

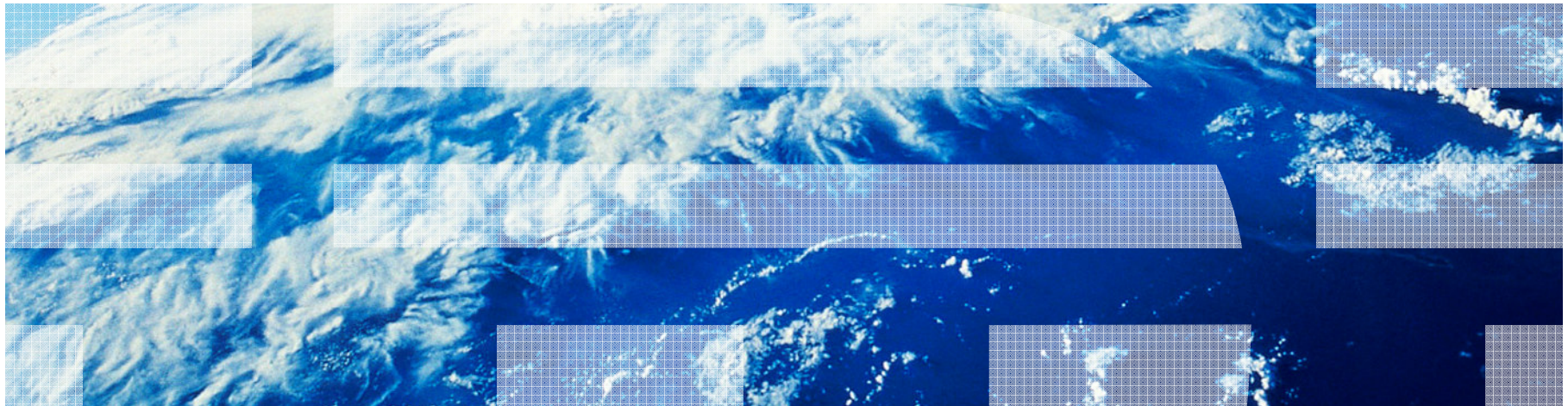
Herman Nielens – Solution Architect

Brussels – 3 March 2010

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# IBM Cognos Business Analytics Introduction for Partner Sales



**Business Analytics**

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## Agenda

- 14h00 Welcome & Registration
- 14h30 Intro
- 14h45 IBM Cognos Business Analytics:  
Essentials & Value - Part 1
- 15h45 Break
- 16h00 IBM Cognos Business Analytics:  
Essentials & Value - Part 2
- 17h00 Conclusion + Q&A
- 17h30 Networking Drink



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## What will be covered today?

- The Cognos Brand
- The Performance Management Wheel
- The IBM Cognos 8 Performance Management System
- Short Demonstration of IBM Cognos 8
- Business Intelligence IBM Cognos Sales Plays
  - Business Intelligence (BI)
  - Financial Performance Management (FPM)
  - Information Applications
  - SPSS Predictive Analytics
- Licensing Models



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## The Cognos Brand – History

A recognized industry leader and one of the largest providers of business intelligence and performance management solutions, with a global customer and partner base across all major industries

- The Consulting days (70's)
  - 1969, Cognos (Quasar) founded in Canada
  - Focus on consulting in Electronic Data Processing
- The Era of 4GL Tools (80's)
  - 1979, Introduction of QUIZ for HP3000 (End User Reporting Tool)
  - 1983, Introduction of PowerHouse (4GL Development tool; supported to-date)
  - 1983, Quasar becomes Cognos to indicate Focus on Information and Knowledge
- The Advent of Business Intelligence (90's)
  - 1990, Introduction of Cognos PowerPlay
  - 1991, Introduction of Cognos Impromptu
  - 1998, Introduction of Cognos Web Services
- The Age of Performance Management (00's)
  - 2002, Cognos Metrics Manager Released
  - 2003, Cognos ReportNet Released
  - 2003, Cognos acquires Adaytum which is the basis for Cognos Enterprise Planning
  - 2004, Cognos Acquires Frango which is the basis for Cognos Controller
  - 2007, Cognos Acquires Applix which is the basis for Cognos TM1
- The Future of Business Analytics (10's)
  - 2008, IBM acquires Cognos
  - 2009, IBM acquires SPSS
  - 2011, IBM's 100th Anniversary



# The Cognos Brand – IBM Information On Demand (IOD)

A recognized industry leader and one of the largest providers of business intelligence and performance management solutions, with a global customer and partner base across all major industries

Customer & Product Profitability    Financial Risk Insight    Workforce Optimization    Dynamic Supply Chain    Multi-Channel Marketing

**Business Optimization**

**Better Business Outcomes**

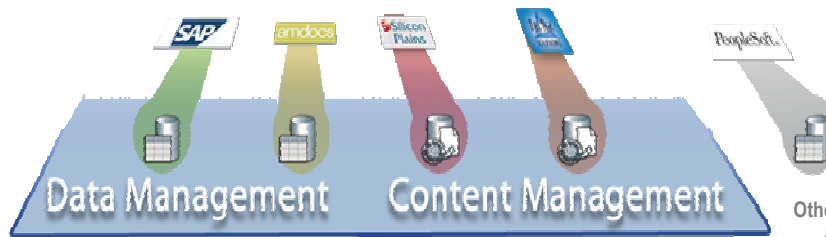


*Leverage information to better understand and optimize business performance*



*Establish accurate, trusted information for a single version of the truth, managed over time*

*Flexible Architecture for Leveraging Existing Investments*



*An efficient and solid foundation for managing data and content over its lifecycle*

Other Information & Application Sources

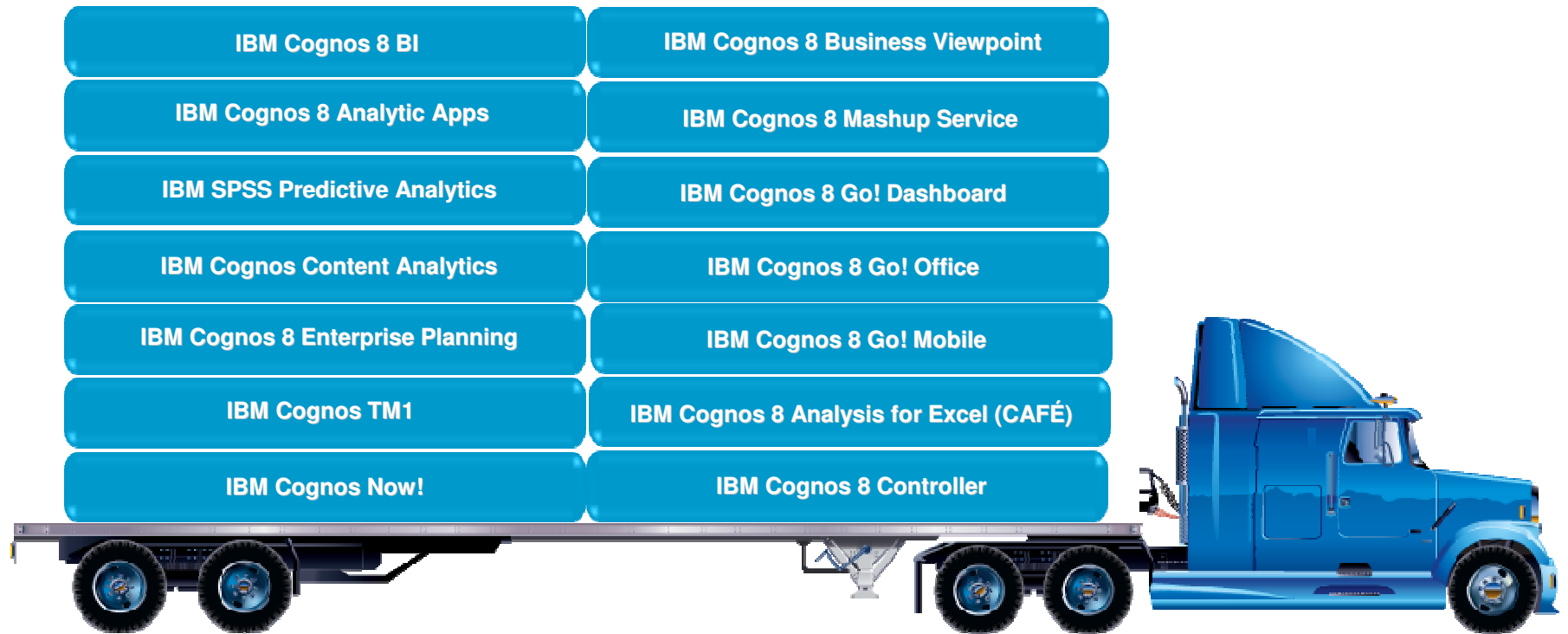
**Cognos software**



# The Cognos Brand – Our Customers



# The Cognos Brand – *What's on the Truck?*



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## What will be covered today?

- Short history about the “Cognos” Brand
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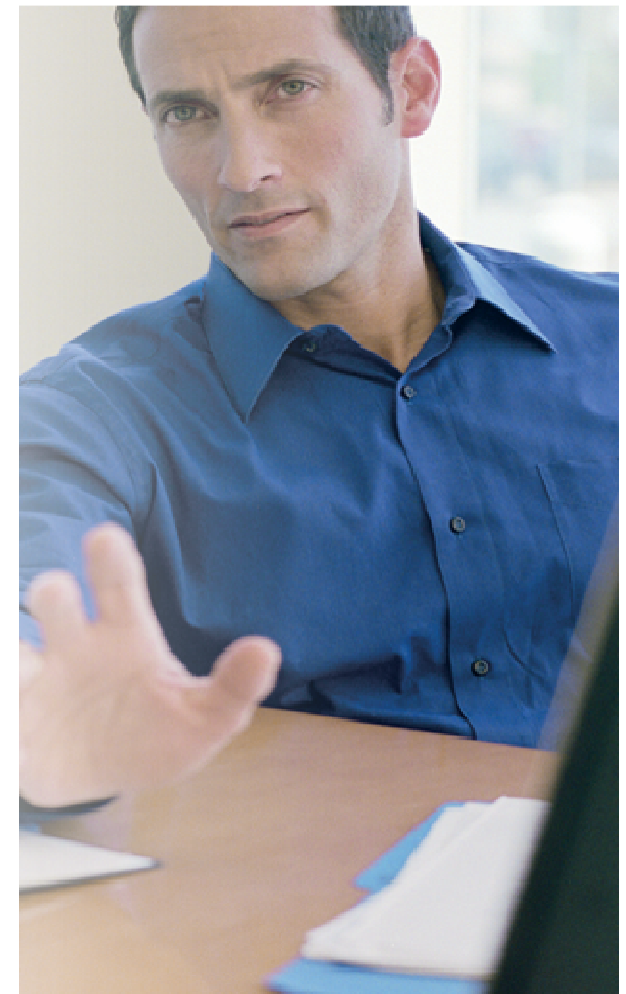
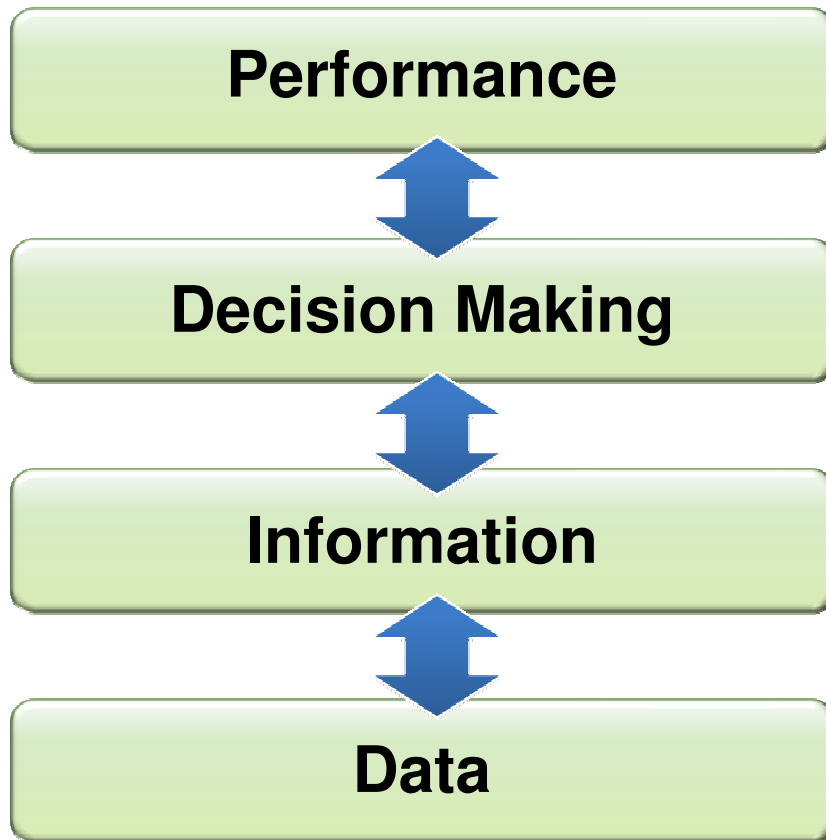
## The Performance Wheel – Key Challenges for Organizations today

With today's challenges organizations are looking for new ways to differentiate themselves from their competition and increase efficiency.

