

Unlocking the Value of

TRUSTED DATA AND ANALYTICS AT

SCALE



An Analyst's Perspective:
BARC Founder and
CEO Dr. Carsten Bange

Aligning Your Data and
Analytics Strategies

Partnering to Win-Win:
Our New Global Partner Program



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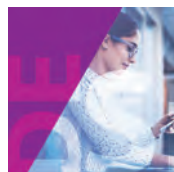


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Business Application Research Center (BARC)

Dr. Carsten Bange



Information Builders Talks Analytics, Artificial Intelligence, Internet of Things, and Other Key Topics With BARC Founder and CEO Carsten Bange.

Information Builders: What obstacles must organizations overcome to scale their analytics solutions to many types of business users?

Bange: To be truly useful to a wide audience, analytics should be easy to consume. "Casual" data analysts typically do not have the background, education, or training to employ sophisticated analytical methods. They need guidance in the tools and applications. For example, an analytics solution

should include self-explanatory and self-validating methods for accessing and visualizing data. Today, as data becomes more prevalent and more important to business operations, training casual users in analytical tools and methods becomes increasingly important.

Information Builders: How valuable is data quality to enterprise business intelligence (BI) initiatives, and what are the consequences if users can't trust the data?

Bange: The old truism about data quality – that no BI tool can provide value without trustworthy data – is more relevant today than ever. In BARC's annual BI Trend ➤

As data becomes more prevalent and more important to business operations, training casual users in analytical tools and methods becomes increasingly important.

Monitor, more than 2,500 BI users voted data quality management as the number-one most important trend. Most business users have seen the problems of having poor data in source systems, and they know how hard it is to improve it. The proliferation of self-service BI tools gives many users direct access to business data, but that doesn't mean it has been cleansed or validated. If you don't trust the data, you either won't use it or you will become frustrated with how much time and effort it takes to correct and validate it.

Information Builders: Tell us more about this comprehensive BI Trend survey that BARC conducts each year.

Bange: Our annual BI Survey gathers input from more than 3,000 respondents, which makes it the most comprehensive survey of its kind. Our analysts examine user feedback on BI product selection and usage across 30 criteria, including business benefits, recommendation, price-to-value, customer satisfaction, customer experience, operational BI, embedded BI, and vendor support. Incidentally, Information Builders has achieved consistently above-average results in several categories for many years. For example, this year WebFOCUS scored 17 top rankings and 14 leading positions out of 60 categories. One survey respondent called WebFOCUS a "very scalable technology for all areas and functionalities" that offers "limitless application and extension possibilities."

Information Builders: Now that data comes from so many different places, and in so many formats, what kind of integration capabilities do analytics platforms need in order to make full use of all the available information?

Bange: Analytics platforms still use mostly structured data, meaning relational data in tables, but they must also be able to obtain data from many other sources — not just the usual transactional systems. For example, many companies wish to analyze data from their suppliers and customers, such as information about shipped goods and products at customer sites. Other companies wish to acquire real-time data from machines, sensors, and personal devices. Being able to access data from a growing variety of sources is increasingly important. And there are lots of ways to do it. For example, you can pull it into a central data store, such as a data warehouse or data lake, or you can query it directly as needed, a technique known as "virtual data integration."

Information Builders: There are lots of data visualization tools on the market that make analytics accessible to casual business users. What do these tools need to be enterprise-ready?

Bange: There are several essential capabilities that qualify BI tools for enterprise use. First, they need inherent scalability to support high user numbers and large data volumes. They also need a high-performance architecture to ensure good response time when accessing data and submitting queries. They must be easy to maintain, especially once they expand into large production environments that support many users and a large variety of applications, dashboards, reports, and data sources. Finally,

they need robust security features to ensure protected access for large numbers of users and many types of data sources.

Information Builders: Today's BI apps must be able to monitor a workflow or process, and respond to events as they happen. What types of capabilities do you need to accommodate these scenarios?

Bange: For starters, you must be able to tap into data streams produced by sensors and software applications. Once you have access to this data, you need to be able to filter out non-relevant data, which is typically a large portion of the data set. Then you can move from merely monitoring an activity to more advanced forms of analytics, such as predicting what is going to happen and finding interesting patterns in the data.

Information Builders: How are AI and machine learning (ML) technologies impacting today's BI initiatives?

Bange: The steady rise in computing power and storage capacity allows businesses to apply AI and ML in new and interesting ways. However, most of these new business models need analytics to generate insights and add value to the data. For example, machine learning and deep learning technologies depend on longstanding statistical models designed to classify, cluster, associate, and make predictions. Traditionally, this type of technology has only been available to experts, but that's starting to change as analytics platforms evolve. Business analysts can now use advanced forms of data analysis without having to catch up on their studies in statistics.

Information Builders: How is cloud computing impacting enterprise BI projects, and what are the advantages and disadvantages of engaging a cloud vendor for analytics?

Bange: Empirical user data from our BI Survey shows that about 30 percent of newly deployed BI tools and applications are now hosted in the cloud. Customers select cloud deployment models mainly for their flexibility and instant scalability, since you don't always know how popular a BI application will become, how fast the user base will grow, or how many compute and storage resources will be needed to support the analytics workload. As usage patterns change, cloud resources can be added or subtracted to meet fluctuating demands. Those are the positives. Possible negatives include a lack of know-how in setting up and administering cloud environments, potential lock-in to the cloud vendor's technical ecosystem, and sometimes also the price.

Information Builders: As IoT applications enter mainstream production use, how can businesses make IoT data accessible to a large audience?

Bange: IoT requires a broad mix of capabilities, starting with technical access, harmonization, and integration of data. You need a general-purpose BI environment that can access and analyze a variety of data types. Data architecture plays an important role in IoT scenarios. For example, it might be feasible to employ "edge analytics" on devices or gateways to study

streaming data, rather than capturing that data and transporting it to a central data lake. You can start by simply monitoring these data streams to detect trends and anomalies. However, to make IoT data accessible to a broader audience, you need to be able to use IoT data within reports and dashboards, as well as conduct both ad hoc and advanced analytics. 

Dr. Carsten Bange is founder and chief executive officer of the Business Application Research Center (BARC), a market research and consulting company focused on the successful application of software solutions for the analysis, management, and implementation of business processes.





Frank J. Vella
Chief Executive Officer
Information Builders

The Importance of Leveraging Trusted Data and Analytics, at Scale, Throughout Your Business

Today's businesses are dealing with more data than ever before – often of increasing complexity. Given the accelerating pace of change in most industries, the speed at which people can extract insights and knowledge from that data has become critical to their success. To achieve speed, you need scale – and this is what sets Information Builders apart. We provide a highly scalable data and analytics software platform that makes trusted data easy to access and analytics easy to create and consume.

Our WebFOCUS business intelligence (BI) and analytics platform delivers data and insights to all types of people – from front-line workers within individual departments to executives guiding the enterprise, as well as to authorized users outside the firewall. In today's data-driven business world, these capabilities are more important than ever. The digital economy is awash with data; not only structured data from enterprise applications, but also unstructured data from web pages, social media sites, equipment sensors, point-of-sale terminals, chatbots, mobile phones, utility meters, and many other sources. According to researchers at McKinsey & Company, the total global value of analytics

is between \$9.5 trillion and \$15.4 trillion.¹ Unlocking the value in those information assets will differentiate winners from losers in the years ahead.

To maximize the value of your analytics endeavors, you need to align them with an enterprise strategy. That means acquiring data that supports organization-wide goals, and connecting those goals with day-to-day activities. Everybody should be able to contribute to the information value chain; not just executives and business analysts, but also operational users. That's a tall order, and it extends far beyond merely visualizing data in compelling ways. That's why our platform includes mature data access, management, and cleansing functionality. It also has a

complete metadata layer, which enables users to analyze, share, and visualize data securely and consistently.

The Last Mile of BI

Self-service BI used to mean empowering end users to build their own reports. However, this definition fails to consider how most people access and use information – not to mention the typical skill sets of operational workers. Business users should not have to understand an obscure syntax, “build” reports, or search for data. The data should find them, and be accessible within the context of routine activities. ➤

DATA AND ANALYTICS AT

SCALE

BY FRANK J. VELLA

Our overriding objective is to help organizations thrive through the pervasive use of trusted data and analytics, at scale, throughout every aspect of their business.

WebFOCUS is based on an extensible architecture that enables you to embed analytics into day-to-day decision-making processes. More importantly, it allows you to create the right experience for each user – what we call the “last mile” of business intelligence. The architecture is inherently scalable, as evidenced by the customer success stories published in this issue.

For example, **Attenti** uses WebFOCUS to help parole officers in more than 30 countries monitor more than 200,000 parolees per year. **Orange County, Florida** uses the software to help millions of citizens stay connected with government services via interactive applications on their computers and phones. **Worldpay** empowers analysts to drive insights from 23 billion annual transactions, and provide value-added services to nearly 800,000 merchants.

Other customers like our platform because it is easy to embed as part of a larger application or experience. For example, **Rosnet** used WebFOCUS and InfoAssist to embed profitability analytics in a SaaS-based restaurant management system. **Willis Towers Watson** created an embedded WebFOCUS portal that tracks the enrollment activities of nearly 1.5 million retirees. And **Wings Travel Management** devised a customer-facing analytics portal that helps clients in the oil, gas, and marine sectors measure and improve the performance of their global travel programs.

