Note: This presentation will feature product demonstrations with fonts around this size >

─ FINSLSW
  ⊞ Periods
  ⊞ Products
  ⊞ Broker
  ⊞ Staff
  ⊞ Channel
  ⊞ Sales Facts
  ⊞ Data Tier
  Corporate Plan
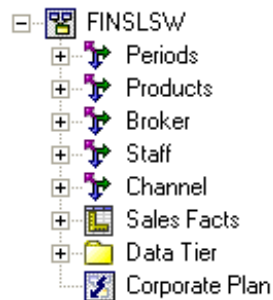
Please sit where you can comfortably read the above text.

IBM Cognos 8 Business Intelligence Roadshow - Scorecarding

Cognos.
software

MARKETING

FINANCE

PRODUCT DEVELOPMENT

How are we doing?

Why?

What should we be doing?

SALES

OPERATIONS

CUSTOMER SERVICE

IT

HR

How are we doing?

PERFORMANCE

MEASURING & MONITORING

IBM Cognos Connection — Sales & Operations — Log Off

Public Folders | My Folders | **Sales & Operations Performance** | Inventory Management

No filter | No grouping

Name

On Time Customer Shipments →

Forecast Accuracy - Operations →

Inventory Obsolescence as a % of Total Inventory - Operations →

Unplanned Maintenance Downtime - Operations →

Production Compliance - Operations →

Committed Delivery Performance - Operations →

CAPACITY EXCEPTIONS

Decision makers need the ability to measure and monitor the business and share current status.

Enterprise Scorecarding
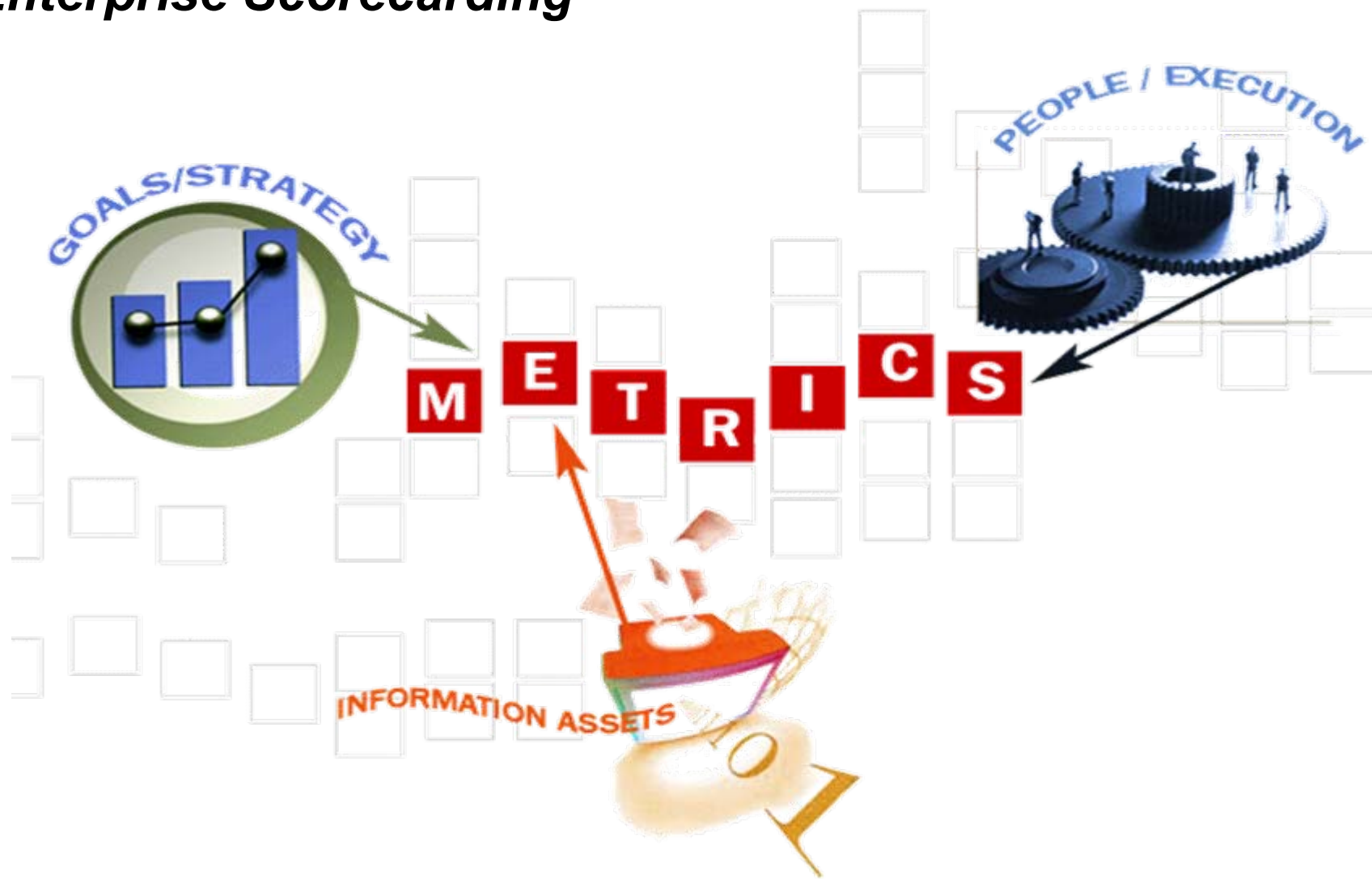
Cognos Metrics Studio