- Focus is shifting from Business Automation (Transactional; ERP Systems) to **Business Optimization**
- Organizations want to **maximize their performance** through better and faster decision making



The Performance Wheel –  
*Make Information Actionable in order to Optimize Performance*





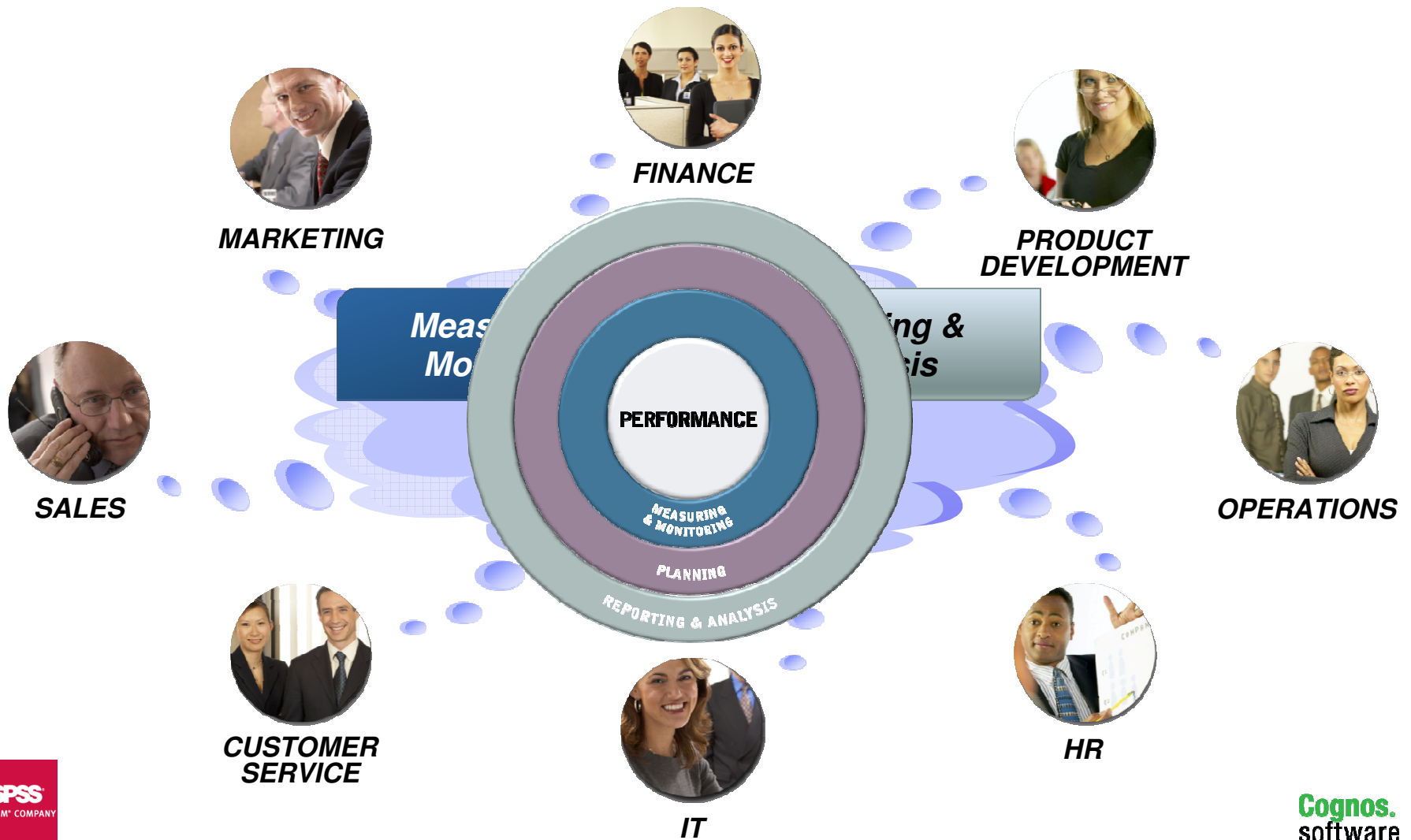
# The Performance Wheel – *Three Questions that Drive Performance*



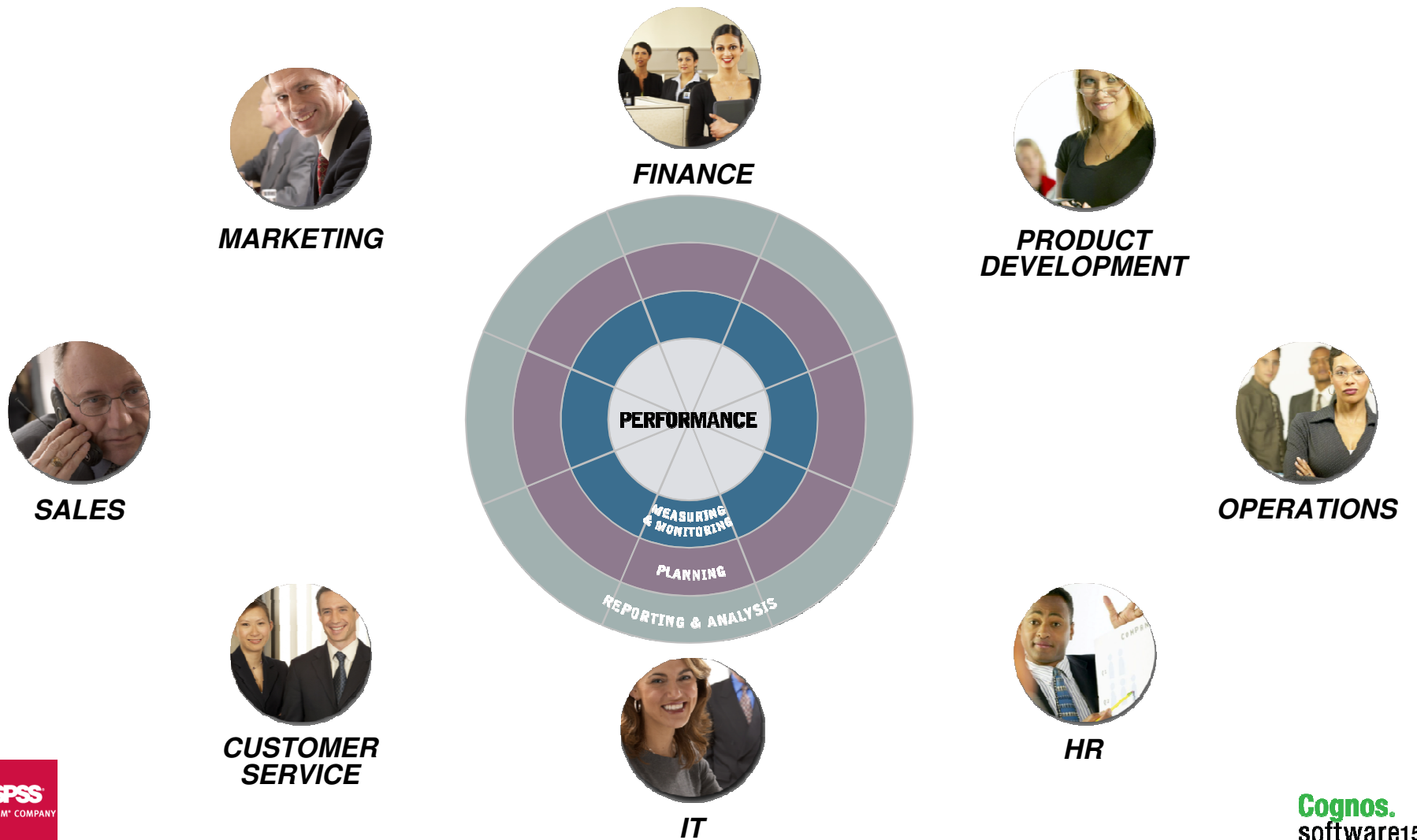
# The Performance Management Wheel – *Three Questions that Drive Performance*



# The Performance Management Wheel – *Performance Management Capabilities*



# The Performance Management Wheel – *Performance Management Capabilities*





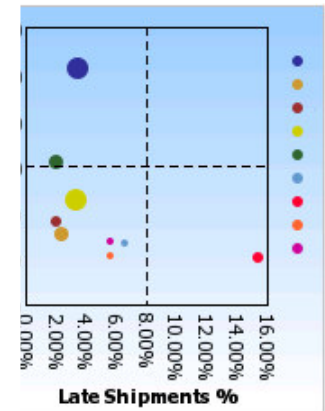
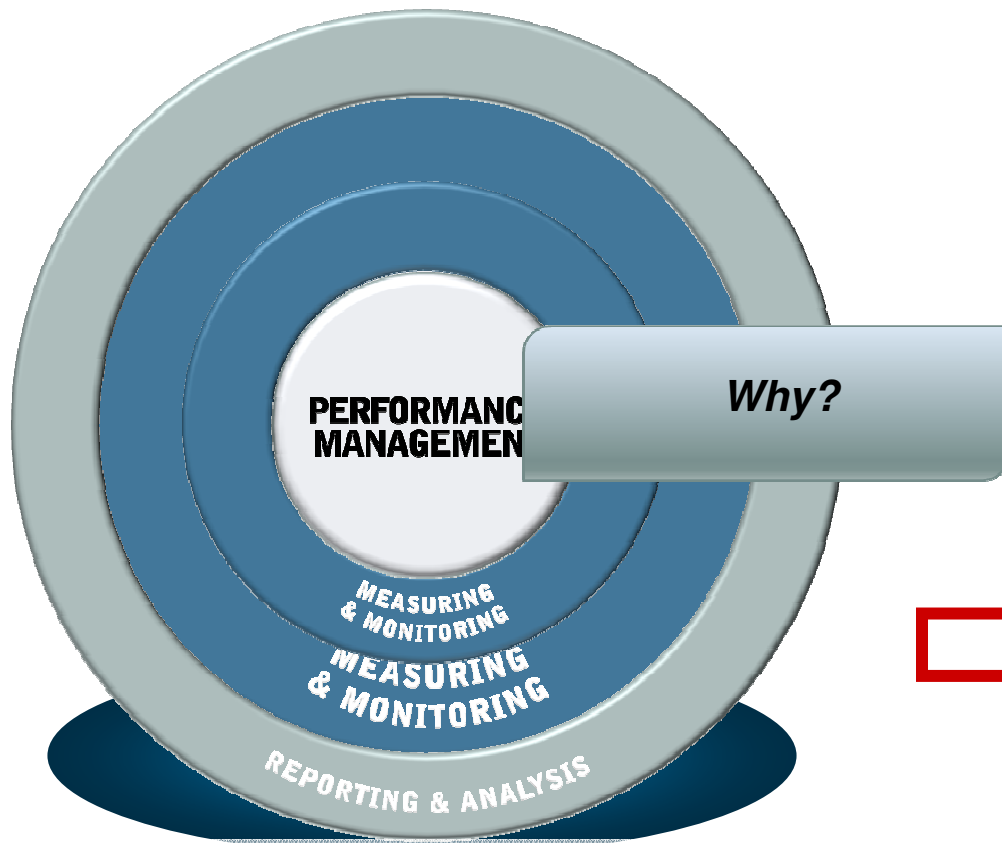
ory -



Scorecard or dashboard shows On Time Shipments below plan



*How are we doing?*



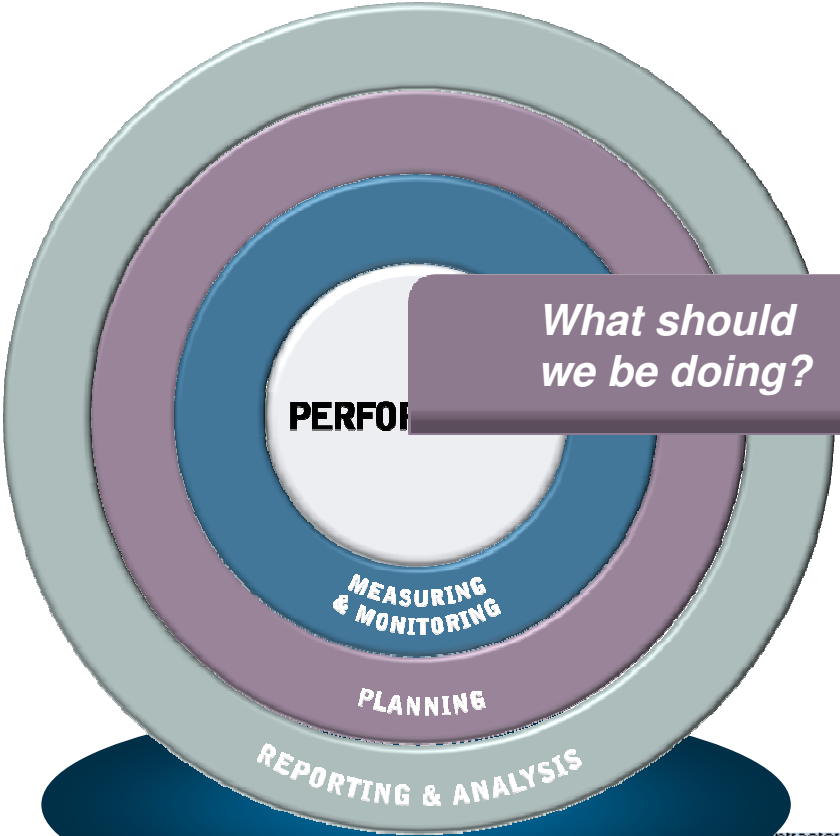
Ordered	Mat. Shortage Desc.
074,732	
521,303	
300,000	
388,867	Yes
544,732	

**Report shows production bottleneck due to Material Shortage**



*How are we doing?*

*Why?*



*What should we be doing?*


Contractor	Jul-07	Aug
	7,956	
	20.00%	
	20.00%	
	20.00%	
	20.00%	
	20.00%	
	0.00%	
	100.00%	100
	0.00%	
	0.00%	

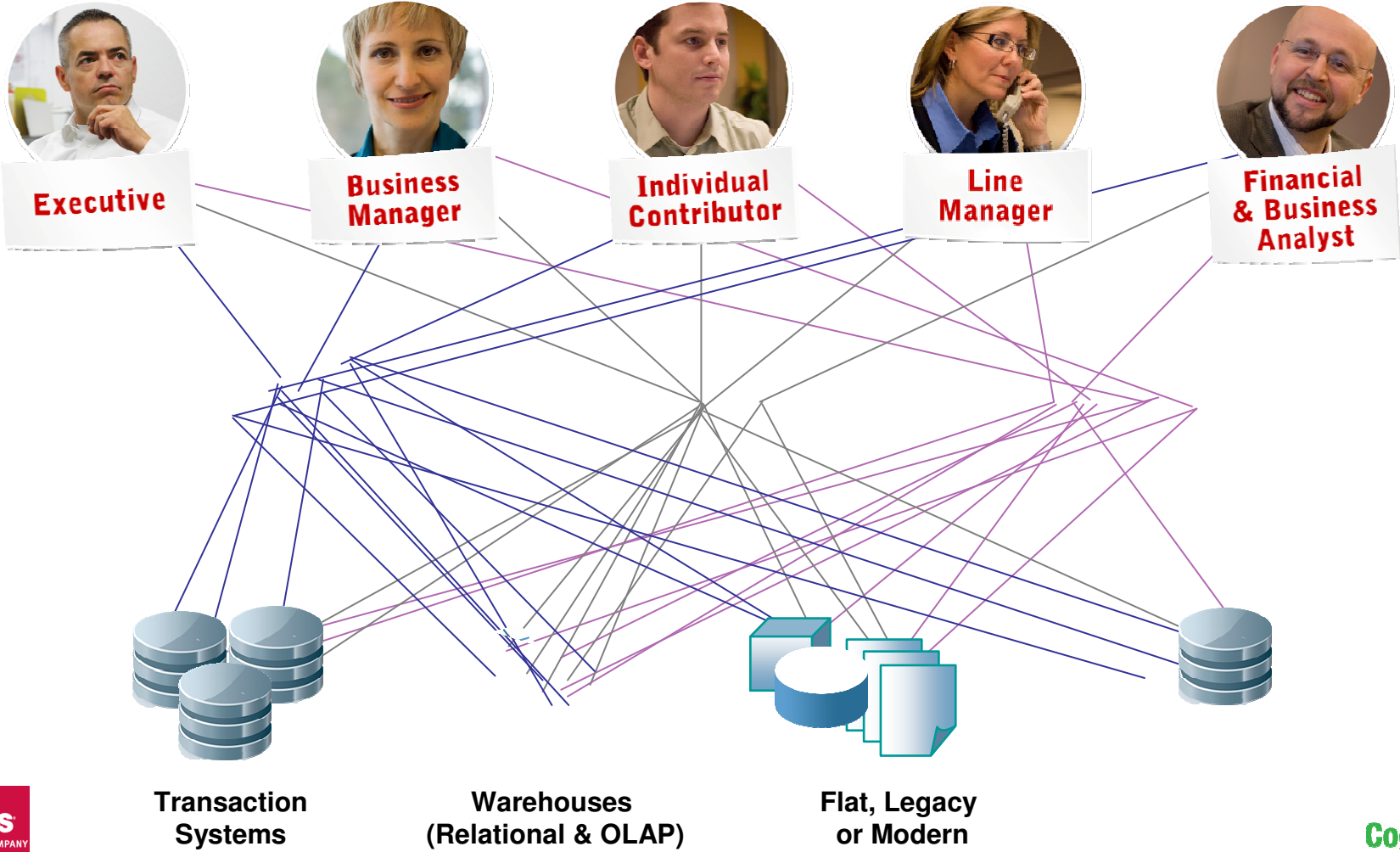
	0.00%	
	(20.00)%	(2
	0.00%	
	20.00%	
	0.00%	
	20.00%	21
	20.00%	21
	20.00%	21
	0.00%	
	20.00%	21
	20.00%	21
	100.00%	100
	1,591	
	1,591	
	1,591	
	0	
	1,591	

