Operational BI Solutions Brief

How to **Increase Visibility Into Mission-Critical Processes** With Operational Business Intelligence
What Our Customers Say

“Our goal is to make the Internet a safer and more valuable place to do business and interact. We are accomplishing that through real-time threat monitoring and fraud detection using shared intelligence about devices that are interacting with online businesses.”

Greg Pierson
CEO

iovation

“WebFOCUS is increasing the effectiveness of our sales promotions and improving customer relationships. Thanks to this system, we’re growing faster than any of our competitors in our core markets and products.”

J. Ed Smith
Chief Information Director

Utz Quality Foods

“By understanding which factors are most critical, and identifying potential students who meet those criteria, we can take a more focused approach to our recruiting efforts and eliminate the waste that comes with marketing to students who aren’t necessarily a good fit for our university.”

Edwin Welch
Director of Institutional Research and Associate Registrar

Taylor University

“It only takes one click to see the overall performance, one click to see the claims in a particular category, or one click for many other useful measures.”

Jim Lollar
Business Systems Manager of Global Warranty Operations

Ford Motor Company
While strategic planning is vital to any organization, it is the countless day-to-day processes, carried out by frontline workers, that play the biggest role in corporate performance. Activities such as logistics coordination, supply-chain management, and field service all have a profound impact on a company’s success. But the systems that support these operations are often fragmented and dispersed, hindering collaboration and coordination.

Operational business intelligence (BI) is a subcategory of BI that supports operational systems. Information Builders has been helping organizations to maximize productivity and effectiveness in these vital operations for many years. Our technologies provide complete visibility into key operations so organizations can:

- Empower all users – even non-technical users – with the ability to access and analyze operational data from a wide array of sources
- Monitor and measure the status of mission-critical operations across the business in real time
- Boost productivity by identifying and correcting problems and areas in need of improvement
- Understand and anticipate the factors that drive operational performance
- Promote regulatory compliance

For example, at Ford Motor Company, operational BI provides greater transparency into service and repair trends. This has resulted in 40 percent fewer dealers being audited or entering the company’s global warranty counseling process.
Data Monetization
Operational BI is an effective way to monetize the big data generated from internal sources, as well as new sources such as mobile, social media, and the cloud. With operational BI, organizations can make information an integral part of their value proposition, and unlock the significant financial value of the data within their enterprise systems – either by creating new revenue streams, or by identifying opportunities to save money, reduce waste, or cut costs.

Embedded BI
Embedding operational BI and analytics capabilities directly into applications, workflows, or processes empowers users with intuitive, engaging functionality that delivers timely, reliable, and impactful intelligence. They can capture and analyze data in new and meaningful ways – seamlessly and consistently – to gain better insight into operations and related performance.

Types of Operational Business Intelligence
There are three categories of operational BI: process intelligence, performance intelligence, and discovery intelligence. Each type supports a number of different applications. (The tables below provide examples of the different types of applications, customer examples, and their business drivers, within the three categories of operational BI.)

Process intelligence taps into enterprise information to improve employee decision-making and operational performance to save costs, boost process efficiency, and drive productivity improvements. It also enables decision support aimed at enhancing quality of service or eliminating errors; aiding in loss prevention to reveal and proactively avoid potential areas of fraud, waste, and abuse; and promoting opportunity capture to uncover ways to increase revenues.

Process Intelligence Quick Reference

<table>
<thead>
<tr>
<th>Application Type</th>
<th>Customer Example</th>
<th>Key Drivers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operational Performance</td>
<td>Ford Motor Company</td>
<td>Improve employee decision-making and performance to achieve direct cost savings.</td>
</tr>
<tr>
<td>Process Efficiency</td>
<td>Utz Quality Foods</td>
<td>Enhance a process to make it faster, better, or more cost-effective.</td>
</tr>
<tr>
<td>Decision Support</td>
<td>First Rate Investments</td>
<td>Increase quality of service and/or minimize errors, to eliminate the cost of bad decisions and optimize customer loyalty.</td>
</tr>
<tr>
<td>Loss Prevention</td>
<td>iovation</td>
<td>Uncover and eliminate potential losses from fraud, waste, and abuse.</td>
</tr>
<tr>
<td>Opportunity Capture</td>
<td>nVision Global</td>
<td>Identify opportunities within business processes to capture new or incremental revenues, so employees can quickly capitalize on them.</td>
</tr>
</tbody>
</table>
Performance intelligence uses information to increase employee performance and drive personal accountability. It provides dynamic alerts to eliminate failures, omissions, and disruptions in services and processes to avoid financial losses or customer attrition. At the same time, it enables widespread distribution of documents and other information to large numbers of users to provide them with a complete view of their accounts, which helps to reduce costs and improve the customer experience. Performance intelligence also promotes the establishment of organization-wide performance management, and facilitates trust and transparency by improving visibility into operations and providing the public or customers with vital statistics on particular topics of interest.