- Second Generation Cognos Scorecard Product

- Released 4+ years ago

- Now standard studio as part of Cognos 8. Shares:
  - Metadata
  - Security
  - Reports
  - Platform

Cognos Metrics Studio

IBM
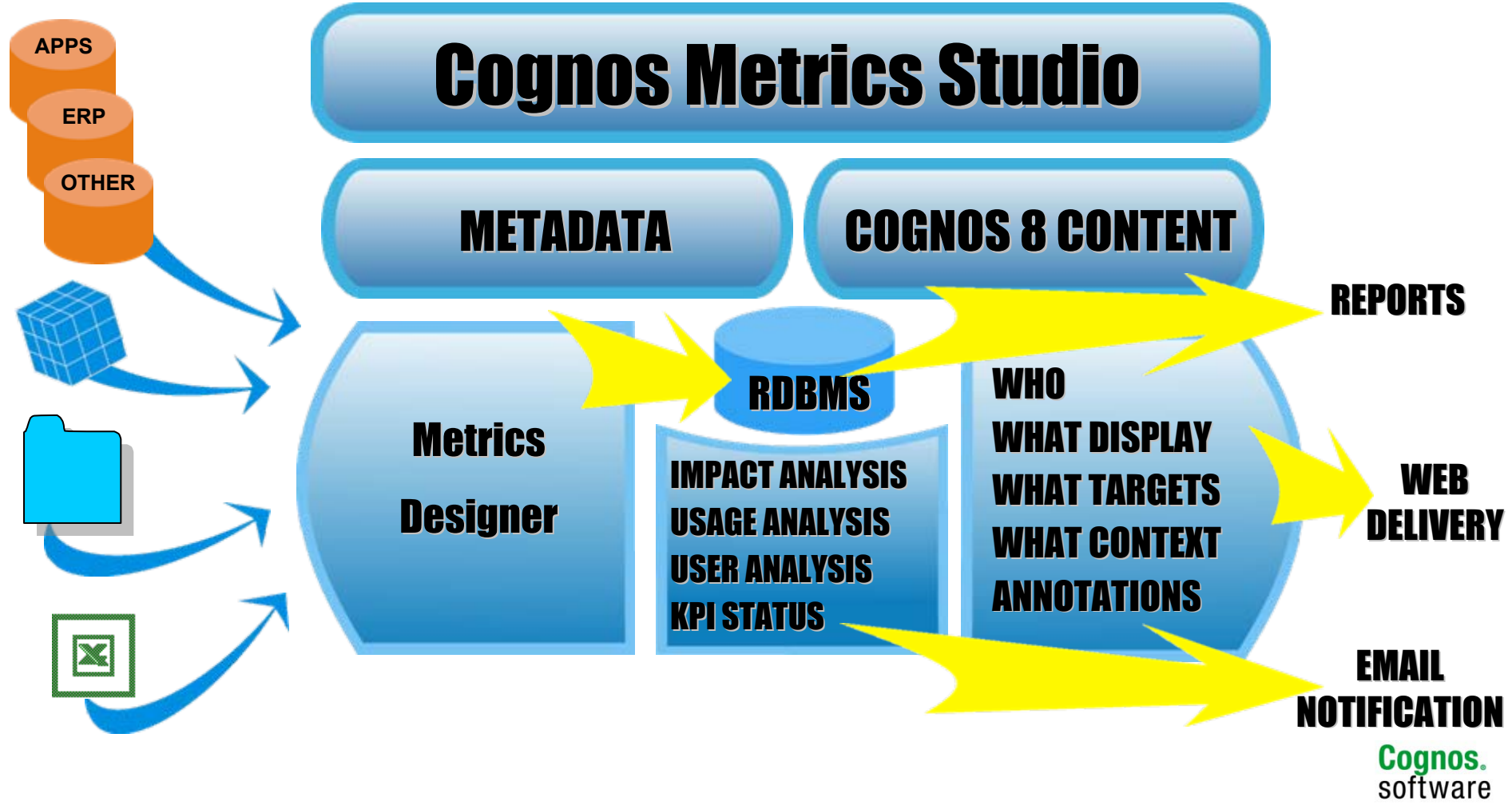
Scorecards, Dashboards & Metrics – Oh My!