**Demand Volume is reviewed and Plant Production Plan is adjusted to remove bottleneck**

Contractor	1,029	1,029	1,239	1,403	1,591
AN ENR...	5,145	5,145	6,197	7,016	7,956







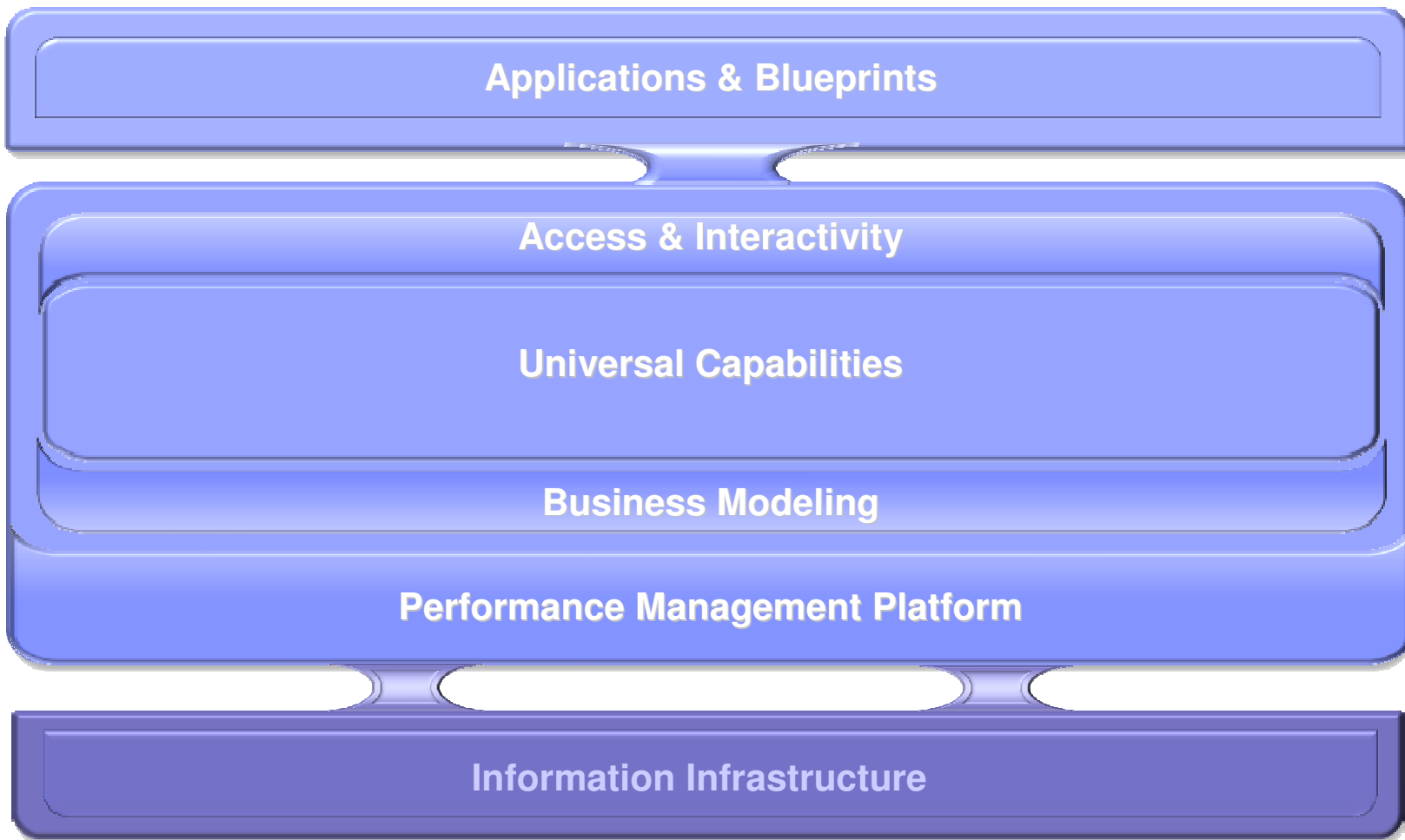
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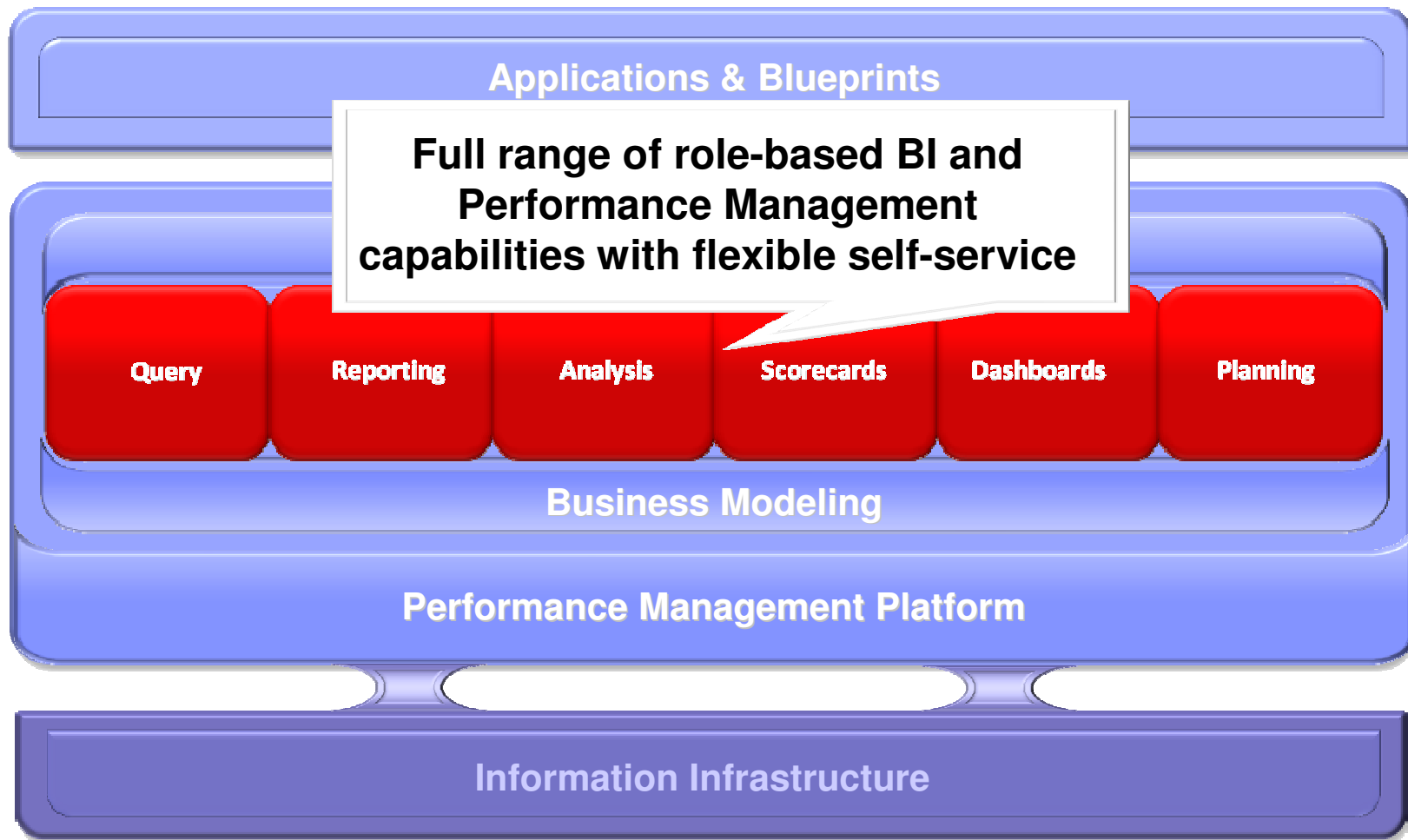
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# The Cognos 8 Performance Management System – *Value and Solution Capabilities*



# The Cognos 8 Performance Management System – Universal Capabilities

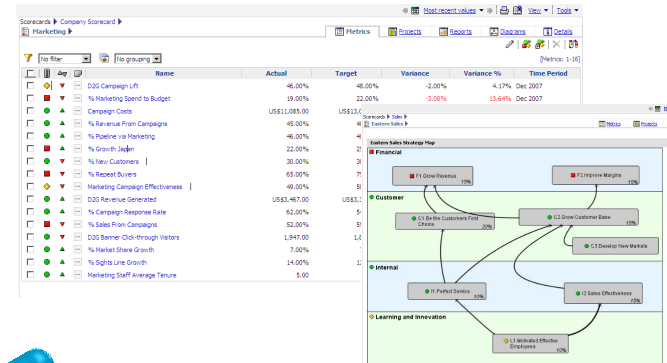


# Scorecards and Dashboards – Measuring and Monitoring to See “How” You’re Doing

## Scorecards

- Instant measurements to targets/benchmarks
- Aligns decision tactics with strategic initiatives
- Supports reporting methodologies
- Ensures ownership and accountability
- Extensive portlet support to broaden access

IBM Cognos 8 BI



## Dashboards

- Full range of dashboard styles: self-assembly views with Embedded Analytics
- Provides glance impact of complex information
- Highly visual and intuitive
- Helps focus on issues that need attention/action
- Combines information across disparate sources

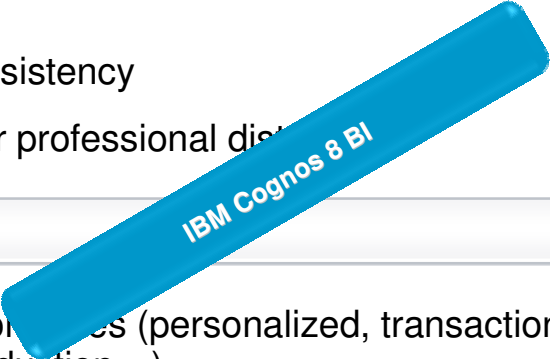
IBM Cognos 8 BI  
IBM Cognos 8 Go! Dashboard  
IBM Cognos Now!



# Query, Reporting – Showing the “How and Why” of Business Performance

## Ad-hoc Query

- Intuitive, self-service reporting
- Access to all data; drag and drop query creation
- Easy sorting and filtering
- Corporate templates for consistency
- Share ad-hoc or promote for professional distribution



## Reporting

- Provides full breadth of report types (personalized, transactional, management, statutory, production...)
- Author once, consume anywhere
- Ability to leverage all data; consistent information
- No re-authoring; ability to re-use queries, analyses, express-authored reports
- Easy access to data lineage, glossary, annotations

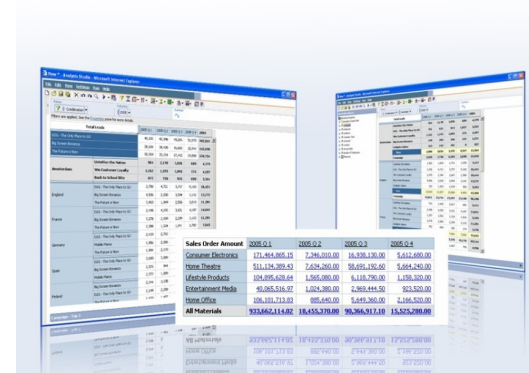


# Analysis – Understanding the “Why” of Business Performance

## Exploration and Analysis

- Compare and contrast to reveal symptoms and causes behind trends
- Flexible analysis using Web or Excel interfaces
- Personal exploration across multiple dimensions
- Summary level to detail with ease
- Ability to work disconnected

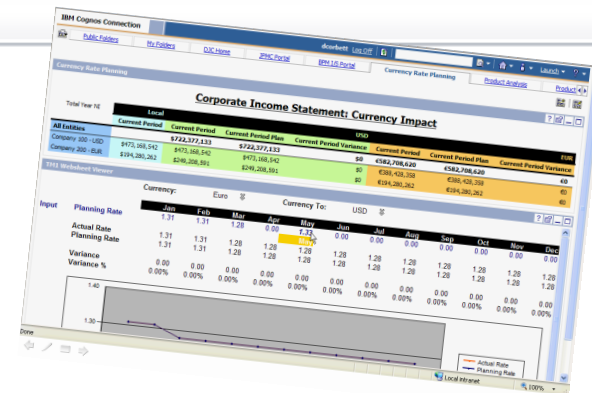
IBM Cognos 8 BI  
IBM Cognos 8 Analysis for Excel (CAFÉ)  
IBM Cognos TM1



## ‘What-if’ Scenario Modeling

- Model and compare scenarios (e.g. financial or profitability analysis)
- Flexible analysis using Web or Excel interfaces
- Reorganize, reshape information with write-back
- Tight integration of Cognos TM1 with Cognos 8

