

Empower Business Managers with Point-and-Click Access to Reporting

...and Six Other Benefits of Self-Service Business Intelligence

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Against the current backdrop of economic uncertainty and weak consumer demand, corporate work forces are running leaner than ever, forcing worker productivity to all-time highs¹. How can IT departments gain even greater productivity without spending a fortune or waiting years to realize a positive ROI on their investment? Leading organizations already know the answer: empowering their workforce with self-service business intelligence (BI).

Common Misperceptions of BI

While BI has a proven track record delivering critical insights across a wide spectrum of industries, enterprise-wide penetration of BI tools is still surprisingly low. Why is that? There are several common misperceptions contributing to slow penetration of BI:

1. BI solutions are costly
2. BI solutions are difficult to use and deploy
3. BI solutions are slow to deliver real business value

Self-service BI is beginning to shatter these perceptions by delivering low-cost, rapidly deployed decision support to business users throughout organizations large and small.

What is Self-Service BI?

Essentially, self-service BI democratizes access to business-critical information across your organization. It does this by enabling any worker, regardless of job role, geographic location or department, to work from a single set of data, presented in a context and detail level relevant to their job role and appropriate to their data access privileges. Unlike traditional BI, self-service BI eliminates the need for data warehouses. This reduces the overall cost by lowering hardware requirements and trimming the IT consulting engagements, and also makes for speedier deployment and faster time to benefit.

Traditional Business Intelligence	Self-Service Business Intelligence
Deployment timeline measured in years	Deployment in weeks to a few months
Extensive user training required to gain competence	Little or no end-user training required
Requires significant IT support to maintain	Minimal IT involvement
Expensive: upfront costs in millions of dollars	Modest investment or monthly subscription
Requires data warehouse	Data warehouse not required

Let's look at seven ways that self-service BI can raise productivity, foster fact-based collaboration across your organization and ultimately increase corporate profitability.

#1. Empower Workers to Conduct Their Own Analysis

Self-service BI empowers anyone in your organization with rich, role-based analytical capabilities. From the CEO, to the VP of Marketing, to each individual sales rep, accountant, shipping clerk and machine operator, virtually every job role can benefit from access to timely, accurate information and the ability to analyze that information from any angle.

In an interview published in the Harvard Business Review, tech venture capitalist Marc Andreessen highlights the importance of creating and nurturing an analytical culture. According to Andreessen, "the best of the companies we're seeing now are unbelievably good at analytics. They have this incredible closed loop where they analyze data and feed the numbers directly back into the process virtually in real time, running a continuous improvement loop."² An analytical culture emerges within companies empowering workers at all levels with the data and tools to perform their own analyses.



"Any executive or sales manager can pull information very easily out of the system and be able to analyze that for their customers and for the products that they're responsible for. [They can] determine any changes without having to contact IT to run a special report or to get information out of a system that they may not have easy access to."

*Jim Staton
Vice President of IT
Mutual Distributing Company*

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#2. Give Your IT & Finance Teams a Break

Your enterprise data resides in multiple computing systems - Financial software, ERP, HR, MES and other organizational data stores. In many organizations these systems are poorly integrated and it is difficult to get rolled-up reporting to support business decision-making. When canned reports from the individual systems are not good enough to support business decision-making, two departments typically bear the burden of fielding special requests for custom reporting and analysis: IT and Finance. These requests can represent a significant ongoing time-consuming burden.

Your IT and Finance teams have far more strategic things to work on than running reporting service bureaus. Furthermore, custom reports will typically be delivered as spreadsheets, which pose significant risks for calculation errors and data security breaches, among other problems³.

Self-service BI takes a major load off of Finance and IT by integrating data from disparate systems and delivering rolled-up, report-ready data views to users. Data security rules can ensure each user views only data they are authorized to access. Requiring only a browser-based interface, self-service tools have modest hardware requirements



"People were always needing reports for specific accounts, products, divisions, and sales reps, sorted in various ways and then they would have to compare it with other information to figure out what happened," explains Elaine Ritchie, Director of IS for New Balance. A report request could take months to complete and the information required often changed by the time a person received it.