While many executives claim to be on the cutting-edge with data and analytics, the reality is that very few companies break away from their peers in this fashion. There are a couple of reasons for this phenomenon:

■ Data is difficult to access

According to researchers at Carnegie Mellon University, organizations with siloed data have a much harder time employing a holistic management approach, in which operations and tasks are optimized across the organization²

■ Users don't trust the data

Inconsistent data is a major hindrance to today's digital transformation initiatives. Gartner goes so far as to call it a “crisis in information trust,”³ pointing out the negative impact of bad data on financial performance. When it comes to predictive analytics, the statistics are even more dismal, with only 10 percent of organizations bringing predictive insights into a production setting

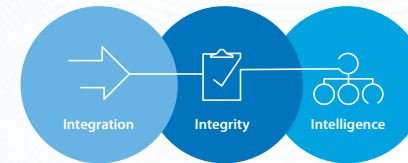
To break through these barriers, organizations need front-end analytics tools that are built on a powerful back-end data management platform – backed by award-winning professional services and customer support. When I took the helm of this dynamic company, I knew that maintaining this successful direction would involve a renewed emphasis on this “customer-first” approach, anchored by industry-leading technology innovation. It's the best of both worlds: modern technology backed by decades of proven mission-

¹ Chui, Michael; Chung, Rita; Henke, Nicolaus; Malhotra, Sankalp; Manyika, James; Miremadi, Mehdi; Nel, Pieter. “Notes From the AI Frontier: Applications and Value of Deep Learning,” McKinsey & Company, April 2018.

² Edwards, John. “Data Silos: Now and Forever?” InformationWeek, November 2018.

³ Moore, Susan. “How to Create a Business Case for Data Quality Improvement,” Gartner, Inc., June 2018.

Information Builders' Unique 3i Platform



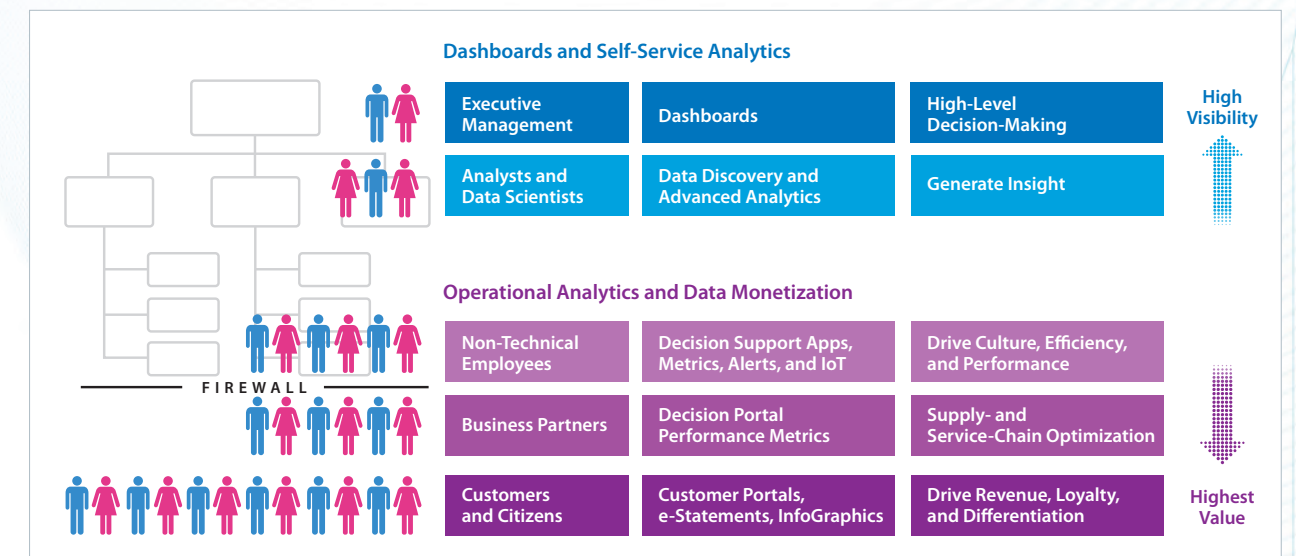
Our unique “3i” platform: Integration and integrity anchor a pervasive layer of intelligence.

Value comes from scaling data and analytics throughout an extended organization.

Integration: We give you many different ways to access your data, either in its current location and format, or by moving it into another location, such as a data warehouse or data lake. Batch, real time, big data – we do it all – so you can leverage your data investments at a tremendously high scale.

Integrity: Data integrity hinges on trust. Business users want data that is complete, accurate, consistent, and governed in a controlled environment. We allow people to deploy secure applications that turn fresh insights into measurable, consistent outcomes.

Intelligence: Our intelligence platform, anchored by WebFOCUS, can bring analytics capabilities to every user in the enterprise, as well as extend analytics to people outside your firewall. Developers and analysts have tools for creating portals, dashboards, and InfoApps™ that allow business users to answer their own questions with a few clicks.



critical deployments, and the wealth of knowledge and creativity that comes from that experience.

A Complete Platform for Data Management and Analytics

Information Builders' central value proposition hinges on our unique 3i platform. We make data accessible through our **integration** technology; we make sure it can be trusted using our data **integrity**

technology; and we deliver valuable insights with our **intelligence** technology.

Our comprehensive platform yields clean, consistent data that is easy to access, move, and blend – regardless of its format, location, volume, or latency. Each of these three components works with the others, and they can be deployed separately as well. ➤

Why is this important? In a word, completeness. All data visualization environments look good in demos, but many of them lack intelligent data preparation and collaboration capabilities, leading to analytics silos and data discrepancies. They create flashy front-end displays that are only a pixel deep, with little or no emphasis on the foundational pillars of data integration and data integrity. By contrast, WebFOCUS apps are built on trusted, business-ready data that is accessible to all users, and relevant to all types of use cases. Having a strong data management platform gives users confidence in the strategic value of the information.

It's no wonder many of today's analytics tools run up against a user adoption wall. On average, only 17 percent of employees are capable of using these tools, according to a 2018 BARC survey.⁴ Most analytics dashboards, portals, and reporting systems are designed for executives, high-level managers, and professional analysts – not front-line workers.

With WebFOCUS, by contrast, decision-making capabilities can be extended to everybody. In addition to portals and dashboards, WebFOCUS can create InfoApps™ that enable non-technical users to easily explore data via charts, graphs, and data visualizations through an app store-like experience. Instead of learning complex tools and

worrying about data preparation, InfoApps provide quick answers within a targeted domain.

New WebFOCUS features let you add voice recognition capabilities via chatbots and digital assistants. Our integration platform includes adapters for machine-generated data, location data, spatial data, time series data, web log data, and many other sources – both structured and unstructured. You can also merge real-time and traditional data into a live model. Thanks to a relationship with Amazon Web Service (AWS), these analytics environments can be deployed on-premises or in the cloud. With our award-winning customer support, consulting services, and a rapidly expanding global partner network, you are sure to find the expertise that you need for every job.

Lifeline to a Data-Rich Future

In 1955, the average life expectancy for American companies was 75 years. Today, it is 15 years, due mainly to the rapid pace of change in most industries. Organizations that thrive in this fast-paced business environment have learned an important lesson – comprehensive, user-friendly analytics capabilities are no longer merely the province of market leaders. They are necessary just to stay in the game.

⁴The BI Survey 18, BARC, October 2018.

Our unique software platform has continued to evolve, but we have never wavered from our core focus. Our overriding objective is to help organizations thrive through the pervasive use of trusted data and analytics, at scale, throughout every aspect of their business. We don't just provide analytics tools. We help customers deploy secure, data-driven applications that turn insights into outcomes. We believe BI becomes truly valuable when you can extend it to every worker in the enterprise. And thanks to our unique 3i architecture, we can do it all at scale. Some of the world's largest analytics applications are based on WebFOCUS.

Companies that invest heavily in analytics tend to gain a competitive edge. To do it well, however, you must establish a comprehensive, trusted analytics environment that serves your entire enterprise. We'd like to help you on this journey. You'll join thousands of other organizations that have devised data-driven business models to vault ahead of their competitors and, in some cases, disrupt entire industries. 🚀

“With its embedded analytics, dynamic reporting, scalability, and low cost of ownership, WebFOCUS was the perfect platform for building our customer-facing application.”

Manesh Kitanhoth
Senior Director for Enterprise Data
Warehousing and Business Intelligence
Willis Towers Watson

WILLIS TOWERS WATSON

Enhances Client Experience With Embedded BI Portal

WebFOCUS Analytics Boost Efficiency for Global Advisory Company

Managing client data is a big responsibility. Along with assurances about data privacy and security, most of Willis Towers Watson's users expect a modern experience that allows them to interact with their data via the web, phone, e-mail, and other channels.

A global company with more than 40,000 employees, Willis Towers Watson handles risk management, insurance, and many essential HR processes for its clients, which include 80 percent of Fortune 1000 companies, along with many mid-market and smaller businesses. Willis Towers Watson selected Information Builders and its partner, BloomfieldX, to create BenefitView™, a client-facing analytics portal that delivers an easy, secure, and seamless experience for clients to visualize their information in an actionable way.

When data management apps are embedded into a larger online experience, users expect single-sign-on (SSO) access so they can quickly navigate among related functions, with each dimension of the experience reinforcing the look and feel of a unified corporate brand.

Willis Towers Watson's Benefits Delivery and Administration business segment sought to address many of these needs. It investigated an analytics environment that would empower corporate benefit administrators to view data about their retirees as they enrolled in new Medicare insurance on the segment's Via Benefits marketplace.

Via Benefits is the consumer-facing brand name for Willis Towers Watson's Individual Marketplace service line, which works with employers who have chosen to move their retired employees from group Medicare ➤

Snapshot

Organization

A global multinational risk management, insurance brokerage, and advisory company, Willis Towers Watson operates in more than 140 countries and has a workforce of more than 40,000 employees.