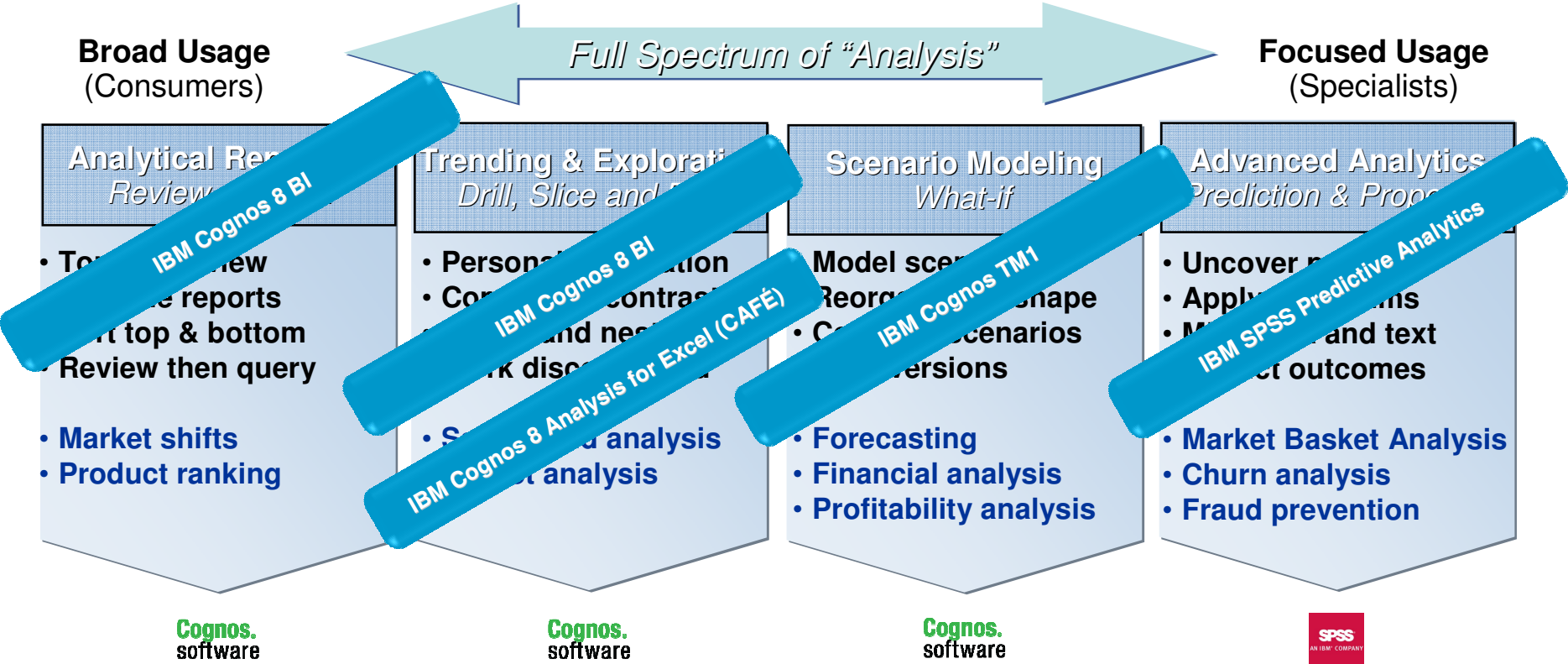
IBM Cognos TM1





# Analysis – Understanding the “Why” of Business Performance

IBM is the only one in the competitive playground of Business Analytics that provides for the full and integrated spectrum of Analysis Capabilities

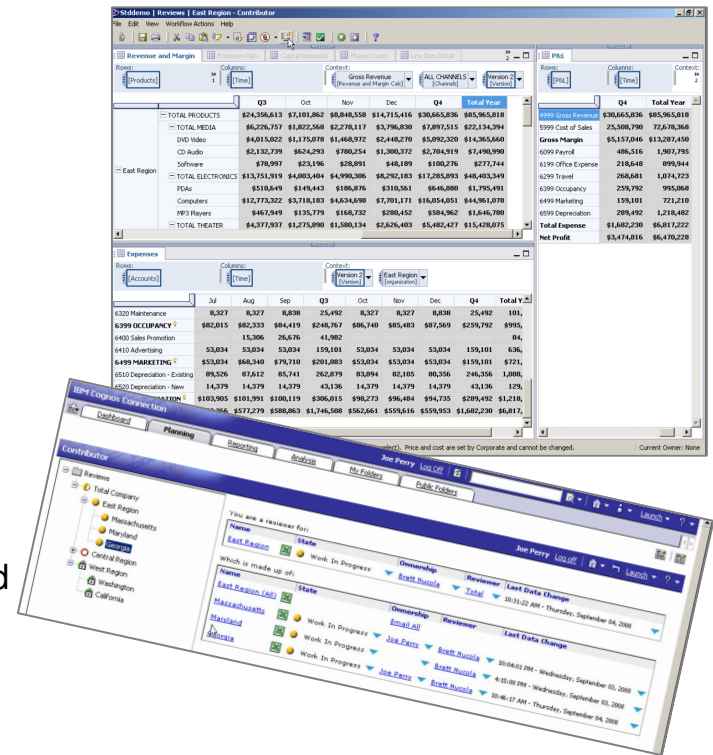


# Planning, Budgeting and Forecasting – Determining What you “Should be Doing”

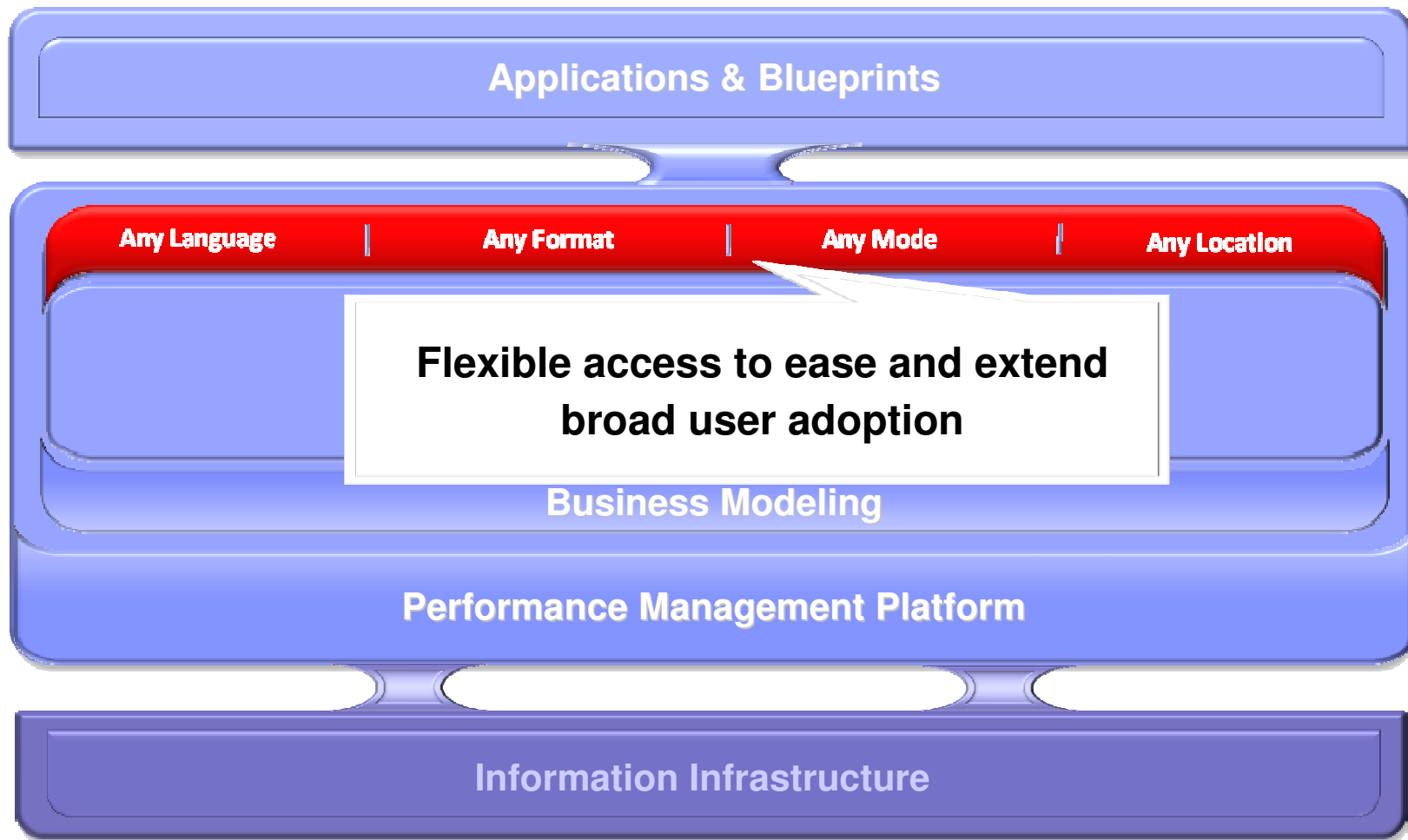
## Enterprise Planning

- Replaces spreadsheet based, manual budgeting and planning
- Connects Finance and other systems
- Enables the whole organization to make better informed decisions
- Replaces rigid, annual budgeting with continuous planning for higher responsiveness
- Supports best practices (e.g. driver based planning, rolling forecasts)
- Offers packaged best practice Blueprints for processes inside and outside of Finance across industries
- Rich client for improved user experience and personalization, and simplified deployment

IBM Cognos 8 Enterprise Planning  
IBM Cognos TM1



# The Cognos 8 Performance Management System – *Access & Interactivity*



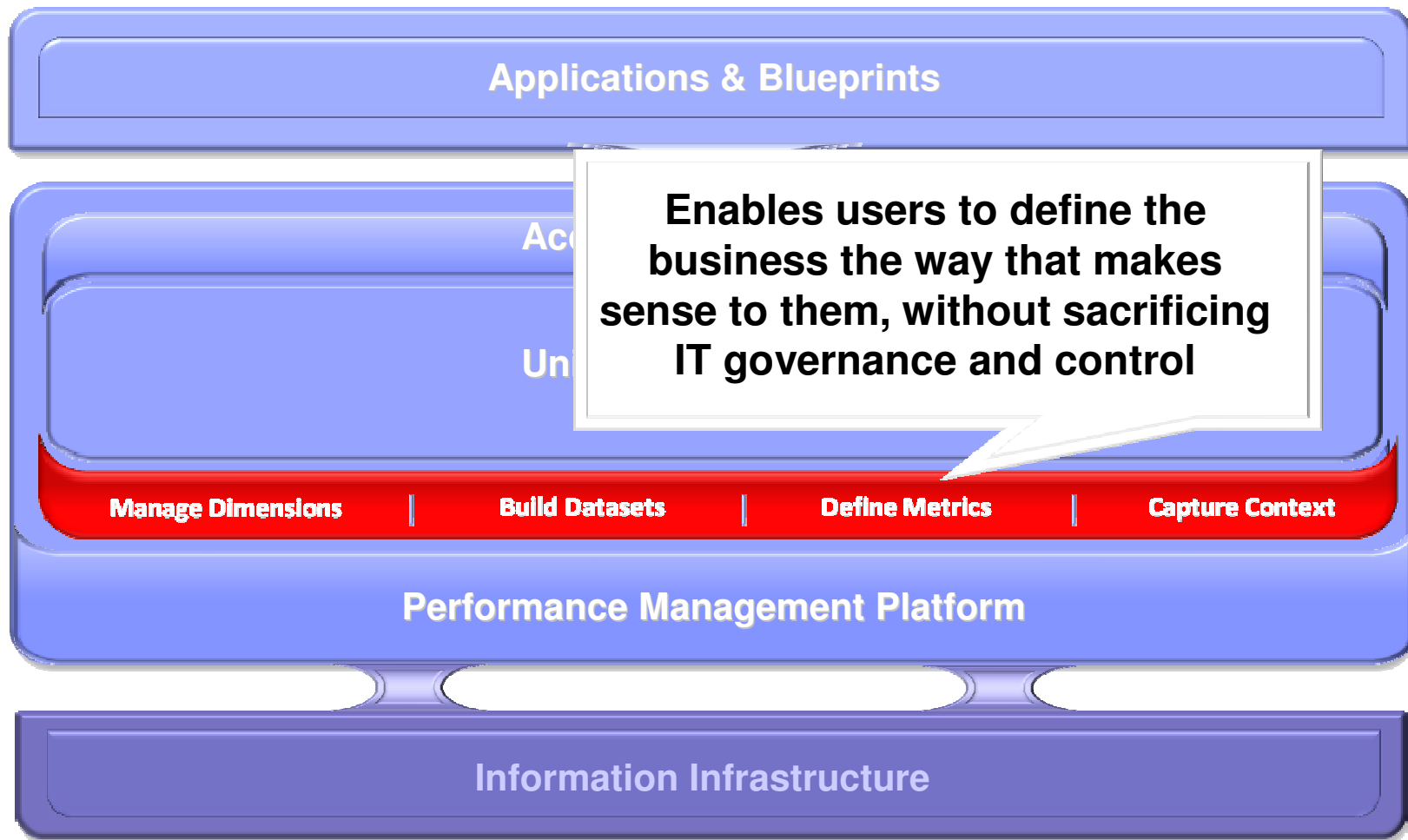
# The Cognos 8 Performance Management System – Flexible Access to Information

- Any language (robust Unicode support)
- Any format (PDF, Excel, etc.)
- Self-servicing access for personal and shared search engines and applications
- Automated delivery with scheduling, email bursting, and event-triggers
- Access from within applications; in-process; Mashups
- Access in location that best suits the user (MS Office, mobile devices, search...)