STRATEGY MANAGEMENT

Manage

Measure

Monitor

Aggregate

Business Activity

DASHBOARD

SCORECARD

Cause & Effect

Strategy Maps

Metric History

Actual & Target

Stoplights

Drill Through

Drill Down

Visualization

Charts

REPORTING

Cognos. software
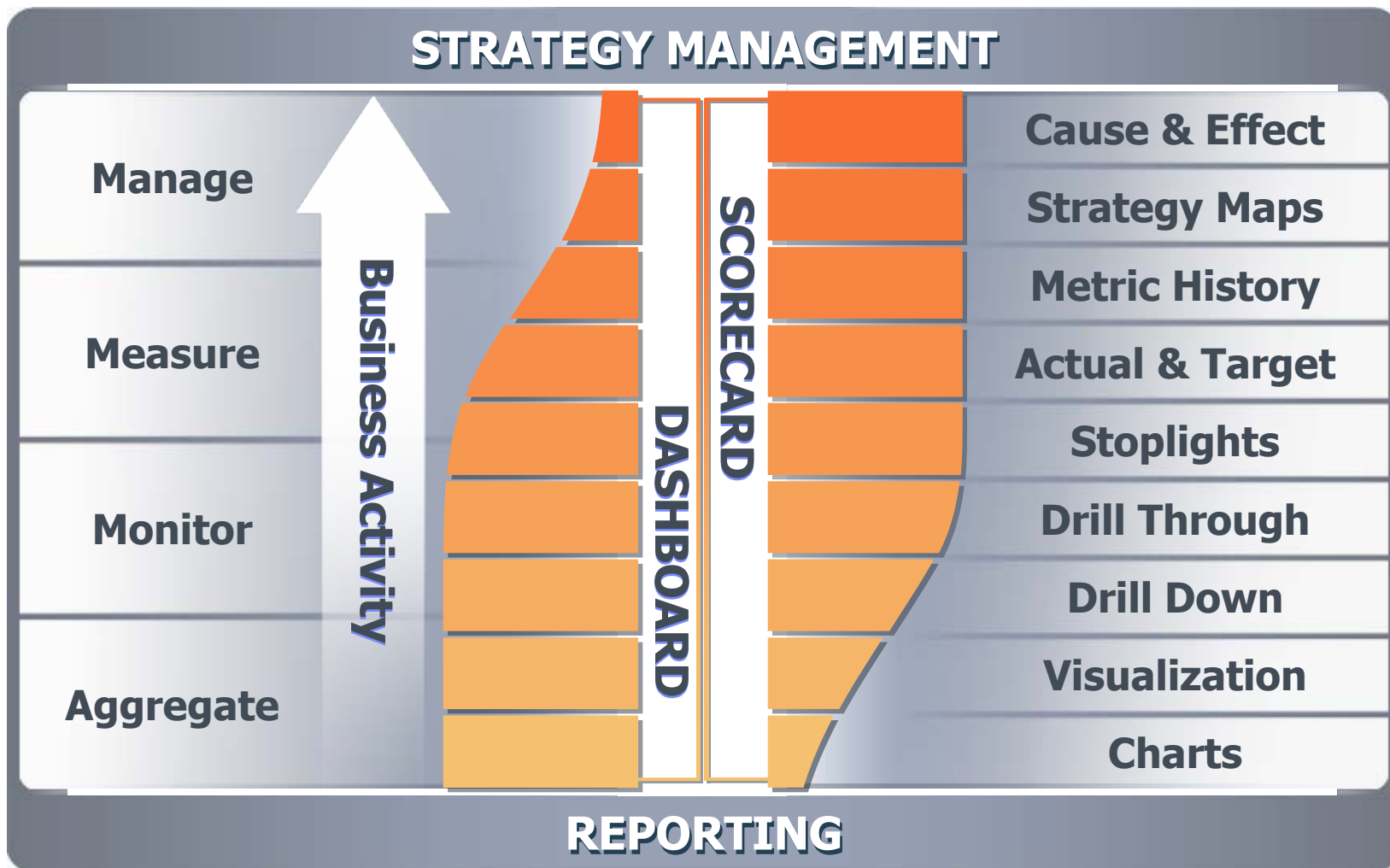
Trends in Scorecarding

- **Integrated Scorecards & Dashboards**
  - Dashboard linking to functional scorecards
  - Key metric supported by a dashboard
- **Bridge Between Planning and BI**
  - Populate targets with planning #'s
  - Embed Live BI
- **Operational Focus**
  - 70% Operational vs 30% Strategic
- **Guidance from Methodologies**
  - Balanced Scorecard most popular
  - "Quality" Methodologies Growing

Cognos. software

Best Practices

- Avoid the "Perfect Scorecard" Pothole
  - Target Areas for "Quick Wins"
  - Metrics will evolve over the year
- Communicate with Organization
