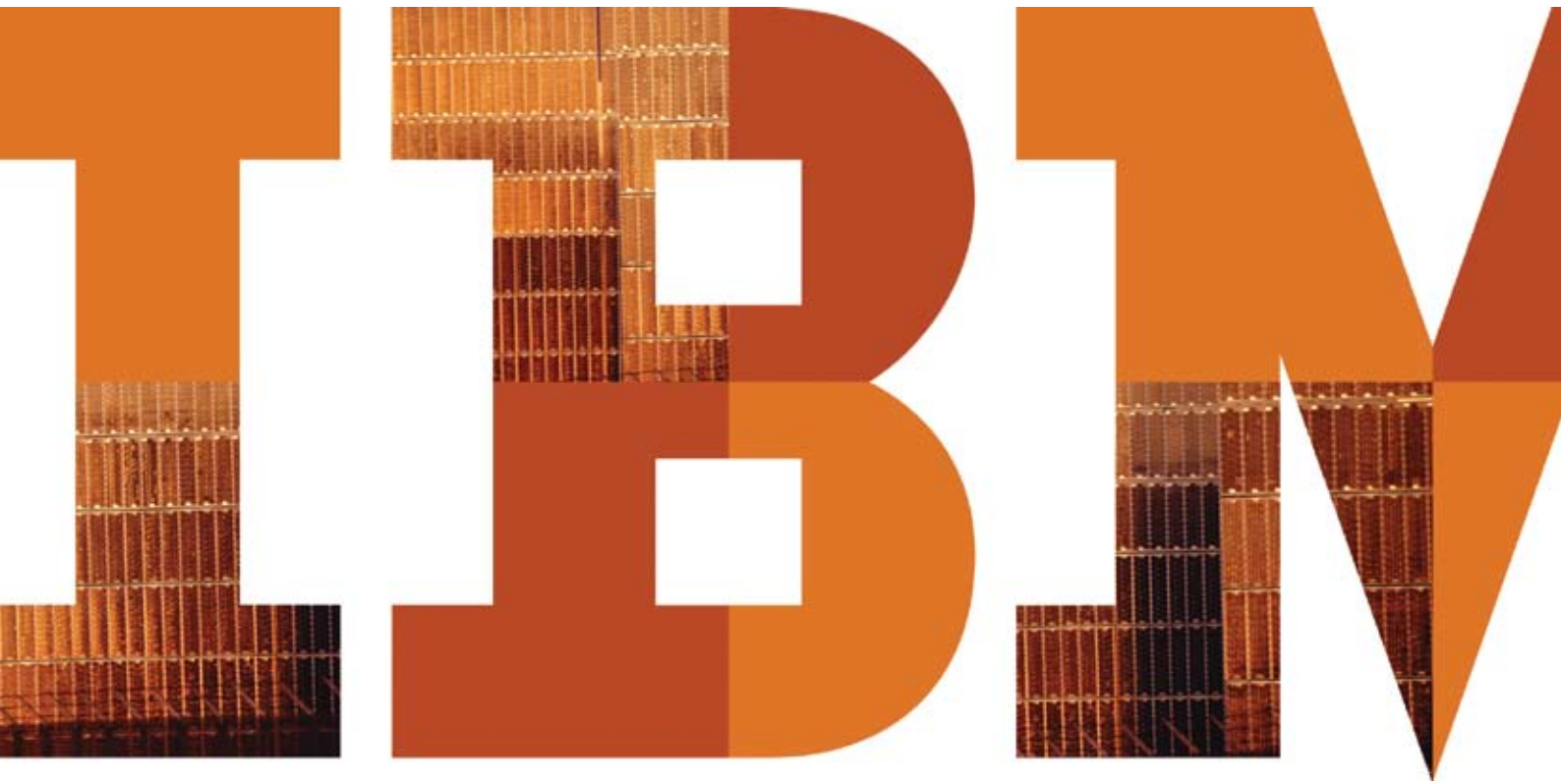


# Business intelligence for business users: Insight when and where you need it



## Overview

Knowing your business, market, customers and competition is essential for any organization. Increasing complexity and uncertainty worldwide demand that businesses and governments continue to improve their ability to understand and anticipate change. In the past, IT departments made significant investments in business intelligence (BI) solutions to gather, analyze and share this information with top-level executives and decision-makers.