IBM Cognos 8 BI  
 IBM Cognos 8 Mashup Service  
 IBM Cognos 8 Go! Office  
 IBM Cognos 8 Go! Mobile



# The Cognos 8 Performance Management System – *Business Modeling*



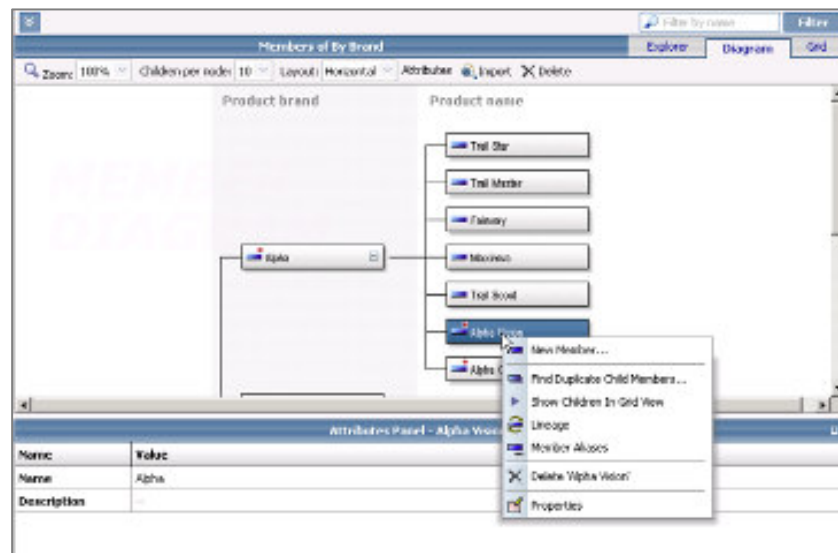
# The Cognos 8 Performance Management System – Business Modeling

- Easy to use **IBM Cognos TM1** list data sets (Cognos 8 Financials, Cognos TM1)
- Define metrics & thresholds, link metric relationships, and create initiatives (Cognos 8 Metric Designer)
- Answers to what terms mean and where the data comes from (data lineage and glossary)
- Design geographic representation of information (Map Manager)
- Dimension management (Cognos 8 Business ViewPoint)

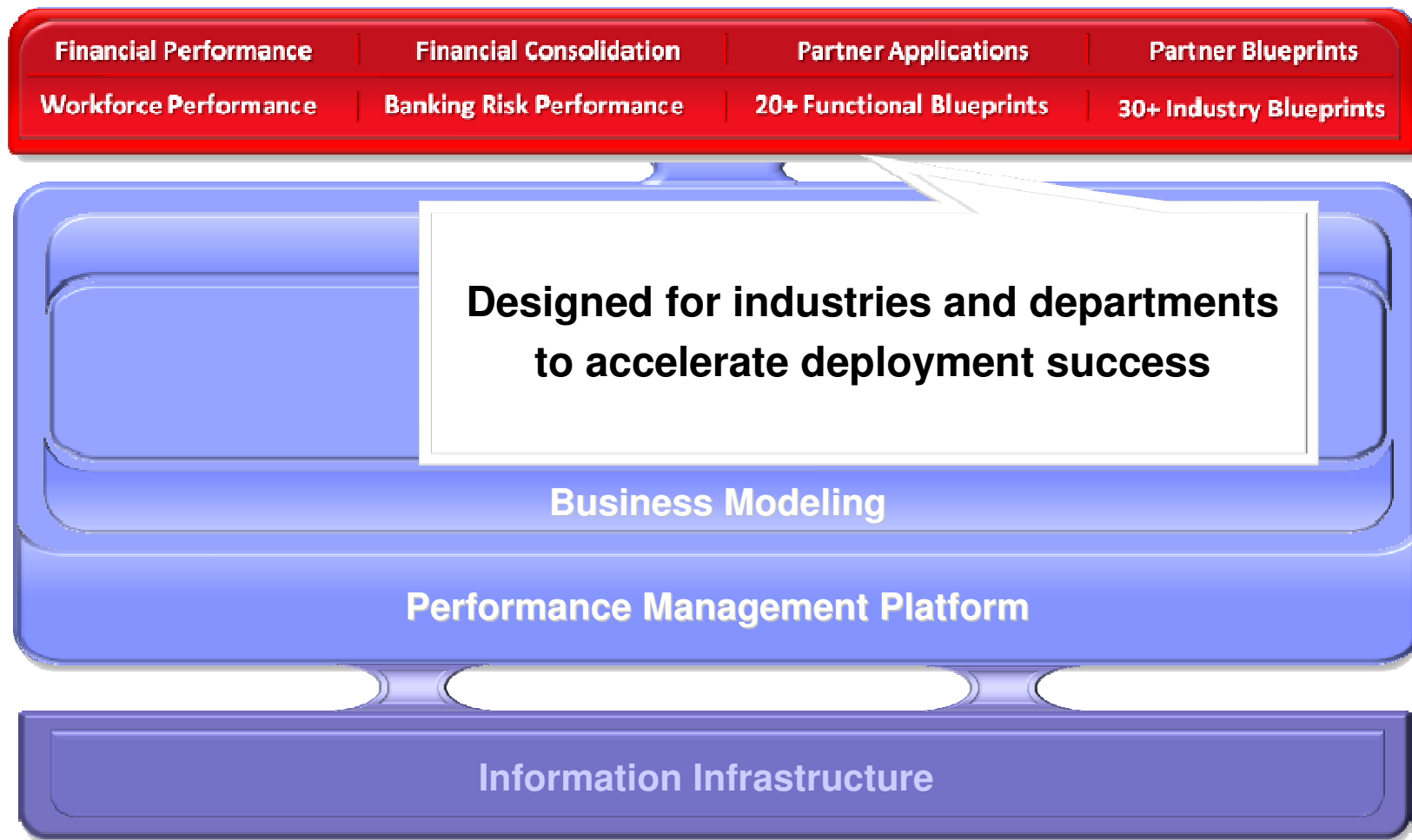
– *Create and maintain*; enable the business to capture their own current and future needs

– *Collaborate and automate*; replace manual, error-prone efforts with fully transparent, automated and efficient processes

– *Share and synchronize*; approved viewpoints across the decision-making process/systems



# The Cognos 8 Performance Management System – *Applications and Blueprints*





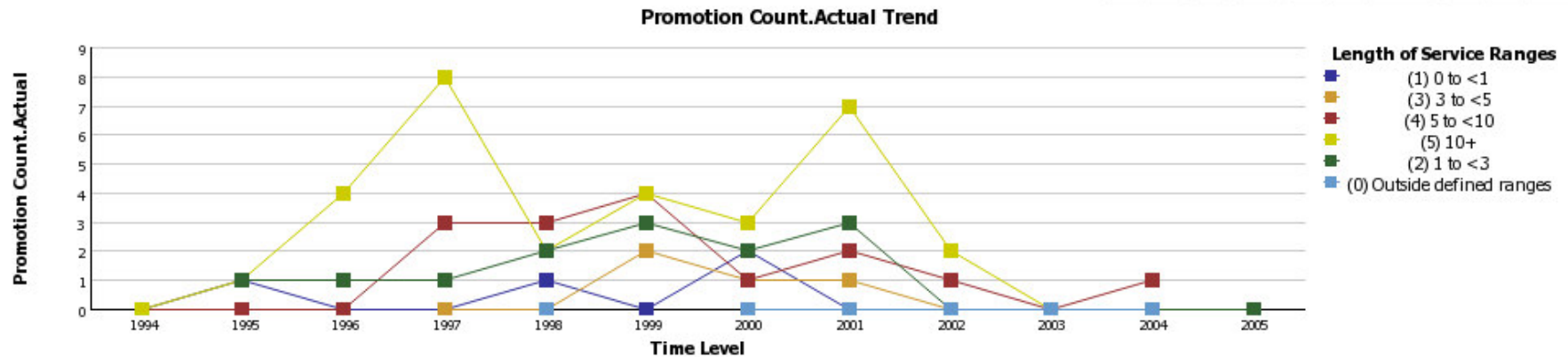
## IBM Cognos Performance Management System – *Applications and Blueprints*

- Analytic Applications
- Financial Consolidation
  - Close the books, consolidate results, report out with confidence
- Blueprints
  - Pre-built data, process and policy models based on best practices



# IBM Cognos Analytic Applications

*Value: Produce Reports Quickly with Minimal Effort*



**Promotions by Length of Service Ranges, Year (Time Trend)**

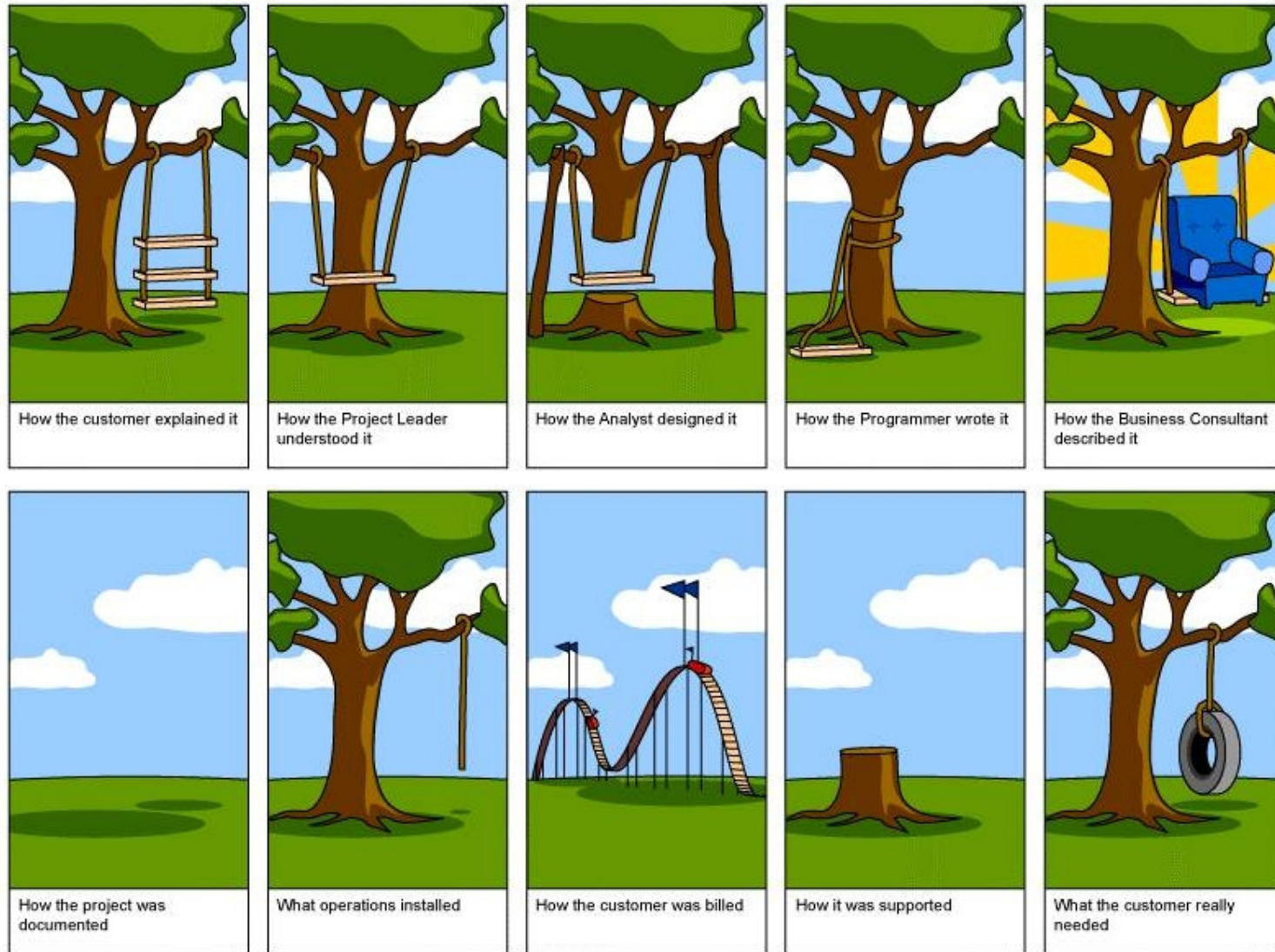
Year: 2005; Location: All; Department (Organization): All; Job Function: All; Employee Age Ranges: All; Length of Service Ranges: All; Dimension Perspective: 2;

Promotion Count	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	Row Total(s)
(0) Outside defined ranges					0		0	0	0	0	0		0
(1) 0 to <1	0	1	0	0	1	0	2	0	0	0	0	0	4
(2) 1 to <3		1	1	1	2	3	2	3	0	0	0	0	13
(3) 3 to <5	0	0		0	0	2	1	1	0	0	0		4
(4) 5 to <10	0	0	0	3	3	4	1	2	1	0	1		15
(5) 10+	0	1	4	8	2	4	3	7	2	0	0	0	31
<b>Column Total(s)</b>	<b>0</b>	<b>3</b>	<b>5</b>	<b>12</b>	<b>8</b>	<b>13</b>	<b>9</b>	<b>13</b>	<b>3</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>67</b>