Performance Intelligence Quick Reference

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<th>Application Type</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Performance Accountability</td>
<td>Lutheran Life</td>
<td>Improve employee performance and drive personal accountability to achieve higher productivity.</td>
</tr>
<tr>
<td>Status and Alerting</td>
<td>Farm Bureau Insurance</td>
<td>Eliminate failures, omissions, or disruptions in services and processes to avoid financial losses or customer attrition.</td>
</tr>
<tr>
<td>Information and Distribution</td>
<td>U.S. Bank</td>
<td>Enhance the customer experience and eliminate the costs associated with in-person inquiries by providing comprehensive documents to a large number of users to give them a complete view of their accounts or business dealings.</td>
</tr>
<tr>
<td>Trust and Transparency</td>
<td>City of Irving, TX</td>
<td>Increase transparency and visibility into operations or provide the public or customers with vital statistics on topics of interest.</td>
</tr>
<tr>
<td>Opportunity Capture</td>
<td>nVision Global</td>
<td>Enable operational performance management by establishing enterprise-wide KPIs to improve insight into the health of the organization.</td>
</tr>
</tbody>
</table>

Discovery intelligence helps analysts and other power users to discover the root causes of problems and gain insights from data that identify hidden costs and revenue opportunities. Advanced analytics can also be embedded into existing applications and processes to reduce costs and make information an integral part of process execution.

Discovery Intelligence Quick Reference

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<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Tools for Professional Analysts</td>
<td>Taylor University</td>
<td>Empower analysts to discover the root causes of problems and uncover new opportunities within data, to identify hidden costs and revenue opportunities.</td>
</tr>
<tr>
<td>Embedding Advanced Analytics</td>
<td>Plex Systems</td>
<td>Enhance the analytic capabilities in existing applications, to reduce costs and enhance processes.</td>
</tr>
</tbody>
</table>
Customer Successes:
Process Intelligence Applications

**Ford Motor Company: Operational Performance Apps** – Operational BI and data visualization empower Ford dealers to quickly identify and resolve problems with warranty repair costs, and compare their warranty performance with other dealers. Greater transparency into service and repair trends has resulted in 40 percent fewer dealers being audited or entering Ford’s global warranty counseling process. Stakeholders can also leverage 15 years of historical data to glean new insights about vital operations to assess manufacturing efficiency, supplier quality, and more.

**Utz Quality Foods: Process Efficiency Apps** – Because success in the snack food industry depends on the ability to keep fresh product on store shelves, Utz implemented an operational BI environment that supports sales and distribution. Inventory and demand data is collected via handheld devices as drivers make their rounds, and then automatically loaded into a database once the device is docked. From there, managers and other stakeholders in sales, logistics, purchasing, and marketing can analyze it to determine how much of a product is selling on a given day, how much was sold into a particular store or chain, at what price, and in response to what promotions.

**First Rate Investments: Decision Support Apps** – As a leading developer of portfolio analysis and performance measurement software, First Rate wanted to empower its investment advisor clients to enhance service to their account holders. By incorporating operational BI into its solution, the company gives clients the ability to obtain in-depth details about hundreds of thousands of portfolios, perform batch reporting for tens of thousands of accounts, and enhance communication by delivering customized presentations that make portfolio information easy to interpret for investors.

**iovation: Loss Prevention Apps** – This provider of online enterprise protection services relies on operational BI to give its clients greater insight into fraudulent actions. The company enhanced its ReputationManager360 solution with operational analytics that empower users to derive actionable intelligence about particular devices used in fraudulent interactions, suspicious transactions, or how often business rules are invoked. This enables clients to protect their Internet channels from potential threats, while giving iovation a competitive edge.