  - "Red does not mean dead"
  - Scorecard vs Reportcard
- Be Flexible with Methodology Selection
  - Pick and choose pieces of multiple frameworks
  - Avoid being too rigid

Cognos.
software

File   Edit   View   Favorites   Tools   Help

Back   »   Links   Cognos Connection - Welcome   Cognos(R) Metrics Manager 2.2   Customize Links   Free Hotmail   Windows   Windows Marketplace

Metric Studio   Cognos Connection

Log On   ◁ ▦ 2003, Q4, December ▾ ▷   🏠 ▾ 🖨 A 📖 🔍   View ▾   Preferences ▾   Tools ▾   Help ▾

Scorecards ▸ Sales ▸
Metric Types ▸ Discount Percentage
Sales Discount Percentage   History   Actions   Reports   **Diagrams**   Details

Status	Trend	🗒	Actual	Target	Variance	Owner	Last updated
◆	▼	...	5.27%	5%	0.27%		May 31, 2005

Impact Diagram

Available Diagrams

Metric Studio

Administrator   Log Off   Launch
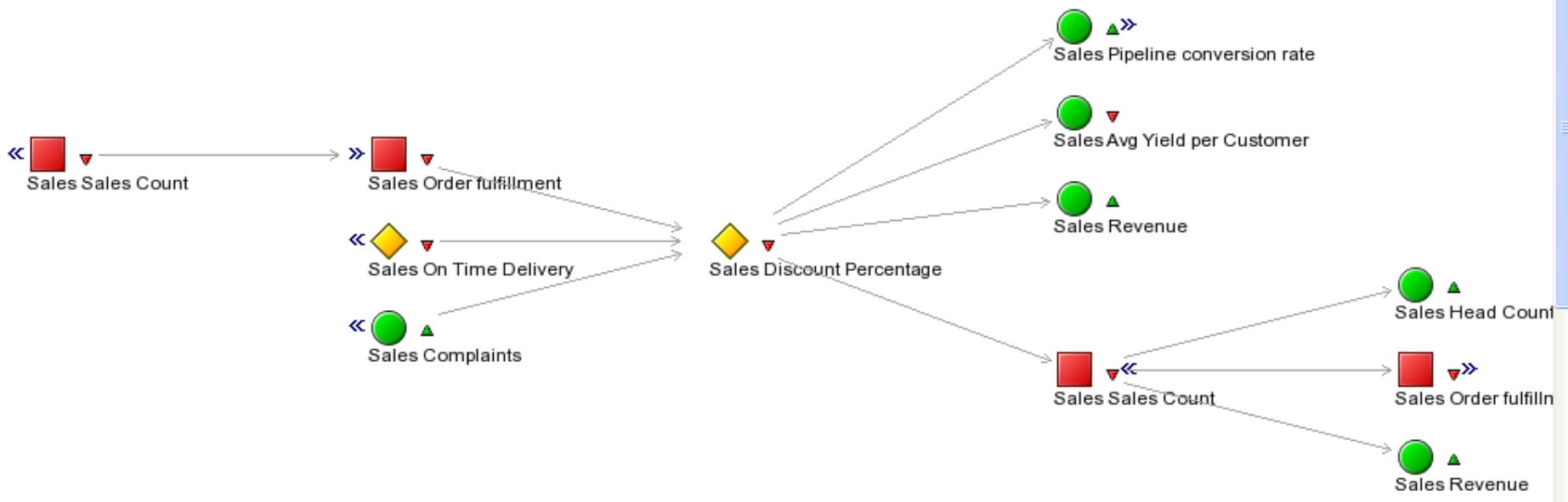
Most recent values   View   Tools

