IBM Cognos Software Webcast Transcript
IBM Cognos Data Adapter for Salesforce

Cognos provides business intelligence and performance management solutions with world-class enterprise planning and BI software and services to help companies plan, understand and manage financial and operational performance.

The Cognos Performance System in an open and adaptive solution that can reach into an organization's breadth of diverse systems and applications to give customers the ability to answer critical questions. How are we doing? Why are we on or off track? And what should we do about it?

Cognos serves more than 23,000 customers in more than 135 countries, and its top 100 enterprise customers consistently outperform market indexes. Today, I'd like to talk to you about how Cognos can help you extend the value of your salesforce.com investment and demonstrate how Cognos can quickly enable new insights and perspectives to make better, more informed decisions.

Salesforce.com is the leader in on demand customer relationship management, and yet the value you provide to your salesforce users and the value of your customer data need not be limited to the saleforce.com application.

Indeed, the data captured in salesforce is an asset that companies are looking to use more broadly to drive performance management. Some requirements that we've heard from our customers include the ability to extend reporting and beyond simple lists and be able to do historical trend reporting such as pipeline this month versus pipeline last month.

Or, a report on what changed since yesterday, and the ability to more easily access data, deliver that access at high performance, combine hosted and on premises data, and yet conform to the standard salesforce.com data interfaces.

So, for example, sales teams want to ensure their customers and project orders can be met by product in inventory. With Cognos, we bring the power of BI to your salesforce.com users providing them with reporting, analysis, scorecarding, dashboarding and business event management to ensure that they have in their hands the view of information they need to make better decisions.

And we bring additional information valid to salesforce data by enabling business users across your organization to create more sophisticated reporting that crosses marginal boundaries, combine data from disparate areas, derive calculations, and capture snapshots over time to enable historical trend reporting like this time period versus last time period.

Finally, we integrate salesforce data with data from other systems across your organization so that business can gain a complete, consistent enterprise view of all information at the point of decision.

Cognos BI provides a complete set of BI capabilities on a single platform, built to address the diverse set of users wishing to access data, from executives to line managers to sales and support staff.

Business users can access any data or combination of data through this BI capability and through a breadth of access modes including zero footprint Web browser, the salesforce.com portal, enterprise search, Microsoft Office and even on a mobile device.

The common platform provides complete flexibility to incorporate information from salesforce.com, other transactional systems, relational and warehouse data, OLAP, and modern sources like XML. And it's all founded on a Web services based Services-Oriented Architecture.

From a salesforce.com perspective, Cognos can access salesforce data directly and we can capture snapshots of salesforce data to be able to cache or pass information for trending and period to period analysis. Because of our one platform, this data is immediately available to all BI capabilities, all users, and can be combined with other data in your organization.

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So let's take a look at how the technology for this works with salesforce. Here are the steps involved in delivering BI with salesforce. At the top are the business users who wish to access reports through the Web, in the office or in their mobile device. These reports and analyses are provided by BI capabilities.

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Here, a report can be offered once and made available to many users wherever they want to view it. For example, you can create a pipeline or change report, then the east and west region managers can be sent that report on their mobile device with just their respective regions' data represented.

All these reports and analyses are founded on a single business model. The business model combines and [bridges] data from salesforce, ERP, data warehouses and other systems, then puts that data into terms that business user understands. This model is built once and serves as a basis for all the reports and analysis needed.

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The business model accesses salesforce through their Cognos Data Adapter for salesforce. The data adapter's job is to respond to requests for data from the common business model and interpret that query to request the data through the standard salesforce interfaces. This process is optimized to minimize the amount of data retrieved and to transit the data into a format to match the request.

Using this same interface, Cognos BI can capture snapshots of salesforce data to store in a large cache. It's also made available through the common business model to support user needs to report on what changed and period against period. So for example, to monitor pipeline and orders closed daily trends in the last week of the quarter. The key value here is that the data access is set up once and that users can self-serve any number of different reports and analysis they need to make their critical decisions.

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Let's take a look at this might work in a particular scenario where the business is looking to understand the effectiveness of their marketing campaigns by analyzing cost versus generated revenue and comparing the relative effectiveness this quarter versus last quarter and the same quarter last year.

The first step in the process is to gain access to the required information to support the reporting and analysis. Then we'll go on to demonstrate reporting process and how to make those reports available to users when and where they need it.

