

EMC - A First-Timers Guide to Creating a Successful Enterprise BI Environment

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DIUC 2010
Breakout Session

Agenda

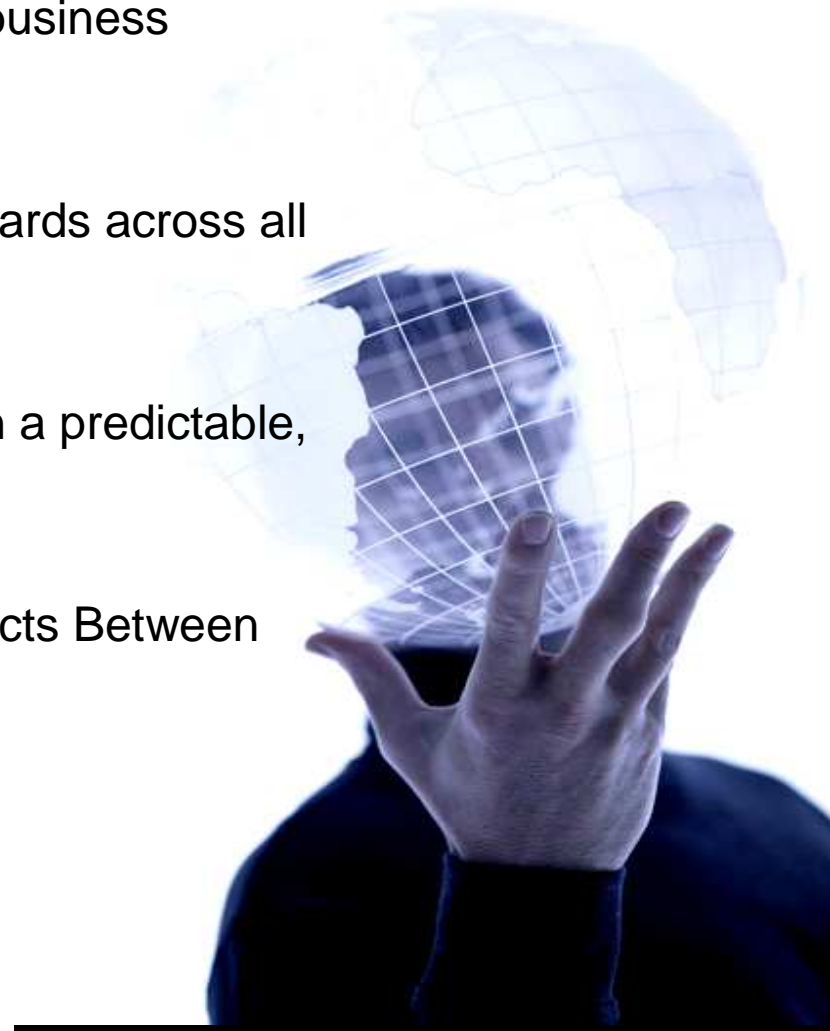


- Road to the Balanced Scorecard
- The Architecture
- Key Benefits
- Demonstration
- Q & A

Balanced Scorecard Objectives



- Provide comprehensive view of all key business functions
- Use a common set of metrics and standards across all lines of business and geographies
- Drive performance and improvements in a predictable, measurable and consistent manner
- Define the Inter-Relationships and Impacts Between Metrics