Recent events and experiences have taught us that the true driver of success comes from putting information and insight into the hands of many different users. Companies are most likely to reach desired business outcomes when many different business users can access complete, consistent and trustworthy information.

## **Analytics-driven organizations outperform**

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*Organizations that consistently apply analytics to the full range of decisions—from operational to strategic—outperform their peers. A recent IBM CFO study shows that analytics-driven organizations had 33% more revenue growth, 12 times the earnings (before interest, tax, depreciation, amortization) and 32 percent more return on capital invested.*

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Many organizations are using BI technologies to help. The key is to unleash BI with solutions everyone can use to answer key business questions. Business users need a simple and intuitive experience that helps them engage and find answers to their own questions. And they shouldn't have to switch environments or learn new applications as they expand their thinking. They need software that can keep pace with the way they think, decide and respond.

In this paper, we demonstrate how important it is to address the different BI needs of your business constituents, so they have insight when and where they need it.

## **Business users and BI: A progression**

Earlier generations of BI solutions typically targeted specific, high-level roles in an organization, so few people ever had occasion to use them. Instead, they analyzed information using conventional office productivity tools such as spreadsheets and desktop databases. The impact on an organization was significant. Most managers and much of the workforce had grown adept at using the basic tools available to them, but this ad hoc strategy was not enough to satisfy their expanding information management needs. They were unable to obtain the kind of detailed reports that would truly aid them in their jobs, and often lacked timely access to critical information. They needed better solutions to turn their insight into action so the benefits of their knowledge would be realized, not lost.

As a result, the BI market was transformed in the early decades of the 21st century, offering BI solutions that put the right information into the right hands throughout an organization. Basically, BI solutions moved BI out of the hands of the relatively few and into the hands of nearly everyone who could benefit. These solutions scaled BI for the entire organization, aligning the tools to the day-to-day workflow of those who used them.

Dashboards consolidated data from multiple sources into useful, interactive views. Scorecards linked individual performance to organizational strategies and goals. BI capabilities landed squarely on the desktop of business users, giving them more power to influence organizational direction. And companies were able to get answers from business users quickly, thoroughly, consistently and independently. But that's not the end of the story by any means.

We are now in the decade of smart. The world is increasingly instrumented, interconnected and intelligent. More data is available than ever before—and not just from business systems and communications devices. The influence the Internet and social networks have on how people think and communicate is growing by leaps and bounds. In this fast, interconnected and complex world, it is no longer sufficient to decide and act based on limited information, traditional time horizons or strategic planning cycles. Business users need BI solutions that are designed to provide agility—the ability to assess, reinvent and adjust.

### Intelligence unleashed

For the best business outcomes, companies must unleash the intelligence found in all parts of their organizations from the executive suite all the way to the front lines of the business. They need a solution that breaks down the barriers to analytics and expands traditional BI capabilities with planning, scenario modeling, real-time monitoring and predictive analytics. More specifically, they need:

- **Analytics they can use to answer key business questions** provided in a single place with the information most meaningful to them (Figure 1)
- **Collective intelligence** gleaned from collaborating with other business users like themselves, along with other types of business users, to agree, decide and act
- **Actionable insight** any type of business user can use anywhere and at any time to respond at the point of impact

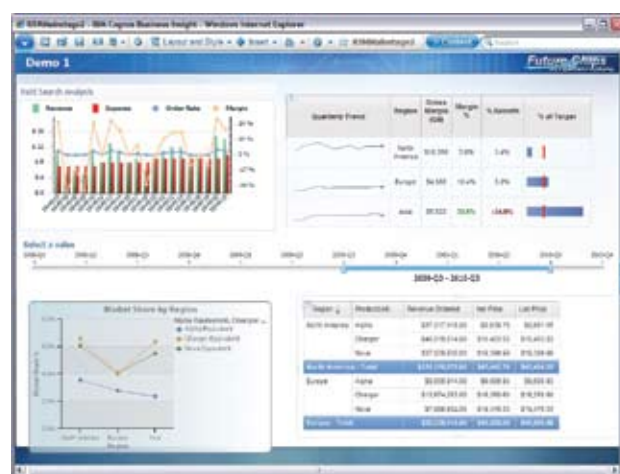


Figure 1. A unified, interactive browser-based workspace can help users explore information regardless of where the data is stored.

