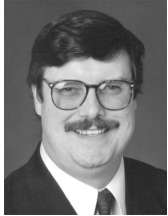


August 23, 2004

Grading BI Reporting And Analysis Solutions

by Keith Gile

TECH CHOICES



August 23, 2004

Grading BI Reporting And Analysis Solutions

No Single Solution Answers Every Firm's Questions

by **Keith Gile**

with Laurie M. Orlov, Colin Teubner, and Philip Russom

EXECUTIVE SUMMARY

Reporting is fundamental to all companies. Most companies strive to standardize on a single reporting and analysis platform to deliver analytic, business, and enterprise reporting, but it is a reality for very few. There is no one single reporting and analysis platform that can deliver every feature and function needed. The direction that companies should take is to adopt a standard that can support at least two of the three different reporting types and fill in gaps with emerging XML and Web services capabilities, advanced visualization, and process definition whenever possible.

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NOTES & RESOURCES

Forrester surveyed 13 vendors for this report: Actuate, Applix, Business Objects, Cognos, Hyperion Solutions, Information Builders, Microsoft, MicroStrategy, Oracle, ProClarity, SAP, SAS, and Temtec. We spoke with two reference customers for each participating vendor. Geac, MIS AG, PeopleSoft, and Siebel Systems were also invited but chose not to participate.

Related Research Documents

"BI And Performance Management Complement Each Other — But Serve Different Purposes"
June 23, 2004, Tech Choices

"Active Data Visualization Turns Image Into Interface"
March 25, 2004, Trends

"Debunking The Death Of OLAP"
March 16, 2004, Trends

"Making Dashboards Actionable"
December 17, 2003, Report

"Profiling The Analytic End User For Business Intelligence"
June 26, 2003, Planning Assumption

REPORTING AND ANALYSIS IS FUNDAMENTAL AND PERVASIVE

Reporting and analysis are not luxuries that a company can choose to grant or deny. Every transaction-based enterprise application, every database, and each process that workers perform on a day-to-day basis needs reporting in some fashion (see Figure 1). Reporting and analysis have become pervasive in business, and they must be seen as a core requirement and be held to the same standards as all core technologies.

A Mature Market Is Consolidating To Grab Market Share

The reporting and analysis market is mature. Companies have a wide variety of technology options, from a plethora of BI vendors to platform and application vendors. The participation by so many vendors reflects two issues:

- **Companies want a single BI reporting and analysis solution.** Every company and government organization wants a single, standard reporting and analysis solution for the entire organization. Why? They need to drive down IT support costs and simultaneously increase the likelihood of a single version of critical data.
- **Vendors want to be selected as the BI reporting and analysis standard.** Simply put, the vendor that offers the most comprehensive BI reporting and analysis solution is in a better position of being selected as the reporting standard. To that extent, there has been a significant amount of activity by the vendors during the past year to deliver a broader BI reporting and analysis platform.

BI Reporting And Analysis Is A Mature Yet Fragmented Market

To better understand the BI reporting and analysis landscape, Forrester categorizes BI vendors into tiers based on their annual revenue:

- **Tier one.** These players report BI revenue in excess of \$400 million annually: Business Objects, Cognos, Hyperion Solutions, and SAS (see Figure 2).
- **Tier two.** This layer has BI revenue between \$100 million and \$400 million annually: Actuate, Information Builders, and MicroStrategy (see Figure 3).
- **Tier three.** These vendors record less than \$100 million of BI revenue each year: Applix, Arcplan, Computer Associates, Hummingbird, Jinfonet Software, ProClarity, QlikTech, Temtec, and a host of other niche vendors (see Figure 4).