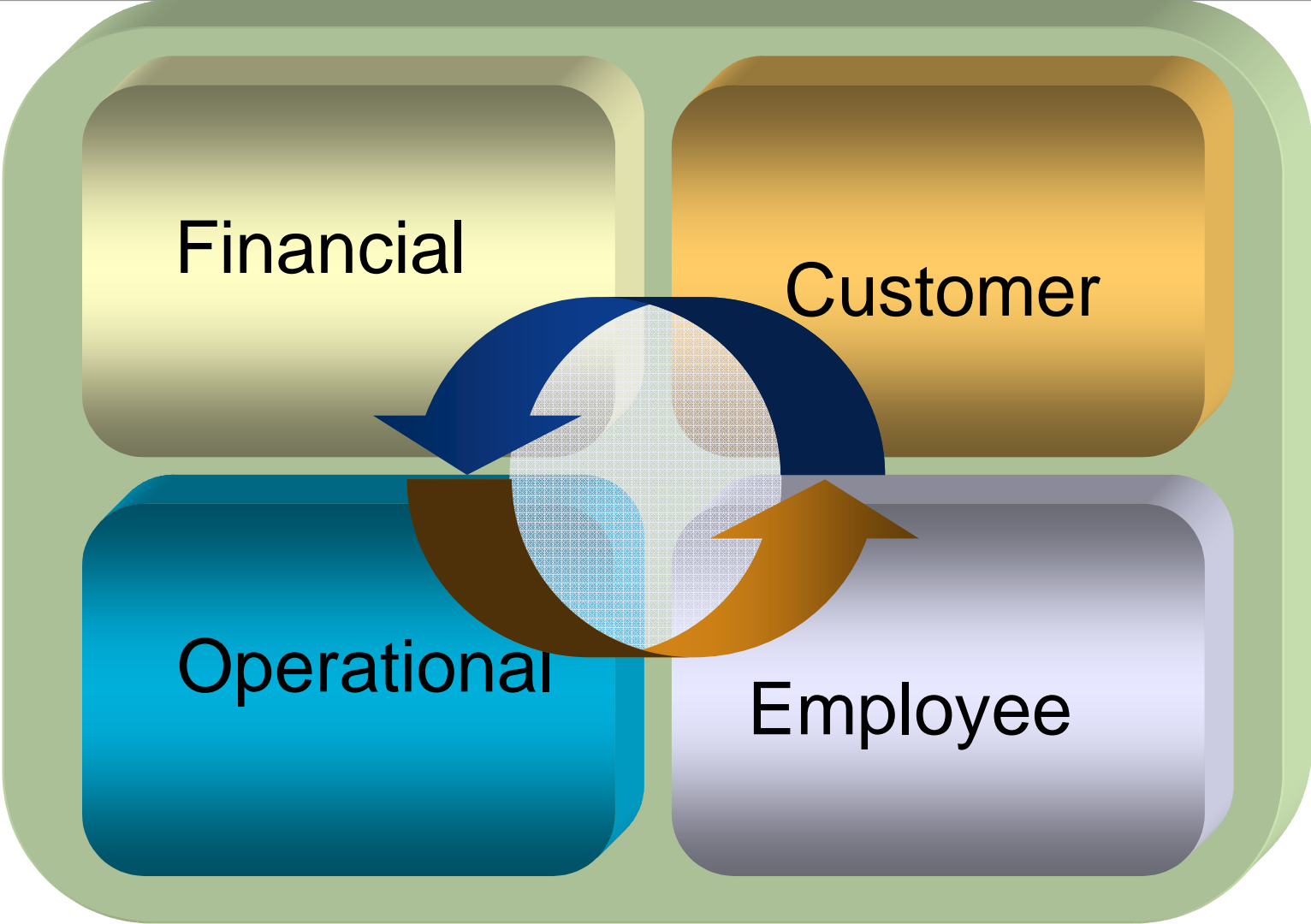


Initial Actions



- Form a Core team
- Assign Specific Areas
- Conduct Research
- Identify First Pass Metrics Inventory
- Create Draft Strategy Map
- Conduct Reviews

