

# Bringing Information to Your Decision Makers

A practical, well thought out approach to Business Intelligence

Business1st Consulting LLC

IT Strategy, ERP Optimization and Business Analytics

**CHAIN-SYS**  
Business Process Automation Experts

# Agenda

- Definition
- Forrester Study and Our Perspective
- Our Reference BI Architecture
- Quick Start Approach

# Definition

*“A set of methodologies, processes, architectures, and technologies that transform raw data into meaningful and useful information used to enable more effective strategic, tactical, and operational insights and decision-making”*

*Boris Evelson, How Do We Define a "BI Vendor", The Forrester Wave, July 2008*

# Critical Success Factors for Business Intelligence Deployment

- In December 2009, CIO magazine cited a Business Intelligence study, “It's Time to Reinvent Your BI Strategy” conducted by Forrester Group
- The study highlighted 10 critical success factors
- This section of our presentation will focus on how our technology and approach aligns to these success factors
- Follow this link to read the article:

[http://www.cio.com/article/148000/10\\_Keys\\_to\\_a\\_Successful\\_Business\\_Intelligence\\_Strategy?page=2&taxonomyId=3000](http://www.cio.com/article/148000/10_Keys_to_a_Successful_Business_Intelligence_Strategy?page=2&taxonomyId=3000)

# 1. Choose a C-level sponsor (who's not the CIO)

**“BI should be sponsored by an executive who has bottom-line responsibility; has a broad picture of the enterprise objectives, strategy and goals; and knows how to translate the company mission into key performance indicators that will support that mission”**

- Provide “out of the box” information while effectively insulating the end user from unfamiliar technology
  - Pre-defined “data mart(s)” are structured to facilitate analysis
  - Confirm readiness for BI through “ERP Wellness” templates, which provide guidance on the condition of foundation data
  - Common business metrics and, where practical, industry specific performance indicators provide immediate benefit to the business
- Put actionable information in the hands of your end users and decision makers, which brings business intelligence concepts to life

## 2. Create common definitions.

**“2. Without common (data) definitions, a BI implementation cannot succeed. And lack of agreement is a widespread problem in companies today..., negating the value of automation. To combat this problem, get subject matter expertise throughout lines of business. IT's participation should be limited to running the project management office and taking ownership of compliance and business standards and policies”**

- Staging tables should consolidate data from multiple sources – from common ERP platforms, CRM, PDM, MES, custom systems and external sources.
- This provides a repository for common terminology across the business for the purposes of BI reporting or, at the right time, a master data management initiative
- Chain.sys has additional technology to facilitate a full MDM initiative and harmonize data across your applications landscape

# 3. Assess the current situation

**“3. You should analyze the current business intelligence stack and processes and organizational structures surrounding current BI implementations. Both IT and the business should be involved.”**

- Sound business intelligence information is build on a foundation of accurate and timely data from your transactional systems
- For customers starting up a business intelligence program, an assessment of data quality (and the process disciplines that lead to data quality) is a necessary first step
- Consider a pre-configured approach that includes a rapid, highly cost effective assessment of ERP data that highlights where improvements can be made in the quality of foundation information

## 4. Create a plan for data storage.

**“4. Create a plan for data storage. Many organizations begin with an isolated data mart, since it’s quick and cheap, but consider that this tactic means additional silos will need to be created as additional data storage needs arise, which can grow out of control within a few years”**

- We believe our approach provides the quick starting advantages of a data mart and an eye towards future needs
  - BI Schema is designed to support cross industry and industry specific Key Performance Indicators “out of the box”
  - The tables can be easily extended to support customer specific data needs
  - The data “pump” is easily configured to refresh the tables based on each customer’s requirements at the element level
- For small and medium sized businesses, this approach provides both the benefits of a pre-configured solution and a design that is sustainable for the long term

# 5. Understand what users need.

**“5. The three broad classes of business intelligence users are strategic, tactical and operational. Strategic users make few decisions, tactical users make many decisions a week, use both aggregate and detail-level information, and likely need updated information daily. Operational users are the front-line employees....They need data within their own set of applications.”**

- Our business intelligence approach is focused on the needs of the strategic and tactical users
- Business intelligence should be treated as a journey, increasing in complexity and sophistication as your business gains experience with the technology
- For most clients, the ability to generate meaningful information “out of the box” is valuable for both decision making and educating the business about business intelligence technology

## 6. Decide whether to buy or build the analytical data model.

**“6. In general you may benefit from an out-of-the-box, industry-specific data model if you have a more homogeneous IT environment—such as one ERP, one CRM system. More complex enterprises...may still want to consider beginning with an industry-standard model as a template or a set of guides.”**

- An “out of the box” schema ‘can support a homogeneous environment built on Oracle’s applications
- A heterogeneous model is also supported but may require additional, client specific effort to map and normalize the data
- Once the staging tables are created there are several option for creation of the analytical cubes and data visualization including OBIEE or Cognos.