Figure 1 The Three Types Of Reporting And Analysis Solutions

Analytic reporting
Description

- OLAP, query, and analytics solutions
- Targeted at small groups of power-user producers
- Ideal for ad hoc query and analysis

Examples of use

- **Query and analysis** of data and content by power users for ad hoc analysis and proof-of-concept BI applications
- **Data mining** and comprehensive predictive analytics of customer, product, and corporate information to describe and predict future business opportunities such as customer churn within analytic applications
- **OLAP** is used to model business scenarios in financial apps (budgeting, planning, consolidation), and create a multidimensional view of product and customer data for brand and customer analysis, respectively

Example vendors: ArcPlan, Applix, Business Objects, Cognos, Hyperion Solutions, Information Builders, MicroStrategy, Oracle, Siebel, SAP, SAS

Enterprise reporting
Description

- Format-centric production output and presentation solutions
- Targeted at large groups of casual-user consumers
- Ideal for information display and dissemination

Examples of use

- **Production reporting** extends operational data to a wide variety of customer, partner, and government agencies in the form of bank statements, product orders, and compliance information
- **Embedded reporting** within ERP, CRM, and financial applications gives users a glimpse into what is happening right now in the business
- **Inline analytics** bring predictive and descriptive analysis to any production application such as supply chain optimization or anti-money laundering

Example vendors: Actuate, Business Objects (Crystal Decisions), Cognos, Hyperion Solutions (Brio Software), Information Builders, Jinfonet, Microsoft, MicroStrategy

Business reporting
Description

- Collaborative mechanism for manipulation and analysis solution
- Targeted at medium-sized groups of business-user consumers
- Ideal for cell-level local analysis and formatting

Examples of use

- **Tight integrations** with Microsoft Office components for analysis with Excel, Word, and PowerPoint
- **Uses collaboration** for enhancing analysis of data with portals, messaging, and groupware capabilities

Example vendors: Actuate, Applix, Cognos, Hyperion Solutions, ProClarity, Temtec

Source: Forrester Research, Inc.

Figure 2 BI Vendor Tier Classifications: Tier One

Recent activity	Results for vendor	Questions for customer
Business Objects		
Acquired Crystal Decisions in December 2003	<ul style="list-style-type: none"> • Strong position in analytic reporting (Business Objects 6 and WebIntelligence) • Strong position in enterprise reporting (Crystal Enterprise and Crystal Reports) 	<ul style="list-style-type: none"> • Can Business Objects complete the integration of the two products within two years, and do you want to standardize on Business Objects for some/all reporting and analysis?
Cognos		
Released ReportNet and updated Metrics Manager in September 2003	<ul style="list-style-type: none"> • Strong position in analytic reporting with PowerPlay and Impromptu • Solid position with version 1 enterprise reporting solution ReportNet, which is also a replacement for Impromptu 	<ul style="list-style-type: none"> • Can ReportNet deliver enterprise formatting and dissemination functionality while also delivering analytic features more commonly found in Impromptu?
Hyperion Solutions		
Acquired Brio Software in October 2003	<ul style="list-style-type: none"> • Stronger position in analytic reporting (Hyperion Essbase OLAP engine and Hyperion Performance Suite - Brio Intelligence) • Presence in enterprise reporting (Hyperion Reports - Brio SQR) 	<ul style="list-style-type: none"> • Will companies adopt Hyperion Reports as the enterprise reporting standard? • What is Hyperion's strategy for enhancing the legacy Brio products?
SAS		
Released Web Report Studio and enhanced Enterprise Guide in March 2004	<ul style="list-style-type: none"> • Strong position in analytic reporting with Enterprise Guide and legacy SAS products • Entry position with version 1 enterprise reporting solution Web Report Studio 	<ul style="list-style-type: none"> • Will power, business, and casual users find the products easy to use, or will IT still be doing all of the complex work for them?

Source: Forrester Research, Inc.