Inter-Related Business Model Elements

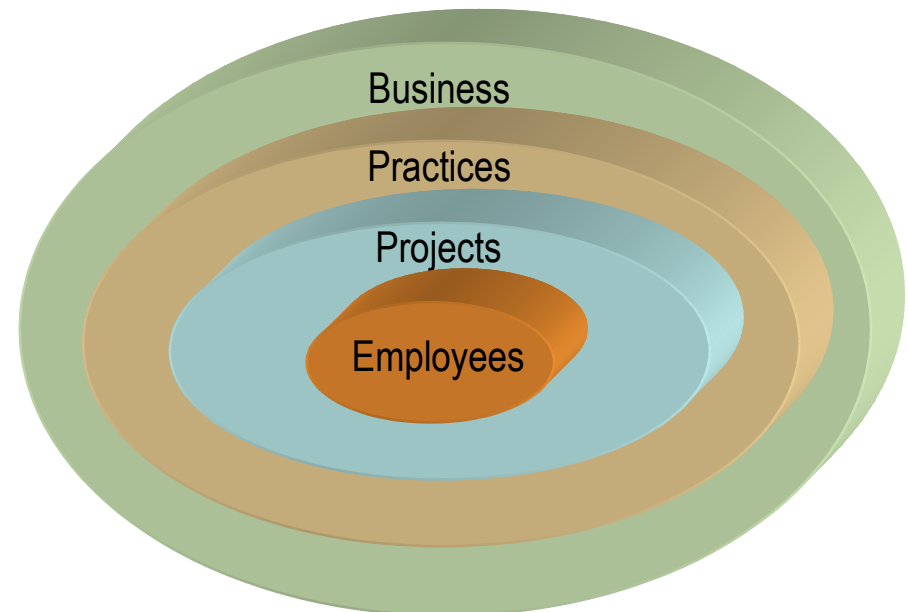


Layers of Visibility



Effectively measurement = Visibility into four Layers

1. Employee
2. Employees into Projects
3. Projects into Practices
4. Business = 1 + 2 + 3