The Challenge

Modernize the customer experience, simplify security, and streamline access to sensitive client information.

The Strategy

Create a customer-facing analytics portal that serves multiple lines of business, anchored by a HIPAA-compliant security layer that allows single-sign-on access to essential business functions.

The Results

By providing dynamic access to client data, Willis Towers Watson empowers benefit administrators to make educated decisions that positively impact the welfare of their retirees.

Information Builders Solution

WebFOCUS, Portal, App Studio, and InfoAssist.

plans to the individual market for Medicare Advantage, Medicare Supplement, and Part D Prescription Drug Plans. “The Individual Marketplace services support retirees throughout the process, helping them evaluate and choose coverage tailored to their needs and managing the Health Reimbursement Account (HRA) provided by employers to reimburse their medical expenses,” explains Manesh Kitanhoth, senior director for Enterprise Data Warehousing and Business Intelligence (BI) at Willis Towers Watson.

Viewing Benefits: A Benefit for All

The Individual Marketplace business leaders considered upgrades to BenefitView. The initial version allowed benefit administrators to manage data related to their retirees’ experiences with new Medicare insurance. But over time, the application did not keep pace with the growing needs of the company.

A web-based portal, BenefitView enables clients to monitor enrollments, insurance plan selections, and service center metrics within the Via Benefits individual insurance marketplace. Benefit administrators use the portal to track details about allocation amounts, funding information, and service center metrics, as well as to monitor HRA spending.

“We received complaints about BenefitView availability issues, connectivity, and data loading,” admits Kitanhoth. “BenefitView 1.0 was not scalable for high-volume transactions and required significant maintenance. We needed to upgrade to a scalable solution with a

robust architecture that would continue to manage our business-critical requirements, including absolute security for HIPAA data.”

A lot was riding on the BenefitView project: securing, managing, and analyzing corporate data is fundamental to everything Willis Towers Watson does throughout its four business segments: Benefits Delivery and Administration; Corporate Risk and Brokering; Human Capital and Benefits; and Investment, Risk, and Reinsurance.

“We needed a dynamic BI application with interactive key performance indicators (KPIs) that Individual Marketplace clients could use to manage benefits for their retirees,” says Kandha Packirisamy, head of Customer Success and a founding member of BloomfieldX. “They wanted to deliver these analytics capabilities through a branded, self-service environment embedded in their own portal. We chose Information Builders’ WebFOCUS BI and analytics platform because it is a proven environment for creating analytics portals and embedded BI applications.”

Modern Reporting Capabilities Improve Information Tracking

BenefitView provides key information to clients, including current and projected eligibility, disposition, and enrollment status based on their population. The business traditionally ran various reports that were pushed manually to clients. “Our old process was inefficient in terms of production, distribution, and latency,” says Jim Baloun, managing director of Client Relationship Management at Willis Towers Watson. “We wanted to provide metrics in near-time, for the populations selected, and based on the timeframe designated.”

“WebFOCUS solves our information delivery challenges, improves productivity, and provides the foundation for us to build out more self-service functions in the future. Our clients are thrilled with this solution.”

Jim Baloun
Managing Director of Client Relationship
Management
Willis Towers Watson

With help from BloomfieldX, the Individual Marketplace team used WebFOCUS to create an improved version of BenefitView.

“WebFOCUS is a powerful tool with robust and highly configurable security features, which enable us to continue to protect sensitive client and participant data,” says Kitanhoth. “With its embedded analytics, dynamic reporting, scalability, and low cost of ownership, WebFOCUS was the perfect platform for building our customer-facing application.”

Technology Search Yields Speedy Solution Deployment

Before selecting WebFOCUS for their application development project, Kitanhoth and his team examined many off-the-shelf analytics solutions. With guidance from BloomfieldX, they determined WebFOCUS was the only software platform that could meet the many requirements of the Individual Marketplace service line:

- Data access from multiple sources
- Complex security needs, including single-sign-on
- Dynamic reporting, interactive charts and graphs, and data visualization

- Scalability and failover
- Compliance with HIPAA regulations
- Self-service capabilities
- Ability to embed in a larger solution
- Branded interactive dashboards
- Ease of use for non-technical users
- Quick deployment
- Customer-facing
- Predictive analytics capabilities

In a swift 45 days, BloomfieldX used WebFOCUS to develop a unified portal that serves as a single point of entry for many of Willis Towers Watson’s client-facing capabilities and applications. Developers appreciated the versatility of the architecture, which includes point-and-click development functionality through WebFOCUS App Studio, as well as the ability to utilize JavaScript and RESTful APIs to connect other application functions.

“WebFOCUS had the security and scalability we needed, and is user-friendly and quick to deploy,” Kitanhoth explains. “BenefitView 1.0 took our internal teams more than a year to develop. Deploying

the new release in just a month and a half, using WebFOCUS with all of its amazing data visualizations, was a remarkable accomplishment.”

Data Visibility Enables Educated Decisions

Today, BenefitView enables SSO access for a broad range of internal and external users. WebFOCUS automates a complex user administration model for hundreds of companies, simplifying access and streamlining HIPAA compliance. More than 400 Willis Towers Watson clients use the BenefitView portal to track the enrollment activities of close to 1.5 million retirees, with enrollment group sizes ranging from 100 to 200,000 people.

The data comes from many sources, including call-related data from the interactive voice response (IVR) system, enrollment data, CRM data, customer service feedback, HRA administration data, and application data – all loaded into a Microsoft SQL Server data warehouse. The entire solution is architected for scalability and failover between two data centers, with load balancing technology to improve performance by shuttling ↗

requests between multiple web servers, application servers, and database servers.

One notable feature is the HIPAA designee tracking mechanism. “In the past, we used a manual process to track HIPAA designee activities in Salesforce, and then people had to download the report to see who is accessing what,” Kitanhoth explains. “With the new BenefitView release it’s all in one ecosystem with a single

provide any decision-maker with fast, easy access to actionable information – that are much more useful than the static displays BenefitView 1.0 provided. BenefitView now provides a client-owned HIPAA authorization module that will allow client-authorized officers to add, modify, and remove users.

Kitanhoth expects that having better interactivity and streamlined information access will translate into more efficient operations for Willis Towers Watson’s clients – and a more cohesive user experience overall. “With BenefitView 1.0, our clients were required to log into multiple portals to access the information they need,” he says. “It was not user friendly. Now they spend less time collecting information, and WebFOCUS lets them access data elements from multiple service lines. Our clients have a single portal that connects them to many different types of KPIs, dashboards, and reports, giving them consistent data from a secure, reliable source.”

Baloun agrees. “WebFOCUS solves our information delivery challenges, improves productivity, and provides the foundation for us to build out more self-service functions in the future,” he adds. “Our clients are thrilled with this solution.”

infrastructure. We track HIPAA designees as well as security. Those features help our user community work more efficiently. WebFOCUS allows us to eliminate many of our redundant programs, and its robust security architecture made it the right choice for our solution.”

Willis Towers Watson is contractually obligated to provide certain metrics to its clients. WebFOCUS lets users drill down into the underlying data and visualize these metrics through InfoApps™ – purpose-built, business-driven analytical apps that



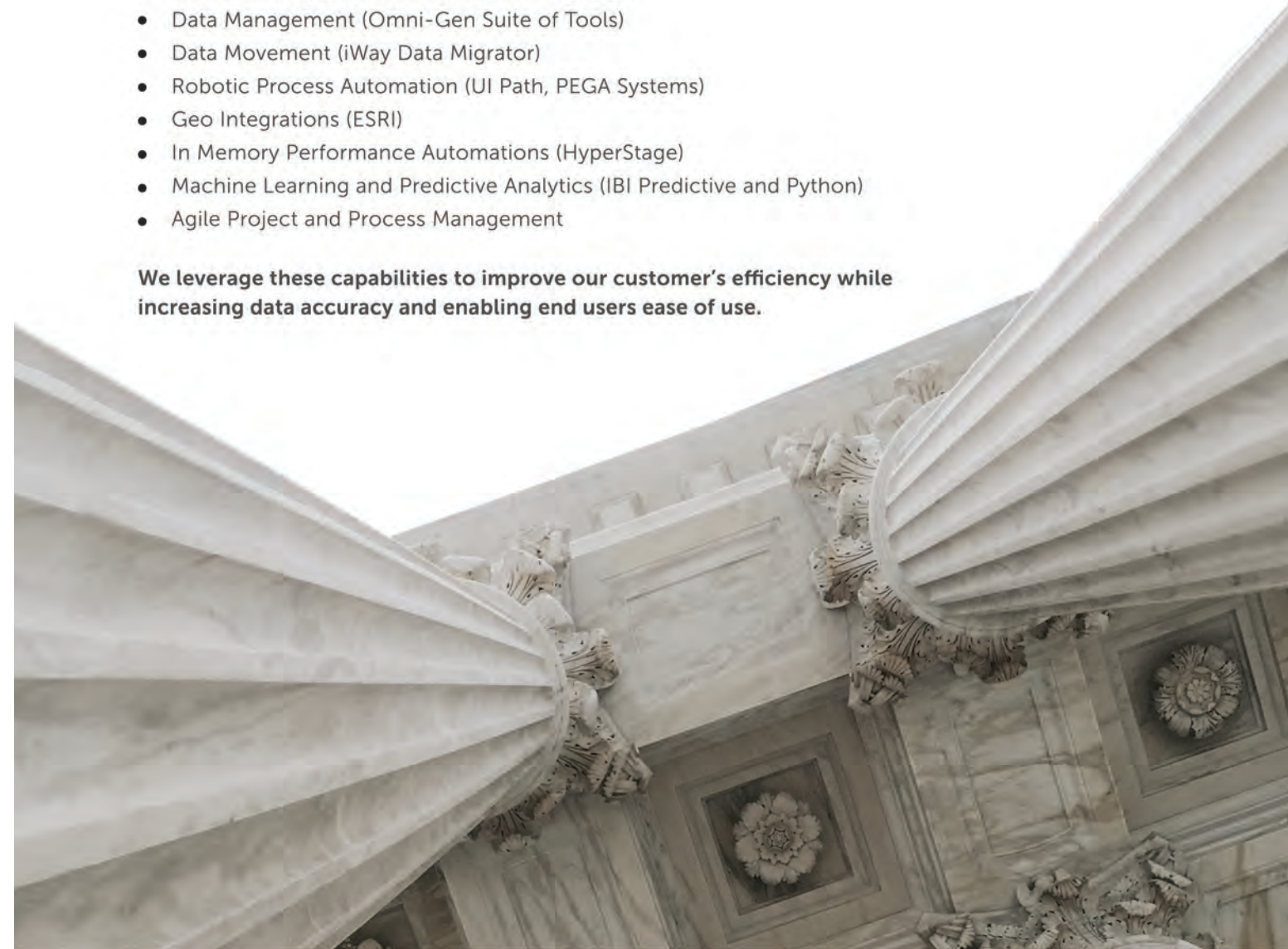
BenefitView delivers timely information in an easy-to-read dashboard.

