Next Generation Performance Dashboards

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Speakers

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Agenda

• Self-Service BI
• Tailored Delivery
• MAD Framework
• Double MAD Framework
Common Definition of Self Service BI

“Empower users to create their own reports so users get what they want when they want it without having to ask IT.”
## Percentage of Active BI Users

<table>
<thead>
<tr>
<th>Role</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Power Users/Analysts</td>
<td>61%</td>
</tr>
<tr>
<td>Managers</td>
<td>33%</td>
</tr>
<tr>
<td>Executives</td>
<td>25%</td>
</tr>
<tr>
<td>Field staff</td>
<td>24%</td>
</tr>
<tr>
<td>Customers/Suppliers</td>
<td>5%</td>
</tr>
<tr>
<td>All employees</td>
<td>24%</td>
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</tbody>
</table>

Two Types of Self-Service

• Ad hoc report creation (Power Users)
  – Select facts and measures from a folder
  – Query databases
  – Format output
  – “Ad hoc BI”

• Ad hoc report navigation (Casual Users)
  – Click to drill, filter, or navigate
  – Select filters from list boxes or respond to prompts
  – “Tailored delivery”
What is Tailored Delivery?

- Ad hoc report navigation

- An interactive, information sandbox!

- A more elegant way to deliver self service to casual users!

- Meets 60%-80% of the information needs of 80% of the users
What is Tailored Delivery?

- A layered information delivery system
- Parcels information on as needed basis
- Tailored to a specific group of users
- That individuals can personalize
Tailored Delivery

**PRODUCT PERFORMANCE**

- Each level contains about 20 dimensions and 12 metrics
- Users think they are doing “ad hoc” but they’re not
- Each can replace dozens or hundreds of reports
Evolution of Tailored Delivery

• Parameterized reports
  – Select filters
  – Select attributes and metrics

• OLAP reports
  – Ad hoc drilling in a cube
  – Ad hoc drilling in a star schema database

• First generation dashboards
  – Multiple charts/tables assembled in a portal
  – Synchronized filters

• Next generation dashboards
  – Layered information delivery systems
Performance Dashboard

Functionality

Monitor

Graphical Data

Executives/Managers

Users

Analyze

Summarized Data

Analysts

Drill thru

Detailed Data

Workers

MAD Sandbox

T D W I  R E S E A R C H
Cisco System’s BI Framework

Purpose, Audience, Architecture

- Actionable Metrics
- Contributing Metrics
- Detail Metrics

Measure Performance

Increase Productivity

Intelligent Business Actions
Intelligence & Knowledge
Information & Data

Increase Productivity
This is Insane!! Not MAD

Reports

Detailed Data

Everyone
Evolution – Double MAD!

Functionality

Monitor

Analyze

Drill thru

Adjacent Applications

Model

Advanced Analytics

Decide & Do

Detailed Data

Summarized Data

Graphical Data
Advanced Visualization
Predictive Dashboard

Customer Scorecard for Jackson Frazier

- **Churn Prediction**
  - **Recommended Action**: High Risk: Offer a new high-end phone and 500 additional minutes
  - **Churn Propensity**: 85.92%
  - **Remaining Contract Value**: $9,588.59
  - **Revenue Risk**: $9,197.22

- **Status**
  - **Revenue Risk Range**
    - High Risk: > $5,000
    - Med Risk: $3,000 - $5,000
    - Low Risk: $1,000 - $3,000
    - No Risk: < $1,000

- **Customer Revenue Details**
  - Monthly Fees: $628
  - Monthly Profit: $596
  - Lifetime Value: $3,994
  - Net Present Value: $3,994

- **Contract/Usage Details**
  - Active Months: 8 months
  - Current Months: 8 months
  - Remaining Months: 0 months
  - Renewals: 0
  - Avg Min per Month: 9,114 minutes
  - Problematic Calls: 11

- **Customer Demographics**
  - **Address**: 2050 N Center, Hawthorne, California 90250
  - **E-mail**: hrz2007@free.com
  - **Household Count**: 6
  - **Income Bracket**: >100K
  - **Marital Status**: Single
  - **Education**: Graduate
  - **Gender**: Male

Jackson Frazier has a Revenue Risk of $9,197.22 and a Remaining Contract Value of $9,588.59.
Collaborative Dashboards - Email
Collaborative Dashboards – MS Office
Collaborative Dashboards - Mobile
## User Inventory – New School

<table>
<thead>
<tr>
<th></th>
<th><strong>80% of the Time</strong></th>
<th><strong>20% of the Time</strong></th>
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</thead>
<tbody>
<tr>
<td><strong>Casual Users</strong></td>
<td></td>
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<tr>
<td>Task</td>
<td>Task</td>
<td>Task</td>
</tr>
<tr>
<td>Monitor</td>
<td>Tool</td>
<td>Tool</td>
</tr>
<tr>
<td>Analyze</td>
<td>MAD Dashboard</td>
<td>Find reports</td>
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<tr>
<td>Drill to Detail</td>
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<td>BI search</td>
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<tr>
<td><strong>Power Users</strong></td>
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<tr>
<td>Author</td>
<td>Author</td>
<td>Find reports</td>
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<tr>
<td>Plan</td>
<td>Query/Report tool</td>
<td>BI search</td>
</tr>
<tr>
<td>Analyze</td>
<td>Excel via BI</td>
<td>Create queries</td>
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<tr>
<td>Predict</td>
<td>Next-gen OLAP</td>
<td>BI search</td>
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<td></td>
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<td>Create plans</td>
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<tr>
<td><strong>Tailored Delivery</strong></td>
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<td><strong>Ad Hoc</strong></td>
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</table>
Ad hoc for Casual Users?

