

INTELLIGENT BUSINESS STRATEGIES PRESENTS



MIKE FERGUSON

**RIGHT-TIME BUSINESS INTELLIGENCE
& PERFORMANCE MANAGEMENT**



OVERVIEW

There is no doubt that performance management (PM) is fundamental to building, growing and managing a successful business. Improvements in performance can be delivered if performance is measured in specific business areas and related to strategic business objectives and targets. Popular methodologies exist to manage performance at strategic levels e.g. Balanced Scorecard. However, while different performance management (PM) methodologies are used, many companies have not yet managed to achieve enterprise-wide execution of business their strategy or use BI to optimise business operations. To make this happen requires that business intelligence (BI) is integrated into processes in the context of the activity being performed by each and every user. If everyone in the enterprise could contribute effectively to performance we could manage performance at both strategic AND operational levels and move beyond business intelligence towards right-time business optimisation

Some would argue that PM is a *business intelligence* (BI) problem and to date, much of the software aimed at supporting it has come from BI vendors. These so called 'corporate performance management' software products are however limited in that they are often standalone systems with their own database holding summary key performance metrics data and in some cases data on objectives and objective owners. Yet many executives have a vision of PM that is way beyond just a scorecard product with integrated budgeting, planning and reporting built on top of a BI system. Their vision is that PM is a *process oriented* problem requiring a solution that helps and guides everyone in the company to all contribute towards business performance. Methodologies like Six Sigma are *process improvement* based and yet CPM tools on the market are not yet integrated with business process management software. Performance management requires a lot more than CPM. It is a holistic problem that requires every person and every system in the enterprise to be able to leverage the right intelligence at the right-time in every process activity to guide them towards making their contribution to the overall performance of the business. PM is therefore about going beyond strategic level scorecards and dashboards to building an intelligent business by integrating BI right into operational business processes to guide and drive decisions and actions in every day business. A full intelligent business implementation therefore includes:

- CPM scorecards and dashboards
- Enterprise budgeting and planning
- Processes and BI both integrated with CPM software (not just BI)
- In-line analytics for on-demand BI, reports and analyses available in operations
- BI web services to integrate BI into operational business processes
- Business activity monitoring (BAM) and complex event processing (CEP) of business process events to detect exceptions and opportunities
- Enterprise data governance
- On-demand and event driven data integration to integrate historic and operational data for real-time analysis
- Developing and deploying scoring models for automatic analysis
- Reporting services for on-demand and event driven reporting
- Rules engines to make automatic decisions and take automatic actions
- Automated alerts
- Live recommendations
- Guided analytics
- Dynamically guided intelligent processes
- Activity based costing to monitor and measure the cost of operating

This new two-day seminar is intended for business sponsors, BI/DW managers, IT architects who have already built a BI system and now need to integrate it into operations to empower employees, business partners, suppliers and customers to achieve full blown business optimisation and "active" performance management.

It provides a roadmap and methodology to creating the *right-time intelligent enterprise* by using methodologies and new technologies to manage a business at both strategic and operational levels. It looks at how operational performance monitoring technologies like BAM, CEP, predictive analytics, alerts, recommendations and actions can be integrated with operational business processes and linked to corporate performance management technologies such as scorecards and dashboards as part of a top-to-bottom enterprise business performance management program. It also looks at enterprise 2.0 technologies such as social networking to empower people to find, share and collaborate over performance at all levels of the enterprise.

The seminar takes an in-depth look at the technologies and methodologies needed to build the 'performance aware' intelligent business and how BI integration via Operational BI can be applied in every day business process operations.

AUDIENCE

This seminar is intended for business and IT professionals responsible for information delivery, business integration, business performance management and leveraging business intelligence in operational environments. It assumes that you have already built a BI system and are now looking to leverage it in everyday business operations

LEARNING OBJECTIVES

Attendees will learn how to justify, architect, and integrate business intelligence into operational business processes and applications as part of a coordinated business performance management program. They will learn how to use automatic real-time closed loop processing to monitor operational events as they happen to detect problems, identify opportunities, and drive and guide business operations. Attendees will also understand how to use real-time data integration, on-demand analysis servers, BI web services, XML queries, real-time decision engines, enterprise alerting and business process automation to put BI to work in driving every day business operations. Finally they will learn how to maximise the use of personalised business intelligence across the enterprise and beyond to continually optimise business performance.