# 7. Consider all business intelligence components in the technology stack.

**“7. Be sure to define the architecture for all layers of the business intelligence stack; even though they may not be part of the BI strategy itself, they will effect the success of implementation.”**

- Technology stack can be based on Oracle standards
  - Oracle database for the schema
  - Java and PL/SQL for the data pump
  - OBIEE for data presentation
- For some, open standards are preferred and provide high levels of functionality at lower cost, for example:
  - MySQL for the BI Schema
  - OpenOffice or Adobe Flex for presentation layer

# 8. Choose a systems integrator.

**“8. Business intelligence implementations require guidance from a partner who has deep experience. Do not outsource the fine-tuning of business intelligence. The process requires a high degree of collaboration among end users, analysts and developers.”**

- Your integration partner should bring the following to the table:
  - The means to efficiently extract and stage information from your transaction systems
  - Industry and process knowledge that provides “out of box” business intelligence functionality for your decision makers
  - A technology platform to grow on

## 9. Think “actionable” and “baby steps.”

**“9. Choose an end user, business analyst and developer to create a first proof of concept within a few days. Choose a few key performance indicators and build a few reports, then add new releases every few weeks.”**

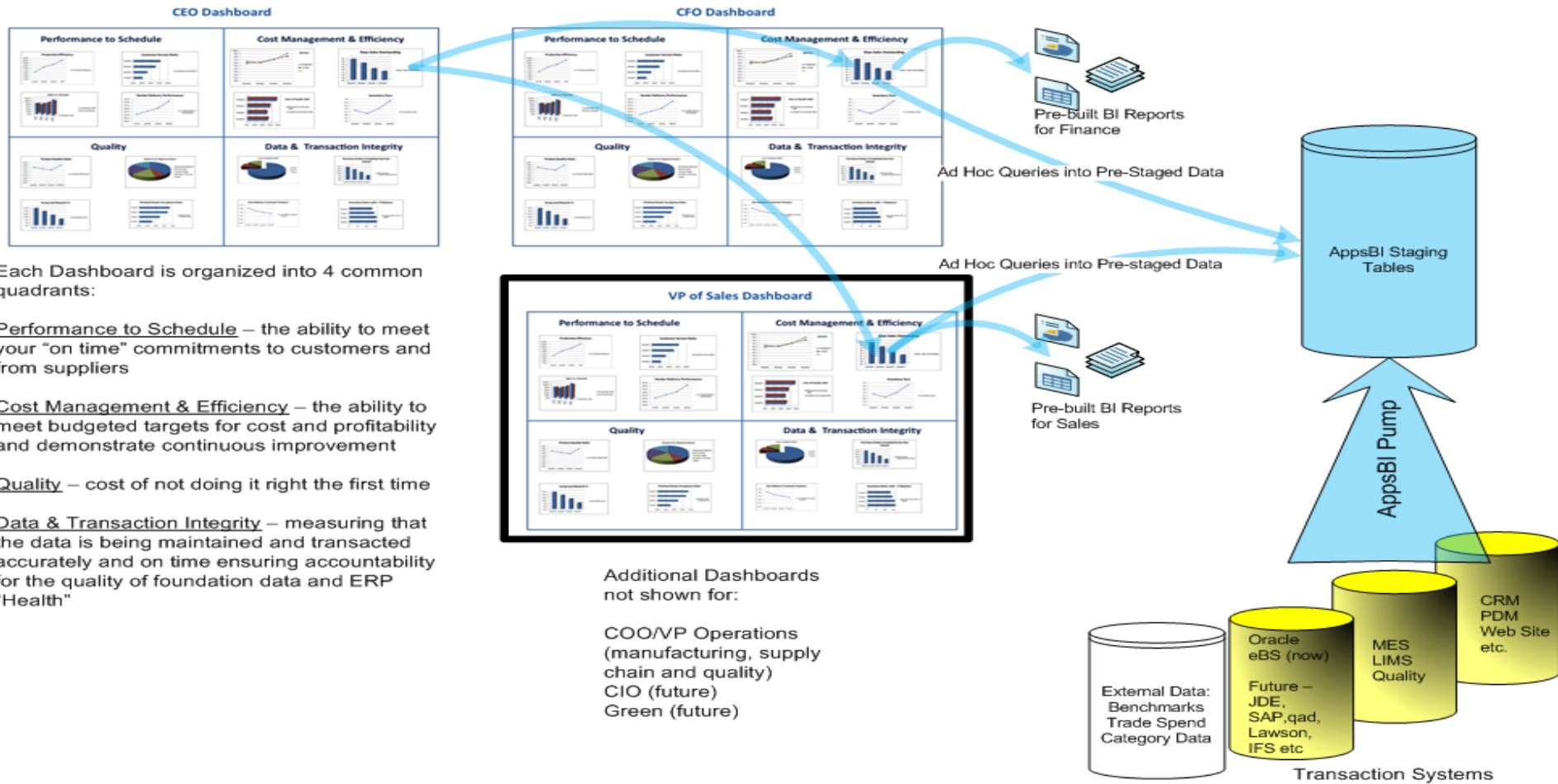
- Our approach is build around incremental steps and quick results:
  - Pre-built staging table and load processes
  - Initial ERP wellness metrics help ensure sound foundation of transaction data on which to construct BI applications, and
  - Provides actionable information to your business from the outset

# 10. Choose low-hanging fruit to start.

**“10. Evelson recommends choosing high-value, simple components to begin. For example, a sales analytics data mart may present high-value targets that also have plenty of existing models and best practices.”**

- In addition to foundation metrics on ERP health, our approach supports general and industry specific key performance metrics in
  - CFO/Finance
  - COO/Supply Chain Management & Manufacturing
  - VP Sales/Marketing & Order to Cash

# Reference Architecture



# Quick Start Approach

- Data staging tables will be designed to enable “out of the box” metrics on ERP “wellness”, common and industry specific performance metrics for core processes, such as:
  - Finance
  - Order to Cash
  - Supply Chain
    - ◆ Inventory
    - ◆ Procure to Pay
    - ◆ Manufacturing

# Thank You

- Business1st Consulting and Chain-sys thank you for your kind attention
- To learn more about our technology offerings, please attend our weekly webinar. For more information, visit [www.chain-sys.com/Webinar.shtml](http://www.chain-sys.com/Webinar.shtml)