



White Paper

Unlocking the Intelligence in Your Data – the Key to Real-time Business Intelligence

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Too much data can hide important facts. Depending on an individual's role they may have more or less time to examine the data. Content should be aggregated depending on their requirement and allow them to drill down to the underlying data when needed.

Also understand that the time it takes to pull data together may be onerous. You may find it takes hours each week gathering the same data again and again. This is slow, expensive and prevents data from being available in a timely manner. Tools such as Excel should only be used for producing new analysis, not for regular copy and paste routines each day, week or month. Data that is required on a regular basis should be automated to allow talented individuals to do what they do best - the reason you brought them into the organisation.

How to Define the Right KPIs

KPIs can be defined as "...the vital few metrics that indicate progress towards strategic objectives - where metrics include the numerical measurement, measuring process and frequency."

Make sure that data is understandable and actionable. When viewing data everyone should know what it means, how to spot problems, and what action to take to address them. This also means you need to identify who needs to be able to view what data.

For actionable KPIs the Business Intelligence should be:-

- Sent automatically when thresholds are crossed - don't wait for the relevant people to discover the problem
- Actionable – ensure everyone knows what to do to correct the issues
- Able to highlight good performance, i.e. if Team A's performance is better than Team B's make sure that Team B are able to review Team A's processes and learn from their performance
- Focused – if you give people too many KPIs / targets they will lose focus
- Not open to manipulation i.e. by decreasing servicing time at the expense of customer satisfaction. You must understand the links between measures and make sure that you do not make easy gains in one area at the expense of others

Although there are many useful metrics, it's the vital few that are worth the time and effort.

Consider this; in an older Boeing 747 if all the instrumentation were taken out of the cockpit and laid end-to-end it would stretch over 27 feet in length. Pilots couldn't pay attention to all those dials and displays all the time. Instead they viewed six key indicators. If something appeared out of order pilots checked the other instruments corresponding to that key indicator. Now aircraft cockpits use digital displays to show key information, which can be adjusted to display additional flight information as needed.

The same is true for KPIs - it's the vital few rather than the useful many that is the "key" in KPIs.

Once management, with staff input, has identified the vital few KPIs to use, the ability to implement them must be checked. KPIs may be realistic and productive but impractical to implement for a number of reasons including:-

- Measurements for that data do not exist
- Data collection requires too many resources
- Potential disturbances or interactions with end-users outweigh the benefits

KPIs should be defined explicitly by including:-

- **Metric Category:** Defining categories before figuring out individual KPIs helps you choose KPIs for important business areas, such as: Cost, Quality, Safety etc.
- **Metric Name:** Providing a unique descriptive name helps avoid confusion between similar sounding KPIs
- **Unit of Measure:** Name what you're counting, i.e. square feet, hours, incidents etc.

- **Calculation:** The formula used to calculate values of the metric, i.e. (square feet / hours worked), or (# of responses in compliance / # responses non-compliant)
- **Measurement Frequency:** Hourly, weekly, monthly, quarterly etc.
- **Measurement Procedure:** Such as manual tallying of complaints, or online digital tracking of requests, or however you capture data
- **Weight:** You may want to weight KPIs individually or by category based on their importance, e.g. responsiveness may not be as critical as cost, and therefore weighted less important
- **Target Value:** The numerical goal for a reporting period, can be either an industry benchmark, better than past, best possible value (i.e. 100 out of 100)
- **Threshold:** Can be current numerical starting point, minimum acceptable bottom line, or indicating deficiency

Facilitating Transparency for Customers – Satisfying Demands for Customer Reporting

Your customers require data. The more effectively you can communicate with them, the happier they will be. You should provide your customers with access to data about their contracts, the service delivery and performance etc. Effective communication will not only make them happier but will reduce their requirement to ask you questions through inbound phone calls and emails.

Customers and management are always thinking, if not asking, **"Am I receiving what I have paid for?"**

It's a legitimate question. You cannot hold services in your hand, they are different every time, and they are performed in front of customers over and over again. KPIs can help make service tangible in a way that management can understand - in numbers, showing that services were performed and value was received.

However, KPIs can also be used to achieve high-value strategic objectives. They belong in an improvement hierarchy that includes management's:

- **Future-state objectives** - that are related to:
- **Specific goals** - that can be achieved with:
- **Critical Success Factors** - that are initiatives to achieve goals, where:
- **KPIs** - monitor and measure performance towards achievement of goals

Consider the Six Sigma quality measurement process baked into GE, or Hewlett-Packard's measuring performance in TQRDCE (Technology, Quality, Responsiveness, Delivery, Cost, and Environment).

These companies connect KPIs to strategic organisational objectives. That is the way they work and so must their service providers.

Using the Right Business Intelligence Solution: Dashboard - the At a Glance Tool Which Brings it All Together

Common issues that companies in almost all industries are faced with include:-

- Too many business decisions are based on inaccurate or incomplete data
- Businesses are experiencing exponential data growth
- Too much information is stored in individual systems, effectively locking data into silos

Even if just one of the above three statements applies to your business you are probably already looking for a Business Intelligence tool to help you unlock your data potential. But which tool should you choose?