**nVision Global: Opportunity Capture Apps** – This logistics management services provider implemented sophisticated operational BI with interactive graphing and mapping capabilities to provide customers with information about shipping routes, rates, logistics, and carrier contracts. The secure, web-based environment, known as iFOCUS, allows clients to scrutinize all facets of their logistics operations, so they can prioritize and streamline related activities.
Customer Successes: Performance Intelligence Applications

**Lutheran Life: Performance/Accountability Apps** – Swift growth presented this non-profit senior living organization with significant administrative challenges. Disparate information systems made it difficult for directors and department heads to obtain a unified view of the business and access the information they needed to support day-to-day decision-making. The organization gained better visibility into its operations by developing dashboards that depict the performance of each business unit via interactive displays. This gives management an actionable window into performance, staff accountability, and daily activities.

**Farm Bureau Insurance of Tennessee: Status and Alerting Apps** – When two devastating storms left this insurer struggling to manage a year’s worth of claims in just two months, operational BI helped the company gain a clear view into its activities, operational performance, and financial metrics. Information is culled from a variety of databases, and presented through dashboards, strategic scorecards, and user-friendly interactive reports. Alerts are also part of this cohesive reporting environment, instantly notifying key personnel when storm events occur so they can maintain adequate staffing such as call center reps and claims adjusters.

**U.S. Bank: Information Distribution/Access Apps** – The fifth-largest commercial bank in the country gives more than one million small business customers access to operational BI through dashboards for monitoring debit and credit card transactions, tracking corporate spending, conducting trend analysis, and benchmarking spending against similar companies. The software-as-a-service (SaaS) environment, known as Scoreboard, has improved client loyalty while reducing support costs.

**City of Irving, Texas: Trust and Transparency Apps** – With operational BI and performance metrics, the City of Irving, Texas is monitoring performance and trends that impact city management, while achieving greater transparency into its administrative processes. The City can now identify opportunities for improvement, resulting in $44 million in cost savings, more than 500,000 hours in increased productivity, $25 million in additional revenues, and better citizen feedback ratings.

**ThyssenKrupp: Operational Performance Management** – In an effort to strengthen purchasing activities across the business, this worldwide manufacturer deployed a web-based scorecard to achieve greater visibility into related operations. Strategic objectives and performance indicators are defined, recorded, summarized, and presented through the scorecard, increasing productivity and accountability by creating formal structures for purchasing control.
Customer Successes:
Discovery Intelligence Applications

**Taylor University: Tools for the Business Analysts (leveraging Rstat)** – Operational BI, with predictive analytics capabilities, helped this institution boost its already stellar student retention rates. Data points such as board scores, mid-term grades, financial aid status, and attempted vs. completed hours are used to identify at-risk students who are likely to drop out or transfer. These students are then targeted for mentoring services designed to help put them on the path to success. The university has achieved significant return on investment through reduced attrition.

**Plex Systems: Embedding Advanced Analytics in Apps (leveraging InfoAssist)** – Plex develops cloud-based enterprise resource planning (ERP) solutions for the manufacturing industry. When manually creating reports proved to be too cumbersome for customers, Plex embedded operational BI capabilities into its application. Users can drag-and-drop data elements into custom, interactive reports, charts, graphs, and dash-boards. Hundreds of Plex customers now have a better way to access, analyze, and visualize their data, so they can establish benchmarks and measure performance, and discover hidden trends and inefficiencies.
Information Builders helps organizations transform data into business value. Our solutions for business intelligence (BI) and analytics, integration, and data integrity enable smarter decision-making, strengthen customer relationships, and drive growth. WebFOCUS, iWay, and Omni products work together to seamlessly cover all your information needs.

**Intelligence**
The WebFOCUS BI and analytics platform delivers rich, consumable, interactive information to the widest range of users.

**Integrity**
The iWay Data Quality Suite and Master Data Management Suite enable profiling, analysis, merging, managing, and cleansing of data from any source – structured or unstructured. Omni applications enable a single, complete strategic and operational view of key business services.

**Integration**
The iWay Integration Suite is the most flexible and agile integration foundation available, providing interoperability between disparate systems and data for faster time to market on IT and business initiatives.
Intelligence, integrity, and integration solutions help our customers seamlessly navigate the full spectrum of information management for sharper insights and fact-based decision-making.

To learn more about our solutions enable stakeholders at the operational level to access the best data available, visit our online Operational BI Solutions Center at informationbuilders.com/solutions/operational_bi.
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