Designing and Building Analytical Data Solutions for Federal Customers

cBEYONData supports US Federal Government agencies with:

- Enhancement and Automation of Business Processes
- Cloud Migrations (AWS and Azure Gov Clouds)
- Business Analytics & Dashboards (WebFOCUS)
- Data Management (Omni-Gen Suite of Tools)
- Data Movement (iWay Data Migrator)
- Robotic Process Automation (UI Path, PEGA Systems)
- Geo Integrations (ESRI)
- In Memory Performance Automations (HyperStage)
- Machine Learning and Predictive Analytics (IBI Predictive and Python)
- Agile Project and Process Management

We leverage these capabilities to improve our customer’s efficiency while increasing data accuracy and enabling end users ease of use.



ROSNET

Enhances SaaS Platform With Embedded Profitability Analytics

Snapshot

Organization

ROS Technology Services, Inc. (Rosnet) offers SaaS-based restaurant management solutions to 150 major restaurant franchises in North America.

The Challenge

Help restaurant operators improve profitability and drive internal efficiencies by providing accurate data to analyze food and labor costs, and many essential service metrics.

The Strategy

Use WebFOCUS to create a customizable, self-service BI portal that delivers analytics and insights for internal and client use.

The Results

The IT team no longer has to spend time creating, modifying, and customizing reports for clients. Restaurants enjoy easy access to metrics on operational efficiency and profitability.

Information Builders Solution

WebFOCUS and Professional Services.

Enjoying an evening at your favorite restaurant depends on more than just good food and prompt service. A multitude of factors occur behind the scenes to ensure exceptional dining experiences, from having the right inventory on hand to scheduling an adequate number of servers.

To accomplish everything successfully, restaurant managers must carefully analyze the cost of food, labor, and other overhead items. That's why Houlihan's, IHOP, Applebee's, Wendy's, Panera Bread Co., and other popular brands depend on ROS Technology Services (Rosnet) to improve efficiency and drive dollars to the bottom line. User-friendly query and analytics tools, based on Information Builders' WebFOCUS business intelligence (BI) and analytics platform, have made Rosnet's PowerCenter restaurant management system the choice of successful restaurant operators around the world.

"We created the first nationally offered, web-based data management and reporting service to work reliably with all types of restaurant point-of-sale (POS) systems," explains Gene Peters, president and CEO of Rosnet. "We've recently gone beyond POS to capture data from inventory, employment, and other back-of-the-house functions to help restaurants manage costs and improve the guest experience.

"WebFOCUS enabled us to create visually appealing dashboards and parameterized reports associated with fundamental business activities, such as food costs and labor costs. Restaurant managers depend on our embedded BI system to maximize profitability." >

“WebFOCUS is easy to integrate with our customer-facing application. Users run reports from URLs in any portal, application, or menu. There is virtually no learning curve for accessing and receiving information from our embedded reports and dashboards.”

Gene Peters
President and CEO
Rosnet

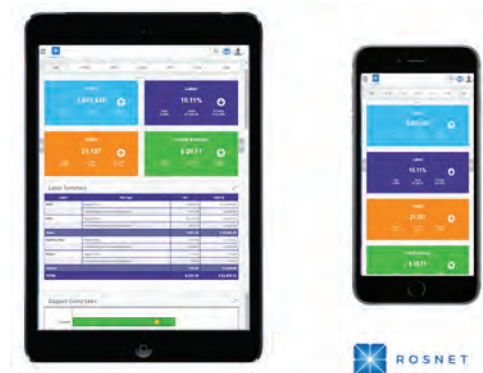
Embedding Powerful Analytics

Peters and other members of the BI evaluation conducted an exhaustive request for proposal (RFP). They initially evaluated 10 software vendors and invited Information Builders, Microsoft, IBM/Cognos, and Birst – their final four selections – on-site to present their offerings.

The team selected WebFOCUS over these competitive solutions due to Information Builders' comprehensive analytics functionality, developer flexibility, mobile capabilities, and dedicated support team. Today, Rosnet runs WebFOCUS internally and in an external, software-as-a-service (SaaS) capacity for 20,000 users. PowerCenter's embedded BI environment includes data visualization capabilities, BI dashboards, and self-service analytics tools for internal and external use.

PowerCenter uses a SaaS model to deliver functionality to restaurants over secure Internet connections. All of the BI assets – including portals, dashboards, reports, and analytics – reside in the cloud without requiring restaurants to install on-premises software or maintain the associated hardware infrastructure.

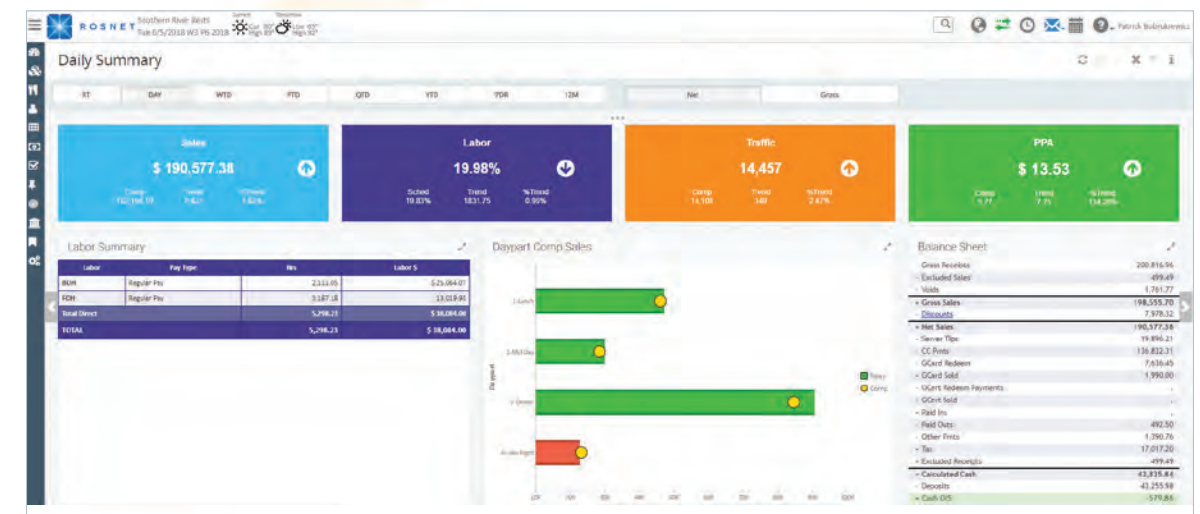
According to Peters, WebFOCUS architecture is popular with SaaS vendors since it can be easily embedded into a larger solution or rebranded within a third-party application. “We embedded a sophisticated analytics system into PowerCenter without having to retain a major development team,” Peters says. “WebFOCUS is easy to integrate with our customer-facing application. Users run reports from



URLs in any portal, application, or menu. There is virtually no learning curve for accessing and receiving information from our embedded reports and dashboards.”

Peters also appreciates the responsive design techniques of WebFOCUS, which permit developers to create analytics applications that work interchangeably on any device. “You code it once and it works properly on a laptop, a tablet, or a phone,” he adds. “About 60 percent of our user base runs our software on back-of-the-house PCs, 20 percent use a laptop or smartphone, and 20 percent use tablets.”

To onboard new clients, Rosnet loads historical data about sales, labor, food costs, budgets, and profit and loss into the PowerCenter system, often pulling in several years' worth of data. The system tracks essential metrics, such as which server is providing a particular guest experience, when the guest settled the bill, and how long diners were in the establishment – all tied to a satisfaction survey. WebFOCUS parameterized queries return discrete sales, overhead, and labor



Comprehensive Data Management – Rosnet’s technology, powered by WebFOCUS, is a multi-unit restaurant management solution designed with a unique business in mind. Rosnet offers unparalleled integration coupled with configurable dashboards, allowing users to get their data how they want it, when they want it.

metrics, so restaurant managers can analyze profitability over designated time periods.

“Creating dashboards with WebFOCUS is a lot simpler than what we were doing in the past,” Peters asserts. “Information Builders also has sophisticated analytics technology, which allows us to gather information from every facet of the restaurant management process and use it to help restaurant operators make better management decisions.”