Trade Processing

Scorecards

Scorecards ▶
Asia/Pacific ▶

| Metrics | Projects | Reports | Diagrams | Details |

Scorecards
- Scorecards
  - All Metrics
  - Asia/Pacific
  - EMEA
  - N America

No filter   Mid/Back Office Clearing & Settlement

●	···	**Back Office Trade Capture**					■ 1 ◇ 1 ● 1 ⌃
		Name	**Actual**	**Target**	**Variance**	**Variance %**	**Time Period**
● ▲	···	Total Costs to Volumes - Asia/Pacific	2	2	0	11%	Oct 2008
◇ ▬	···	Unfilled Orders - Asia/Pacific	100	100	0	0%	Oct 2008
■ ▼	···	Future Clearing Details Correct - Asia/Pacific	91%	98%	-7%	7%	Oct 2008

■	···	**IT Performance**					■ 1 ◇ 1 ● 0 ⌃
		Name	**Actual**	**Target**	**Variance**	**Variance %**	**Time Period**
■ ▼	···	System Capacity - Asia/Pacific	78%	99%	-21%	21%	Oct 2008
◇ ▼	···	Average Failure Recovery Time - Asia/Pacific	14 Min	15 Min	-1 Min	3%	Oct 2008

■	···	**Position Management & Reconciliation**					■ 3 ◇ 0 ● 0 ⌃
		Name	**Actual**	**Target**	**Variance**	**Variance %**	**Time Period**
■ ▬	···	Maximum No. of Options - Asia/Pacific	2%	1%	1%	100%	Oct 2008
■ ▬	···	Maximum No. of Futures - Asia/Pacific	23%	1%	22%	2,200%	Oct 2008
■ ▲	···	Trades Reconciled Correctly - Asia/Pacific	86%	100%	-14%	14%	Oct 2008

●	···	**Pre Value Date Settlement Instruction**	■ 0 ◇ 0 ● 1 ⌄
◇	···	**Settlement Failure**	■ 1 ◇ 1 ● 1 ⌄
■	···	**Settlement Instruction**	■ 1 ◇ 0 ● 0 ⌄
■	···	**Staff**	■ 1 ◇ 0 ● 0 ⌄
●	···	**Trade Agreement**	■ 0 ◇ 0 ● 1 ⌄
■	···	**Trade Enrichment**	■ 3 ◇ 0 ● 0 ⌄
◇	···	**Trade Validation**	■ 1 ◇ 0 ● 3 ⌄