Today, managers in every department can navigate through data models to answer their own questions and analyze particular areas of interest.

With the self-sufficient data access and flexibility of self-service reporting, New Balance eliminated one quarter of their printed reports, all special one-time reports, and the entire backlog of new report requests.

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and eliminate the need to install, maintain and administer large-footprint clients on each user's workstation. Intuitive, role-appropriate content and functionality means little or no training is required for users to become informed, empowered and productive within hours, not months. All told, self-service BI represents a tremendous unburdening for the IT and Finance departments who are saddled with business reporting challenges.

#3. Quit Arguing, Start Analyzing

Many organizations have their valuable data locked away in enterprise computing systems that are not integrated with one another. When rolled-up reporting is required, often times it is manually copied and pasted into spreadsheets, merged & transformed with crosstabs and spreadsheet formulas, and then presented to business decision-makers. Intuitively everyone knows that spreadsheets cannot be trusted. And so, what often ensues is a raging argument over the veracity of the numbers being presented. Is your calculation right? Is the data up to date? What is the source of that data? Why does your data not match my data?

Organizations mired in this sort of "spreadsheet morass" can spend more time arguing over the accuracy of the spreadsheets than they do in digesting the information, isolating and correcting the causes for problems, and identifying new opportunities. This is corrosive to establishing an information-driven corporate culture. Workers constantly questioning the veracity and provenance of the numbers in their spreadsheets will lose confidence in decisions made based on those numbers.

In contrast, self-service BI fosters collaboration and information sharing across an organization by eliminating data silos. When everyone is working from an automated, up to date, integrated data model -- a single version of the truth -- the finger-pointing between individuals, departments and business units stops. Instead, workers begin to collaborate on analyzing promising opportunities, identifying root causes of waste, and optimizing existing products and processes. Once departmental data silos and "spreadmarts" are eliminated, workers find that data transparency, consistency, and trustworthiness helps them work smarter and more effectively.

By sharing insights gained from data analysis with other team members and stakeholders, everyone can contribute to finding solutions. This enables organizational decisions based on information and facts, rather than gut feel, straw polls or executive order. It also increases stakeholder buy-in and credibility in the final decision.

#4. Get at The Numbers Behind The Numbers

Getting to the root cause of problems can often be like a scavenger hunt, as you pursue the details through multiple disconnected enterprise systems. For example, circulating a general ledger report often triggers a flood of requests for custom reports showing



"Every functional department of our company utilizes Diver. Sales, finance, warehouse, purchasing, our credit department, customer service... so it's integrated throughout our whole company, and it's our source for all information relating to our operations and sales."

*Peter Colletis
EVP Sales & Operations
Martignetti Companies*

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the details behind GL summaries, which can reside in multiple different source systems -- systems that are not directly accessible to the reviewers of the GL report.

Self-service BI integrates the data from multiple source systems, allowing you to get at the numbers behind the numbers...

...**QUICKLY**: Self-service BI boosts worker productivity. Choose a filter or date range value from a drop-down box to get a more nuanced view of the data. Click a number and instantly see the details behind that summary. This is a highly efficient and intuitive way to deliver business decision-making support.

...**ACCURATELY**: The data model is automatically updated regularly (hourly, daily, monthly - the interval can be set based on the business needs). With self-service BI, data integration is automated and documented with a clear audit trail to ensure accuracy and regulatory compliance.

...**SECURELY**: With self-service BI, data access and interaction privileges can be specified for data models, reports, and even individual data elements from a centrally administered server. It is relatively easy to ensure that the wrong people don't get access to sensitive data. The same cannot be said if your reporting solution is manual and entails emailing hundreds of unsecured spreadsheets between individuals.