Figure 3 BI Vendor Tier Classifications: Tier Two

Recent activity	Results for vendor	Questions for customer
Actuate		
Released Actuate 8 and Actuate Analytics in 2004; Actuate Query in 2003	<ul style="list-style-type: none"> • Strong position in enterprise reporting with eReporting and business reporting with eSpreadsheet • Entry position with version 1 analytic reporting solution Actuate Query 	<ul style="list-style-type: none"> • Is the analytic solution robust enough to supplant incumbent best-of-breed analytic reporting solutions? • Can this IT-centric solution deliver self-service enterprise reporting?
MicroStrategy		
Released Report Services and MicroStrategy Office	<ul style="list-style-type: none"> • Strong position in analytic reporting with Intelligence Server • Entry position with version 1 enterprise reporting Report Services and business reporting MicroStrategy Office solutions 	<ul style="list-style-type: none"> • Are two new version 1 components tested and mature enough to handle production enterprise reporting when data can only be sourced from RDBMS (a limitation of the core technology)?
Information Builders		
Enhanced WebFOCUS and iWay	<ul style="list-style-type: none"> • Solid consolidated analytic, enterprise, and business reporting solution in WebFOCUS with embedded best-of-breed data integration in the iWay ETL component 	<ul style="list-style-type: none"> • Is the analytic solution adequate to supplant incumbent best-of-breed analytic reporting solutions? • Can this IT-centric solution fit in with companies looking for self-service reporting by business and casual users?

Source: Forrester Research, Inc.

Figure 4 BI Vendor Tier Classifications: Tier Three

Recent activity	Results for vendor	Questions for customer
Applix		
Enhanced core TM1 engine and financial performance management solutions	<ul style="list-style-type: none"> • Arguably one of the best OLAP engines, and a portfolio of finance-targeted apps built on that engine 	<ul style="list-style-type: none"> • Is there a compelling business or technical reason for companies to continue selecting a proprietary OLAP engine over commodity OLAP from the RDBMS vendors?
ProClarity		
Released/enhanced ProClarity Business Logic Server and ProClarity Dashboard Server	<ul style="list-style-type: none"> • Strong analytic reporting offering to front-end the Microsoft Analysis Services platform • Entry position in business reporting with ProClarity Dashboard Server 	<ul style="list-style-type: none"> • Can ProClarity expand its niche offerings and survive in direct competition with Microsoft in business reporting?
Temtec		
Enhanced Executive Viewer core product	<ul style="list-style-type: none"> • A cost-effective, easy-to-use solution for the large installed base of Hyperion Essbase, Microsoft Analysis Services, and Applix TM1 clients 	<ul style="list-style-type: none"> • Is there a compelling business reason and sufficient value for IT to support and maintain a very easy to use front-end tool for a targeted group of business users in financial services apps?

Source: Forrester Research, Inc.

- **Application or database platform BI.** In addition, there are a number of database platform and application vendors offering some BI reporting and analysis solutions that do not report their BI revenue separately and yet are impacting how BI evolves. These players include SAP, Microsoft, Siebel Systems, Oracle, PeopleSoft, IBM, Teradata, and Geac, to name a few (see Figure 5).

DEPLOYMENTS ARE BASED ON THE END USER PROFILE

Companies introduce confusion when they oversimplify the process of defining exactly what “report” means, and exactly to whom “end user” refers. To muddy the waters further, most Global 2000 companies and large governmental organizations have between five and 15 different BI reporting and analysis solutions in production — many of which are at best redundant, and at worst obsolete. Companies must first recognize the characteristics of each end user community, and then map the necessary reporting functionality to them. Then they can appropriately assess vendor options to fill gaps or be declared as the standard reporting and analysis platform.

Figure 5 BI Vendor Tier Classifications: Platform Business Intelligence

Recent activity	Results for vendor	Questions for customer
Database platform BI		
Microsoft		
Released Reporting Services	<ul style="list-style-type: none"> • Production reporting engine to complement the production OLAP engine within Analysis Services 	<ul style="list-style-type: none"> • Is the lack of a legitimate front-end report writing tool a deal-breaker?
Oracle		
Enhanced OLAP engine and Discoverer product with an emphasis on Java-based BI Beans	<ul style="list-style-type: none"> • Solid analytic reporting solution in Discoverer • Limited enterprise reporting solution in Reports • Best-of-breed database and solid application server components 	<ul style="list-style-type: none"> • Are companies willing to adopt a Java-centric approach to building BI reporting and analysis applications and shift the development responsibility to app developers?
Application platform BI		
SAP		
Enhancements to SAP BW and the inclusion of SAP NetWeaver in the BI context	<ul style="list-style-type: none"> • Strong data warehouse infrastructure with SAP BW • Solid analytic reporting with BEx • Solid enterprise reporting solution with Crystal Reports OEM 	<ul style="list-style-type: none"> • How viable is the SAP BI solution when a company already has a data warehouse and just needs a reporting and analysis solution?
Siebel Systems		
Enhancements to Siebel Analytics	A competitive analytic reporting solution with links to the Siebel applications	Can Siebel Analytics become a production reporting solution?