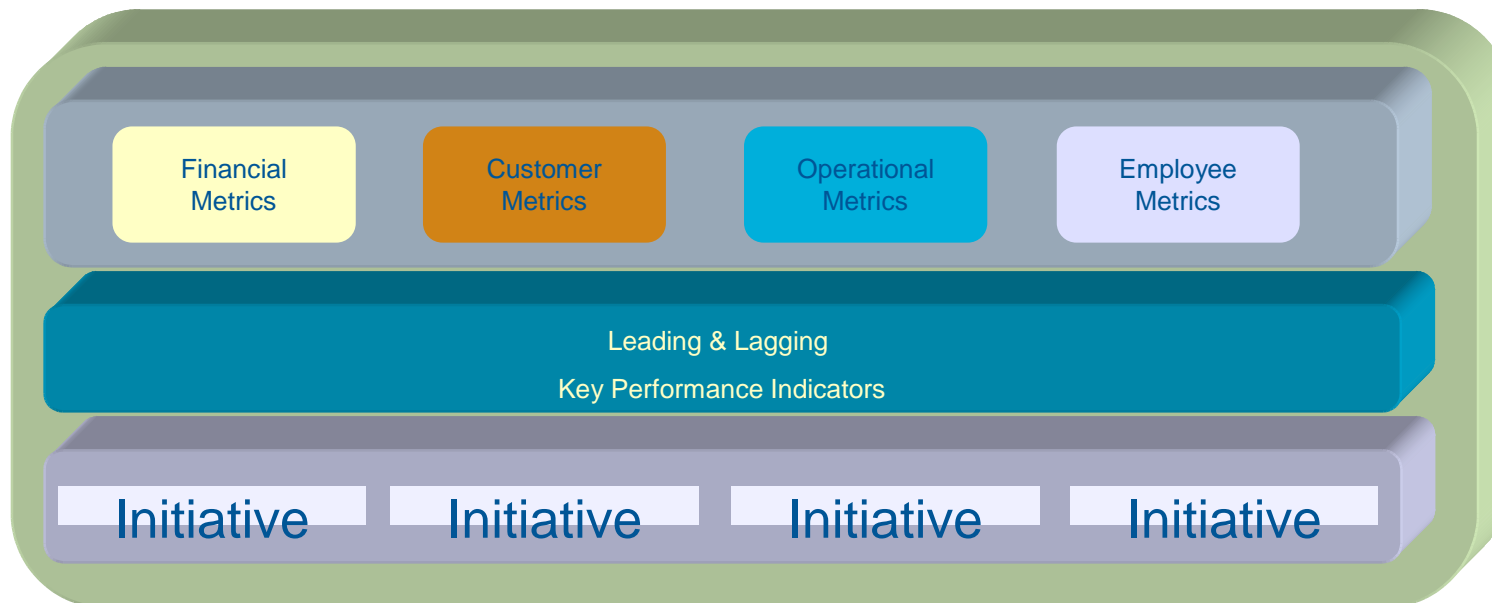


Producing predictable results

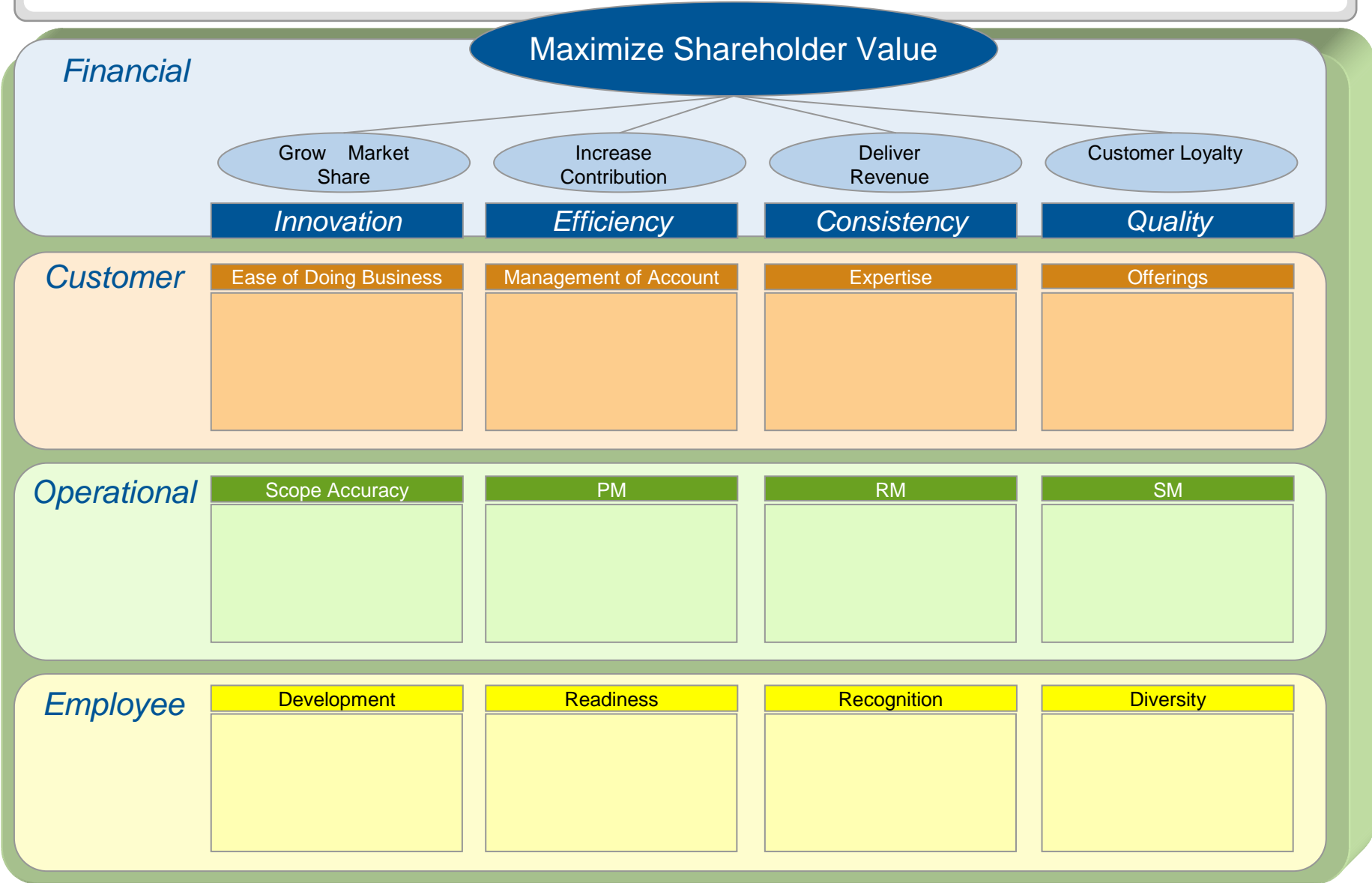


Driving improvement = Correlate impact of initiatives to the metrics

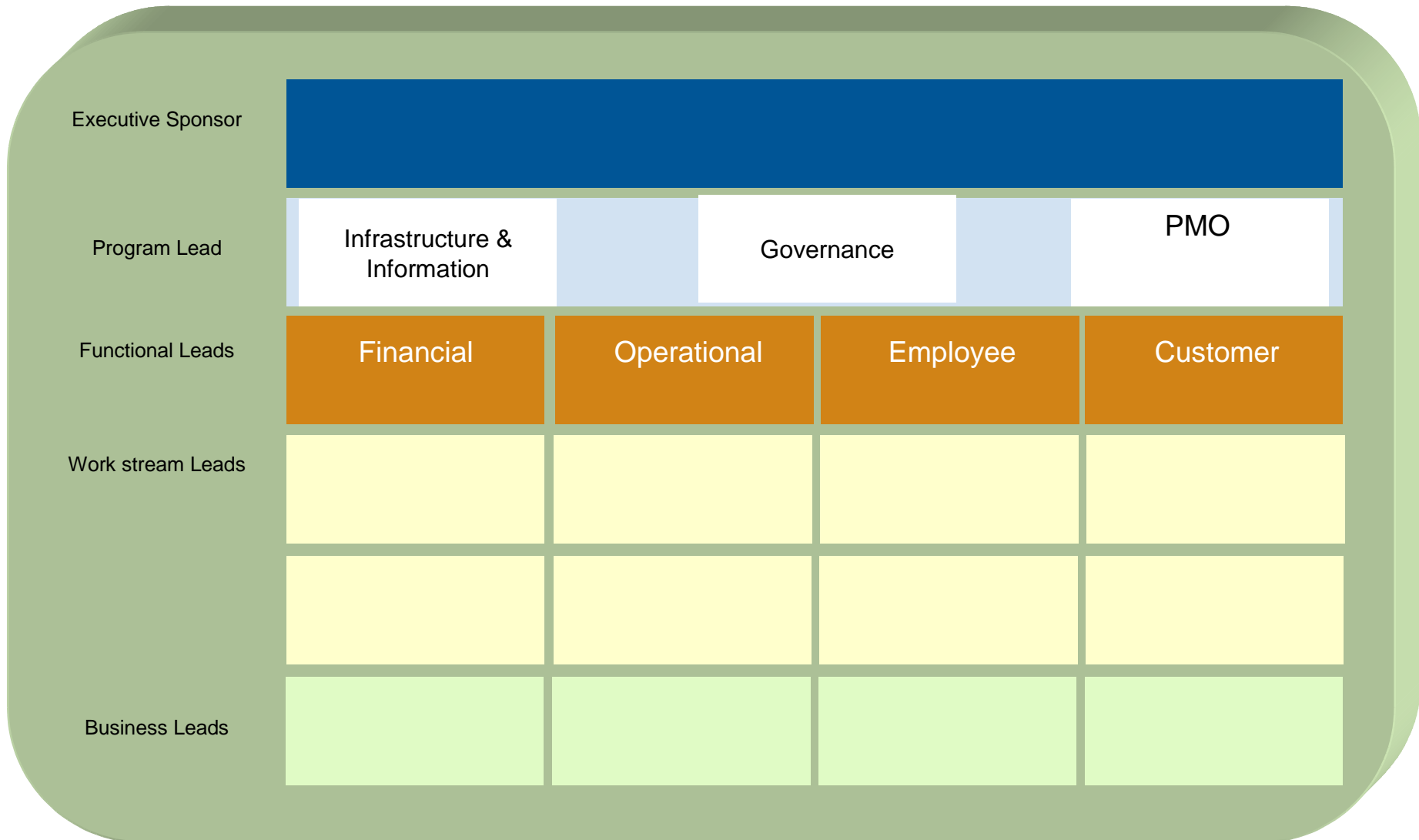
1. Initiatives = Predictably impact metric
2. KPIs = Drive expectations for impact
3. Metrics = Show positive impact as expected



Strategy Map - DRAFT



Program Governance Structure



Metrics Inventory



Metric Group

Metrics	Data Source (system)	Data Quality (Low, Med, High)	Metric Owner	Frequency of Update	Contacts

