Executive Demo Script

The old adage "the buck stops here" is all too true for executives. The executive is ultimately responsible for everything he or she oversees, so confidence that everyone is working towards a common company vision and goals is a must.

That means an exec can only be assured if his or her domain is built on a common understanding of data, and a common framework for moving forward together on plans.

IBM Cognos Business Intelligence software, together with IBM Cognos TM1, is designed specifically to deliver that level of confidence. Our solutions deliver enterprise-scale Business Intelligence software, services, and hardware if need be – while remaining open to any underlying data or platform.

In this scenario, we'll assume the role of a busy marketing executive who among other things is responsible for revenue-generating campaigns.

The executive starts in his IBM Cognos BI dashboard, where he can see at a glance how the various product lines are performing in terms of revenue.

In this particular demonstration, the data behind the dashboards is delivered from IBM Cognos TM1, a powerful 64-bit in-memory server for performance management. However, using IBM Cognos 8 Business Intelligence, the data underpinning dashboards such as this can in fact come from virtually any data source or combination of data sources… from any relational or dimensional database, from XML and Web Service data feeds, or from real-time operational data feeds.

On his dashboard, the exec can see actual versus plan for all of the company's product lines, with clear status indicators and historical trends for each line.

He can also see the percentage of revenue that his campaigns are contributing to overall product revenue, and key marketing expenses, as well as the overall revenue trend for the current year.

The executive sees that while campaign performance for some product lines is meeting target, it's certainly not stellar. And for some product lines, it's actually falling below acceptable thresholds.

The executive knows that earlier in the year, there was a pilot campaign run to cross-sell the company's high-end Receivers with certain Flat Panel televisions.

This promotion was based on a data mining initiative conducted using IBM SPSS, where customer buying patterns were analyzed and it was discovered that customers who buy certain Flat Panel TVs also tend to buy highly-profitable Receivers.

He changes the campaign filter to zero in on Cross-Sell / Up-Sell Campaigns, and sees that indeed, there has been success in selling the company's high-margin receivers.

Because the data is dimensional in nature, he can drill into successive levels of detail, which he does for the Receivers product line.

The results are even better than he had expected –across all of the cross-sell campaigns.

But he is interested in the results from the pilot campaign.

Quickly, he opens his Marketing Program Detail page, where he has access to the people in his organization.

He starts a collaborative conversation with the marketing manager who is responsible for the pilot campaign using IBM Lotus SameTime Connect, embedded directly within his portal.

The exec asks for the specifics of the pilot cross-sell campaign, and the marketing manager tells him which store the campaign was run in, and for what period of time.

With all of the info he now needs, the executive returns to his dashboard, and in the Campaign Details area, he sets his Channel filter to reflect sales across all stores, and he focuses on his Receivers product line. He also resets his campaign filter to show all campaigns in the Cross-Sell Up-Sell program.

The results begin to confirm what he already started to suspect – there's great success and possibility of great opportunity here with the sales of receivers in the pilot Get and Receive campaign at almost 140% of target.

The exec returns to his main dashboard page and filters the display to show the San Francisco sales channel's results for the "Get and Receive" campaign.

Immediately he sees the huge sales and up-side revenue based on bundled cross-sales of specific receivers with some of their popular Flat Screen televisions, with targets exceeded by a very wide margin.

Of equal importance, while the marketing costs associated with running the campaign look like they have risen slightly, they appear to be well within the norms for running such a campaign.

The exec returns to the conversation he had started with the manager, and indicates that, based on the success of the campaign, the manager should do some "what if" analysis to determine the potential upside of running a similar campaign in some of the company's other markets.

The manager responds that he is already in the process of doing just that. Because he's using the powerful "what if" scenario modeling in IBM Cognos TM1, the manager can be confident that the results will be available before the day is out.

The collaborative exchange affords the manager the opportunity to update the executive on a couple of other items.

The manager starts by indicating that they've just updated the Management Executive Briefing Book and asks the Exec if he would like a copy.

The exec indicates he'll simply run the new report from his dashboard.

Finally – the manager indicates that there's a recently found an issue with product profitability across the company's sales channels and stores – and he again asks if the executive wants a copy of the report.

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The executive again declines, as all of that information is readily available in his dashboard.

He closes with a final endorsement of their cross-sell plans – as focusing on more Receiver sales than Flat Panel TV sales will likely help solve the profitability issue.

This ability to collaborate quickly and easily from within the context of a trusted, scalable business intelligence and planning solution – means that there's no waiting for information when it's needed.

And all of the information exchanged in these chat sessions is optionally stored, creating an audit of key conversations.

Back in his dashboard, the executive decides to run the Executive Briefing Book the marketing manager just mentioned.

He's prompted to select the current month, on which the report content will be based. And when it executes, the report displays a highly-formatted, multi-page PDF report.

These multi-page reports can pull data from virtually anywhere, and support the simplest through to the most demanding report layouts, all with seamless navigation built in.

Here he sees immediately that his Seasonal Campaigns are not performing as well as they should be… and are in fact impacting overall program performance.

He can quickly inspect the campaigns in that program, and he sees that 2 of 3 campaigns are badly under-performing – something he'll definitely have to follow up on later.

The exec can quickly examine any and all his campaign details online, or print a copy to take with him when he leaves the office.

And even if the executive forgets to take the report with him, he can access the report from his mobile device using IBM Cognos GO Mobile – whether he uses a Blackberry, Windows Mobile, or a Symbian device.

Before he finishes, the executive decides to follow up on the product profitability issue his marketing manager mentioned, and accesses his Product Profitability page.

There he sees the top and bottom performers in terms of a measure called 'DPP', or Direct Product Profitability.

Receivers are highly profitable, while Flat Screen TVs are not.

In the chart, the executive hovers over that looks to be an obvious outlier – and it turns out that Flat Panel TVs seem to be at the root of the profitability issue, with relatively low profitability compared to the amount of space they occupy.

Conversely, the company's receivers are generating high profitability relative to their shelf space.

One of the things that can plague large organizations is common understanding of business terms – especially when it comes to industry-specific terminology like 'Direct Product Profitability'.

The Executive cannot quite recall the exact definition of that term, so he accesses the IBM Business Glossary directly from with his report.

Immediately he is presented with a concise definition of what the term means, complete with an example and related terms, as well as who the owner of this particular term is. IBM Business Glossary provides an intuitive, structured environment for common business terms to underpin any IBM Cognos 8 BI application, or indeed, any application.

With clear understanding of the profitability issue, together with the facts that the company's receivers are generating better profit than its Big Screen TVs, and that the cross-sell campaign has been wildly successful, our marketing executive can be confident that extending the cross-sales of more receivers together with specific Flat Screen TVs is the right call.

Using the powerful combination of IBM Cognos 8 Business Intelligence and IBM Cognos TM1, together with the data mining insights of IBM SPSS, making the right business decision, in the right time frame, with the right information becomes the norm. Executives can quickly and easily isolate both issues and opportunities.

While this scenario has demonstrated the application of IBM Cognos 8 BI in a marketing context, dashboards like the ones you've seen here are in production in virtually all industries and all lines of business, including Operations, Human Resources, Sales, and Finance to name just a few.

Additionally, this demonstration barely scratches the surface of what's actually possible with IBM Cognos 8 BI and IBM Cognos TM1. IBM delivers the broadest spectrum of Business Intelligence capabilities in the market. With IBM Cognos software, you can confidently understand information, collaborate with others, and take the guess work out of your key business decisions.

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