Source: Forrester Research, Inc.

Getting To Know End User Categories

Defining users as belonging to one of two groups (“power users” or “all others”) is an obsolete practice. Functionally targeted user constituencies must replace these generic definitions. Within these user constituencies, there are two distinct groups: producers and consumers. Most BI tools are targeted at the producers — but most of the users are consumers. This paradox has led to companies repeatedly purchasing tools that are deployed to the wrong group.

In total, Forrester estimates that 14% of end users are producers — those who create analytic reports and author enterprise reports. The remaining 86% of end users are consumers of the information and data provided by the producers.¹ Mapping the available BI technology to the functional needs of each end user constituency will allow companies to consolidate redundant technologies while supplying greater functionality to a broader user community. The characteristics of each end user category, along with an estimate of the size and makeup of each — as a percentage of the total reporting and analysis user population — are:

- **IT produces the data and information for others to consume.** Representing 2% of total headcount, IT is the producer of data and information for others to consume. The characteristics for BI include application development skills, data modeling, data integration, infrastructure design, application integration, and access and security administration. Generally IT does not use BI reporting and analysis tools in the decision-making process.
- **Power users produce domain-specific apps to support their business units.** Making up 5% of the user community, power users have object-based application development skills and use cube and table data modeling, presentation formatting, and data and information exporting. They generally do not use BI reporting and analysis tools in the decision-making process but directly support the decision-makers.
- **Business users depend on domain-specific data, apps, and Excel.** Business users, representing 25% of total headcount, are consumers of domain-specific data produced by power users. Their BI activities include local manipulation of data at the cell level of granularity, collaboration with domain peers in support of tactical issues, and a preference for working in Microsoft Excel. They primarily use BI reporting and analysis tools to make domain-specific, tactical decisions.
- **Casual users rely on dashboards, reports, and analytic apps.** Thirty percent of total headcount, casual users are consumers of aggregated, cross-domain information produced by power and business users delivered via dashboards, canned reports,

or BI analytic applications. Their BI needs include: report selection, parameter designation, simple report/analysis manipulation (sort, exporting), and collaboration with managerial and executive staff in support of overall organizational issues. Their preference is to work in the Microsoft Office suite or view in PDF and rich text. They primarily use BI reporting and analysis tools in support of strategic decisions.

- **Extended enterprise users push BI beyond the firewall.** The largest group represents 38% of total headcount. Typically customers, partners, or regulatory bodies, they are consumers of highly targeted domain-specific data or information produced by IT and made available outside of the organization's firewall. They need extraction of data to an external location or application and collaboration with domain peers on both sides of the firewall in support of tactical issues, and they have a preference for working in Microsoft Excel or with generic data export formats (CSV, flat file). They primarily use BI reporting and analysis tools to make domain-specific, tactical decisions.

BI REPORTING AND ANALYSIS WAVE™ CRITERIA AND RESULTS

The Forrester Wave has three major elements — current offering, strategy, and market presence. We evaluated 26 criteria related to the current offering, 10 criteria for the vendor's strategy, and 10 criteria for market presence, for a total of 46 criteria. Using four scenarios — analytic reporting, enterprise reporting, business reporting, and a consolidated reporting platform encompassing all — we assigned weightings to each of the criteria to help prospective buyers understand the strengths and weaknesses of the products in each situation.

- **Current offering.** The functional criteria used in this evaluation are representative of the broad footprint of reporting and analysis processes that the leading solutions evolved to cover. Companies and public sector organizations assessing these solutions may not need all of these functions and should adjust the framework to their needs. Organizations evaluating specific reporting and analysis solutions should talk to similar organizations actively using the software to understand implementation challenges and service levels.
- **Strategy.** A vendor's strategy and vision, and its ability to invest in continued product development, indicate its customer commitment and potential long-term viability. Rather than trying to do it all, the vendor should demonstrate the ability to maintain value-added relationships with systems integrators, technology leaders, and complementary reporting and analysis vendors.

