

# Enhancing a Performance Management System to Improve Business Critical Processes

*A low risk, low cost, fast path to drilling to actionable information*

*“Our Performance Reporting system gave us fast benefits and identified areas for improvement, but we needed to drill to the detail to find the information we required to take action to make business process improvements...” COO*



## Situation

The customer installed a web-based performance management system with Key Performance Indicators and color coded lights. The KPI's were operations-based and concentrated on Bookings, Procurement, and Inventory Management. The customer was able to quickly identify where problems existed and therefore, opportunities to improve their competitiveness.

However, the Performance management system only alerted management to a particular area where the problem was occurring, but not the supporting detail. That detail existed in LOB and ERP systems but the Business users had to manually extract that information from the somewhat inflexible reports produced by those systems.

One option was to begin to build a corporate Data Warehouse. A Data Warehouse could support the entire enterprise with information needed for all departments. However, a Data Warehouse would be a large, expensive and timely undertaking that would absorb a lot of IT and user resources and was subject to high risk.

## Customer Concerns

The customer knew that there were several risk factors:

- Dissipation of scarce budget resources if the benefits were not captured
- Loss of user confidence if the information was incorrect or difficult to retrieve
- Dissemination of wrong information would adversely affect user business decisions

One option was to build a small scale Data Warehouse (DataMall) that would support individual departments or workgroups. The smaller-scale DataMall is typically easier to build than the enterprise-wide warehouse and can be rapidly implemented. Although the potential for fast payback was high and the risk much lower, the user was concerned that deploying DataMalls would prevent the ability to scale the architecture to an Enterprise Data Warehouse that would serve the needs of the future. And, the customer was concerned that IT would be overwhelmed in supporting a possible myriad of platforms, operating systems and reporting tools.

The customer had to find an easy reliable way to be alerted when agreements were up for renewal and they had to find an improved collaborative solution that we reduce the time and effort to process and approve new agreements. Users were expecting an easy to use solution, delivered in a web browser, using the Microsoft desktop tools with which they already were familiar.

The customer is a leading Aerospace and Defense supplier with multiple divisions and customers worldwide.



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Another concern was raised about the business data mapping process; specifically that the mapping and labeling of data, which if done incorrectly, would result in erroneous business process reporting when accessed by the users. So, they required support from someone who had the business expertise to find and interpret the information stored in the ERP systems.

## **Solution**

The customer brought in AccessIG, Inc., a Microsoft Certified Partner, as a member of the team to help mitigate the risks and to accelerate the capturing of the benefits. Because AccessIG had extensive business experience the customer did not have to script each step; and, based on their extensive experience, brought valuable “best practices” experience that their customer could draw upon.

AccessIG understood both the Business and IT concerns identified by the customer and developed a solution, using Microsoft technologies as common standard that would deliver immediate business benefits while ensuring future IT scalability. As a result, the customer gained faster benefits at a lower cost due to:

- the acceleration of the process improvements/prototyping phase
- the acceleration of the identification of the cost/benefit
- the acceleration of the identification of avoidable risk

The customer agreed that the real key to attaining fast benefits while protecting the ability to scale at a later date was to standardize on hardware and software for all DataMall deployments. The customer chose Microsoft technologies as their standard:

- SQL Server Database as their database for storage
- SQL Server Integration Services (SSIS) as their ETL Tool
- SQL Server Reporting Services (SSRS) and SQL Server Report Builder (SSRB) for reporting and Web Deployment

With these standards in place, the customer was able to quickly deploy a BI-DataMall® solution based on Microsoft SQL Server technologies. Data was extracted using SSIS and users were quickly trained on SSRS and SSRB. A single BI-DataMall solution was able to support several departments and workgroups with specific subsets of data that was needed to support the Performance Management system. Specific drill downs were tied directly to the Performance management system and user could access the actionable information they needed with only a few keystrokes.

## **Benefits**

- The customer was able to quickly and inexpensively deploy a BI-DataMall to get to actionable information when drilling within the Performance Management system
- The value of the Performance Management system investment was greatly enhanced
- IT support was reduced due to the standardization of tools
- The customer retained the ability to scale to a full Data Warehouse in the future
- All users in the department or workgroup have a centralized location for accessing information
- The information is structured for easy reporting and analysis
- Customer has multiple options for creating and distributing reports; i.e., automatically generated, one time, published, e-mailed, etc.