MODULE 1: BUSINESS OPTIMISATION - REDEFINING PERFORMANCE MANAGEMENT

This session introduces next generation business performance management as a new approach to building an intelligent enterprise whereby business people everywhere in the enterprise are guided by intelligence. It starts by looking at where we are today with BI and performance management and where businesses want to get to in leveraging BI in core business processes for business optimisation. This session briefly discusses performance management methodologies and PM products from leading software suppliers. It then looks at why current PM products only solve some of the performance management problem and at why managing the business at a strategic level is not enough. We then set the scene for what is needed – intelligent business.

- What is involved in managing a business – the need for strategic AND operational performance management
- What is performance management?

- PM methodologies in brief – Balanced Scorecard, Six Sigma, TQM, Baldrige
 - Setting up scorecards
 - Attaching metrics to scorecard objectives
 - Options for integrating PM scorecards with existing BI systems
 - The distinction between BI dashboards and scorecards
- Review of existing PM vendor solutions
- Problems with existing solutions – why they only solve half of the PM problem
- Next generation Performance Management – why two initiatives are needed for business optimization
 - Business intelligence
 - Business integration
- Requirements for business optimization, multi-level strategy management & operational BI

MODULE 2: INTRODUCING THE REAL-TIME INTELLIGENT ENTERPRISE

This session introduces the real-time intelligent enterprise and looks at why we need it and what is required to make it happen.

- Business integration – what's happening to simplify business operations
- The five levels of business integration
- The need to leverage business intelligence (BI) in real-time
- Limitations of existing BI systems
- Next Generation Business Optimization - What needs to happen to leverage BI?
- What is an intelligent enterprise?
- Right-time BI – on-demand BI when you need it, where you need it
- Why build the intelligent enterprise? – the business case
- Requirements for real-time intelligent business – the active BI strategy
- Steps to implementation

MODULE 3: TECHNOLOGIES AND TOOLS FOR BUILDING THE RIGHT-TIME INTELLIGENT ENTERPRISE

This session looks at the technology components needed in an end-to-end business optimization.

- Data integration and data quality services for event driven and on-demand real-time data integration
- EII Vs ETL Vs Message Brokers
- Enterprise metadata integration
- Business intelligence platforms
- On-demand analytics via BI web services
- Embedding analytics in operational applications
- Leveraging analytics and aggregate functions in your database
- Business integration platforms
- Service Oriented Architecture (SOA)
- What is business process management?
 - Business process modelling
 - Business process execution
 - Business processes monitoring
- Enterprise portals for personalised information delivery
- Decision / rules engines
- Guided analysis to rapidly lead users to problem identification
- Social Networking and collaboration

MODULE 4: ARCHITECTURE OPTIONS AND METHODOLOGIES FOR RIGHT-TIME BI

This session looks at the various architectures for integrating BI into business processes when building the intelligent enterprise. It also looks at the pro's and cons of these options.

- Why integrate BI into operational systems and processes?
- A methodology for business optimization and the intelligent business

- BI integration – why a single approach is not enough
- Understanding user communities, roles and the applications they use
- Understanding business processes and process events
- Right-time operational BI requirements - Who needs what BI and when?
- Integration options for internal and external exploitation of right-time BI
- Integrating BI with portals and Office for personalised BI, personalised objectives and personalised dashboards
- Delivering right-time BI using web syndication
- Integration of BI and PM with real-time collaboration and social networking
- Using on-demand BI services in a service oriented architecture (SOA)
- Integrating BI with process management
- Automatic decision services
- The implications of right-time operational BI on existing BI systems
- Pros and cons of options for right-time BI and performance management
- Identifying the best architecture option for business optimisation of each role
- Customer case studies

MODULE 5: INTEGRATING BI INTO BUSINESS PROCESSES

This session looks at business process management and why process integration is becoming mission critical to reducing costs and improving efficiency. It then focuses on how to use BPM and BI technologies for right-time BI and also how to monitor cost and efficiency of business processes.