My Folders

Scorecards

Metric Types

Strategies

File   Edit   View   Favorites   Tools   Help

Back   Search   Favorites   Links

Metric Studio   Cognos Connection

Most recent values   View ▼   Preferences ▼   Tools ▼   Help ▼

Scorecards ▶
Sales ▶

Metrics | Projects | Reports | **Diagrams** | Details

BSC Strategy Map_Blank
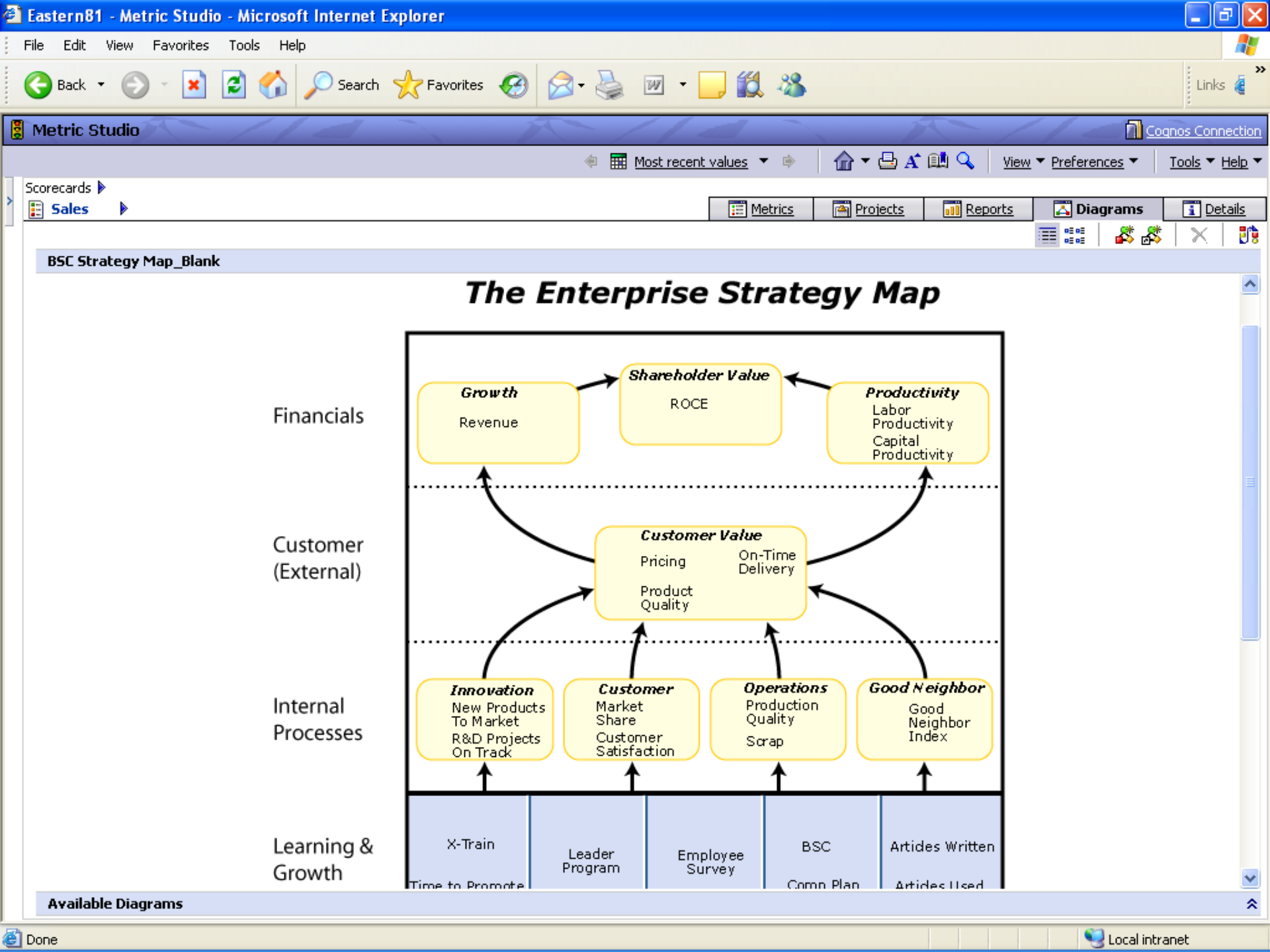
The Enterprise Strategy Map

Financials

Growth
Revenue

Shareholder Value
ROCE

Productivity
Labor Productivity
Capital Productivity

Customer (External)

Customer Value
Pricing
On-Time Delivery
Product Quality

Internal Processes

Innovation
New Products To Market
R&D Projects On Track

Customer
Market Share
Customer Satisfaction

Operations
Production Quality
Scrap

Good Neighbor
Good Neighbor Index

Learning & Growth

X-Train
Time to Promote

Leader Program

Employee Survey

BSC Comp Plan

Articles Written
Articles Used

Available Diagrams

Done   Local intranet

Metric Studio   Cognos Connection

Most recent values   View ▼   Preferences ▼   Tools ▼ Help ▼

Scorecards ▶
Enterprise BSC ▶   Metrics   Projects   Reports   Diagrams   Details