With these capabilities, business users can easily view, assemble and personalize information to follow a train of thought and generate unique perspectives. They can explore all types of information from all angles to assess the current business situation, analyze facts and anticipate tactical and strategic implications with more advanced, predictive or what-if analysis.

Business users need collaborative and social networking (Figure 2) to establish decision networks to share insights and drive toward a collective intelligence. The transparency and accountability that collaboration and social networking provide drive alignment and consensus, help business users communicate and make it possible to coordinate tasks so the right people are engaged at the right time.

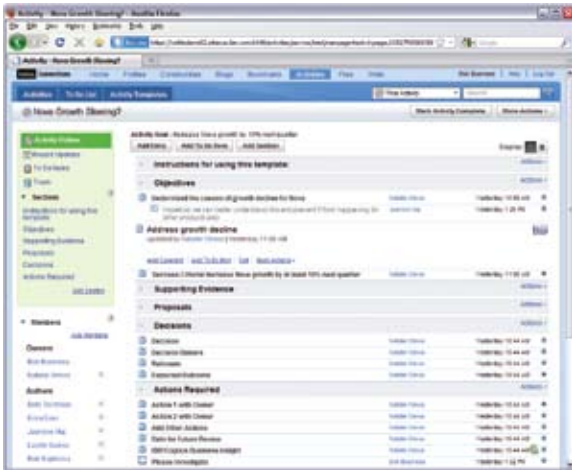


Figure 2. Collaborative and social networking establish decision networks to share insights and drive toward a collective intelligence.

### Social networks for sharing information and insights

With IBM Cognos® Business Intelligence, users can share insights and solicit ideas with a broad set of social networking capabilities. Cognos Business Intelligence provides them with integrated access to blogs, wikis and message boards, so they can expand the reach of their information, increase the impact of their insights and build a collective store of knowledge that everyone can use. As a result, business users can:

- Make better-informed decisions based on their organization's collective intelligence.
- Establish hubs for information and communication that span users, divisions, locations and departments.
- Capture, consolidate and communicate insights more efficiently.

And it should not matter one bit where business users are located or when they need insight. Their BI solution should include mobile capabilities to accelerate delivery of interactive analytics anywhere. Business users need every tool available to help them address the challenges of compressed decision cycles with real-time analytics that they can also integrate into everyday work and in workflow to inform business processes. From executives and analysts to business users and BI professionals—they all must be able to access reports, trends, scenarios and predictive analytics when they need them to get the job done.

### Executives

*“Insight and foresight are linked with leadership. It’s insight that helps to capture opportunity.”<sup>1</sup>*

—Zhou Ming, Executive Vice President and Secretary General, China Council for International Investment Promotion

Executives demand information that is highly summarized and bears direct relevance to their key initiatives. They do not need to be bogged down by minor details; they need to be able to see the big picture quickly and clearly so they can take action. To meet their needs for at-a-glance views of operational and financial performance, executives need preassembled, interactive, browser-based workspace content to start their day.

Collaboration tools, social networking features and integrated workflow are also important to executives. Therefore a BI solution for this user group must provide these features so that they can:

<sup>1</sup>Capitalizing on Complexity: Insights from the 2010 IBM Global CEO Study, IBM Institute for Business Value, May 2010.

- Connect with other executives or managers to share insight and gather broader perspective and opinions.
- View plans and information and make annotations so others can view their comments and suggestions and make adjustments.
- Track projects and activities and gain instant access to a complete task list.
- Put their fingers on a source of data or a report whenever they need it with features that easily trace the history, author and path of any information received.