Fueling Efficiency With Unparalleled Integration

Managers access PowerCenter to manage inventory and schedule staff. House managers use it to schedule servers and host staff. Restaurant managers analyze macro costs and improve overall profitability with the software. Each user customizes the BI portal to display relevant information without having to navigate through cumbersome menus and reports.

Rosnet's easy-to-use inventory system features rich mobile applications for iOS and Android devices and includes interfaces with more than 350 main line, produce, and small wares vendors. Peters believes that the PowerCenter food costing system alone can typically drop about two percent to the client's bottom line – and his customers agree.

"We started with Rosnet eight years ago, and during that time, we improved our food cost by 1.5 basis points, improved the productivity of our office staff, and streamlined back-of-the-house procedures for our GMs," notes Barry Beam, vice president of operations at Applebee's.

One critical area in food management for large restaurant chains involves maintaining a record of recipes. In many organizations, recipe information is tasked to staff who already have other full-time job responsibilities. Thus, they have little time to devote to carefully tracking recipes, ingredients, and inventory. PowerCenter ▸

"We started with Rosnet eight years ago, and during that time, we improved our food cost by 1.5 basis points, improved the productivity of our office staff, and streamlined back-of-the-house procedures for our GMs."

Barry Beam
Vice President of Operations
Applebee's

maintains these recipes in conjunction with an inventory control system that ensures the right ingredients are always on hand, even as recipes and menus change.

Meanwhile, an advanced labor management module helps control labor costs, while a mobile app simplifies scheduling by enabling managers to push schedules to employees through text or e-mail. If employees need a day off or want to swap shifts, they make the request through the app. The system processes the request and provides visibility to staffing managers, so they can track and monitor all changes.

On the financial side, WebFOCUS interfaces with a restaurant's general ledger to offer customizable account reporting configurations and facilitate store-by-store reporting down to the individual account level.

Reflecting on a Successful Implementation

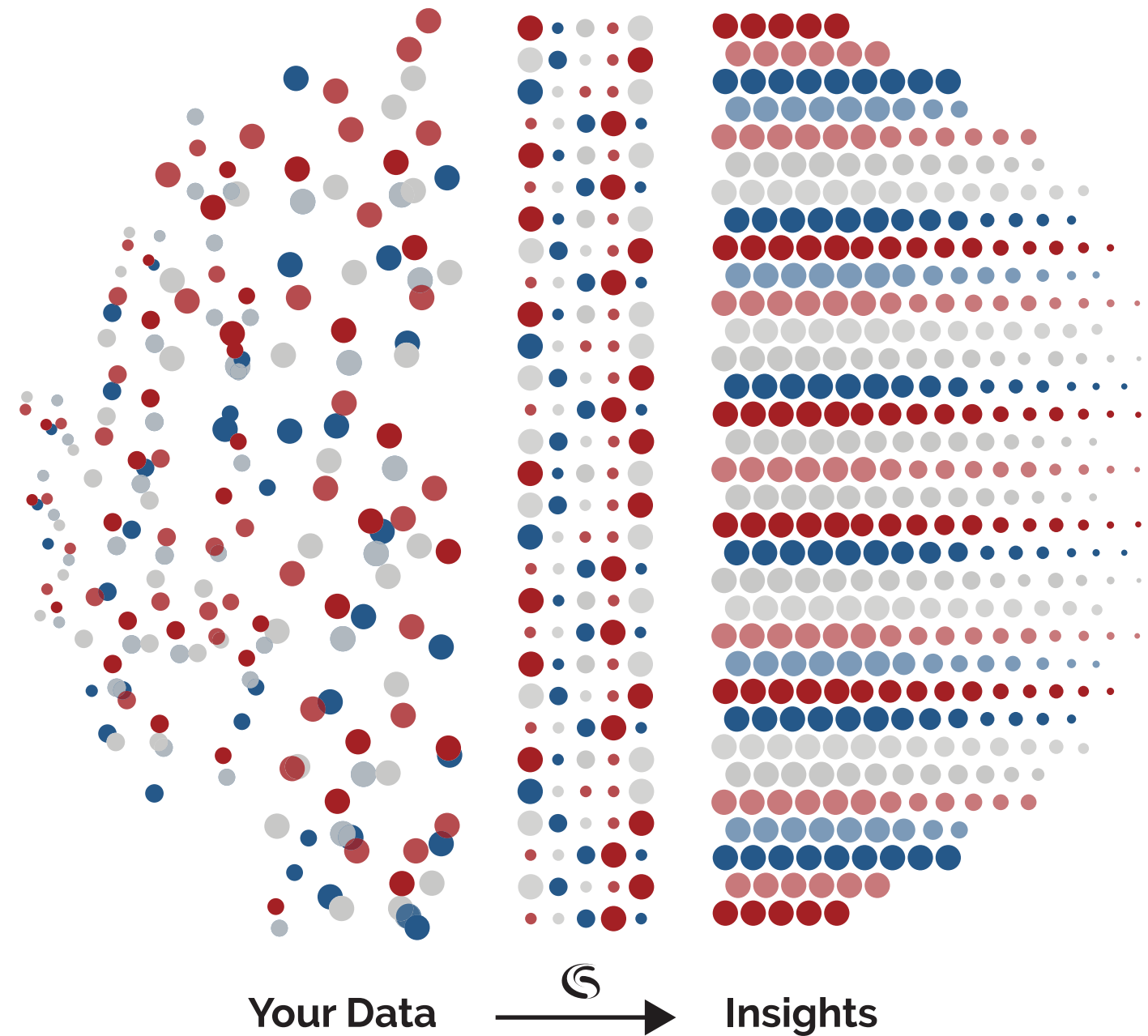
Peters is pleased with the support Rosnet received from Information Builders, especially the Professional Services team that helped with the initial setup, security parameters, and dashboard design. Rosnet has grown 60 percent over the past three years, and received the *Inc. Magazine* "500 Fastest Growing Companies" designation three times in a row. While Rosnet added some IT staff, it requires fewer people for analytics and reporting than prior to its purchase of WebFOCUS. With advanced BI, analytics, and customized dashboards now in place, Rosnet's clients more easily measure the effectiveness of business development initiatives, and justify new technology investments where needed. Rosnet plans to use InfoAssist to give power users

custom analytics and data visualization capabilities, helping to minimize requests for custom reports that are currently fielded by the IT staff. The company also plans to add a mapping feature with WebFOCUS location analytics to allow restaurant chains to view regional data through interactive maps. This type of demographic analysis will help them determine, for example, if it makes sense to open a restaurant in a certain location.

"We're pleased to deliver advanced functionality and an enhanced user experience to our customers," Peters concludes. "Our give-away, take-away ratio – which refers to how many clients we've lost to other vendors, and how many we've taken away from other vendors – is the best in the business. That's partly because our analytics capabilities enhance the user experience for our customers and streamline business processes for our company. Information Builders has been a great partner. In fact, it has always felt more like a partnership than a traditional vendor/client relationship." 

Photo by Jay Wennington on Unsplash

Set a Date with Data



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WINGS®

Travel Management Takes Off With WebFOCUS

Snapshot

Organization

Founded in 1992, Wings® Travel Management specializes in oil and gas-related travel as well as full-service corporate travel.

The Challenge

Capture travel data for clients operating across Europe, North America, South America, Africa, and the Middle East and put it in a form that they can use to monitor their travel programs.

The Strategy

Create customer-facing analytics portals along with a secure metadata layer that enables clients to visualize just their subset of the travel data via interactive charts, graphs, and maps.

The Results

Clients monitor their travelers, control travel spending, and verify compliance with corporate travel policies, freeing Wings' IT team from having to create thousands of custom reports.

Information Builders Solution

WebFOCUS, Portal, ReportCaster, and Customer Education.

Cloud-Based Analytics Helps Corporate Travel Managers Improve Safety and Control Costs

Travel interruptions grind businesses to a halt, and travel spending that doesn't comply with corporate policies takes a big bite out of profits. To mitigate these concerns, most companies institute corporate travel programs that treat business travel strategically, like any other controllable expense. These procedures govern everything from negotiations with suppliers to traveler safety, credit-card management, and travel and expense management.

Wings® Travel Management has carved an important niche in the managed travel market as a trusted travel provider for clients in the Oil & Gas and Marine sectors, as well as companies operating in service- and people-critical industries, where travel is an integral part of their business. At the heart of Wings' offering is a business intelligence (BI) environment called goData that helps companies measure and improve the performance of their travel programs. By providing direct access to corporate travel data via a mobile-friendly, self-service analytics environment, travel managers extract valuable insights about traveler behavior, costs, and safety. Information Builders' WebFOCUS BI and analytics platform makes goData possible.

"Before we acquired WebFOCUS, we had antiquated analytics that prevented us from easily arriving at accountable reports or insights," says Leon Weideman, head of Business Information for Wings Travel Management. "WebFOCUS allowed us to create a single database, which centralizes information from our Global Operations and provides a fast and simple viewable format of our data with a single currency reporting capability. It provides accurate data for our clients' travel requirements as well as for our internal processes." >

“We were astounded with the robust capabilities of WebFOCUS. All you need is an Internet connection, and you have this wide array of data available. WebFOCUS is customizable, offers a single-currency conversion, and uses metadata to secure and simplify our reports.”

Leon Weideman
Head of Business Information
Wings Travel Management

Previous analytical inquiries couldn't prevent users from changing formulas that the IT team created, which meant similar inquiries sometimes yielded conflicting results. Making matters worse, managing the underlying data was tedious. “We had to manually control hundreds of individual queries and reports,” Weideman adds. “Our team needed a tool with an across-the-board impact that controlled the metadata and made nimble changes.”

