



# CAPSTONE

Discover • Plan • Lead • Build • Empower



## You're Sitting on a Goldmine

Proven Business Intelligence Strategies

*Infotec*  
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Capstone Consulting, Inc

# Goal / Agenda

- Goal
  - Show proven strategies for getting value from Business Intelligence
- Agenda
  - Definitions / Business Value
  - Common BI Valuable Areas
  - Strategies for Exploiting BI Value
  - Examples of Effective BI Strategies
    - Sales / CRM – sales force speed
    - International BI standardization - sales force speed and efficiencies
    - BI / Compliance – efficiencies
  - How do you achieve it in your organization?



# What is Business Intelligence?

*BI is not about delivering access to a massive repository of data, often unconstrained and overwhelming. BI is about delivering highly relevant, highly valuable applications, reports, and dashboards, designed to maximize the user's ability to gain specific, actionable knowledge from corporate data.*

*Of course – and this can't be overstated – this requires a culturally-relevant, well-supported governance model and a highly-specialized, flexible data architecture, both optimized for this purpose.*



# What is a Business Intelligence Strategy?

The development and maintenance of a single, unified, organization-wide plan for the use of corporate data as a vital asset for strategic and operational decision-making. Investing in a formal business intelligence strategy lends much needed intentionality around critical data related issues, such as data value, quality, metadata, performance, data distribution, organization, ownership, security, privacy, etc.



# Business Value from Business Intelligence

- What is “concrete” business value from BI?
  - Opposite of abstract ideas / strategies
  - In the hands of the business, not IT
  - Dollars and cents
    - Many different calculation models
      - ROI, COCOMO, COSYSMO, SEER-SEM, etc.
    - Market speed
    - Sales force speed
    - Efficiencies
      - Staff reduction
      - Redistribution of staff
        - » Data gathering vs. data analysis
      - Reduce costs while growing sales
      - Slope to flat line
- What is “immediate” value?
  - Tasks which can deliver value in the next 30-90 days, next year, not 3 years
  - BI and Agile
    - Collaboration
    - Iterative
    - Measured business results



# BI Value Business Areas

- What are common areas?

- Marketing
  - Market penetration
  - Market strengths
  - Evaluation of campaigns
  - Targeted campaign
- Sales
  - Sales force effectiveness
  - Distributor effectiveness
  - Targeting customers
  - Customer value
- Supply Chain
  - Inventory management
  - Vendor effectiveness
  - Manufacturing
- Corporate Finance
  - Accounting
  - Globalization

- What are uncommon areas?

- Human Resources
- Employee relationship management
- Internal Audit / Compliance



# Strategies for Exploiting BI Value

## Goldmine

- G - gold nuggets – find on top of the mine
- O – ownership – data must be owned by the business
- L – leadership – solutions are business driven AND IS lead
- D – delivery quick but deep
- M – move the view of data
- I – it's the champion that makes the difference
- N – need for data quality
- E - empowerment



# Sales / CRM – Sales Force Speed - Context

- Oracle ERP, OWB, Out of box Oracle Analytics
- Pharmaceutical Company
- Issue – IT owned the data, no single source of truth
- Market changing quickly
- 1.5 year delivery of warehouse, marts, cubes - ~8 on team
- \$2M project



# Sales / CRM – Sales Force Speed

- G - gold nuggets
  - Daily Sales Flyer, Reporting owned by data analysts
- O – ownership
  - BICC deployed Sales, Marketing and Finance
- L – leadership
  - Business driven and IS lead
- D – delivery quick but deep
  - Sales flyer in months, full environment 1.5 years
- M – move the view of data
  - Cubes/OLAP - Cognos
- I – it's the champion that makes the difference
  - Bill – Director of Marketing
- N – need for data quality
  - Business tested, retested to insure data was correct
- E – empowerment
  - Business owned the reporting and actionable items



# Sales / CRM – Sales Force Speed Results

- Business running with BI environment
- IT insured data delivered correctly and accurately
- Sales Issue
  - Sales down \$14M 2 weeks before end of month
  - Major campaign in progress , too late for new campaign
- Solution
  - Business analyst mined the data, no IT involvement
  - Picked top five customers for each sales rep
    - Hadn't purchased as much as before
    - Hadn't used the campaign much (save them \$)
- Results
  - End of month – sales target exceed by \$24M



# International BI Standardization - Context

- MS Dynamics ERP (multiple versions), SQL Server DW, multiple tools (SQL, Crystal Reports, home grown tools)
- Issue – no standardization in data, very difficult to measure success; business analysts – data gatherers, report writers
- Assessment for 3 months, delivery over 2 years



# International BI Standardization

- G - gold nuggets
  - Sales patterns across the globe
- O – ownership
  - BICC deployed internationally Sales, Marketing and Supply Chain
- L – leadership
  - Business driven and IS lead
- D – delivery quick but deep
  - ERP version sync first, local BI standardization, the global
- M – move the view of data
  - MS DW, MS Services, Cognos
- I – it's the champion that makes the difference
  - Jose – International Region VP
- N – need for data quality
  - Business tested, buddy system across BICC
- E – empowerment
  - Business owned the reporting and actionable items



# International BI Standardization Result

- ERP and DW Versions in sync
- Business running with BI environment
- Issue
  - Managing across the globe
  - By the time patterns in emerging markets seen too late to replicate
- Solution
  - BICC Business analysts continually monitor the data
- Results
  - Patterns recognized and passed via reporting to management teams
  - Continue to build on standard BI platform



# BI / Compliance – Efficiencies Context

- Legacy systems, new distributed system coming online, many different data sources
- Issue
  - capturing and reporting on financial information difficult
  - meeting regulations and compliance standards being raised
- 1.5 year operational and BI implementation



# BI / Compliance – Efficiencies

- G - gold nuggets
  - Meeting compliance, efficiencies in finance department
- O – ownership
  - SME's from 3 departments own the data
- L – leadership
  - Business driven AND IS lead
- D – delivery quick but deep
  - Agile delivery, get the data storage, summarization, reporting
- M – move the view of data
  - Spreadsheets to reporting objects
- I – it's the champion that makes the difference
  - Grant – VP of Accounting
- N – need for data quality
  - Business tested, production volumes often and for months
- E – empowerment
  - Business owned the reporting and actionable items



# BI / Compliance – Efficiencies Result

- Data flowing through effectively
- Issue
  - Compliance must be met
  - Efficiencies by accounting department
- Solution
  - Operational and BI solution in place and running
  - Business owners monitoring data daily
- Results
  - Business owners monitoring data daily
  - Planned business value being seen
  - Unplanned business value
    - New reporting objects on sink systems providing value



# How have you achieved your goldmine?

## Goldmine

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# Capstone Consulting BI Practice

- If you don't have the expertise or resources on staff
  - External expertise
  - Follow a proven process
    - Discover
    - Plan
    - Lead
    - Build
    - Empower
- Discovering the valuable BI assets
- Planning for building the mine
- Leading projects to successfully deliver the gold
- Build the goldmine
- Empowering the business to continue to mine the gold

Presentation at:

[capstoneomaha.com/business\\_intelligence\\_resources.jsp](http://capstoneomaha.com/business_intelligence_resources.jsp)