Executives don't have time to learn new interfaces or complicated software. The right BI solution gives executives the option of working with the familiar Microsoft® Office interface, if that is what they are comfortable with. And, because executives are often on the go, it is important that they have access to information outside the office with mobile connectivity.

Executives are ultimately responsible for the decisions that can stay a company's course or take it in a whole new direction. They need to evaluate situations or anticipate the outcome of a course of action. Therefore, they need a BI solution that provides real-time analytics capability so they can be confident that they are making optimal decisions for their organizations with all the information they need at their fingertips.

### Business managers

With accountability for the success of key initiatives and profitability, business managers need both a high-level view of the business and an ability to delve into operational details. Fast access and contribution to relevant information can help them make better business decisions.

Business managers, like all business users, need an intuitive workspace for arranging and organizing information. To explore any combination of data over any time period and create unique and personalized views of the performance of their departments, divisions, lines of business, regions and so on, their workspace should include functionality for dragging and dropping planning data, external data (Figure 3), scorecards and metrics into their reports, dashboards, plans and more.

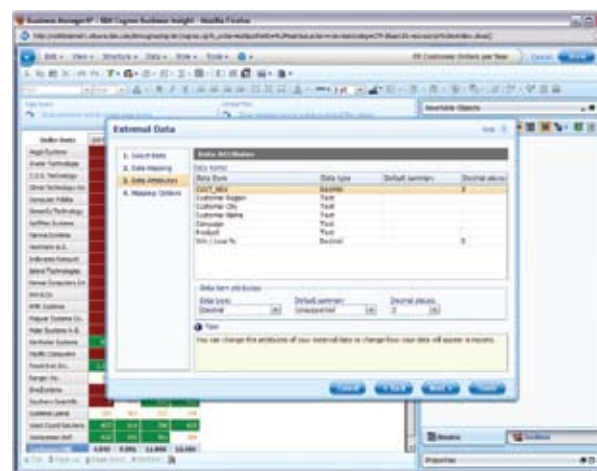


Figure 3. Augmenting their BI data with external data provides a more complete picture of performance for business managers.

*“Metrics have become and will continue to be an indispensable tool when it comes to managing any corporate function strategically.”<sup>2</sup>*

—Dr. John Sullivan, Talent Management Thought Leadership

<sup>2</sup>Dr. John Sullivan, “How to get your executives to pay attention to metrics.” 6 Sept. 2010, <http://www.drjohnsullivan.com/>

A scorecarding capability is critical for business managers. Creating metrics, process diagrams and scorecards once and then using them throughout their organization for strategy management can help them share goals from the top down and ensure everyone is using the same definitions and working toward the same targets.

The right BI solution for business managers also includes:

- Reporting capabilities that provide them with a comprehensive and consistent view of business and operations
- Features for interacting with those views using a web browser
- Multidimensional data management for reconciling transaction and planning data to create a corporate-sanctioned view of business information
- An enterprise dictionary to provide meaning
- A facility for integrating external data to their corporate information

Business managers are very likely to be comfortable using Microsoft Office interfaces and want to continue working in the familiar format. For those reasons and more, they need a solution for interacting with BI content using Microsoft Office. For traveling managers who need immediate information access, a mobile capability should make it easy for them to access what they need the moment they need it, no matter where they are.

Collaboration and networking can help business managers:

- Engage with other managers or members of their teams or even external partners or suppliers to share ideas, points of view and thoughts.
- Make comments and suggestions at the cell level of reports or make adjustments or approve a high-level plan.
- Access the history of any report, including who authored it, descriptions and all comments that were made.

Like executives, managers benefit from a BI workflow capability they can use to initiate tasks at any time, assign ownership of an activity to an individual, manage initiatives and track projects and activities. This workflow should be easy—relying on preassembled activity templates for saving repetitive processes, reusing best practices and integrating with the productivity software business managers currently use.