- **Market presence.** Forrester assessed each vendor on its overall financial strength, organizational scale, and installed base. Criteria include product revenues, profitability, number of dedicated BI developers, customer references, and geographic presence.

Organizations Will Weigh Criteria Differently

Forrester graded each vendor against 46 criteria based on questionnaire responses, supplemental information, and our existing knowledge of this software market segment. The details of our evaluation of each vendor can be viewed by clicking on the Excel spreadsheet file above the Forrester Wave graphic online. When considering the weighting of criteria, readers should weight based on their specific reporting needs. Various Forrester Wave analyses emphasize different attributes based on the target objectives of that category of reporting.

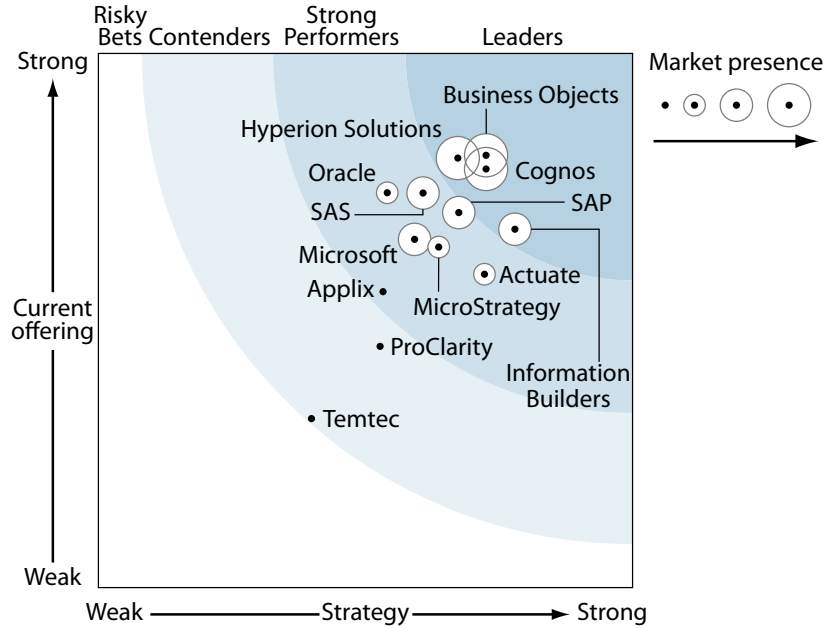
- **Analytic reporting: metadata, data access, and functionality.** The weighting for analytic reporting examines the depth of the solution to help users create complex, involved, BI applications.
- **Enterprise reporting: presentation, report development, and scalability.** The weighting for enterprise reporting is targeted at the breadth of the solution to help users create well-formatted, highly distributable, and consumable BI applications.
- **Business reporting: collaboration and Microsoft productivity integration.** The weighting for business targets the flexibility of the solution for integrating with collaboration technologies, as well as accommodating the needs of business users to work in teams.
- **Consolidated reporting: a mix of data, formatting, security, and scalability.** The weighting for a consolidated reporting platform examines the ability of the solution to satisfy all of the different BI application requirements.

Analytic Reporting Wave

Analytic reporting is used by companies to create ad hoc queries related to customers, products, channels, or services; for instance, it is employed to build multidimensional OLAP cubes to allow for slicing and dicing data pertaining to the supply chain within manufacturing, customers churn in telecommunications, property and casualty claims assessment in insurance, and risk assessment in financial institutions (see Figure 6). What stands out in the analytic reporting Wave?

Figure 6 Forrester Wave™: Business Intelligence For Analytic Reporting

The spreadsheet detailing this Forrester Wave™ is available online.



Source: Forrester Research, Inc.