Enterprise BSC

The Enterprise Strategy Map

Revenue
Time Period:	2003,Quarter 4,November
Trend:	▽
Actual:	US$811,721.63
Target:	US$1,000,000.00
Variance:	-US$188,278.37

Available Diagrams

Links Cognos8
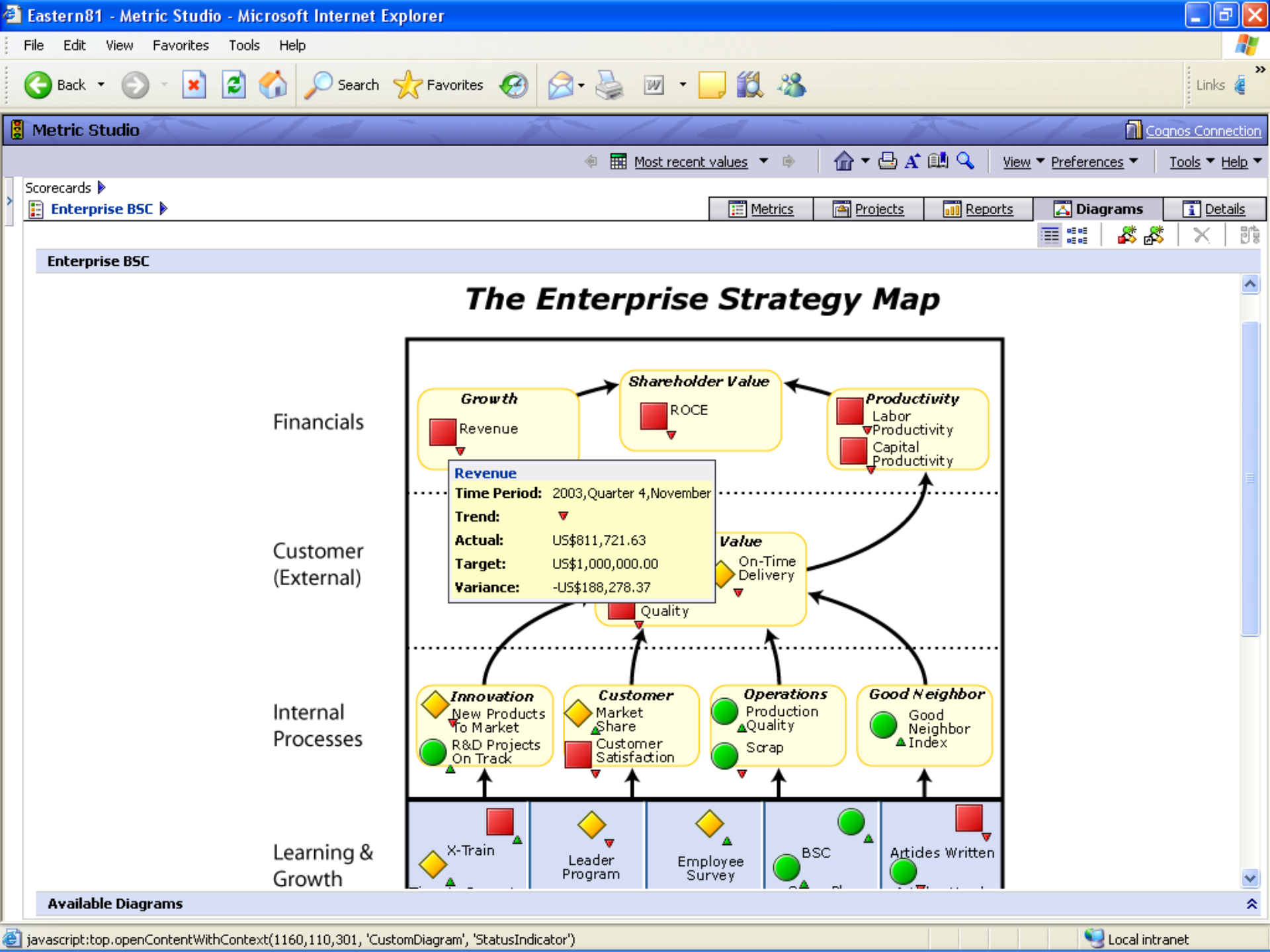
Metric Studio   Cognos Connection

Administrator   Log Off   Most recent values   View ▼ Preferences ▼   Tools ▼ Help ▼