What if the spreadsheet with sales results is emailed to the whole sales team? Have you just shared sensitive comp plan details indiscriminately with people who should not have access to that data? What if it gets sent outside of your company? Have you just given your competitor critical customer and product pricing data? Self-service BI represents a much more secure alternative.

...**APPROPRIATELY**: Information is highly context-sensitive. The machine operator on the shop floor requires a different view of the data than a process engineer investigating a process failure. BI tools ensure that exactly the right information is accessible for every worker, delivered in the appropriate context for their roles and responsibilities within the organization.

#5. Eliminate Corporate Decision Fatigue

The fewer decisions our brains have to make on the way to completing a task, the more likely we are to successfully complete the task. If it is a tedious task to just get the information needed to make a decision -- i.e., seeking data from numerous disconnected systems, performing various manual integration tasks and calculations in a spreadsheet, etc. -- then the chance that "decision fatigue" will lead to mistakes, missed opportunities, and failure to correct problems is much higher.



"Our users were getting the information they needed, but not always in a time-frame that best suited their needs. By giving our users timely access to data, they can grow their business and communicate better with their accounts. It's helping us make better decisions and it's allowing us to focus on areas that require attention."

Luci Cain
Sales Technology Coordinator
Lipman Brothers

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"Diver helps us to spot troubling numbers, then immediately "dive" into the details -- regardless of where the data is stored. It's very powerful, yet very flexible and easy to use. In fact, many managers in our system are using the product to customize reports on their own."

Jill Emblar
Vice President of Financial Planning
Continuum Health Partners

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Decision fatigue is very real in the business world today, and it can be dangerously counterproductive.⁴

By providing workers with the right information in a context and format appropriate to their role, it becomes far more likely that the right decisions will be made. Self-service BI dashboards, reports and visualizations are designed to convert information into action quickly and unambiguously. Empowering workers with the data and tools to analyze it not only significantly lowers corporate decision fatigue, it results in better decisions.

The highly optimized data models that form the foundation of self-service BI tools ensure nearly instant response time to even complex queries. This means users can quickly validate a line of reasoning with a few clicks, touches or swipes and then investigate additional ideas based on the results. This also lowers decision fatigue by letting users remain engaged in their analysis rather than spending hours waiting on spreadsheet queries to complete.

#6. Save Money

...INTUITIVE INSTEAD OF INTIMIDATING: Everyone gets up to speed quickly with self-service BI and most workers rapidly gain competence with little or no training. With a visual, point-and-click interface, users can focus on their data instead of having to learn a complex tool or become spreadsheet experts. Training and support costs are significantly lower compared to complex traditional BI solutions.

...LOW FOOTPRINT MEANS LOW TCO: Self-service BI doesn't require separately-installed desktop software, workstation upgrades, or help-desk resources. Web browser based information access and analytics means users can access and analyze their data from their current laptop, tablet, smart phone or desktop. Vendors offering SaaS-based self-service BI provide additional cost efficiencies by replacing up-front server investments and ongoing maintenance costs with a convenient monthly subscription.

...SEAMLESS SCALABILITY: BI platforms scale seamlessly across departments, geographies and business units. As BI adoption increases across an organization, additional server capability can be added without disrupting information access or requiring significant IT resources. This protects your existing server investment by letting you add capacity as your user community grows.

...EXTEND THE LIFE OF LEGACY SYSTEMS: Replacing your Financial system or ERP can be a massive undertaking. In addition to the software cost, you probably need to invest in new hardware, consulting, and end-user training. But if your decision to replace an



"Some of the return [on investment] can be measured by recovering incorrect billings promptly, while others are a result of holding down expenses. These expenses include the software costs of seats on the ERP system as well as people in Finance and within Operations."

"During a time of growth, the Finance department is able to go a lot further without adding resources. Diver permeates all aspects of financial operations including Inventory analysis, P&L forecasts, business segmentation and analysis, Accounts Receivable exposure, Purchase Price analysis and control."