Wings also wanted to give clients the ability to log in and view their own corporate travel data, customize the analytics displays, and create a self-service environment. The BI team looked at analytics platforms from a number of software vendors, but were most impressed with the data integration, integrity, and intelligence technology from Information Builders. “We were astounded with the robust capabilities of WebFOCUS,” Weideman says. “All you need is an Internet connection, and you have this wide array of data available. WebFOCUS is customizable, offers a single-currency conversion, and uses metadata to secure and simplify our reports.”

Connecting People With their Travel Data

With support from InfoBuild South Africa, Wings developed six customer-facing analytics portals and an accompanying data management environment as the foundation of goData. An executive portal provides a high-level overview of each client's corporate travel program. Other portals display supplier and traveler costs, track traveler activity, enforce ISO quality standards, and allow people to perform their own analytics. Users review summaries of supplier

activity, monitor corporate travel contracts, and employ historical travel data to negotiate better supplier agreements. Being able to visualize the information through InfoApps™ helps them control spending and verify that travelers comply with advanced booking policies, lowest logical airfare protocols, and other compliance measures.

Approximately 200 people at more than 50 companies regularly use the goData environment, including travel managers, procurement officers, and travel administrators, along with thousands of travelers who wish to track their individual trips and expenses. Users customize their portals to create dashboards that display the most important metrics. A WebFOCUS metadata layer simplifies the data structure, enforces consistency, and allows goData to achieve exceptional performance – much faster than the processing speeds of the old environment.

According to Clayton Peacock, senior systems engineer for InfoBuild South Africa, WebFOCUS makes it easy for users to access the data set without needing to know anything about its underlying structure. “The WebFOCUS security architecture ensures that each user and company sees only the data that they are authorized to see,” he explains. “It's an entire security layer that's built on top of the metadata layer.”

The new analytical environment not only helps Wings' travel consultants make travel arrangements for their clients, but also lets clients measure and improve their own travel programs. Authorized users access, analyze, and visualize their travel data, which frees Wings' IT team from having to create thousands of



Wings Travel Management maximized the value of their data using WebFOCUS BI and analytics to build a portal.

custom reports. User-friendly graphs, charts, and drill-downs simplify complex analyses, such as highlighting traveler behavior that could affect cost and safety. The InfoApps make it easy to display the data or export it to HTML, XML, PDF, Excel, and other output formats – whenever the business development team needs to extract data for quarterly reviews.

With InfoBuild's help, the team also created several internal portals for Wings' users. For example, a human resources portal helps the HR team monitor workforce metrics, such as the number of employees per country, the number of people per department, as well as deploy analytics that summarize global salaries, health benefits, leave data, sick pay, and other information essential to managing employees, contractors, and costs.

“The speed of extracting data is phenomenal,” Weideman says. “Previously, you might have to wade through a 40,000-row table, then wait 45 minutes to generate an inquiry report. Today, even the longest and most complex inquiries run in under five seconds, and customers view their data in any

format they choose, using handheld devices, tablets, notebooks, or computers.”

A Birdseye View on Safety

Wings helps managers keep a watchful eye on their travelers to determine where they are – from day to day, and sometimes from moment to moment. This knowledge is particularly critical to clients in the energy and marine sectors, where employees frequently change locations and often journey to emerging markets that have limited infrastructure and security safeguards. The Traveler Tracker Portal enables them to monitor these travelers via real-time, interactive maps.

All WebFOCUS maps feature drill-down functionality that makes it easy to perform pre-trip and post-trip analysis. Users sort the data by country, departures, arrivals, and hotels, and also view aggregated metrics to discover long-term trends.

Compliance officers use the Quality Portal to track adherence to ISO 9001:2008 standard protocols, while the Reports Portal lets people access parameterized reports to examine bookings, invoices, and many other facets of each travel

program. Users sort, filter, add comments, or print these reports from within their browsers, as well as create their own custom reports from scratch.

Currency conversion is a critical component for any global travel program, since employees frequently incur expenses from many different countries and in multiple currencies. goData eliminates the confusion by providing clients with consolidated reporting in a single currency. WebFOCUS manages all currency conversions in the background, allowing clients to see their data almost in real time, in the currency most familiar to them.

Wings uses WebFOCUS ReportCaster to stage cost and travel data to cloud-based data marts, with booking data updated every hour. Data from across Wings' global enterprise is captured in an open source MySQL database, including supplier and client information, bookings, and invoices. Thanks to this automated data-scheduling environment, they no longer need to manually aggregate data from finance, billing, and reservation systems, or other enterprise data sources.

Wings client and internal users were constantly demanding views of data in multiple formats, causing the business information team to constantly develop these new views. “Clients would send requests to their account managers, who would then send them on to the reporting team to develop/extract the required data set,” Weideman says. “Now, it's instant. People click a button to get the information they need, and the results are more consistent, since the portals give everybody a standardized view.”

Partnering to Win-Win

Introducing Information Builders' Global Partner Program



Pat Bernard
Senior Vice President,
Global Partner Business and Program
Information Builders

By Pat Bernard

Information Builders has been known for more than 40 years as an organization that is innovative, responsive and easy to work with, and committed to providing award-winning service to its customers.

As a newly energized, growth-oriented private software company, we began pursuing new markets, making acquisitions, and leveraging the partner model. We determined that investing in partners was a strategic and intuitive path for us. Partners are not only a dominant growth strategy for the company, but also an essential driver to Information Builders' transformation – from a “big small company” to a “small big company.” Our approach to differentiating ourselves in the market through partnerships is by extending our award-winning customer success capability to world-class partner success.

Information Builders has evolved from working with partners transactionally to becoming a truly partner-centric company, and we've taken a very thoughtful approach to designing our new partner program. Specifically, we sought to understand the underlying reasons why many partner programs fail and, most importantly, examine what is fundamentally important to partners.

We discovered that most programs underperform and fail to engage partners due to lack of proper investment, lack of compelling commercial incentives, and ongoing and institutional channel conflict. We then built our program around these very things that partners care about most – with a commitment to creating a mutually successful partnership: the win-win.

Driving Partner Success

The Information Builders Global Partner Program is centered on three drivers: profitability, investment, and partner-centricity.

Profitability – Economic Rewards

With incentives, discounts, referral fees, and deal registrations, our partners can be confident in our commitment to their financial success. Our Global Partner Program supports a range of partner sales models – OEM, Resell, Referral, and Co-sell – that capture the terms and business practices of an economically rewarding partnership with Information Builders.

Investment – Marketing, Technical, and Enablement Support

We believe that the right tools, training, and support are necessary for creating partnerships that become true assets. Information Builders is committed to our partners' success by investing in a range of marketing, technical, and enablement programs, resources, and tools. Our new Partner Portal gives members of our global partner ecosystem access to success stories, customer testimonials, training videos, and distinct sales plays that make it easy to show the value of an Information Builders solution.

Partner-Centricity – Easy to Partner With and No Conflict

Being easy to work with starts with an operating model and field policies that embrace partners as complementary channels. Our Global Partner Program is simple and focused on what partners need to be successful. The barriers to entry are low for companies just seeking referral fee eligibility or software for internal evaluation. Companies seeking a deeper partnership will find that, in addition to their partner manager, an entire team is invested in their success.

We looked at every aspect of the program – from tools, enablement, marketing, and engagement. We examined our internal policies for interacting with our partners and made changes that impact how we remunerate our direct sales force, minimize channel conflict, improve field sales, and support a true multi-channel model that drives incremental sales. It was a complete rebuild.

In parallel with the global partner business transformation, we have stepped up our investment in technology to empower our partners with highly scalable data integration, data management, and analytics tools to meet the needs of their customers. The goal of our new partner program is to provide our partners with compelling, industry-leading products to help them create new revenue streams and drive success in the data and analytics market.

A Global Partner Ecosystem in the Digital Transformation Era

Today, organizations of all sizes recognize the inherent value of their information assets and are executing on their digital transformation strategies. This is creating horizontal market opportunities for our partners worldwide. To serve these existing and emerging markets, we need to involve partners that have the capability to help organizations of all sizes to democratize insights and generate value from their data.

We are seeking to serve the exponential growth in demand for data analytics by working with other growth-minded organizations that can deliver a better data transformation solution. These companies share our ethos of enabling customer success by helping clients to integrate and

The Information Builders Global Partner Program is centered on three drivers: profitability, investment, and partner-centricity.



manage data, generate insights, take action, and deliver measurable impact for their organizations.

Today, digital transformation, mobility, cloud-based services, Internet of Things (IoT), and smart cities have made data pervasive. Using data visualizations to check our finances, track our exercise levels, and monitor our energy usage are the new normal. Analytics is part of our daily lives. In this new data-centric world, we recognize that our partners are critical to the extension of our technologies to new customers and market sectors, to help us to serve unique market requirements and capitalize on emerging opportunities.

Partner Success Using Our Industry-Leading 3i Platform

Over the past year, Frank Vella, chief executive officer of Information Builders, has presided over the acceleration of our product development: implementing a new innovation lab, hiring Eric Raab as senior vice president of Engineering and Product, and investing in our industry-leading 3i data and analytics platform.

A key focus of our roadmap is to extend the scalability of our platform beyond the data science teams and IT department to support the data-first, data-pervasive mindset of organizations. The new WebFOCUS empowers business users and customers to gain insights from governed data, without

needing to call on IT teams. The platform also provides more user-friendly functionality, with improved workflow, collaboration, and visualization features.