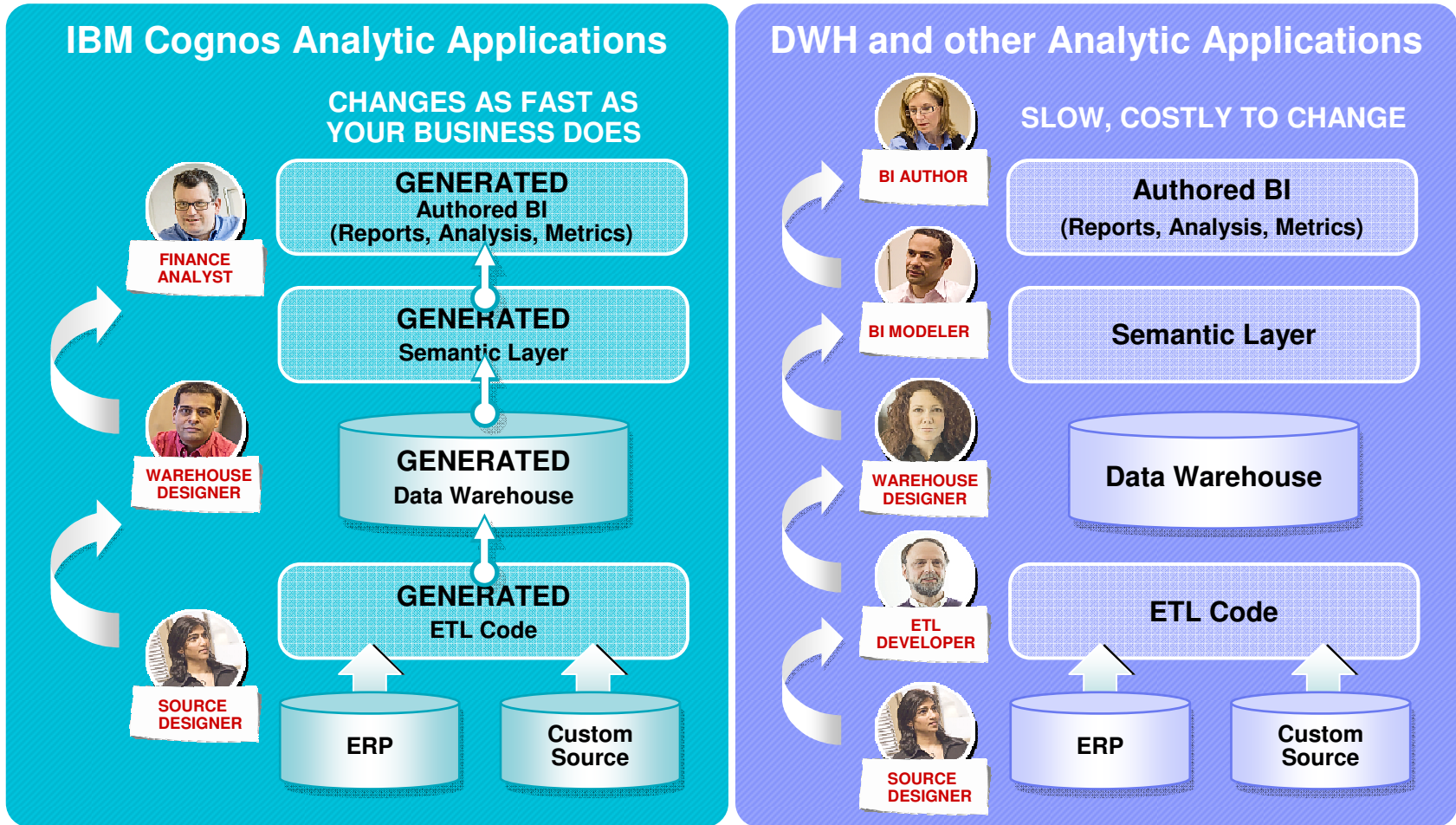
# IBM Cognos Analytic Applications

*Avoid the risks that cause many Data Warehouse Projects to fail*

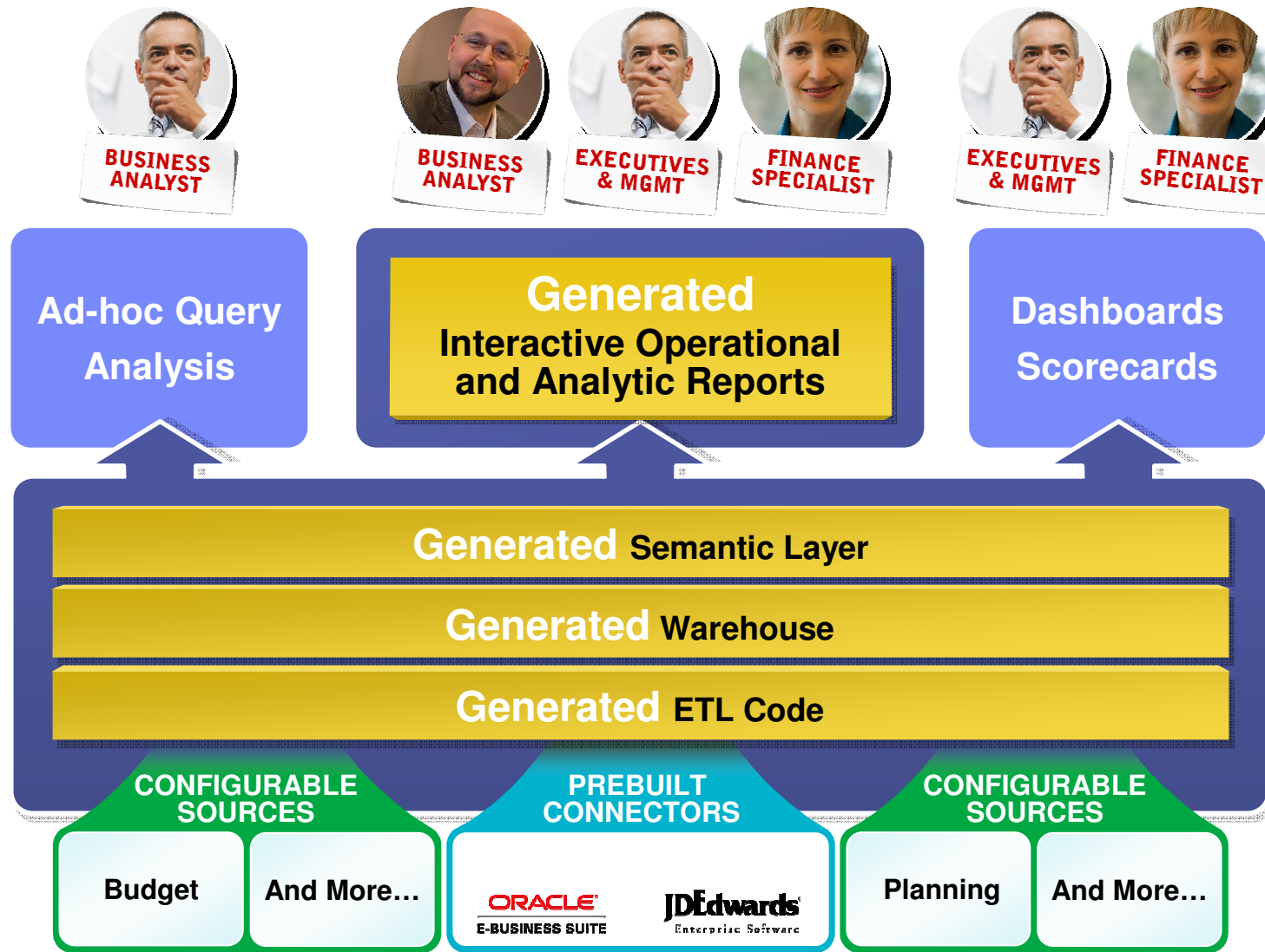


# IBM Cognos Analytic Applications

*Difference in approach leads to faster deployment*



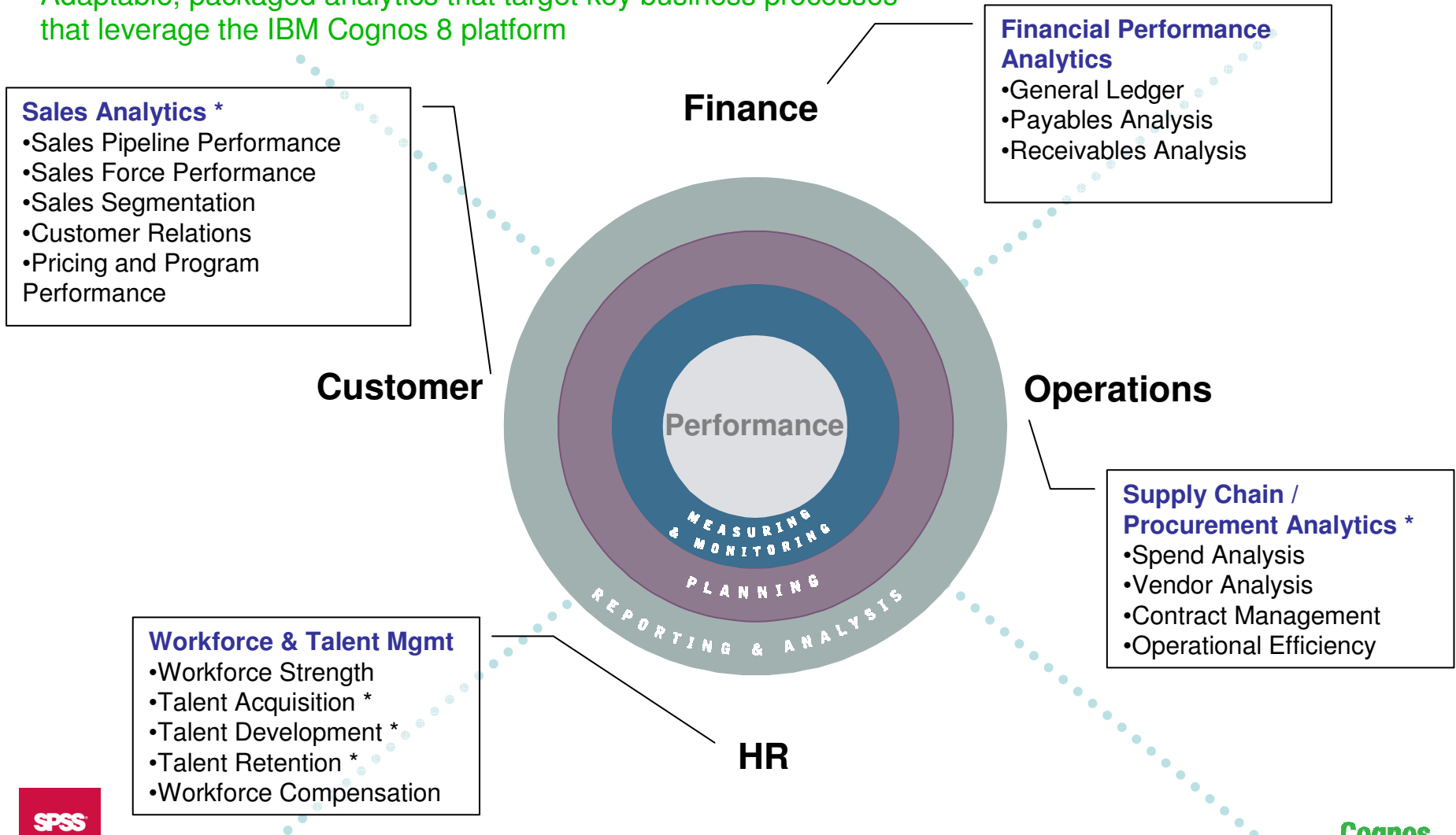
# The Advantage





# IBM Cognos Analytic Applications

Adaptable, packaged analytics that target key business processes that leverage the IBM Cognos 8 platform

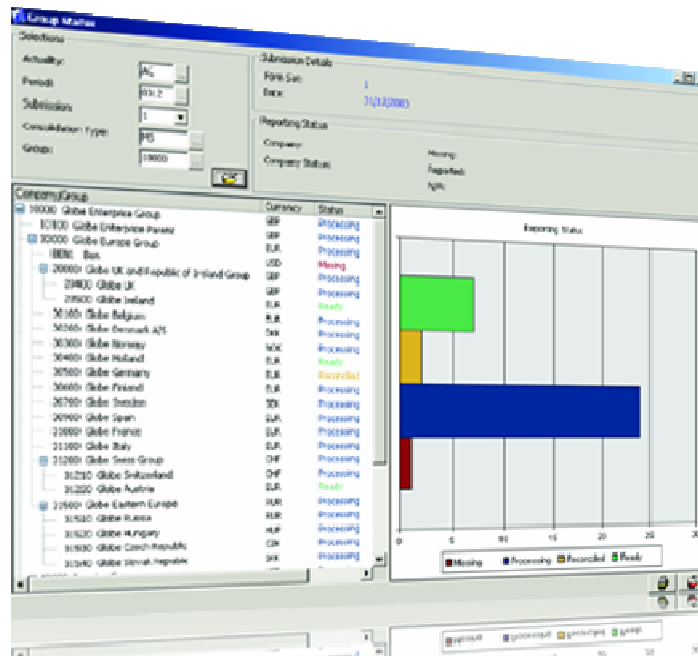


\* New Applications just released



# Financial Consolidation – IBM Cognos Controller

Report to external stakeholders with confidence



- Replaces manual spreadsheet-only or legacy consolidation solutions
- Improves the cycle times to ensure a timely close
- Minimizes errors and improves data quality during the closing process
- Accelerates the deliver of financial information to business stakeholders
- Ensure better controls around the consolidation process to ensure compliance