- Integrating BI into operational business processes using on-demand BI services
- Monitoring operational business processes
 - What is business activity monitoring (BAM) and Complex Event Processing (CEP)?
 - Using event-driven data integration and in-memory data
 - Using predictive models for automated event analysis, scoring and pattern detection
 - Using rules engines for automated decisions
 - BAM and CEP technologies – Actimize, IBM, Progress, Oracle, SeeWhy, SL, ThinkAnalytics, Tibco
 - Achieving optimised operational processes using BAM
 - Modelling and monitoring business process cost using Activity based costing
- Re-optimising operational processes using guided analytics and recommendations

MODULE 6: RIGHT-TIME BI AND PM IN CRM AND SUPPLY CHAIN OPERATIONS

This session looks at how to create intelligent front-office and back office business operations. It discusses how right-time BI can be leveraged across all customer touch-points for targeted and personalized customer marketing, sales and service and for improving customer retention and satisfaction. It also looks at how to optimise supply chain operations using operational BI for alerting and automated actions

- Building a 'current state' single view of the customer
- The customer intelligent front office - using BI to improve marketing, sales and service
- Right-time analytics in front-office marketing, sales and customer service
- Leveraging automated analysis for alerting and recommendations in front-office operations
- Integrating BI with multi-channel campaign management systems
- Deploying right-time BI to a mobile sales force

- Continuous monitoring of supply chain performance and operational cost
- Automating supply chain optimisation using demand intelligence
- Right-time alerting in supply chain operations
- Front office and back office BI personalisation for role-based precision

MODULE 7: BI COMMUNITIES – EMPOWERING PEOPLE THROUGH SOCIALLY NETWORKED PERFORMANCE MANAGEMENT

This session looks at the need for manual action taking whereby groups of people may need to collaborate over BI before making a joint decision

- Collaborative tools for sharing BI,
- Collaborative BI options
 - Integrating BI with stand alone collaboration tools
 - Integrating BI with enterprise portal based collaboration tools
 - BI applications with embedded collaboration
 - Pros and cons of each approach
- Using collaborative tools with BI
 - Finding experts to help understand intelligence
 - Sharing BI content in a net meeting
 - Collaborative viewing of active intelligence and office formatted BI content e.g. spreadsheets
 - Attaching threaded discussions to BI content
 - Voting and polling for joint decision making
 - Operational BI alerts using instant messaging

MODULE 8: THE FINAL STEP - ACTIVE PERFORMANCE MANAGEMENT

This final session shows how the use of business intelligence and business integration can be integrated with corporate performance management software to manage business performance at strategic and operational levels

- Achieving active PM via integration with business activity monitoring (BAM) and live alerting
- Creating active scorecards and dashboards with KPIs, live alerts, and operational performance monitoring
- Taking action to solve business problems

PRESENTER

Mike Ferguson is Managing Director of Intelligent Business Strategies Limited. As an analyst and consultant he specialises in business intelligence and enterprise business integration. With over 26 years of IT experience, Mike has consulted for dozens of companies on business intelligence strategy, technology selection, enterprise architecture, enterprise portals, business process integration, SOA and data integration. He has spoken at events all over the world and written numerous articles. Mike is a resident expert on the Business Intelligence Network, providing articles, blogs and his insights on the industry. Formerly he was a principal and co-founder of Codd and Date Europe Limited – the inventors of the Relational Model, a Chief Architect at NCR on the Teradata DBMS and European Managing Director of Database Associates. He teaches popular Enterprise 2.0 master classes in Operational Business Intelligence and Performance Management, Master Data Management, Service Oriented Architecture and Enterprise Portals.



2nd Floor, Springfield House, Water Lane,
 Wilmslow, Cheshire, SK9 5BG, England
 Tel/Fax: (+44) 1625 520700
 Email: ukinfo@intelligentbusiness.biz
<http://www.intelligentbusiness.biz>