*John Withee
VP and Corporate Controller
New Balance*

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old system is based on inadequate reporting, data integration, and analytics, then self-service BI can be a low-cost way to extend the life of those systems and still give users top-notch business decision-support and reporting solutions.

...NO DATA WAREHOUSE REQUIRED: In marked contrast to complex and expensive enterprise BI solutions, agile self-service BI tools don't require either a data warehouse or the associated database licensing costs. This alone shaves months if not years off of BI project timelines and eliminates the considerable expense of building a data warehouse.

#7. Shift Your Corporate Culture From Reactive To Proactive

Like yesterday's news, as your enterprise data "ages," its information content and usefulness diminish rapidly. Giving workers access to the most up-to-date data will surface insights when they matter most - as soon as new data arrives, rather than weeks later. Organizations that empower their workers with the tools to analyze more of their growing data volumes faster than the competition can gain a number of important advantages:

- Increased market share by identifying underserved territories or discovering new placement opportunities
- Cost savings from accurately identifying and discontinuing unprofitable product lines sooner
- Visibility into new distribution channels
- An accurate picture of true product costs enabling more profitable product pricing
- The ability to manage promotional and incentive programs more effectively with fewer resources

Conclusion

Self-service BI provides the tools needed to help your organization transition from reactive to proactive decision making. As more workers become informed and empowered by the ability to analyze and explore their data, decisions are made faster and with greater confidence.

Wayne Eckerson, director of BI research at The Data Warehouse Institute, speaks about embracing the discipline of self-service BI to optimize its benefits. According to Eckerson, self-service BI strengthens the ties of users to the data they're working with. The goal, Eckerson said, is to get users away from spreadsheets and embracing the use of BI tools.⁵



"With Diver, we are able to support line managers who use Diver to do 'what-if' analysis while our executives are served by dashboards and self-service reporting capabilities. We have done this without growing staff or infrastructure. It was not a huge investment on EMC's part to derive the benefits that we have from Diver."

Bob Petrillo
Corporate Technical Operations
Manager
EMC

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"We started out using the product in one application area and the results just blew us away. Three years later we are using Diver in nearly every area of this organization. It is our one source for all of our business critical information."

Nora Lissy
Director, Decision Support Services
Sarasota Memorial Healthcare
System

[Read the full Sarasota case study at
www.dimins.com/case-studies.html](http://www.dimins.com/case-studies.html)

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² How self-service BI improves office culture, ActiveReports Server, May 3, 2013.

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⁵ Self-service BI, Boris Evelson, Forrester Blog, 12/6/2012.
http://blogs.forrester.com/boris_evelson/12-06-12-self_service_bi

Self-Service BI case studies referenced in this paper available at www.dimins.com/case-studies.html:

- [Mutual Distributing Company: An Interview with VP of IT Jim Staton](#)
- [New Balance: Self-Sufficient Access, Analysis of Key Metrics Across A Global Organization](#)
- [Martignetti Companies: An Interview with EVP of Sales & Operations Peter Colettis](#)
- [Lipman Brothers: Empowering a Sales Organization With Role-Based Dashboards & Self-Service Reporting](#)
- [Continuum Health Partners: Providing Better Patient Care and a Healthier Bottom Line](#)
- [EMC: Better Visibility Into Performance Metrics](#)
- [Sarasota Memorial Hospital: Achieving Operational Initiatives Through Business Intelligence](#)

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Dimensional Insight, Inc. is a leading provider of BI solutions with our BI platform and family of purpose-built applications. Our data integration, modeling, reporting capabilities, analytics, portals, dashboards, and applications empower users throughout the enterprise to make timely, data-driven decisions. Thousands of worldwide customers choose Dimensional Insight solutions for flexibility, ease of integration, and rapid time-to-value. Dimensional Insight consistently ranks as a top performing BI vendor in customer satisfaction.



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