1

**Introductions and Engagement Review:** Introduce all workshop participants by their role and responsibilities. Walkthrough the Workshop agenda, expectations and outcomes.

**Goals and Objectives:** Discussion of the overall goals and objectives for the initiative. Conduct a business process walkthrough focusing on systems used; key metrics and KPIs; current reports, dashboards and analytics implemented; and key issues and challenges experienced.

**Pentaho Overview and Discussion:** Presentation on the overall Pentaho Business Analytics (BA) Suite and architecture. This discussion sets the foundation for a Pentaho-based solution.

## Workshop Includes:

Discussion and alignment of program goals and objectives

Building knowledge of emerging technologies and Pentaho

Accelerated requirements gathering and analysis

Creating the Solution Architecture

Documenting an implementation blueprint to realize the solution including key milestones, governance approach, key processes and roles and responsibilities

## DAY 2

**Requirements Exploration:** Collaborative session designed to explore and document the functional, non-functional and technical requirements for the project. Requirement areas to explore include: UI/Dashboards; Analytics and Data Integration.

**Integrating, extending, and embedding Pentaho:** Guided high-level exploration of the different supported techniques for integrating, extending, and embedding Pentaho Business Analytics or Pentaho Data Integration.

## DAY 3

**System Architecture and Environments:** Discuss the operation environment and systems requirements. Collect information pertinent to provide sizing recommendations for the Pentaho environments.

**Joint Design Sessions:** White-boarding sessions to develop the systems and solution architecture, discussing the pros and cons of various approaches, and techniques for data integration, processing and business analytics.

## DAY 4

**Joint Design Sessions:** Complete white-boarding sessions. Discusses best practice implementation techniques for approaches and techniques discussed.

**Processes and Roles:** Identify the key development and management processes and roles required to successfully develop and deliver the solution.

**Implementation Strategies and Project Planning:** Discussion of the different strategies to implement the architecture. Jointly develop a high-level project plan, based on customer milestones that show the major activities needed to implement the solution. Identify the necessary resources and skills required, and the available Pentaho resources and training to aid in the implementation.

**Summary and Next Steps:** Summarize the accomplishments for the week and walkthrough the next steps to complete the Solution Architecture Workshop Summary Document.

## Benefits

- Technology roadmap, aligning needs and requirements to Pentaho features and functionality
- Faster time-to-solution deployment by reducing risks and eliminating false starts
- Higher project transparency across the business and technology stakeholders
- Improved alignment, expectations and buy-in from all stakeholders
- Enhanced accuracy of scope, business objectives, and requirements

## Workshop Requirements and Skills

Overall vision of the solution

Project goals and objectives

High-level requirements and plans

Participation of all key stakeholders and decision-makers

Representation from all impacted technology and operational groups

XML, Java (basics), JavaScript and Web development (OEM/Embed only)

# Duration

- Four days – on-site workshop
- Last day – spent remotely to create the project summary deliverable

## Questions This Workshop Will Answer

- What is the vision, goals and objectives for the project?
- What are the key project and solution requirements?
- What technologies are utilized in the solution? Do I have to possess them?
- How does Pentaho fit into the solution?
- What is the technical architecture needed for the solution?
- What are the various roles, resources and skill sets required to successfully implement the solution? Do I have them?
- What training do I need for the project team?
- What key processes are needed to be in place to aid in the project's success?
- How long is the project? What are the key milestones? Risks?
- What is the implementation approach and plan?
- How can Pentaho help make me successful?

“We would be dead in the water without Pentaho services. Getting an initial consulting and education helped us not only to get up and running pretty rapidly, but also to gain the confidence we needed to have on the full power behind Pentaho. We can easily say that having an initial architecture discussion allowed us to go to market three months ahead of schedule.”

- MATT BOISVERT, CO-FOUNDER & COO | PHAROS RESOURCES