Customer Session: Everlink's "Think Big, Start Small" Strategy Paves Way for Integrated BI and Planning

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Dan Potter: Welcome to the Summit Customer Session where we will discuss how a "Think Big, Start Small Strategy" paved the way for integrating BI and planning. My name is Dan Potter. I am a product marking executive within IBM's Business Analytics Division. And joining me today is Stephen Crocco, who is a Project Manager at Everlink and Don Richardson, the Chief Operating Officer at Accumetrics, an IBM business partner, and specialist in deploying Cognos solutions.

So welcome Don and Stephen.

Stephen Crocco: Good morning.

Dan Potter: So Stephen first. Provide us a little bit of context, a little bit of background about Everlink.

Stephen Crocco: Everlink is a medium sized company or small-to-medium sized company with approximately 70 employees. And we are actually part of the FIS group, the Fidelity Information System. We are slowly moving from a peer-switching company to more of an integrated payment processing. And we support over 300 credit unions and banks across Canada.

All of our applications are 7x24 because we provide payment processing for Interac, MasterCard and Visa for our clients as well as settlement, monthly settlement. Part of the value we provide for our customers is we help them maintain their membership with Interac, MasterCard and Visa. We have a growing practice in EMV which is the new chip cards that are being rolled out to the marketplace. And we help our clients in interfacing with the ATM vendors as well. So providing leadership there.

Dan Potter: Great. And tell us a little bit about some of the business challenges that you are faced with.

Stephen Crocco: A little bit about Everlink. We have a bunch of different data sources and we have a very limited way of reporting because what we do is we have a lot of isolated data that we need to correlate. A lot of the data that we have has to do with resource management and aligning those resources to our top priority and measuring performance of projects as well as some of our trouble ticketing.

And today we can't provide visibility to customers on our Quality of Service and if we are meeting our SLAs or not. And then we want to move towards more of a planning, increase our planning by using some of the data that we have today.

Dan Potter: And Stephen, how did you achieve some of the reporting and analysis requirements in the past?

Stephen Crocco: In the past we have used Excel spreadsheets and to a very limited was crystal reporting, on just the call center stats themselves. But again these were all isolated one-off reports; there was no consolidated view across the organization.

Dan Potter: And with a small IT organization, were the business users always knocking on your door?

Stephen Crocco: Yes, myself and we have one gentleman that actually does some of the reporting, yes, between the two of us.

Dan Potter: So you set out to overcome some of these challenges and you selected Cognos Express. Tell us a little bit more about that process and why.

Stephen Crocco: Well we were sitting down with Don to look at Cognos. What we were looking at was a way of pulling reports from multiple different locations and data sources and creating more dashboard views. And those views would allow operations to not only look at trouble ticketing, they could look at the call center staff and they could look at some of the resource management models that we had taken a look at, so provide them more information to make business decisions.

So we had very good knowledge of the actual data itself. And where Accumetrics played a role was helping us build our initial reports and our initial dashboard. So what we did was we started small; we stared with just replacing some of the reports that we had today and then we expanded that to creating a dashboard view that allows us to drill down to these reports as required.

So then what we are doing now is we are just rolling it out and adding new data sources. So we started off with the trouble ticketing system data and we are adding the call center data. And we are adding data from our time tracking system that we have.

Dan Potter: And Don, I think you were instrumental in helping to identify some of the requirements that Stephen had in the selection of Cognos Express. Give us a little bit about your perspective and why the recommendation.

Dan Richardson: Well from our perspective when we first started speaking with Everlink there was multiple requirements from reporting as well as planning but there was a very clear priority in the sense that the immediate pain was the poor reporting or lack of visibility into some of their key operational data. In addition to that as Stephen talked about, there was a component of better planning and better visibility of resource assignments and aligning mostly those with the right priorities. And what Cognos Express provided was the ability for them to attack those in stages. So, in essence what we could do is we could start by implementing Cognos Express and address their reporting pains. We could bring the multiple data sources together for a unified view of the business as well as it provided an easy management interface. So Cognos Express isn't heavy for the IT division in terms of managing that and Everlink had a small IT group.

Once we were able to address their reporting needs then we were able to move onto the planning component. And I think the reality was that by winning at reporting it gave them the confidence to make the next investment into the planning side. So the whole "Start Small, Think Big" provides not only the ability to do things in stages but also to build on them. So from an executive point of view if you are going to the table to ask for a bit more money, if you have just had success than it is easier to get that investment in the next piece. So that was key.

It also allowed us to do training with the users in stages. So we didn't have to attack or [try to boil the sea] all at once. We could do things in an incremental fashion.