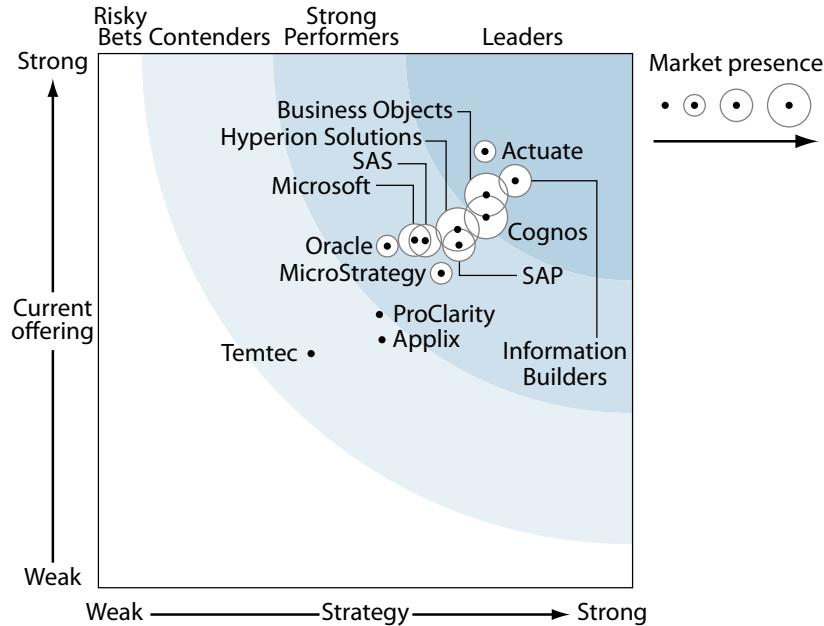
- **No surprise — tier one vendors flex muscle.** As expected, Business Objects, Cognos, and Hyperion Solutions offer the best overall analytic functionality via metadata, OLAP, data access, and query.
- **Solutions for decentralized IT score high.** The leading analytic reporting vendors — Business Objects, Cognos, and Hyperion Solutions — also accommodate a decentralized, self-service approach to delivering analytic functionality. They contrast with Information Builders and MicroStrategy, which tend to emphasize scalability and open APIs.
- **Platform solutions beat out niche and some best-of-breed offerings.** With strong data access, OLAP, and security features, BI platform offerings from Oracle, Microsoft, and SAP show that the gap is shrinking.

Enterprise Reporting Wave

Companies use enterprise reporting to develop and deploy production reports associated with CRM, ERP, and financial applications, as well as to create large volumes of customer telephone bills, paycheck stubs, credit card statements, and standard bulk output such as 401(k) statements (see Figure 7). In the enterprise reporting Wave:

Figure 7 Forrester Wave™: Business Intelligence For Enterprise Reporting

 The spreadsheet detailing this Forrester Wave™ is available online.



Source: Forrester Research, Inc.

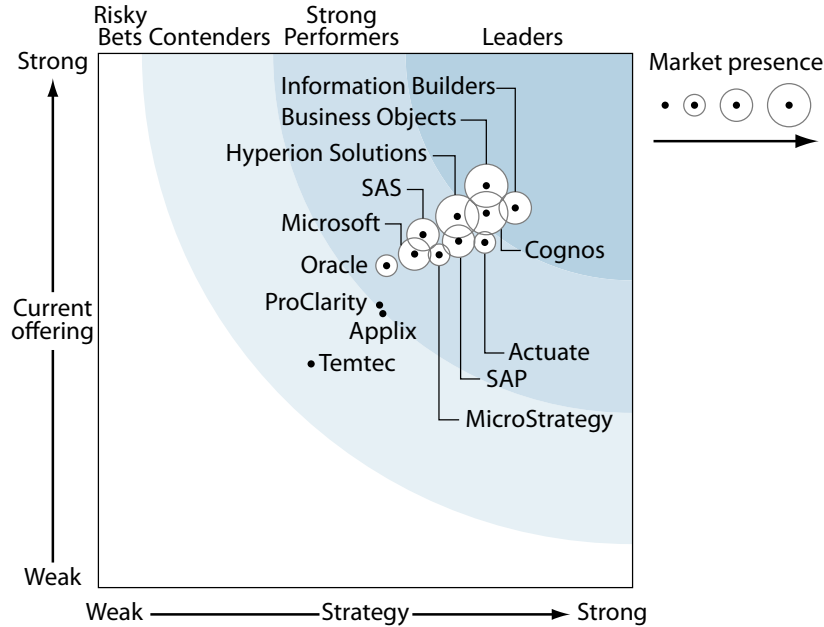
- **Tier two vendors outrank the big guys.** Showing that size is not everything, Actuate and Information Builders reflect strengths in scalability, report development, and presentation formatting. Note that Business Objects scores well here thanks to Crystal Decisions, which was also a tier two vendor until its acquisition in January 2004.
- **Solutions for centralized IT score high.** For enterprise reporting, there is a different — and more demanding — development community. This is reflected in higher application development (scalability, report development, embedded reporting) scores.
- **Version 1 products have something to prove.** The new releases from Cognos, Microsoft, and MicroStrategy still have a way to go in terms of usability and application development, even with their early success.