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Here, we're going to use a common scenario we see at our customers where campaign and opportunity information is held in salesforce.com and associated current order and sales information is in the order management system. In this case, it's SAP R3. In addition, salesforce.com data and other historic information is held in the data warehouse.

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With Cognos and our data adapter you're just clicks away from the data. There are no required changes to your existing salesforce.com environment, and there's no special coding or special skills requiring reducing the risk and the cost of the deployment.

So the published salesforce.com interfaces are used and the S objects are represented as relational resources so you can access, combine and deliver salesforce data easily to the Cognos BI environment. You can create any number of queries against salesforce as a single source or combine that data with other data to create a federated view on the fly.

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To join salesforce.com with SAP you simply create a new query that joins the route and query subjects from both systems. In this case, we're using a canned ID as the unique joint criteria.

You can also specify the relevant column projections and the filtering conditions, and you can add a group [wide] to aggregate revenue across different lead sources. The good news is that all of this can be done graphically using the modeling environment of

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the data adapter. And for those people who are well versed in SQL, the query can be explicitly defined.

This building of query subject satisfied the need to query integrated salesforce.com and SAP data on the fly. However, to satisfy the need for quarter-on-quarter analysis the best route is to provide a data mart or additional data warehouse subject areas that captures the historical information by time period.

And here, there's also good news. The same approach and the method of defining queries that you see in this example can be used to define the queries to extract information to feed data at specified times into a data mart or warehouse.

In this way, you use one common interface to salesforce for all your BI needs. And this is set up once and then it's linked to the common business model so business users can view and build reports without ever seeing or caring about how their connection works.

Now, the query to the data and the source systems available, we're going to discuss how the report is constructed. The business model is already set up and common across all BI capabilities, so there's no way different users can access data and not have the numbers be in agreement. So business users can immediately have access to rich set of BI capabilities to aid them in their decision making process.

Here we see Cognos Report Studio. It's a single, self-service authoring environment that addresses the full breadth of report coverage from managed business reports, production reports and [purge] line reports to dashboards.

To satisfy our demonstration scenario. this report shows campaign costs versus revenue as well as the revenue broken down by sources displayed graphically followed by detailed numbers in a cross tab table.

The resulting report is displayed as HTML in a zero footprint browser, but note that within Cognos the report is written once and then can be published in various formats. HTML, PDF, Excel, CSV, XML or you can just e-mail it.

The business user can also use Cognos analysis capabilities to compare campaign effectiveness quota over quota in different regions. In addition, they can explore how one country is performing compared to another region using the powerful features of mixed grain analysis, compound filters and top bottom filters as well as creating more custom sets.

And then, they can collaborate with their colleagues in the user community by sharing their analysis, by creating a production report like you saw earlier that can be distributed more broadly.

Once campaign effectiveness is better understood, Cognos BI also enables you to set up metrics and benchmarks to monitor that performance ongoing. Snapshots of data are captured over time, and a data warehouse can be used to assess if effectiveness is on or off track, use root cause analysis to understand what factors drove that performance, and then tasks and actions can be set up to address specific areas.

And finally, Cognos 8 Go! is a family of access modes that allows users to easily view and interact with all of the reports, scorecards and analysis that we saw earlier. Now they can contain operational, historical or operational combined with historical data from salesforce and any number of relevant information sources.

In this way, users can view and analyze at a highly relevant campaign effectiveness information using the application or device most convenient to them such as Web portal, like the salesforce.com portal, enterprise search interface, Microsoft Office or a mobile device. They can also proactively send the reports or e-mails and see portal headlines based on information changes that are relevant to them.

So included is the ability to access Cognos reporting on salesforce and the data from within your salesforce.com portal. It's all about enabling users to make informed business decisions anytime, anywhere.

In conclusion, Cognos can help drive better business performance and competitive advantage. Cognos brings the power of Cognos BI to salesforce.com, expands the value of salesforce.com information within the enterprise, and the other enterprise information to the salesforce.com user community.

It enables your organization to standardize on BI across the board, ensures that business has access to the most relevant information at the point of decision, conforms to your salesforce.com standards and optimizes the performance, and eliminates manually intended tasks and duplication of effort learning and skills to make sure your products are cost effective and low risk.

If you'd like to learn more about Cognos and the value we can bring to your saleforce.com investment, please visit us online at www.cognos.com and check out the Contact Us Web page to find your local Cognos team. Thank you for taking the time to find out more about Cognos, and we look forward to working with you to realize more value from your existing investment in salesforce.com.
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