To draw insights, people must trust the validity of data. Too often the data quality process is siloed within organizations, limiting the number of people who can benefit from data-driven decisions. We recently announced our Omni-Gen™ Personal Edition to provide business users with a robust self-service tool to perform data quality activities, without needing assistance from IT professionals.

These product enhancements enable our partner ecosystem to deliver data integration, management, and analytics services to a broader client base, safe in the knowledge that the 3i platform is built to scale up and out to the broadest user base.

The new edition of WebFOCUS also provides our partners' business customers with the ability to personalize their data visualizations and create infographics, so that analytical assets can be embedded into third-party applications.

We have reduced the amount of customization that our partners have to do when deploying WebFOCUS for their customers, or that ISVs need to do to integrate WebFOCUS into their own applications. We have also made it much easier for our partners to develop value-added content and services around the 3i platform for a smoother sales process.

What's Next?

Close to 300 organizations are already part of our Global Partner Ecosystem. These companies include **solution providers**, such as value-added resellers and OEMs; **technology providers**, such as cloud vendors and independent software vendors; and **service providers**, including system integrators, consulting firms, advisory, and system implementation partners.

Our partners have responded positively to the new Global Partner Program, which recognizes their strategic importance in meeting sector-specific demands around data and analytics implementations, while creating and supporting opportunities for our existing and future partners. Together, we can bring measurable value to organizations that want to get the most from their data management and analytics solutions.

We look forward to having many of our partners join us at Summit 2019 and at our series of partner events throughout the year. In the meantime, stay tuned for further announcements, product updates, and training opportunities – all in support of partner success. 

Aligning your data and analytics strategies will align the organization's overall strategy, execution, and people – and will lead to the ultimate path to success.

Aligning Your DATA AND ANALYTICS STRATEGIES

BY MICHAEL CORCORAN AND LYNDSEY WISE

Organizations struggle to make sense of their data and tend to manage their data assets and analytics initiatives separately. In many cases, data management, analytics, and business intelligence (BI) are handled within different teams and by using different approaches. This can create a disconnect between what organizations want to gain from their data assets and what they can actually achieve. For businesses to be successful in both, there needs to be a collaborative approach that integrates data and analytics strategies. This creates a connection between how an organization manages its data and how it gains business insight.

Analytics has become the leading use case for data, but data serves many operational purposes as well. If you do not have a formal data strategy, you need to develop one and make it a top priority. Likewise, if you do not have an analytics strategy, you need to prioritize this as well. Most importantly, you need to make sure these initiatives are aligned.

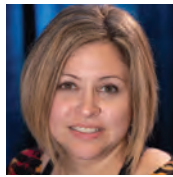
As data becomes more complex, organizations can no longer develop analytical outputs without evaluating how they will leverage data first. This requires a strong data strategy that looks at data through its organization lifecycle – how it will be acquired, stored, used, analyzed, tested, etc. – and the business impact of each of these components. For instance, the type of analytics required will have a direct impact on latency needs and storage.

Building the Case for Aligning Data and Analytics Strategies

First, we need to ensure there is a formal strategy for your analytics initiatives. Random acts of analytics pointed at business problems have a tendency to restrict the potential value gained from analytics while disrupting strategic data initiatives, and >



Michael Corcoran
Senior Vice President and
Chief Marketing Officer
Information Builders



Lyndsay Wise
Director of Market Intelligence
Information Builders

vice versa. An analytics strategy is often developed by following the four stages of the analytics journey, from descriptive analytics to diagnostic analytics, to more advanced predictive analytics, and ultimately, prescriptive analytics. This strategy assumes you will gain perceived higher value along with more potential data complexity at each stage.

Another approach to an analytics strategy is to look at the various business use cases across and outside your organization, as well as outside the firewall. These include management dashboards and scorecards; back-office analytics and data science; operational analytics and decision support, including Internet of Things (IoT); partner portals; and customer experience initiatives. Ninety percent of the current activities in analytics deployment are focused at the management and back-office analysts/data scientists. However, we typically observe organizations recognizing higher returns and faster time to value in analytics initiatives deployed directly to operational workers, partners, and customers. The fact is that all five layers of use cases are important and aligning all of those users to overall business strategy is the best analytics strategy. This strategy will also help prioritize the required data initiatives.

If operational analytics and IoT are important, then you need to consider real-time and streaming data integration along with new data formats to support those initiatives. If you are looking to deliver information and analytics directly to customers, then data quality becomes the most critical data initiative. A data lake project may serve the back-office analysts and data scientists, but not these other business users.

Selling the value of a cohesive data and analytics strategy should be self-evident. However, the reality for many companies is that it becomes a challenge to gain organization-wide support for a data management framework until something goes wrong. Identifying the financial benefits associated with implementing a data quality initiative or confirming the value of a master data management program is a challenge because decision-makers usually want to spend money on what they can see. So, creating dashboards or applying artificial intelligence (AI) to current analytics feels like it provides direct and visible return on investment (ROI). The problem is that creating valuable outputs tied to ROI are directly tied to data inputs. “Garbage in, garbage out” is what you get if a strong data management strategy is not present.



Leveraging diverse and complex data sets also creates competitive advantages for organizations, further supporting the value of a cohesive analytics and data strategy. For instance, **Lipari Foods** leverages geo location, IoT, and logistics data to manage its warehouse in an agile manner with a small team of people. Non-profit **Food For The Poor** gained better visibility into its data by using analytics and data together and went from taking six months to raise \$10 million to six days. And **St. Luke's Hospital** mastered its data to create campaigns targeting specific households to make them aware of specialized medications, in one case having a 98 percent uptake on a campaign targeting 30 households. All of these examples highlight the value proposition of strong data management and how it can tie directly to business value and outcomes.

How to Build a Data and Analytics Strategy

Creating both a data and an analytics strategy can be complex. At its simplest, the following components are essential when developing and aligning these strategies with one another:

Overall goals and policies: This requires the creation of a framework to avoid gaps in data management, such as capturing and storing the right data so that it can be used effectively. Looking at how an organization manages its overall planning, leverages flexible software, uses batch or real-time processing, and streams from all internal systems enables the diversity of data sources and provides access to them as needed. All of these require the flexibility of data use so that the system can shift to accommodate changes required to support a strong strategy.

Evaluation of people, process, technology and how they fit together: Only looking at technology to manage data fails to take into account the business rules and process flow that connects data to its value.

■ **People** – Who are the key stakeholders and what type of involvement and responsibility should they have, not only in developing the strategy, but also in managing aspects of strategic delivery?

■ **Process** – How data interrelates and interconnects within daily business processes is essential. Understanding this will answer

questions about required data sources, data connections, latency, and inputs for analytics, just to name a few

■ **Technology** – What technology components are required, and how should technology be used? This requires looking at different platforms, how data interconnects, storage, latency, etc.

Putting It All Together

No matter how an organization chooses to align its data and analytics and how it plans its strategic delivery, outputs need to be directly tied to how people do their jobs. This means that for field enablement and the use of Salesforce, a different direction will be required than for a customer-facing embedded analytics application.

How data gets architected, integration into Salesforce and/or other third-party applications, data loading, and analytics development will all depend on the end goal. Organizations need to understand their overall strategy and the details required for daily operations, data inputs, and analytical outputs. Some considerations to get started include:

- Address your data quality and consistency (master data) issues as quickly as possible, as this will greatly simplify all analytics initiatives
- Understand how data assets will translate into analytical outputs and the overall goal of analytics. Many companies make the mistake of developing their dashboards first. Companies should know what they want as their outputs and tie that to the way they design their data infrastructure
- Include the right stakeholders with a cross-section of skills. Business skills, as well as understanding how different departments interact and what is important for product or services delivery, are essential
- Ensure the overall strategy is bigger than any one initiative. Many times organizations focus on individual projects and then try to scale and realize they have overlooked key data requirements

Aligning your data and analytics strategies will align the organization's overall strategy, execution, and people – and will lead to the ultimate path to success. 🚀

Service Above and Beyond the Norm



Dan Ortolani
Senior Vice President,
Worldwide Customer Services
Information Builders

Our Customers Are at the Heart of Everything We Do

By Dan Ortolani

It's Friday night before Memorial Day weekend when a major financial services company contacts us with a "Production Down" condition. Over the ensuing days, Information Builders' Premium Support Team kicks into high gear to help this customer resolve a series of issues within a complex, multi-faceted IT environment. After stabilizing the key information systems involved, and getting the analytics environment immediately back online, our support team continues to work with this customer throughout the weekend to determine the root cause of the problem – a case of corrupted user IDs in a key third-party security system.

This example is illustrative of the extent to which our support professionals will go to assist customers during a crisis. Even

though a good percentage of these situations involve technologies outside of WebFOCUS, we always work diligently to resolve issues that prevent customers from using our products. In this case, we pulled in resources from across our Worldwide Customer Services organization, as well as from Product Engineering, to ensure that the customer was up and running by the end of the holiday weekend.

Information Builders offers customers an outstanding breadth of services, anchored by a global "follow-the-sun" support team that ensures a live support rep is always available, no matter where customers are located. Any time, day or night, you can pick up the phone to reach a support professional who speaks your language, understands your products, and can help with the issues at hand. While some companies charge a premium for this type of unlimited access, we do not limit the number of people within your organization who can connect with us, or how often.