Business Reporting Wave

Companies use business reporting to control the flow of data to financial and business analysts within accounts payable and receivable applications, to implement a Balanced Scorecard methodology, and to track performance metrics (see Figure 8). Emerging from the business reporting Wave, we see:

Figure 8 Forrester Wave™: Business Intelligence For Business Reporting

The spreadsheet detailing this Forrester Wave™ is available online.



Source: Forrester Research, Inc.

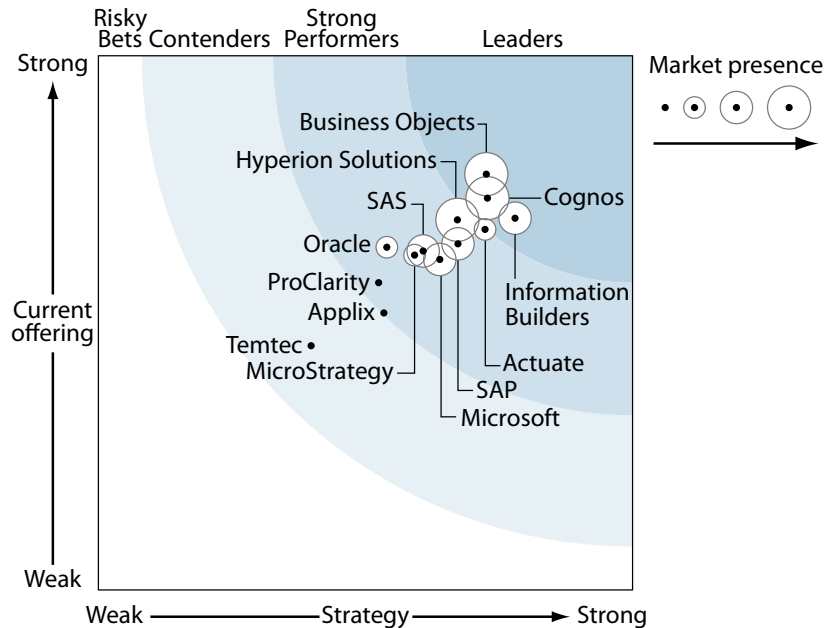
- **The best of both worlds.** The three top vendors in business reporting — Business Objects, Cognos, and Information Builders — offer strengths in metadata, ease of use, and some mechanism for integrating with Microsoft productivity tools.
- **Even Microsoft doesn't integrate well with Microsoft.** Of all the vendors to score low on this, Microsoft must realize that delivering BI Accelerators from the Office group doesn't constitute tight Office integration. All BI solutions must be enhanced to exploit native features of Word, Excel, and PowerPoint, along with collaboration and workgroup capabilities.
- **Everyone does poorly with a few important criteria.** Few vendors offer a strong business-process mechanism within BI — although Cognos is leading the way with Metrics Manager. Microsoft Office integration needs a lot of work by everyone, and collaboration must be addressed for large consumer audiences to participate.