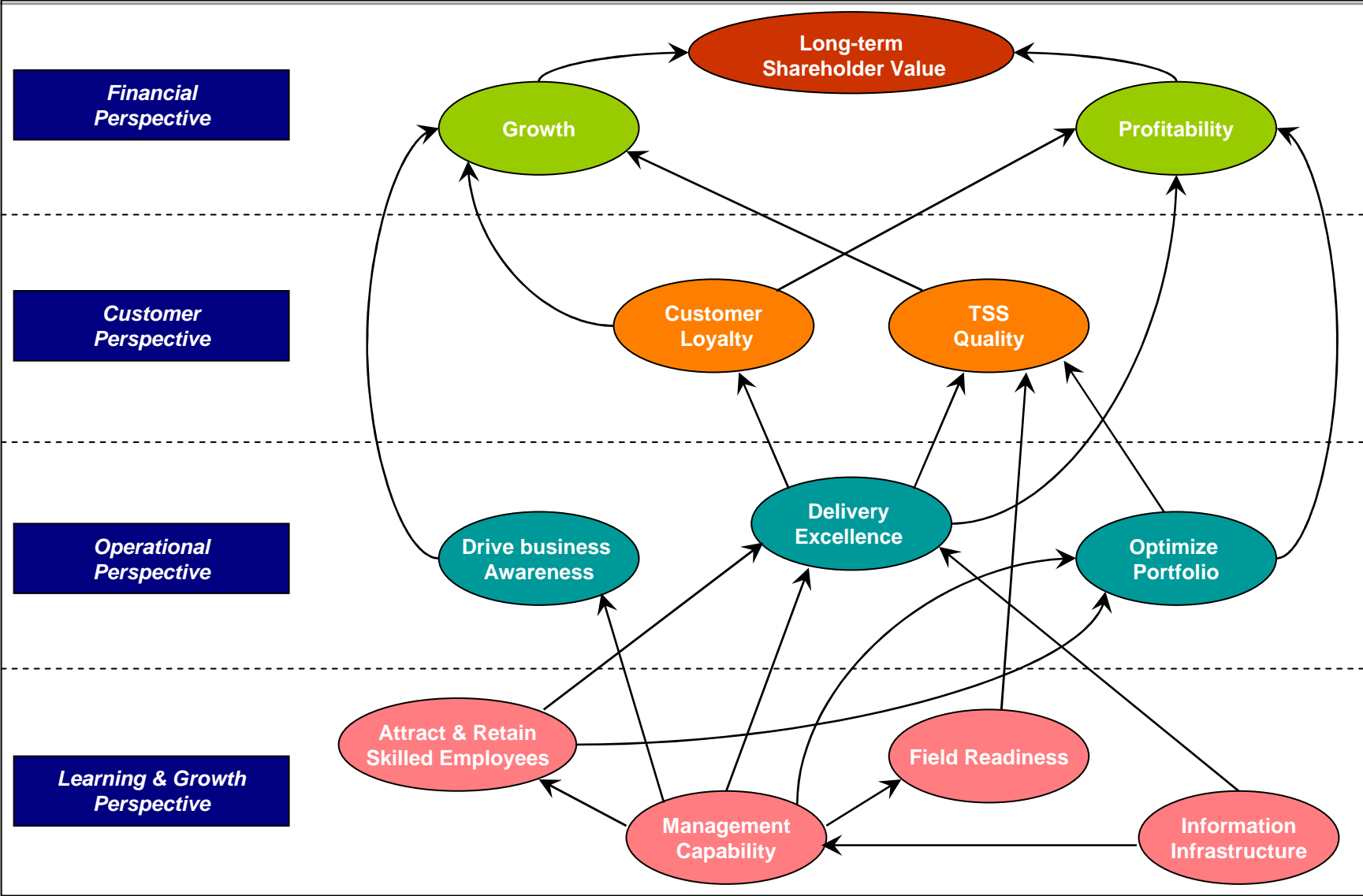
Next Steps



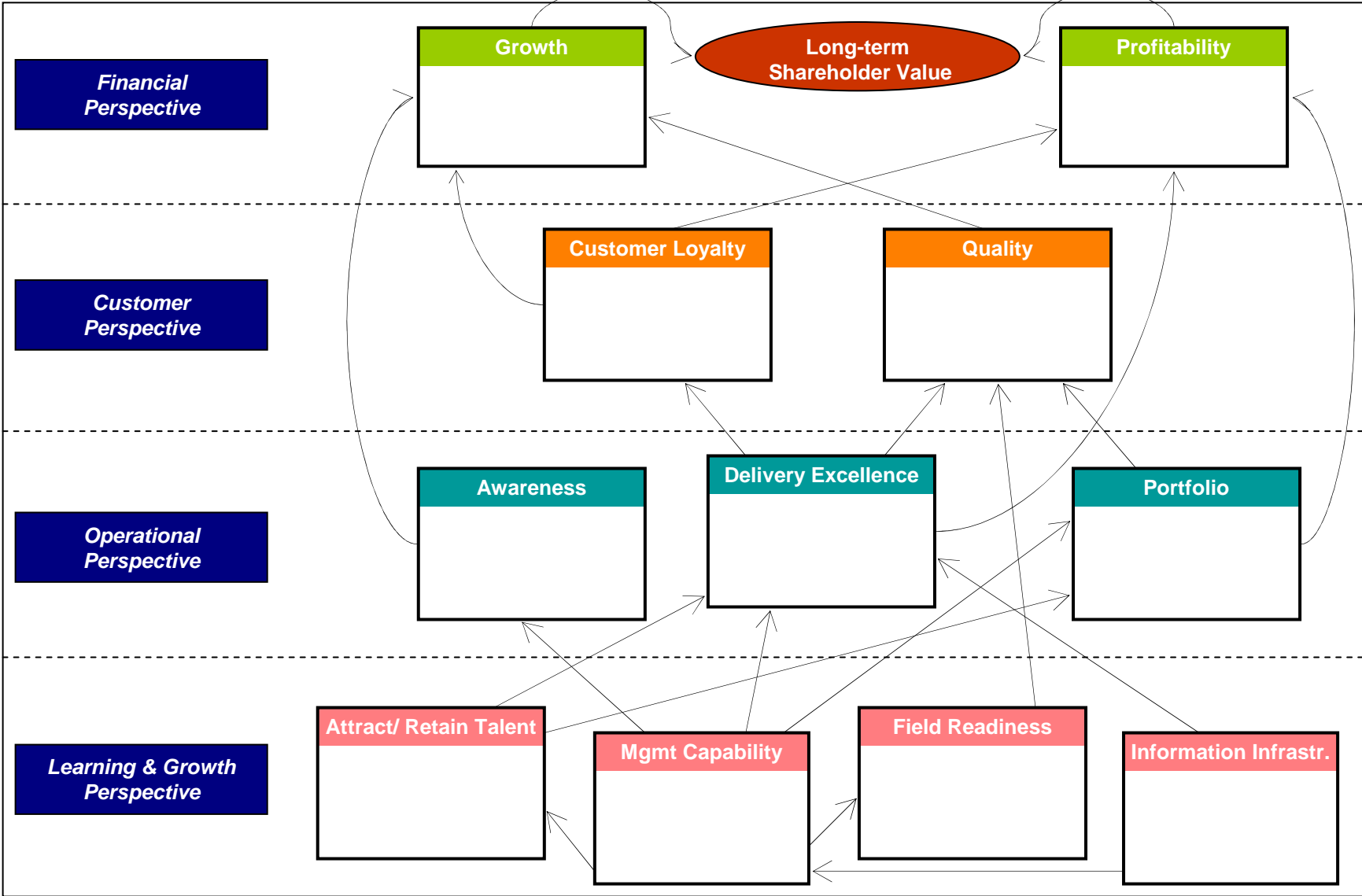
- Requesting Executive Support for:
 - Balanced Scorecard Approach
 - Key Strategies
 - Team Structure

- Work Collectively to:
 - Complete Strategy Map & Initiatives
 - Fill in Gaps in Metrics Inventory
 - Conduct Metrics Rationalization Exercise
 - Define the Interrelationships Between Metrics, Initiatives, and Strategies
 - Conduct Initiatives Rationalization Exercise