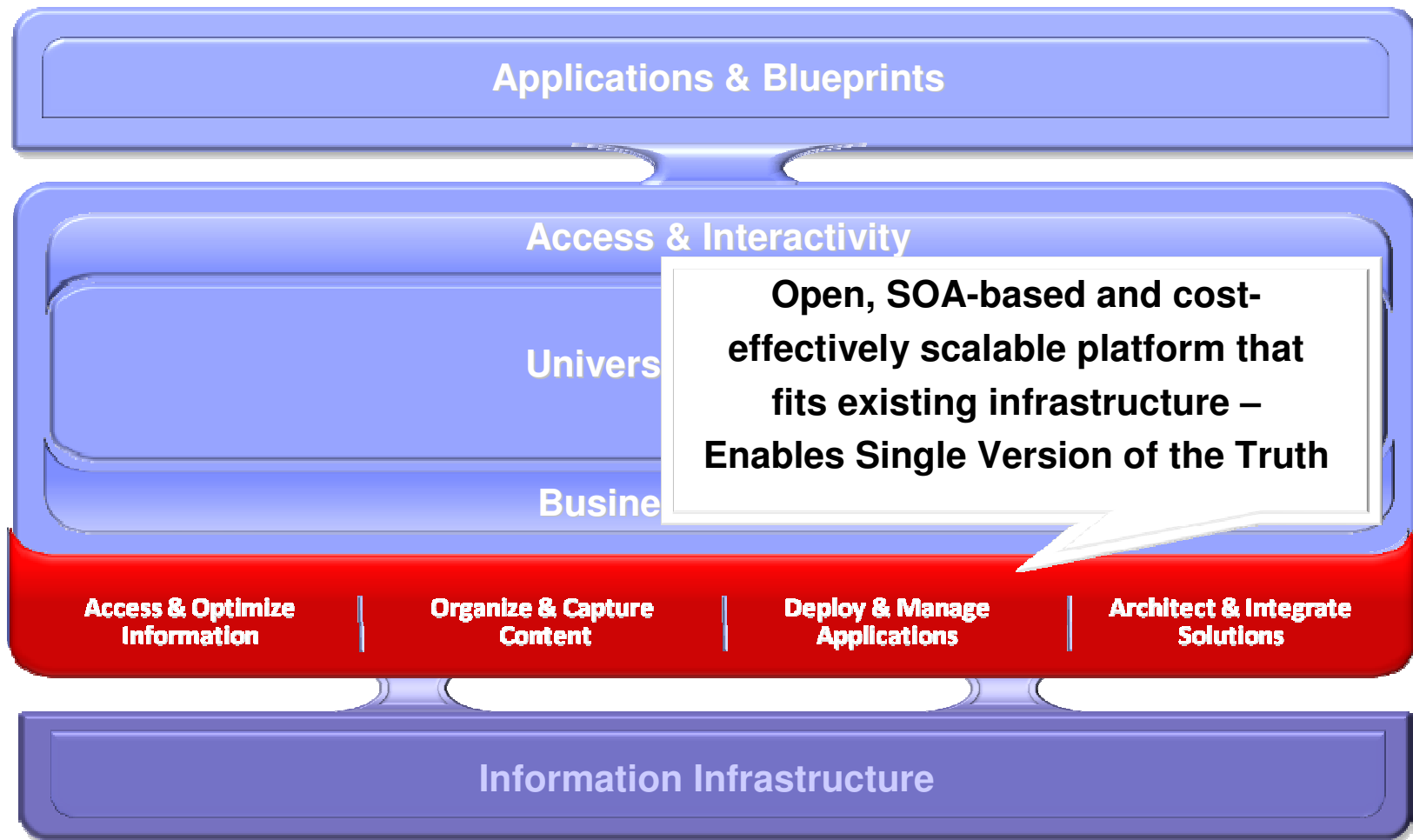


# Cognos Blueprints

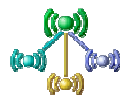
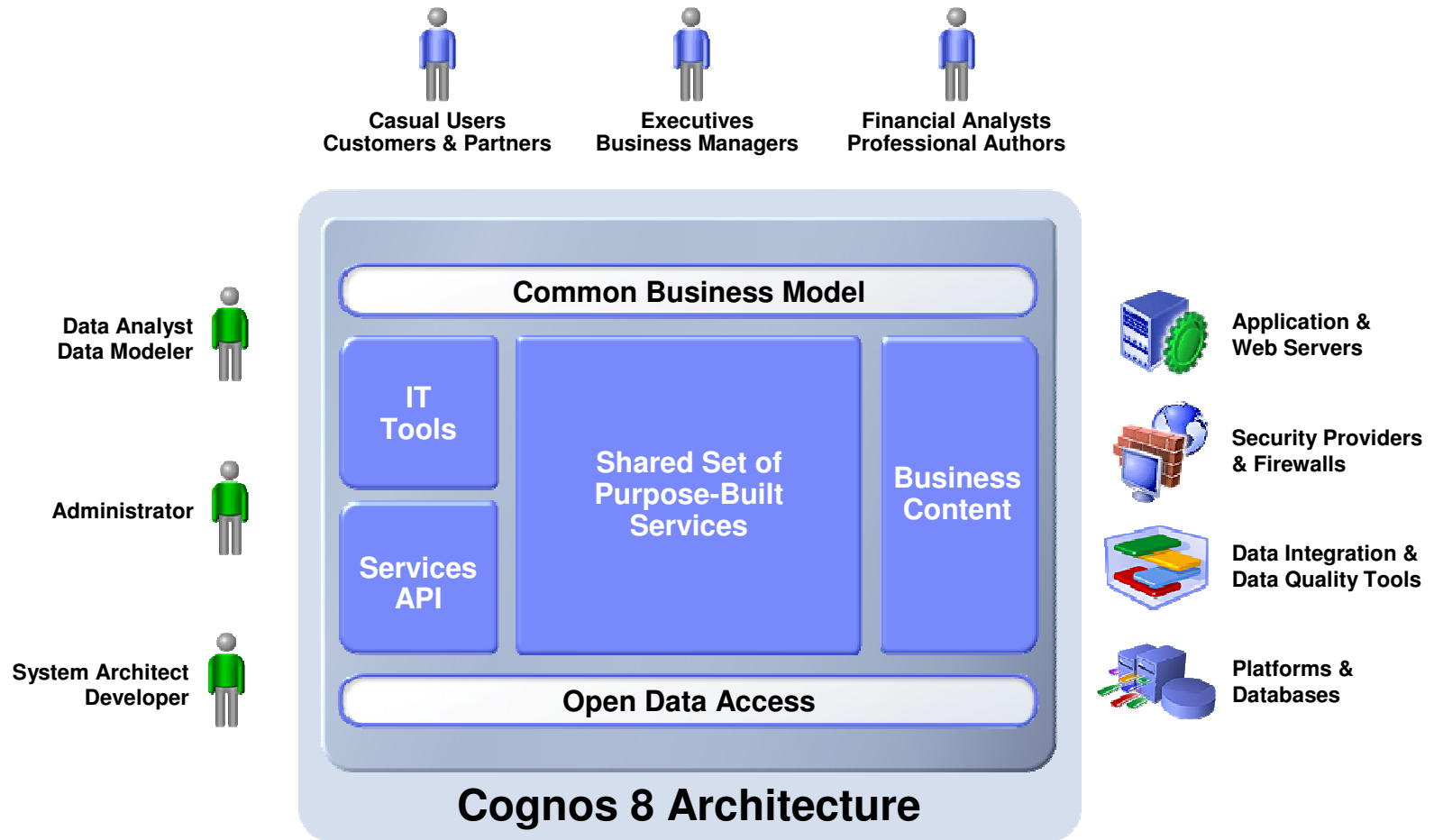




# The Cognos 8 Performance Management System – The Platform Infrastructure



# The Cognos 8 Performance Management System – The Platform Infrastructure High-Level Architecture



Message Sources



Relational Sources



Application Sources



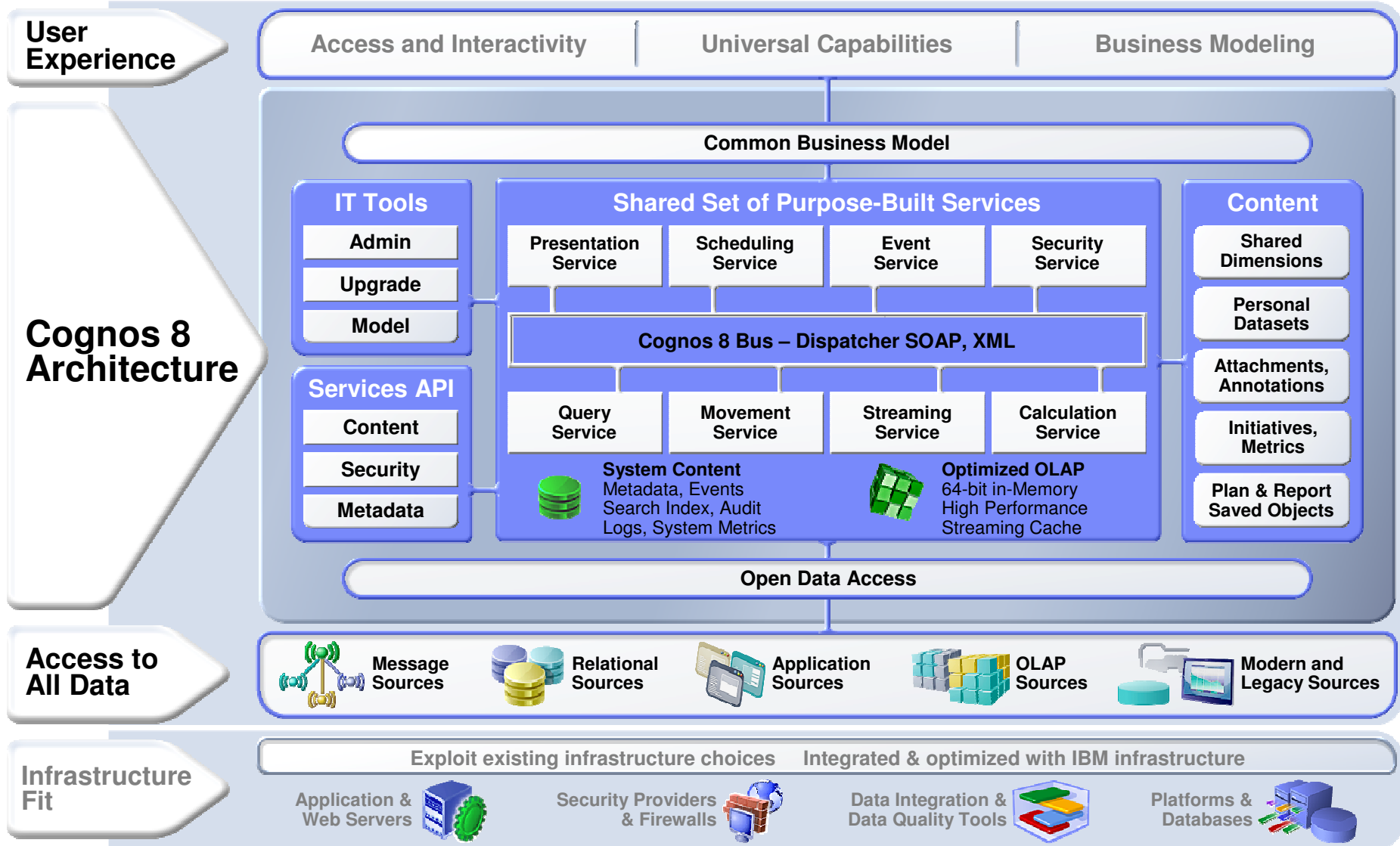
OLAP Sources



Modern and Legacy Sources

**Cognos.**  
software

# The Cognos 8 Performance Management System – The Platform Infrastructure Detailed Architecture



# The Cognos 8 Platform easily Integrates with Existing Environments

<b>Interoperable and Extensible</b>		<b>Environments</b> <i>(Simultaneously available)</i>	
<b>Standards</b>	SOAP, XML, WSDL, HTTP(S), OMG CWM, XML/XMI, WSRP, REST	<b>App Servers</b>	Any J2EE application server Apache Tomcat (incl.), IBM webSphere, SAP NetWeaver, BEA WebLogic, Oracle Application Server 10G
<b>Extend</b>	Open, Web Services API to programming language of choice including Java, Microsoft .NET Framework, COM & Perl	<b>Operating Systems</b>	Any combination of Windows, Unix or LINUX (RedHat)
<b>Embed</b>	Industry Standard Portals including IBM, SAP, Plumtree, WRSP Enterprise Search, BPM, Office, 3 <sup>rd</sup> party Applications	<b>Platforms</b>	Intel, AIX, HP/UX, Solaris
<b>Security</b>	Any combination of LDAP, NTLM, Active Directory, Netegrity, SAP, Cognos 7, custom	<b>Routers/Firewalls</b>	All standard gateways supported

## Cognos 8 Platform

<b>Metadata Integration</b>		<b>Open Data Access</b>	
<b>Modeling tools</b>	CA ERwin, Oracle Designer, Business Objects Designer, Sybase PowerDesigner, CA COOL, Rational Rose, XML/XMI, OMG CWM	<b>Relational</b>	IBM DB2 UDB, Oracle, Microsoft SQL Server, Teradata, other...
<b>ETL &amp; EII</b>	Cognos Data Manager, Informatica PowerCenter, IBM Information Server (Ascential) Metabroker, Composite, IBM II	<b>Modern</b>	XML, WSDL, LDAP, JDBC, JDBC...
<b>Source catalogs</b>	Relational databases, ERP	<b>ERP</b>	SAP, PeopleSoft, Oracle, Siebel, salesforce...
		<b>OLAP</b>	PowerCubes: High Performance Dimensional Cache Industry Standard OLAP Providers: Microsoft, IBM, SAP, Essbase

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## IBM Cognos 8 Demonstration

Focus on VALUE, not on Features and Functions

- A Demo is almost never the first thing in engaging the customer...
- First qualify his pain, so you can demonstrate that IBM Cognos can cure this pain...



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The traditional Cognos Sales Plays –  
*Either BI led or FPM led*





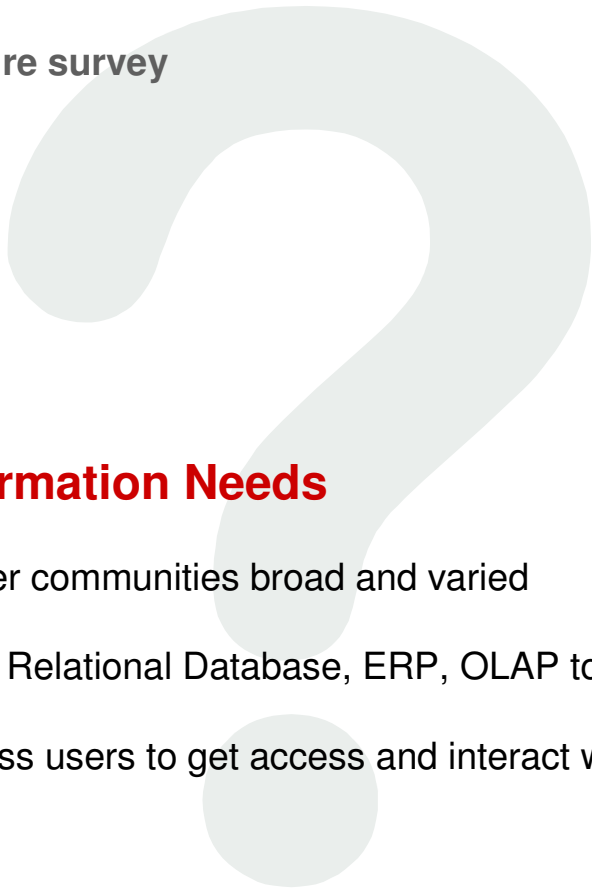
## BI Sales Play – *What to listen for when talking to the Customer?*

### ■ **Line of Business Pain Points** Source: Recent Accenture survey

- 47% of users don't have confidence in their information
- 59% say they missed information they should have used
- 42% of managers use wrong information at least once a week
- 25% user adoption within organizations
- 95% of the typical workforce does not understand the strategy

### ■ **IT Challenges supporting the Organization's Information Needs**

- Too many IT resources and costly tools to support the large user communities broad and varied information needs
- Inability to access data from all existing IT data assets, such as Relational Database, ERP, OLAP to provide visibility across the business
- Existing tools are too IT extensive and don't easily allow business users to get access and interact with their own reports and analysis
- Too many BI costly tools that are not realizing full ROI

