

INTELLIGENT BUSINESS STRATEGIES PRESENTS



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

London 10-11 April 2008

OVERVIEW

There is no doubt that managing business performance is becoming fundamental to building, growing and managing a successful business. This concept is based upon the principle that improvements in performance can only be delivered if performance is measured in specific business areas and related to strategic business objectives and targets. Various popular methodologies now exist to help formalise how we approach performance management (PM) typically at strategic levels e.g. Balanced Scorecard, Six Sigma etc. While these methodologies are becoming familiar to executives at strategic levels, it would be more effective if everyone in the enterprise could contribute so that performance is managed at both strategic *AND* operational levels.

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 BI based CPM scorecard product with integrated budgeting, planning and reporting. 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 not one of the CPM tools on the market has any integration 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 in every process activity to guide them towards making their contribution to the overall performance of the business. PM is therefore about building an intelligent business by integrating business intelligence right into operational business processes to guide and drive decisions and actions in every day business. This is Operational BI. 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) of business process events to detect exceptions and opportunities
- On-demand and event driven data integration to integrate historic and operational data for real-time analysis
- Deployed data mining model 'services' 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, 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.

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: INTELLIGENT BUSINESS - 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 performance management is today and where business wants to get to in leveraging business intelligence in core business processes. 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 data warehouses and data marts
 - 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 to build the intelligent business
 - A business intelligence
 - An operational business integration
- Requirements for holistic PM & 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 - What needs to happen to leverage BI?
- What is an intelligent enterprise?
- Just-in-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 REAL-TIME INTELLIGENT ENTERPRISE

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

- Business intelligence platforms
- BI web services to integrate on-demand analytics and reports into enterprise applications and portals
- Leveraging BI in operational application development
- BI in the database –XML APIs, DBMS embedded OLAP and data mining, – what the vendors are doing
- Enterprise integration platforms
- Service Oriented Architecture (SOA)
- Enterprise portals for personalised information delivery
- What is business process management?
 - Business process modelling
 - Business process execution
 - Business processes monitoring
- Decision / rules engines
- Guided analysis to rapidly lead users to problem identification
- 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

MODULE 4: ARCHITECTURE OPTIONS AND METHODOLOGIES FOR OPERATIONAL BI

This session looks at the various architectures for integrating BI into operational 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 the intelligent business
- BI integration – why a single approach is not enough
- Understanding user communities, roles and the operational applications they use
- Understanding business processes and process events
- Operational BI requirements - Who needs what BI and when?
- Integration options for internal and external exploitation of BI
- Integrating BI with portals for personalised BI, personalised objectives and personalised dashboards
- Embedding BI in operational applications
- Using BI in a service oriented architecture (SOA)
- Integrating BI with process management
- Automatic decision services
- Real-time data versus real-time access
- The implications of real-time operational BI on existing BI systems
- Pros and cons of operational BI options
- Identifying the best operational BI architecture option for each role
- Customer case studies

MODULE 5: BUSINESS PROCESS MANAGEMENT – NEW TERRITORY FOR BI

This session looks at business process management and why process integration is becoming mission critical to reducing costs and improving efficiency. It then singles out how to use BI and BI technologies to monitor business processes using process intelligence.

- Business process automation to integrate BI into operational business processes
- Using BI to monitor operational business processes
- What is business activity monitoring (BAM)?
 - Achieving guided 'intelligent' operational processes using BAM
 - On-demand data integration for BAM
 - On-demand predictive models for automated event analysis, scoring and pattern detection
 - Decision engines for automated enterprise alerting and action messages
 - BAM technologies – Actimize, Cognos, IBM, Instante, Oracle, SeeWhy, ThinkAnalytics, Tibco
- Process intelligence – monitoring how you operate while you operate
 - Process performance intelligence
 - Process cost intelligence – Activity based costing comes of age
 - Modelling and monitoring business process costs using activity based costing
- Guided analytics to navigate process intelligence
- Re-optimising operational processes using intelligence

MODULE 6: INTEGRATING OPERATIONAL BI INTO CRM AND SUPPLY CHAIN BUSINESS OPERATIONS

This session looks at how to create intelligent front-office and back office business operations. It discusses how real-time operational BI can be leveraged across all customer touch-points for targeted and personalised 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 real-time single view of the customer
- The customer intelligent front office - using BI to improve marketing, sales and service
- Real-time analytics in front-office marketing, sales and customer service
- Leveraging operational BI alerting and recommendations in front-office operations
- Integrating BI with multi-channel campaign management systems
- Deploying mobile BI in the sales force
- Monitoring supply chain performance and costs
- Automating supply chain optimisation using demand intelligence
- Real-time alerting in supply chain operations
- Front office and back office BI portals

MODULE 7: BI NETWORKS – INTEGRATING BI, COLLABORATION AND PORTALS FOR DECISIONING

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 the Managing Director of Intelligent Business Strategies Ltd (formerly DataBase Associates International Ltd). As an independent analyst and consultant he specialises in Enterprise Business Intelligence, and Enterprise Business Integration. With over 25 years of IT experience, Mike has consulted for dozens of companies, spoken at events all over the world and written numerous articles. He is also an expert on the B-EYE-Network and on Shared Insights Portals Community Network. Prior to founding Intelligent Business Strategies, was a member of NCR's worldwide product strategy and architecture team as a Chief Architect working on the Teradata DBMS. He spent four years as a principal and co-founder of Codd and Date Europe Limited – the inventors of the Relational Model - specialising in IBM's DB2 product and was a partner at DataBase Associates with Colin White.

RIGHT-TIME BUSINESS INTELLIGENCE & PERFORMANCE MANAGEMENT

10-11 April 2008, London, £995 +VAT

REGISTRATION FORM

REGISTRATION INFORMATION

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Payment is due with your booking prior to attendance.

Seminar fee due	£	
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CANCELLATIONS & SUBSTITUTIONS

Should you be unable to attend, for any reason, we are happy to welcome a substitute colleague, but would appreciate prior notification. If you have to cancel entirely we can offer a full refund, less 10% administration charge, if written notice is received 4 weeks prior to the start date. After this time no refunds will be given.

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