Digital2GoCMM

Scorecards

Scorecards ▶
Company Scorecard ▶   Metrics   Projects   Reports   **Diagrams**   Details

Scorecards

- Scorecards
  - All Metrics
  - Executive Team
  - **Company Scorecard**
    - Human Resources
    - Marketing
    - Service & Support
    - Supply Chain
    - Corporation
    - Sales Performance Scorecard
    - Purchasing Scorecard
    - Finance Scorecard
    - Operations Scorecard
  - Marketing
  - Sales
    - Boston
    - Miami
    - New York
    - Philadelphia

Digital2Go WorldWide

Sales Volumes - Sounds
Sales Volumes - Accessories
Sales Volumes - Sights
Sales Volumes - Motion
Net Income
Sales Volumes - E-Link
Days of Supply

Sales Volumes – E-Link	
Time Period:	2005,Q4,December
Trend:	▽
Actual:	36,140.00
Target:	30,000.00

My Folders

Scorecards

Metric Types

Groups

Available Diagrams

	Title	Description	Actions
☐	Digital2Go WorldWide	"The description gives a clear concise definition of the object. It helps users understand exactly what they are looking at, and what it should/should not be used for. This demo does not contain a description for every object."	
☐	test		

start   Digital2GoCMM - Metr...   3:50 AM

File Edit View Favorites Tools Help

Links BBC Google Phone SF.com WSDL Yahoo! WebEx

Back Search Favorites

Address http://wbragrangeim3/cognos8/cgi-bin/cognosisapi.dll?b_action=xts.run&m=port: Go

Cognos Connection

Metric Studio Event Studio Query Studio Analysis Studio Report Studio

DemoAdmin Log Off

Preferences Help

Public Folders My Folders Start of My Day Branch Profitabilty **Insurance** Tools

Companies news – Financial services – FT.com

FT.com
FINANCIAL TIMES
Financial services

Orix's Korea Life stake draws interest
Bancomer fund targets Mexico's foreign workers
Setback for Schroders in China
Ex-Goldman executive to join Perella
Ex-AIG chief says fine could hit investors
Panmure and HBOS establish joint fund
France launches probe into Euronext
Japanese traders get taste for bonds

No filter No grouping [Metrics: 1-5]

			Name	Actual	Target	Variance	Variance %	Time Period
●	▲	...	Premium Renewal Ratio	89.52%	88.63%	0.89%	1.00%	2002,Q4,Dec
◆	▼	...	New Policies	35	36	-1	3%	2002,Q4,Dec
●	▼		Bound Premium	US$197,194	US$187,650	US$9,545	5%	2002,Q4,Dec
●	▼	...	Quoted Premium	US$221,950	US$214,256	US$7,694	4%	2002,Q4,Dec
●	▲	...	Submit Premium	US$514,522	US$480,372	US$34,150	7%	2002,Q4,Dec

(display all entries)

Insurance

Entries: 1 - 7
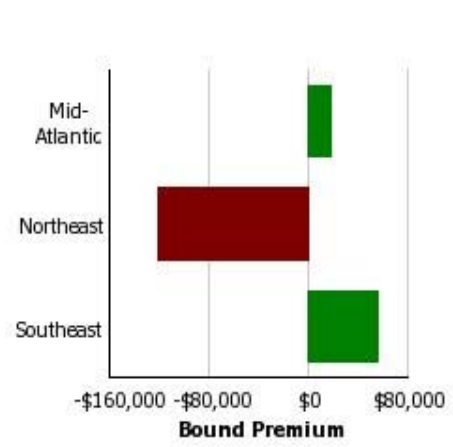
Name ⇩	Actions
📁 Origional Reports	More...
Business Summary Report	More...
Customer Monthly Statement	More...
Individual Customer Report	More...
Insurance Analysis	More...
Insurance Business Ranking Report	More...
Regional Business Summary	More...

Search string:

Search

Options ⌄

Bound Premium chart:
Mid-Atlantic
Northeast
Southeast
-$160,000 -$80,000 $0 $80,000
Bound Premium

MINNESOTA

Done Local intranet

BALANCED
SCORECARD
COLLABORATIVE

BALANCED SCORECARD HALL OF FAME 2004
COGNOS INCORPORATED

Cognos 8 BI Roadshow

Scorecarding