Any business involves a multitude of roles and responsibilities. It is therefore natural that 'what matters to me' may not necessarily matter to you. Businesses are increasingly becoming aware of this and while the business as a whole must be able to gain a complete view of its activities, it's imperative that users can gain insight into data relevant to their business area. Moreover, in an age where we are no longer tied to a desk in an office, it's essential that the relevant information is accessible by anyone, anytime, anywhere, using a variety of hardware from laptops and smart phones to tablets, subject of course to access permissions. The need for tailored, real-time information, delivered 24/7 is the driving force behind finding new ways for companies to equip a larger portion of their stakeholders with timely and relevant business insight. Moreover, companies want to enable this immediacy without having to part with the cost, time and resources typically associated with traditional enterprise level BI implementations.

A dashboard is an interactive BI tool which tracks KPIs, and monitors individual, team and corporate goals in real-time. It facilitates proactive interrogation and promotes collaboration across the organisation, including remote and mobile users.

With new dashboard tools it is possible to facilitate the proliferation of BI throughout the organisation to include more groups and roles.

The Value of Using Mobile Dashboards

Like regular dashboard products the interface for the mobile user is simple, allowing fast navigation to relevant metrics; mouse clicks are replaced by taps, while charts and navigation paths are re-sized and re-worked to fit the screen size of the mobile/tablet. The key features remain, such as sending charts as email messages, viewing KPI alerts with trend indication and drill-down to detailed source information. Key features should be:-

- It is fast – connects to your existing server without additional downloads
- There should be nothing new to learn – you can view the same charts/KPIs as through the regular dashboard
- It is easy to maintain – no need to create new security restrictions, it follows your existing settings
- Easy viewing – end users can view charts in landscape/portrait orientation using the rotate facility

Opening up the Dashboard to Customers and other Partners

We recommend that you select a browser-based, Rich Internet dashboard application. In doing so you already have all that you need to create customer specific dashboards, allowing your customers access through a standard web browser. Many companies already work with secure log on sites for customers on their websites and accessing customer specific dashboards through the same secure portal is an obvious and easy choice.

For Self-Service BI to be successful, businesses need to:-

- Flip the pyramid: today's BI vendors offer a solution which makes it very easy for businesses to adopt a bottom-up approach to BI and thus take full advantage of an information 'pull' from the lower end of the decision-making pyramid (as opposed to a management-driven, top-down 'push' approach).
- Involve users: to maximise user buy-in you need to allow room for staff to develop the look and feel they like, choose which types of charts work for them and let them decide on the most relevant drill paths.

- Listen: while self-service BI can foster a healthy open-door policy, whereby individual achievements are easily recognised, the emphasis on transparency can also promote uncertainty. It is necessary and prudent to address 'Big Brother' fears openly and actively demonstrate the many ways in which the dashboards recognise positive achievement.
- Include business partners: include charts that recognise the input of dealers and resellers and other business partners who influence the overall business.
- Actively support and promote the BI initiative throughout the organisation – leading by example and encouraging extensive use of the tool shows that top management are committed to the organisation-wide use of the solution. Appointing designated champions can further promote user acceptance.

Primary Benefits of Self-Service BI

By utilising a dashboard product that tracks KPIs, monitors individual, team and corporate goals in real-time and promotes collaboration across the organisation, you can:-

1. **Provide visibility and real-time tracking of corporate goals thus instantly spot where you can boost productivity and make efficiency improvements**
2. **Empower managers to track their KPIs and those of their employees, and act on trends immediately**
3. **Motivate staff by allowing them to explore data that is relevant to their particular job role and performance**
4. **Allow staff to stay in touch with KPIs by receiving alerts or accessing them 24/7**

The check lists

Benefits of Investing in Dashboard Software

- Quick to implement
- Data is viewed in real-time
- Utilises data you already hold
- Multitude of uses across your business
- Web-based for fast rollout and lower cost of ownership
- Provides reporting on self-service basis
- Scalable and caters for designated secure user access according to role

What to Look Out for

- Easy configuration – so users can see what 'they' want to see without incurring extra charges from the software vendor
- Great look and feel – intuitive with extensive use of graphs and charts as standard, with the ability to drill down, plus the ability to be easily branded to fit your company
- Accessible – via web or mobile device for anytime access
- Easy to deploy – ability to publish charts to a wider audience e.g. internet/intranet
- Database agnostic - allows combinations of data from different source formats (SQL Server, Oracle, MySQL, DB2, PostgreSQL, Ingres, Ingres Vectorwise and more)
- Scalable – just add additional server instances as required
- Extensible – no limit in the number of data sources
- Platform and browser agnostic - e.g. Mac/PC/Linux and any browser on each of these platforms.
- Exports easily – ability to extract data from the dashboard for further analysis e.g. email reports and copy data into Excel
- Mobile access – view charts on the move, from any device, email charts to other users; should be easily optimised for touch-screen, secure access via VPN or password control
- Easy to pick up and use – software provider should offer free training to 'super users' for fast and easy rollout
- Linked to the rest of the business – ability to link from charts back to your existing applications or to integrate your own application with the dashboard if required.

About Panintelligence

The Panintelligence dashboard is a highly sophisticated BI tool, which facilitates the tracking of KPIs, and the monitoring of individual, team and corporate goals in real-time. It strongly promotes collaboration across the organisation, and with the mobile dashboard application, key information can be accessed at anytime from anywhere. More information on www.panintelligence.com

About Service Performance

Service Performance consults with in-house service managers, procurement and departmental business owners to get more value from their services. Their consulting designs service solutions to performance issues, writes Requests for Proposals (RFPs), develops performance measurements (KPIs & SLAs) and designs awareness and communications programs for end-users. For more information visit: www.serviceperformance.com