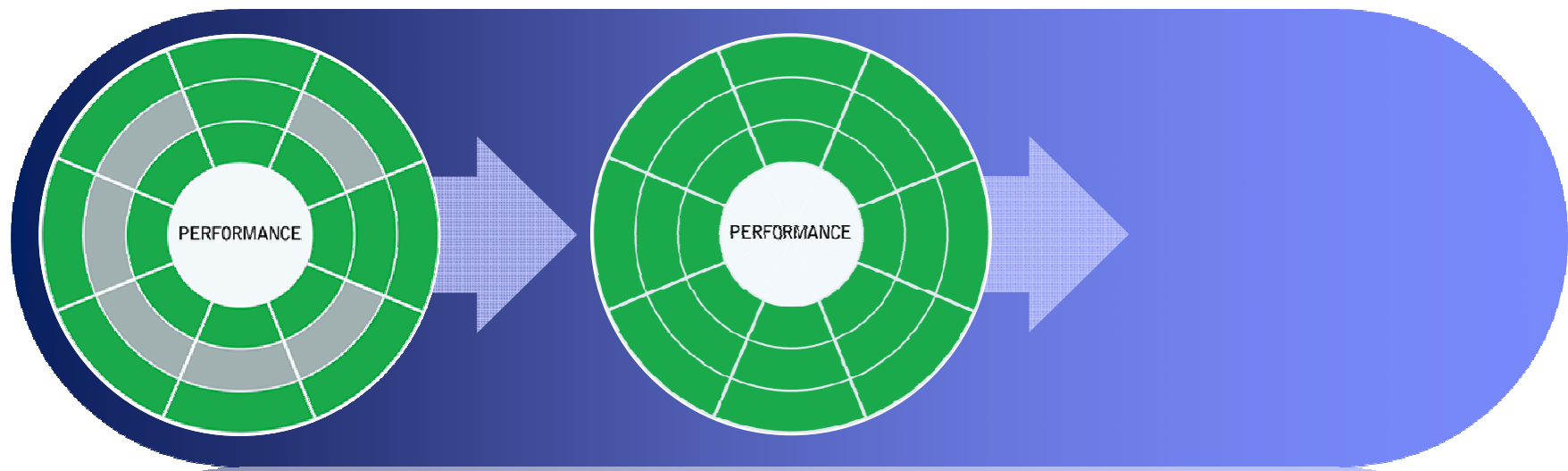


# BI Sales Play – *Start Anywhere and Get Value at Each Step*

*Departmental BI Applications*

*Driver-Based Planning*

*Coordinated Decision Making*



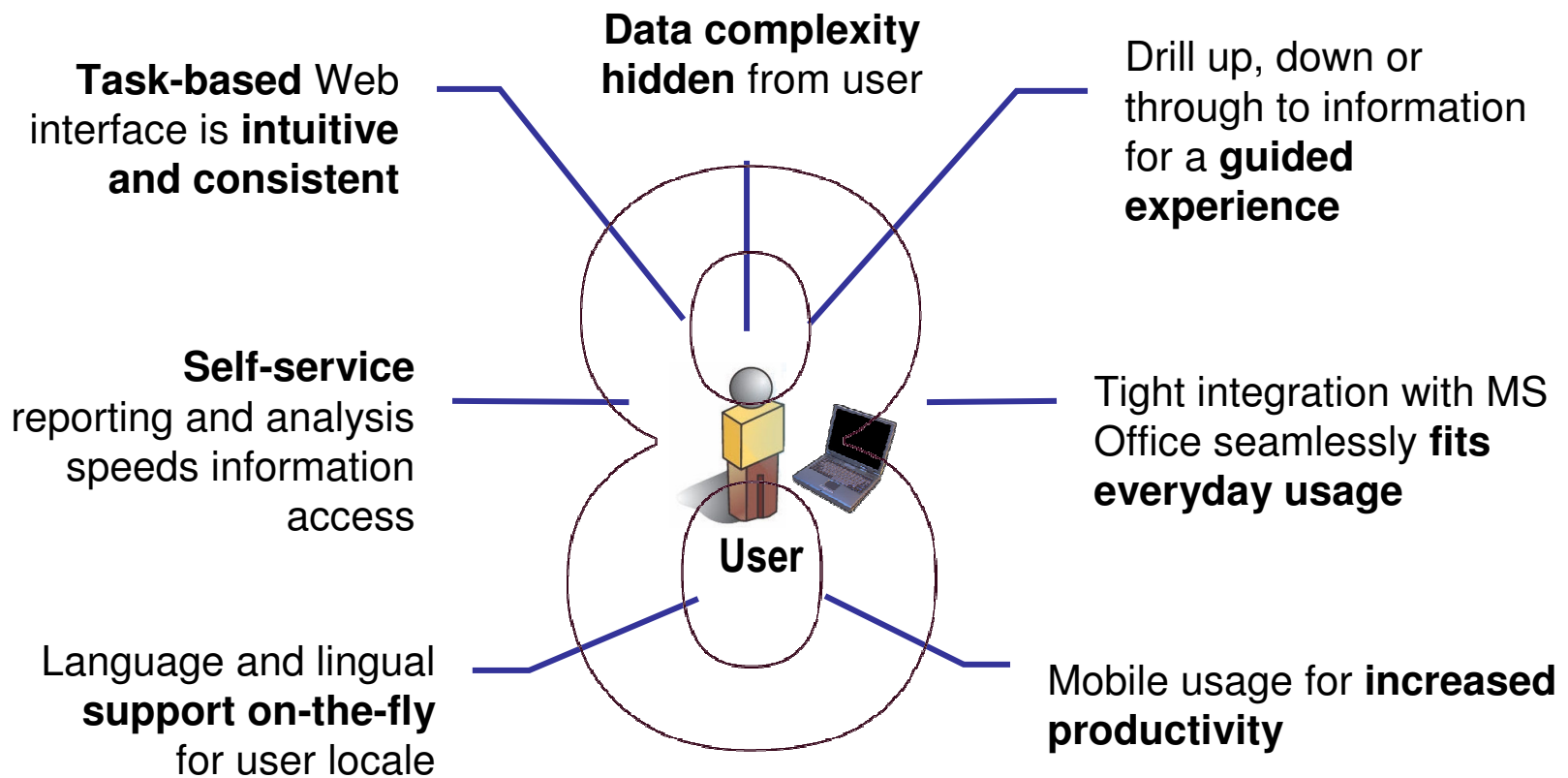
## BI Sales Play – *Typical First Agenda*



- Reporting-led business intelligence initiatives provide a proven, pragmatic approach to implement Performance Management
- Initial focus is on meeting the organizations' reporting needs
- Most organizations are still in stage 1 or 2 in their journey but recognize the need to move to 3 and 4

# BI Sales Play – *Usability in Cognos 8 BI is Key*

IBM Cognos 8 BI Lowers training and support costs, and enables broad user adoption



## FPM Play – *What to listen for? – Finance Function Faces Challenges*

### **Spreadsheets Failing**

*“There have been well-documented cases of errors and losses resulting from spreadsheet manipulation errors and accidents.”*

Source: Gartner, August 2007

### **Disparate Systems**

*“The information I need for my day-to-day analysis, consolidation and financial reporting needs sits in many different source systems. We are wasting time trying to collate the necessary information instead of spending time analyzing it...”*

### **Business Risks**

*“62 percent of enterprises encountered a major risk event ...  
... 42 % of these enterprises were not well prepared for the event.”*

Source: IBM Global CFO Study 2008



## FPM Play – *Finance Function Makes a Difference*

### Driving Performance

*“68% anticipate serving as the performance management experts for the rest of the company.”*

Source: CFO Research, 2008

### ...Enterprise Rewards

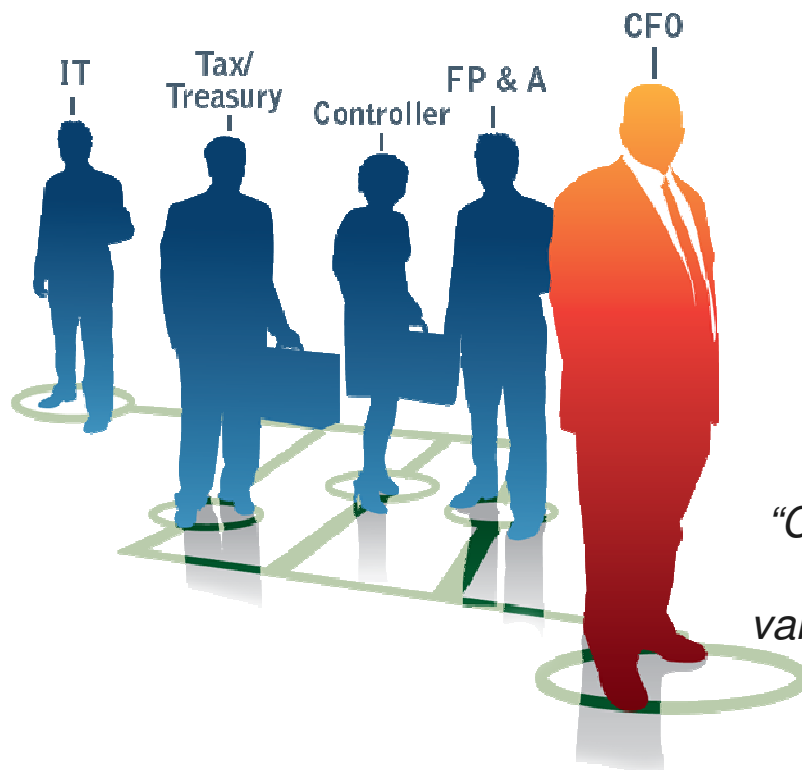
*“World-class EPM organizations deliver 2.4 times the equity market returns of industry-peers companies.”*

Source: Hackett Group, 2008

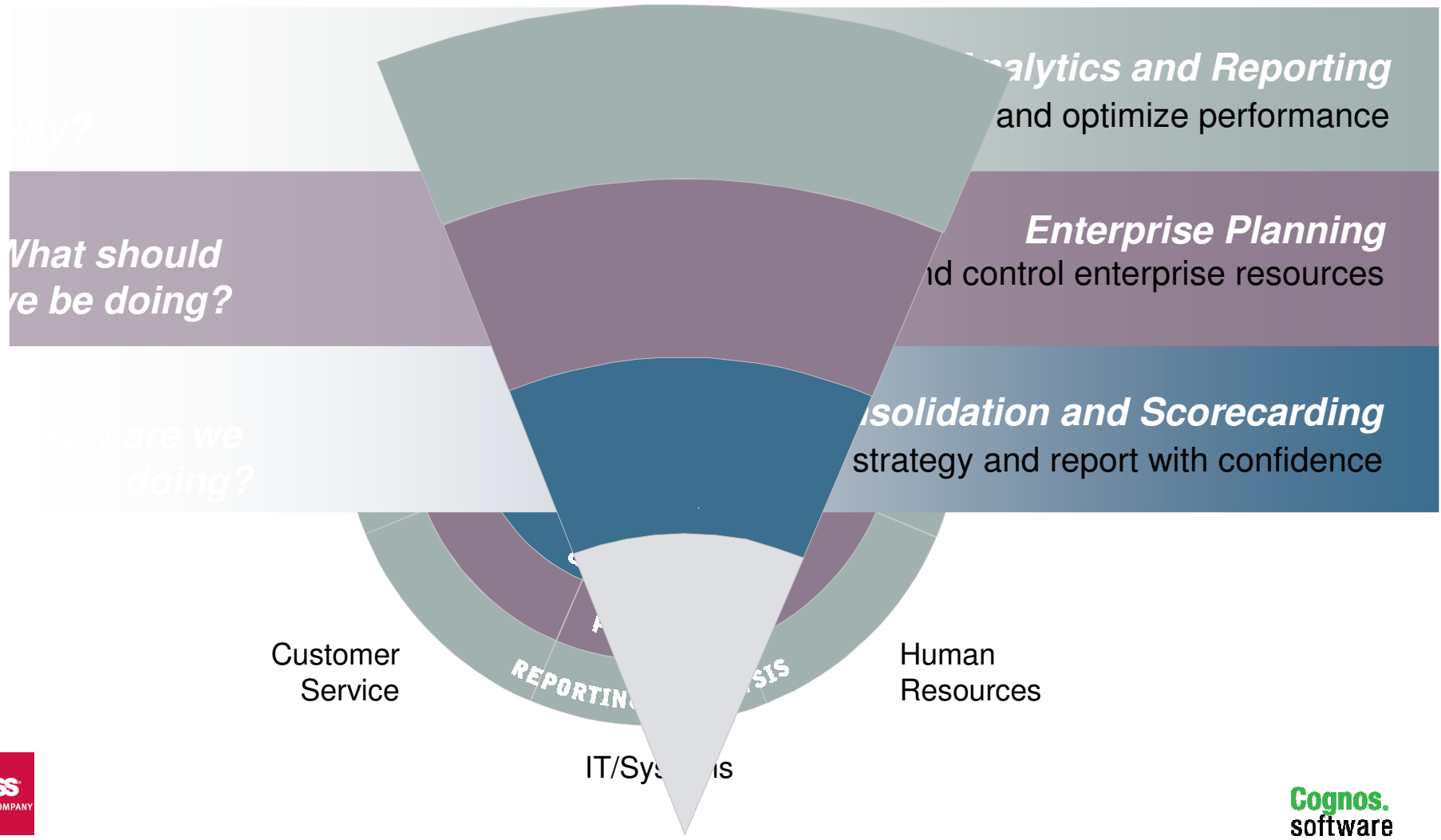
### ...with Professional Upside

*“Corporate performance and CFO performance are inextricably linked; CFOs that deliver shareholder value are most likely to achieve the next career step they desire.”*

Source: CFO Executive Board, Strategies for Inflecting CFO Performance, 2004



# Financial Performance Management Play – *A Specialized View Of Performance Management*



## Information Applications Sales Play – *What to listen for when talking to the Customer?*

### **Data Warehouse Projects Failing**

*“We have been working on a data warehouse for ages and I still do not get the information and answers I need.”*

### **IT is a bottleneck**

*“Our IT department is can not deliver the requested information in time. They indicate they are understaffed or do not have the needed expertise”*

### **I need the information now**

*“We understand the value of an enterprise data warehouse, but we can not wait, we need the information now”*

### **Information is not shared**

*“The majority of the information we need to make better decisions is less valuable to the rest of the company”*





## SPSS Predictive Analytics Sales Play – *What to listen for when talking to the Customer*

SPSS Predictive Modeling generates the necessary information and Cognos visualizes it

- **Need for optimization based on large amounts of information that is hard to crunch manually**

- Customer Intimacy
- Demand Marketing Optimization
- Crime and Fraud Insight & Prevention
- Retail Market Basket Analysis
- Banking Campaign Insight
- Predictive Churn
- Insurance Customer Retention
- ...



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## What will be covered today?

- Short history about the “Cognos” Brand
- The Performance Management Wheel
- The IBM Cognos 8 Performance Management System
- Short Demonstration of IBM Cognos 8
- IBM Cognos Sales Plays
  - Business Intelligence (BI)
  - Financial Performance Management (FPM)
  - Information Applications
  - SPSS Predictive Analytics
- **Licensing Models**



# Licensing Models – Cognos 8 BI

	Reporting		Analysis	Scorecarding
	Query Studio	Report Studio	Analysis Studio	Metrics Studio
Administration	BI Administrator			
Authoring	BI Professional			
	BI Professional Author		Options	
	BI Advanced Business Author ( <i>Report Studio Express only</i> )			
	BI Business Author		BI Business Analyst	BI Business Manager
Consumption	BI Consumer			
	BI Recipient			
	BI Remote Recipient			



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## Licensing Models – *What is included in an Analytical Application?*

- **Packaged Business Content**

- Packaged Application Data Source Model (Dimensions, Facts, Measures, Hierarchies)
- Packaged Reports
- Pre-built Data Sourcing (some apps include, others do not)

- **Adaptive Application Framework**

- Adaptive Warehouse
- Adaptive Analytics

- **One (1) BI Author Licence**

- Can be used to create dashboards, Ad-Hoc analysis, consume reports.

### Note

Client requires a BI Administrator license and BI Consumption licenses



# Licensing Models – TM1

## IBM Cognos TM1 9.4

## IBM Cognos TM1 9.5

Server

Related Server rights included with  
TM1 role based licenses.

TM1 Non-Production

Analytic Server **New**

TM1 Non-Production

Analytic Server will be required for all TM1 deployments  
prior to adding any authorized users.

User roles

TM1 Modeler

Admin/Modeler/Workflow Rights

TM1 Contributor

TM1 Web/ TM1 Excel Read/Write Capabilities

TM1 Modeler

Admin/Modeler/Workflow Rights, **Managed  
Contributor Administration**

TM1 Contributor

TM1 Web/ TM1 Excel Read/Write  
Capabilities, **Managed Contributor Interface**

TM1 Explorer - **New**

TM1 Web/ TM1 Excel Read Only Capabilities



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## Key Takeaways

- **Why Performance Management**
  - **Performance Management is top of mind for ALL organizations today** seeking competitive advantage from their information
  
- **Why IBM Cognos for Performance Management?**
  - IBM Cognos helps everyone in an organization make **more informed, faster, and more aligned** decisions
  
- **Why we win?**
  - IBM Cognos provides a **full range of Performance Management and Business Analytics capabilities** which are built on an integrated **open enterprise-class platform** with the **frameworks and proven practices** to ensure customer success.



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Q&A