#### **Ad hoc workflow: We need a seamless and integrated way to turn insight to action**

The accelerated pace of business poses a significant challenge. On the one hand, business users must spend more time accessing data, analyzing it and making decisions based on it. On the other hand, the world won't slow down just because someone has to engage in a complex quantitative analysis for an upcoming business case.

Therefore, business users need speed along with depth and breadth. Cognos Business Intelligence meets these requirements, by making BI more widely available than ever before, eliminating inefficient workflows that force business users to ask other departments, such as IT, for the information and reports they require.

Using automated, ad hoc workflow capabilities that provide an easily customized and rich interface, business users can:

- Interact with their activities
- Start tasks
- Match individuals with activities
- Manage projects and monitor progress

As a result, they can close the loop from decision to action to avoid problems and take actions with confidence and accuracy.

## Business analysts

Business analysts are tasked with unveiling blind spots and garnering insights from all information sources so they can develop factual context. Business analysts rely heavily on query and reporting to provide them with the information they need to connect the dots between revenues and losses, products and profitability, financial performance and market trends and so on. Therefore, they need a comprehensive query and reporting capability that:

- Presents them with a complete and consistent view of business and operations, not disparate perspectives that they must later compare and rationalize
- Helps them access reliable statistical evidence, trends, patterns and predictions easily (Figure 4)
- Expands visibility and intelligence beyond the information at hand

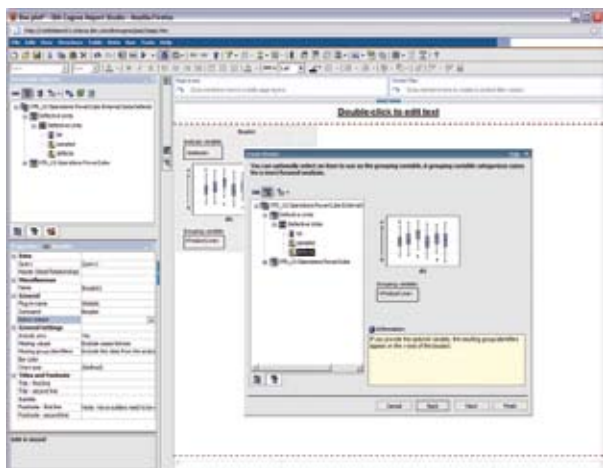


Figure 4. Analysts need a BI solution that enables them to add reliable statistical evidence to their reports

*“Business analysts interact with customers to identify reporting or analysis needs and develop business specifications. They can apply judgment and a critical understanding of the ramifications of strict quantitative decisions such as those generated by BI. This understanding is crucial to success.”<sup>3</sup>*

—William McKnight, *Information Magazine*

To help business analysts find correlations between the various factors that affect business performance, the right BI solution that provides them with the information they need in the form of:

- Scorecards
- Metrics
- Reports
- Statistics

Presentation of data in these formats makes it easier for them to analyze and share results easily with broader business communities and key stakeholders. A unified, interactive browser-based workspace (Figure 2), customized just for them, should help them explore information regardless of where the data is stored.

Drag-and-drop techniques—and even a Microsoft Excel interface—should make it possible for them to get to the “why” behind an event or action, quickly and easily. Drilling down through increasing levels of detail can help them view data by different dimensions, such as sales per region or by product to analyze and report on trends in organizational performance.

<sup>3</sup>William McKnight, “Will Business Intelligence Replace the Business Analyst?” *Information Management Magazine*, February 2005

Business analysts are often asked to provide analysis or insight on the spot, even when they are nowhere near their offices. Therefore, they need a solution that delivers BI content, analysis and statistics right to their mobile devices. They should also be able to:

- Use and save BI content or create sophisticated desktop reports such as briefing books and dashboards in a Microsoft Office application.
- Refresh Microsoft Office documents with updated information on demand.
- Share and publish files to a secure BI portal.
- Access modeling tools that can help them incorporate analysis of a broader range of alternative scenarios to build “what-if” projections.