Consolidated Reporting Platform Wave

Companies use consolidated reporting platforms to deliver analytic, enterprise, and business reporting applications to a broad range of users (see Figure 9). What stands out in the consolidated reporting platform Wave are:

Figure 9 Forrester Wave™: Business Intelligence For Consolidated Platform Reporting

 The spreadsheet detailing this Forrester Wave™ is available online.



Source: Forrester Research, Inc.

- **Acquisitions made a difference, but so did new releases.** The top solution for a consolidated reporting platform is Business Objects via the Crystal Decisions acquisition, with Cognos in second with the release of ReportNet. Hyperion's acquisition of Brio and Actuate's acquisition of Nimble also impacted their respective placement on the consolidated platform reporting Wave. Other sensible acquisition possibilities in the future? Actuate could be acquired by BEA, Microsoft could acquire ProClarity, or Teradata could acquire MicroStrategy.
- **Niches are not well suited for this game.** There may be a compelling reason to select a niche solution like Applix, ProClarity, or, Temtec, but not for a consolidated reporting platform, as no criterion will make up for a host of limitations, including broad access to data or application scalability.
- **Individual solutions are mature — integrated solutions are not.** Since this is a mature market, core functionality related to OLAP, query, presentation formatting, and usability is solid for the best-of-breed BI vendors evaluated, but less so for the database and application platform vendors — which tend to be strong with internationalization and application scalability.

RECOMMENDATIONS

BEGIN THE PROCESS OF STANDARDIZATION NOW

- **The products aren't there yet, but begin the journey anyway.** The lack of an integrated reporting and analysis solution should not deter companies from beginning the process of standardizing, since the first step is to audit exactly what is in place today, who is using it, and for what purpose.
- **Adopt a standard for each reporting category.** Rather than wasting time looking for something that does not exist, start by adopting a standard solution for analytic, enterprise, and business reporting to help facilitate the inevitable consolidation process.
- **Profile all end users before choosing any tool.** This is the most critical step in successfully implementing any BI reporting and analysis solution. Once profiled, the appropriate reporting and analysis solution can be mapped to these end user communities.

WHAT IT MEANS

REPORTING AND ANALYSIS ARE NECESSITIES — NOT LUXURIES

- **Firms need it.** The opportunity to build reports and perform analysis on any type of data is no longer a luxury available only to those with deep pockets. Every bit of data, both structured and unstructured, can be used to help companies and governmental organizations understand how to better serve customers, build new products and services, and improve all aspects of the business.
- **Save money with standardization.** Companies will save money by standardizing on fewer reporting and analysis solutions, ideally adopting a single standard for each reporting category.
- **The all-encompassing solution is two years away.** The earliest that companies can expect to see a viable, integrated single reporting solution that encapsulates all three reporting categories is two years from now.

SUPPLEMENTAL MATERIAL

Methodology

Forrester created evaluation criteria for BI reporting and analysis tools and conducted vendor interviews and documentation of each vendor's standing against the criteria. Users of each BI reporting and analysis tool were interviewed to supplement and validate assessments. Every vendor was given two opportunities to perform fact checks — reviews of their own evaluation.

A number of key BI platform vendors (Microsoft, Oracle, and SAP) do not break out BI revenue on their formal revenue statements. Forrester estimated the separate BI revenue for Oracle and Microsoft as a percentage of their respective RDBMS license new revenue. SAP's BI revenue estimate was based on the number of new licenses for SAP BW times the average cost per new license, plus estimated maintenance fees. The BI revenue totals for these three vendors are estimates, intended only to show the relative position of each within the business intelligence arena.

Companies Interviewed For This Document

Actuate	MicroStrategy
Applix	Oracle
Business Objects	ProClarity
Cognos	SAP
Hyperion Solutions	SAS
Information Builders	Temtec
Microsoft	

ENDNOTES

- ¹ Within the five different user constituencies of the enterprise, there are two distinct groups of analytic end users: producers and consumers. Most BI tools are targeted at the producers, while most of the users are consumers. This paradox has led to companies purchasing the right tool for the wrong group, over and over again. See the June 26, 2003, Planning Assumption "Profiling The Analytic End User For Business Intelligence."

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