Information Builders allows customers to transition from InfoResponse Basic to Premium Support services as their needs change. Customers with mission-critical applications generally subscribe to Information Builders' Premium Support service, which includes a designated senior Account Support Manager who becomes well acquainted with your systems as an advocate and partner. It is partly due to these dedicated, high-touch services that our Worldwide Customer Services division has won several prestigious awards in recent months:

- A Silver Stevie Award and Silver American Business Award for Customer Service Department of the Year
- Information Builders' Technical Director, Mary Casull, was honored as a Bronze winner for Tech Professional of The Year
- A Silver SVUS award for Innovation in Customer Service
- A Silver Best in Biz International award for Most Customer Friendly Company

While we are immensely proud of these accomplishments, it's even more gratifying when our customers receive awards directly. For example, **Rosnet**, an internationally respected restaurant technology services provider, received a Digital Leadership award from Ventana Research for its embedded analytics environment, based on WebFOCUS. Throughout the implementation of Rosnet's restaurant management system, Information Builders supplied a dedicated account support manager to help them meet their implementation deadlines.



Information Builders established Health Checks, a technical service that provides insight into usage and performance via the WebFOCUS Enterprise Usage Monitor.

Customized Services for Unique Needs

Our Customer Support services are constantly evolving to meet our customers' ever-changing needs. For example, Information Builders established Health Checks, a technical service that provides insight into usage and performance via the WebFOCUS Enterprise Usage Monitor. We also offer automated upgrade and modernization assessments. Our new cloud platform service, based on Amazon Web Services (AWS) Cloud, gives customers a unique way to deploy BI, analytics, and data management systems, complete with cloud-managed hosting and support services. The world's largest medical and travel security services firm depends on this cloud service to host its security tracking and monitoring system.

On another front, we're leveraging a new technology called WalkMe that guides users through workflows embedded in WebFOCUS UI/UX. We continue to open new self-service support channels, such as videos and knowledge bases, to accelerate time-to-value for customers, as well as to facilitate

interactions among the 10,000 members of the WebFOCUS community.

When customers need support with highly technical disciplines, such as performance tuning, architecture, server sizing, and so forth, our Advanced Technology Services team helps them resolve issues and plan for future expansion. These services were particularly valuable to **St. Luke's University Health Network**, which was named a gold winner in the "Best Healthcare Content" category of the 2018 eHealthcare Leadership Awards program, as well as a "Best Health Network Implementation" award from MedTech for its implementation of Omni-HeathData™ Insights. As St. Luke's went live with this important system, Information Builders supplied round-the-clock operational monitoring to address issues and make adjustments.

Our customers are at the heart of everything we do at Information Builders. We understand that a strong commitment to service is vital to their success, and this belief permeates everything we do.

WebFOCUS Roadmap 2019



Eric Raab
Senior Vice President,
Product and Engineering
Information Builders

Our Platform Is Re-launched to Provide Users With New Features for Unlimited Intelligence

By Eric Raab

Our strategic plans for our WebFOCUS business intelligence (BI) and analytics platform in 2019 include improvements in cloud, user experience, data prep, data science, cloud, collaboration, and more.

Cloudburst

First, expect a massive shift to the cloud. We're helping clients navigate a sea change in data storage, governance, and analytics.

Our Information Builders Cloud offerings are providing new analytical flexibility at a low cost of ownership through a single solution for account management, software, cloud managed services, and customer support via an all-in monthly subscription.

We're data people, so cloud data resources, such as RedShift, Athena, S3, and Amazon Relational Database Service, are core to our offerings. We're also containerizing WebFOCUS to provide trust, security, high scale, and easy reuse in cloud and multi-cloud deployment scenarios. (It helps on-premises, too.)

Information Builders Cloud was created in conjunction with Amazon Web Services, but we also support Microsoft Azure deployments, Google Cloud, and a variety of others – with easy onboarding and sophisticated services to keep you up and running painlessly.

The Designer Initiative

Designer continues to be a key development area for WebFOCUS. We want businesspeople and developers to have a common, web-based tool that enables data prep, content design, visualization, and app design and deployment – all within a single, intuitive workflow.

A single interface embraced by both businesspeople and IT will help organizations accelerate app development and analytics to reduce backlog, and will eliminate the need for multiple disparate tools and licenses.

Data prep is an important part of the Designer initiative. We've incorporated the most popular features of DataMigrator, our extract, transform, and load (ETL) product, in a simplified form for business users. We also ensure that the data prep functionality in Designer can sample data to improve modeling and overall performance, while detecting data types semantically – recognizing phone numbers, social security numbers, and geographic data to make them easier to cleanse, integrate, and use in your analytics. This prepped data is valuable for analysis, dashboarding, reporting, and our efforts to improve life for data scientists.

WebFOCUS also now includes built-in functions for clustering, regression, forecasting, and correlation. You don't even need to include R or python libraries to select these sophisticated functions. If you do have native python or R functions, you can use them within WebFOCUS analyses and applications almost trivially. Imagine a complex customer churn model being used as a stoplight (red, yellow, green) on a customer service rep's WebFOCUS dashboard, along with the three best offers to prevent churn, and you'll get a sense of how powerful that can be. And RStat users can expect a web-based version to be embedded within Designer in late 2019.

From AI to Augmented Analytics

In addition to providing the ability to tap into artificial intelligence (AI) functionality in libraries, we're also building assistive technology, or "augmented analytics," into everything we do.

For example, WebFOCUS mobile has been re-launched with mobile voice. By leveraging AI to understand the words you say and the processes that they represent, WebFOCUS provides immense flexibility to information seekers.

Speaking of seeking, our InfoSearch capability makes it easier than ever to find analytics created by other business users and developers. Say, "Tell me about Omaha," and it will let you know that there's a company called "Omaha Steaks" and a city named "Omaha." Tell it to filter on the city, and it will provide all of the charts, graphs, visualizations, and reports containing that city, pre-filtered to show you what's going on just in Omaha.

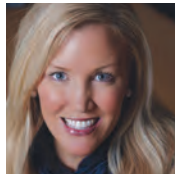
That's not the only way to work with other users. WebFOCUS Designer is incorporating collaboration techniques, such as notifications, content ranking, the ability to follow specific users, and suggestions.

Some of these features are extensions of existing technology, but many are brand new and go well beyond the WebFOCUS you've known. Give your account executive a call to ensure that you see what's new, what's hot, and what's practical, today. 🚀

WebFOCUS in 2019 includes improvements in user experience, data prep, data science, cloud, collaboration, and more.



A Year of Accolades



Kathleen Moran
Executive Director,
Corporate Communications
Information Builders

By Kathleen Moran

Since our last edition of *Information Builders Magazine*, the company has received dozens of prestigious awards for its outstanding technology, great customers, amazing company culture, and commitment to customer satisfaction. We have enjoyed top rankings by analysts, positive customer reviews, and a wide range of industry honors. Congratulations to the many hard-working people who played a role in these accomplishments. Here are some of the highlights. 📄

“The company cares and recognizes its people. It’s truly a unique culture unlike anything in the industry.”

Business Intelligence Group

Always Innovating



2019 Ventana Research’s Value Index For Analytics and BI

Top score in three evaluation categories: Capability, Reliability, and Manageability

- 2019 Ventana Research Mobile Analytics and BI Value Index, Leader
- 2019 Ventana Research Embedded Analytics and BI Value Index, Leader



Leader: Wisdom of Crowds Cloud Computing and BI Market Study



Vendor of the Year Award

Named Data and Analytics Credit Union Vendor of the Year by CUlytics



FrontRunners 2018

WebFOCUS named a FrontRunner for BI Software by Gartner-owned Software Advice



Top Vendor

BI Survey 18

Market Leader

Enterprise BI and Analytics Platforms



iWay 8 Wins Gold for Product of the Year

by Network Products Guide



G2 Crowd Spring 2019

Leader in multiple categories for BI, Analytics, and Data Management



Named “Products of the Year”

and Best-in-Breed Tech

Big Data 100: 40 Coolest Business Analytics Vendors

recognized by our channel



GetApp Category Leader Q1 2019

WebFOCUS ranked by Gartner-owned company for BI apps based in the cloud



Niche for BI and Analytics

Visionary for Data Integration Tools

Visionary for Data Quality Tools



Leader in Analytics Technology Matrix

by Nucleus Research



Strong Performer for Enterprise Business Intelligence

by Forrester Wave™ Report



Leader in 2018 Data Quadrant for Business Intelligence

Leader in 2018 Data Quadrant for Data Analytics

Investing in **People and Culture**



Best Places to Work
by the Business Intelligence
Group



**Best Mid-Size
Employers 2019**
Forbes

"The company cares and recognizes its people. It's truly a unique culture unlike anything in the software industry."

"We have the customer at heart first. This is one of our core values with integrity and innovation and this drives everyone in the same positive direction."

#WeAreIB

Creating **Meaningful Customer Experiences**



**Bronze Stevie®
Award**

in the "Customer
Service Department of
the Year" category



**Silver Winner in
Customer Sales
& Service World
Awards®**

for "Innovation in
Customer Service"



**Silver Winner
in American
Business Awards**

for "Customer Service
Department of the Year"



**Best in Biz
International
Awards**

for "Most Customer-
Friendly Company of
the Year"

Helping Customers **Win in Businesses**



**Digital
Technology
Leaders Awards**

BGL Group honored for
use of WebFOCUS



**Ventana Digital
Leadership
Awards**

Rosnet recognized as a
finalist in the Ventana
Digital Leadership
Awards



**MedTech
Breakthrough
Award**

St. Luke's University
Health Network
honored with Best
Health Network
Technology
Implementation Award



**PTI Technology
Solutions
Award**

Oklahoma Department
of Human Services and
York Regional Police
honored for Data and
Performance Metrics

cloudera

No one knows
Hadoop like
Cloudera



LEARN

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SHARE

Network with peers, become a thought leader in your organization, and gain the knowledge you need to get the most out of Information Builders' products.

Join Us

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informationbuilders.com/usergroups