Similar to other business users, analysts need collaboration and networking capabilities so they can engage with business managers, executives and other analysts to share the insights they have uncovered. They should also be able to access multidimensional data management and an enterprise dictionary to provide meaning, so they can contribute to a corporate-sanctioned view of business information. Data augmentation is necessary for them to add external marketing and trend data to their corporate information.

## **Customer-facing and other business users (non-technical)**

Business users are those workers who are not managers or analysts or in IT. Often on the front lines of a business, they need personal and easy access to information that can help them meet their goals and objectives. These users require:

- A single place they can use as a starting point for understanding information and uncovering insight—and checking on how they are doing
- A browser-based reporting feature to help them interact with the data they need for actionable insight
- Automated scorecards and metrics to help them visualize how they are performing based on targets set for role-specific projects and activities.

Because business users need to be able to create their own impromptu, on-demand queries or modify existing reports, it is important that they be provided with easy-to-use tools that help them contribute to the reporting process—or even create their own. Because many business users deal directly with your customers, they are often in the field. Expanded support for the iPhone and iPad, plus an enhanced BlackBerry interface, can help business users assimilate and navigate information on the spot.

Business users often work outside of your BI infrastructure. In the past, this hampered their abilities to make prompt, effective decisions or take immediate action when it was needed. To resolve that situation, a complete BI experience—browse, explore and author—in a self-contained offline environment is necessary. Business users need to be able to take their data with them to discover opportunities and analyze trends even when they are not online.

In this ever-changing business world, companies are realizing that business users require a solution that offers many of the capabilities that executives, managers and analysts need but tailored to them so that they are not overloaded with data they cannot use or do not understand. The right BI solution for business users provides them with those capabilities and also makes it possible for them to:

- Collaborate with other business users.
- Follow their activities in an automated workflow.
- Make comments and notes in reports.

### **IBM Cognos 10: Intelligence Unleashed Smarter Decisions. Better Results.**

Cognos 10 delivers a revolutionary new user experience and expands traditional business intelligence (BI) with planning, scenario modeling, real-time monitoring and predictive analytics. With the ability to interact, search and assemble all perspectives of your business, Cognos 10 provides a limitless BI workspace to support how people think and work.

Cognos 10 enables organizations to outperform by providing:

- **Analytics** that everyone can use in a BI workspace that sharpens individual skills to answer key business questions
- **Collective intelligence** with built-in collaboration and social networking to connect people and insights to gain alignment
- **Actionable insight** everywhere in mobile, real-time and business processes to instantly respond at the point of impact

Built on a proven technology platform, Cognos 10 is designed to upgrade seamlessly and to cost-effectively scale for the broadest of deployments. Cognos 10 provides you and your organization the freedom to see more, do more—and make the smart decisions that drive better business results.



## Cognos Business Intelligence: BI everyone can use. Answers everyone needs.

The right BI solution enables executives, business managers, business analysts, business users, processes and technology to work together to make more information decisions. With a full range of BI capabilities, all users can access and share information when, where and how they need it. As a result, individuals can make smarter decisions and organizations can gain agility and outperform.

Cognos Business Intelligence delivers a revolutionary new user experience for all business users and expands traditional business intelligence (BI) with planning, scenario modeling, real-time monitoring and predictive analytics. With the ability to interact, search and assemble all perspectives of your business, Cognos Business Intelligence provides a limitless BI workspace to support how all business users think and work resulting in smarter decisions and better results.

### About IBM Business Analytics

IBM Business Analytics software delivers complete, consistent and accurate information that decision-makers trust to improve business performance. A comprehensive portfolio of [business intelligence](#), [advanced analytics](#), [financial performance and strategy management](#) and [analytic applications](#) gives you clear, immediate and actionable insights into current performance and the ability to predict future outcomes.

Combined with rich industry solutions, proven practices and professional services, organizations of every size can drive the highest IT productivity and deliver better results.

### For more information

For further information or to reach a representative:  
[ibm.com/cognos](http://ibm.com/cognos).

### Request a call

To request a call or to ask a question, go to [ibm.com/cognos/contactus](http://ibm.com/cognos/contactus). An IBM Cognos representative will respond to your enquiry within two business days.

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