Strategy Map



Strategy Map with BSC Metrics



BSC Metric Description Form



Metric Area					
Objective	Measures			Initiatives	
	BSC Metric	Primary	Leading		

Balanced Scorecard Functionality



- Through the use of QuickPicks, support several lines of business/divisions in a single page
- Click actions provide functionality to do more, such as
 - ✓ Show “pop-up” metrics
 - ✓ View Help
 - ✓ Dive on data in Diver

The screenshot displays the ProDiver software interface with three data tables and a console pane on the right.

Table 1: TS Division [flash.mdl-Dive A]

TS Division	Booking Goal	Theater Booking Forecast	Bookings	% Goal Bookings	% Fcst Bookings	Revenue Goal	Theater Revenue Forecast	Revenue	% Goal Revenue	% Revenue Forecast
Totals	26,915,731	23,869,556	22,271,247	83	93	26,730,120	26,312,769	26,122,784	98	99
CENTRAL	26,915,731	23,869,556	22,271,247	83	93	26,730,120	26,312,769	26,122,784	98	99

Table 2: Deal Number [flash.mdl-Dive A]

Deal Number	Booking Goal	Theater Booking Forecast	Bookings	% Goal Bookings	% Fcst Bookings	Revenue Goal	Theater Revenue Forecast	Revenue	% Goal Revenue	% Revenue Forecast
Totals	26,915,731	23,869,556	22,271,247	83	93	26,730,120	26,312,769	26,122,784	98	99
63302004	0	0	2,323,920			0	0	0		
CPQ0535453	0	0	1,371,681			0	0	236,434		
CPQ0505572	0	0	1,311,749			0	0	167,247		
CPQ051130	0	0	0			0	0	0		

Table 3: Top Task Name [flash.mdl-Dive A]

Top Task Name	Booking Goal	Theater Booking Forecast	Bookings	% Goal Bookings	% Fcst Bookings	Revenue Goal	Theater Revenue Forecast	Revenue	% Goal Revenue	% Revenue Forecast
Totals	0	0	1,311,749			0	0	167,247		
PS-CUS-EMC	0	0	950,481			0	0	100,088		
PS-CUS-RESID	0	0	225,000			0	0	47,577		
PS-CUS-AVAM	0	0	100,131			0	0	19,582		
PS-BAS-INGUI	0	0	19,029			0	0	0		
PS-BAS-FMAGS	0	0	10,073			0	0	0		
TSG-AVAMAR-CUSTOM	0	0	7,035			0	0	0		
CE-VALPAKRFY	0	0	0			0	0	0		

The console pane on the right shows a hierarchical tree structure for 'flash.mdl', including sections for 'PS Reporting Hierarchy', 'Sales Hierarchy', 'Practice', 'Order Detail', and 'Other Dimensions'. It also includes 'Totals', 'Info', and 'Time Series Info' buttons.

How does *Diver*
help you?

~~Problem~~
Solution!

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- ⚠ Too much time creating, and not enough analyzing reports
- ✓ *KPI's created and validated*
- ✓ *User-defined ,custom , re-usable, reporting*

- ⚠ Inconsistency - Report #1 doesn't match Report #2 !
- ✓ *Common hierarchy & mapping across all information*

- ⚠ Stale/Static reporting leads to “reactionary” management
- ✓ *Ad-hoc analysis environment with data that is always current*

- ⚠ Data overload - Difficult to assemble meaningful reports
- ✓ *Single user interface – Balanced Scorecard*

Lessons Learned



1. Gathering *business relevant* requirements is important
 - Use Program Mgmt resources and methodologies - Don't "go it alone"
2. Displaying "actuals" is not enough - Measuring to targets and goals is essential
3. Get end users involved early and often for best chance of acceptance
4. Communicate, document, and train - Ease the transition
5. Get the most out of your screen real estate
6. Trending/historical data is vital for making informed decisions
7. Use the power of Diver as your "Change Engine"
8. Validation and testing is essential for user adoption
9. Plan for the future now!

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