- Simple
- Fast
- Comprehensive
Summary

• Self-Service BI
  – Ad hoc report creation for power users
  – Ad hoc report navigation for casual users

• Tailored delivery → performance dashboards
  – Layered information systems
  – 12 KPIs, 20 dimensions per layer

• MAD Framework = best practice design

• Double MAD → future of dashboards
Mark LaRow
VP Products, MicroStrategy
Outline

Self-service

1. Traditional Ad-hoc Report Design
2. WYSIWYG Design – A Better Way

Tailored Delivery (Sandboxes)

1. Tailored Delivery – Parameterized Reporting
2. Tailored Delivery – Relational OLAP

MAD Workflow

1. MAD Framework within the BI Platform
2. MAD Framework within a Performance Dashboard
Outline

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Self-service Ad-hoc Report Design

Traditional Report Design

Users Simply Drag Objects Onto The Template To Design A Report
Self-service Ad-hoc Report Design

WYSIWYG Design Over the Web – A Better Approach

WYSIWYG-Mode Uses Microsoft Office-like Skills for Design, and Provides Instant Feedback to Design Changes

Drag-n-drop to Add New Grouping Levels

Drag-n-drop to Change the Data
- Objects on/off the Layout
- Objects on/off Embedded Tables

WYSIWYG Formatting of All Elements:
- All Text Fields/Labels
- All Attribute/Metric fields
- Borders, Colors, Shading
- Alignment/Distribution
- Spacing and Overlap
- Ruler/Snap to Grid

WYSIWYG Design of All Tables:
- Pivot and Sort
- Insert Calculations
- Insert Charts
- Add Subtotals
- Format Text
- Format Numbers
Outline

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MAD Workflow

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Advanced Parameterized Reporting
Users Can Select from a Sandbox of Attributes, Metrics, and Filters

Users Select Metrics, Attributes, and Filters each time they Run the Report.
Advanced Parameterized Reporting
Users Can Create Virtually Any Combination of Data from the Warehouse

Advanced Parameterization (Attribute and Metric Selection)
- Any Attribute (unique to ROLAP)
- Any Metric (unique to ROLAP)
- Any Aggregation (unique to ROLAP)
- Any Filter
- Any Format Auto Styles
Relational OLAP Functionality
Point-and-click ROLAP Allows Users to Dynamically Change the Data
ROLAP Drilling

Users Can Surf to New Combinations of Data Anywhere in the Warehouse

**ROLAP Drill Anywhere**
- Pivot, Page-by, Filter
- Drill Down for Greater Detail
- Drill Up for Greater Aggregation
- Drill Across to Other Dimensions
New Model for Self-service
Parameterization + ROLAP Drilling Gives Full Coverage of the Warehouse

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New Model for Self-service
After “Surfing” to the Data, User Can “Save” the New Report Design

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FROM A SINGLE REPORT DESIGN

My Reports
Save New Reports for Personal Use
New Model for Self-service

Users Can Save the New Report Designs to Shared Folders

Advanced Parameterization (Attribute and Metric Selection)
- Any Attribute (unique to ROLAP)
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ROLAP Drill Anywhere
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FROM A SINGLE REPORT DESIGN

My Reports
- Save New Reports for Personal Use

Shared Reports
- Share New Reports with Others
- Full Security Automatically Applies
New Model for Self-service
Other Users Can Access The New Report Designs

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FROM A SINGLE REPORT DESIGN

Other Users Access These New Report Designs
Pervasive security ensures that no one sees data they are not supposed to see

My Reports
Save New Reports for Personal Use

Shared Reports
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MAD Workflow
1. MAD Framework within the BI Platform
2. MAD Framework within a Performance Dashboard
1. **Monitor the KPIs**

- Look for exceptions by scanning multiple reports daily
Decision-making and BI
MAD Framework without Dashboards

1. Monitor the KPIs
   - Look for exceptions by scanning multiple reports daily

2. Analyze the Problem
   - Conduct OLAP analysis to view the problem from related dimensions to determine root cause
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3. **Investigate the Detail**
   - Look at detailed data to determine which specific area needs attention
Decision-making and BI
MAD Framework with Dashboards

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Performance Dashboards
Encapsulating the Full MAD Framework on a Single Dashboard

1. Monitor the KPIs

2. Analyze the Problem

3. Investigate the Detail

- Parameterization “Selectors” on the Dashboard
- ROLAP Slice-and-Dice on the Dashboard
- ROLAP Detailed Drilling on the Dashboard
Putting it All Together
Combining Surf-and-Save with Performance Dashboards

Users Can “Surf and Save”
Hundreds of Useful Reports
Using ROLAP Drill-anywhere
Putting it All Together
Combining Surf-and-Save with Performance Dashboards

MicroStrategy Enterprise Manager Allows You to Identify Reports That are Run Frequently Together

Shared Reports
Putting it All Together
Combining Surf-and-Save with Performance Dashboards

Combine Reports that Users Run Frequently Together into Performance Dashboards According to MAD Principles

FROM A SINGLE REPORT DEFINITION

Shared Reports
SOME NEXT STEPS

1. Visit our Website and Try our Online Dashboard Demos


3. Attend a Free Full-day Hands-on “Intro to BI” Class in a City Near You

4. Contact Us Directly
Questions??
Contact Information

• If you have further questions or comments:

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