Quick Answer: 4 Easy Ways to Promote Trust in Self-Service Analytics

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Without careful planning, self-service analytics (SSA) often leads to analytic silos, resulting in duplication of analytics content, security and compliance issues. Data and analytics leaders should use this research to understand best practices around promoting trust and credibility in SSA.

Quick Answer

How can data and analytics leaders promote trust when pursuing self-service analytics?

■ Define D&A asset life cycle rules in the self-service workflow to promote best practices around content management.

■ Ensure data quality and accessibility for promoting SSA adoption by leveraging data and analytics stewards for curating and providing right datasets.

■ Build guardrails around SSA by following a prototype-first approach that allows better management of SSA content, as well as encourages more users to create analytics content in sandbox-type environments.

■ Curate a certification or watermarking process to indicate the integrity of the self-service data and content. This ensures quality and reliability of analytics content that further aids in increasing SSA adoption.
More Detail

Gartner CDO Survey 2020\(^1\) indicates that self-service analytics is one of the top enablers for D&A success. However, in the absence of consistent best practices, silos of self-service users often emerge that make the overall SSA process disconnected and self-serving. Moreover, self-service analytics content is often not credible or trustworthy due to a lack of reliable validation and approval mechanisms before content sharing. Consequently, SSA content becomes unreliable with minimized business value.

Therefore, it is essential to create a process and structure around SSA that promotes trust and credibility. Data and analytics leaders must build guardrails around SSA that bridge silos and ensure reliability of analytics content.

D&A leaders should strive toward promoting trust and credibility around SSA to increase its impact in terms of business value and also drive its adoption. This research lays out four key practices required to optimize trust in SSA (see Figure 1).

**Figure 1: Promoting Trust In Self-Service Analytics**

![Figure 1: Promoting Trust In Self-Service Analytics](source.png)

Therefore, leaders should incorporate the following:
Define D&A Life Cycle Rules Throughout the SSA Workflow

The foremost step in SSA implementation is following best practices around controlling and managing SSA data and content (see Data and Analytics Essentials: Self-Service Analytics Operating Model). Often, self-service workspaces are flooded with analytics content, and workspace management becomes crucial to easily find the relevant report, dashboard or dataset. To elaborate, some of the top practices should include:

- Define D&A life cycle rules throughout the SSA workflow
- Increase SSA adoption by leveraging data and analytics stewards to enhance data quality and ensure data accessibility
- Build guardrails around SSA by following a prototype-first approach
- Use certification or watermarks to indicate the integrity of the content

Define D&A Life Cycle Rules Throughout the SSA Workflow

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- Defining “personas” that include the role, activity, skill set and type of data needed to assign various levels of user permissions required to create, edit or view content. For instance, some users that only interact with and explore the content might not need permissions to edit or create new content (see How to Balance Control and Agility in Your Self-Service Analytics).
- Auditing workspaces to archive any unused data and creating a threshold for volumes of data and content that the SSA tools can hold.
- Performing workspace analytics to identify the most-used content and data and users that are frequently leveraging these tools to gather insight.

Increase SSA Adoption by Leveraging Data and Analytics Stewards to Enhance Data Quality and Ensure Data Accessibility

According to the Gartner 2020 CDO Survey, data quality (51%), return on investment (ROI; 44%) and data sharing (43%) are top three objectives that CDOs get measured on (see CDO Agenda 2021: Influence and Impact of Successful CDOs in the Sixth Annual CDO Survey).

To break silos and ensure data sharing, leaders must:

- Adopt a delegated approach to controlling and managing SSA content by aligning data and analytics stewards to various business domains (see Three Approaches to Support Data and Analytics Governance).
The data and analytics steward role is focused on the enforcement of data and analytics governance policies created by the central IT team or governance board.

— What Are Must-Have Roles for Data and Analytics?

- Include roles like the data and analytics stewards within business domains. Stewards act as extensions of the governance board in various parts of the business, enforcing and sometimes interpreting policies in their home departments.

- Data stewards are responsible for maintaining datasets and ensuring data and analytics quality by continuously monitoring and curating analytics content.

- Data stewards are typically power users of modern A&BI platforms in the organization, with expertise in the data and KPIs relevant to their subject matter.

Build Guardrails Around SSA by Following a Prototype-First Approach

- SSA should follow a prototype-first approach. In this approach, users are encouraged to build prototypes in sandbox environments. Once a minimum viable product is created, that content is piloted among a small group of users.

- The content that checks all the set markers defined for a successful pilot is then prepared for production. The data and analytics stewards and the central team should work closely to ensure this content is ready for firmwide use. The content that satisfies all the set criteria is certified for organizationwide use (see How to Enable Self-Service Analytics to Ensure D&A Success).

Use Certification or Watermarks to Indicate the Integrity of the Content

Certification of content indicates that the said dataset, report or dashboard meets the standards set by a firm in terms of quality and reliability. Therefore, D&A leaders should define the qualitative standards and create a certification process that includes:

- Leveraging data and analytics stewards to provide certified datasets to SSA users. In addition, stewards should also continuously monitor all analytics content present in various stages from prototypes to production.
Defining steps that indicate degrees of trust and credibility in the analytics content. Leaders could choose to provide certificates or watermarks (gold, silver or bronze) to the content.

Watermarking to lay out the integrity of the content that, in turn, helps to promote trust in SSA. For instance, a Bronze Certificate could mean the analytics content created might be from a less verifiable data source, and hence, care must be taken before leveraging its insights.

Creating an analytics catalog that becomes a one-stop shop for certified analytics content, providing datasets, reports, dashboards, data stories and data visualizations to users across various business functions (see Hype Cycle for Analytics and Business Intelligence, 2021).

Recommended by the Authors

How to Enable Self-Service Analytics to Ensure D&A Success

Self-Service Analytics Success With Metrics, Data Literacy and Organizational Models

Scaling Analytics Requires Balance and Synergy Between Self-Service Analytics and Composable Analytics Applications

How to Balance Control and Agility in Your Self-Service Analytics

Evidence

1 Gartner’s 2020 Chief Data Officer Survey was conducted to explore the business impact of the CDO role and/or the office of the CDO. The research was conducted online from September through November 2020 among 469 respondents from across the world.

Respondents were required to be the highest level data and analytics leader, the chief data officer, the chief digital officer, or the leader with data and analytics responsibilities in IT or in a business unit outside of the IT organization. The survey sample was gleaned from a variety of sources (including LinkedIn), with the greatest number coming from a Gartner-curated list of over 3,450 CDOs and other high-level data and analytics leaders.