Dan Potter: So, Don, Robert [Kugel] talked about integrated business planning and why it is so critical to have an interconnected system that ties your reporting analysis and planning. You have been an IBM business partner for some time, a specialist in Cognos implementations. Share with us a little bit about your perspective on this chart here, the Information, Insight and Action.

Dan Richardson: I think the key here, and Everlink is a prime example in the sense that they wanted better reporting. They needed the ability to drill down and gather insight into what is driving that performance. So if we look at a ticketing system, I have tickets that are staying open too long or high priority tickets getting opened while low priority tickets are getting closed. And it is not a function of people not doing things that need to get done; it is a matter of no one has the visibility of what the right priority was and what the assignment was.

We then take that and we can see that, perhaps, and I will just make up a scenario is we have maybe four resources looking at this particular area of tickets and we have two over here doing these other category of tickets. But what we are seeing is it is the second category that is falling behind. So then we

can go into the planning side and look at those resource assignments and change them so that we can realign our resources where they are needed and then come back and validate in our reporting that those changes in the plan are affecting our performance and making them better. So it provides that whole link between reporting is going to tell us where we are. The analysis is going to help us understand why that is the case, whether it is good or bad. And then move over to the planning side and make the adjustments to your business model to improve that performance and then you should be able to monitor that in your reporting. And then, again, it is not any one thing; it is that sort of continues involvement of understanding where we are now, where do we want to go, what changes do we need to make and put those into the plan.

Dan Potter: So the whole theme here is having that bigger vision around interconnecting the reporting analysis and planning, but again, not boiling the ocean, right? Think Big but start small. And let's talk about how you started; the implementation in phases.

Stephen, you want to tell us a little bit about the implementation plan and Don chime in?

Stephen Crocco: Yes, so earlier on in the project we provide Accumetrics a bunch of reports we actually do today to give them a good feel for some of the current reporting requirements but at the same time we were asking them to think outside of the box and look down the road and say, "You know what, you really understand the power of the tool, this is what we are doing today, but what can we move towards?" So we didn't want to handcuff them by saying, "I need this report, X, Y, Z," and going that way.

So what we did was we used more of an iterative approach. So we had specialists from Accumetrics onsite working side by side with our folks that really understand the data. So we would go through and we would actually create a report on the sly, say, "Hey, this is what it looks like, and then using the tools to kind of fine tune it and add the bells and whistles.

So then after we had a couple of good reports there, Accumetrics had gone away and said, "Use your expertise; you guys have seen dashboards before. What do you think our dashboards should look like to provide an enterprise view of the data?" So at that point they came back after about a week and brought us in the very first dashboard. So it gave us a good feel for the power of the tools, when you want to look at it from an executive perspective. So providing a number of different key indicators that you could drill down and look at the raw data or the actual reports themselves if you wanted to.

So we kept building on some of the reporting that we had done. So that was for the reporting. For the planning I had actually created a fairly complex model. So this model was in Excel and it had a lot of links in it. And it made it very, very hard to maintain because every time you added a new project or resource there were a number of different links that had to get updated. So, again, we had a working session with the folks at Accumetrics where we presented what we had today and then really at a high level what we wanted to, from a planning perspective, on a go-forward basis.

So, again, Accumetrics went away, brought all of the information and the tools, provided a straw man model that we could work with and, again, we had a working session where we tweaked it. So we just kept adding functionality. So now we have a working dashboard where operations has a good view of the trouble ticketing as well as we have a model we can use for planning. So this would be for resource planning out into the future.

Dan Richardson: Yes, and I would just like to add to that is some of the sort of preliminary work that we provided was a bit to address the "sometimes you don't know what you don't know" issues. So they are looking at a dashboard, well they have never built a dashboard before. So they weren't asking us to build their dashboard. But what we were able to do was take some of their data and build a sample dashboard so they could understand what the tool is able to do so then they could go away and say, "Okay, we get it now; we understand that a bit better. Let's make these changes to the dashboard to better reflect our particular needs."

And in terms of the planning side, we are able to leverage [via Memory Analytic Server] that comes with Cognos Express to eliminate all of that manual extraction and manual updating of an Excel-based tool and visual basic scripts and all of that and be able to draw directly from the data sources to bring the data into the Analytic Server and then present that information to the end user and give them the ability to write back in terms of changing resource allocations or priorities, that sort of thing, and have those immediately reflected in their reporting.

So now we are at a point where they have reporting against their ticket systems. They have a resource planning model. They are starting to see the impact between the two and then will continue to grow and enhance the model as they move forward.

Dan Potter: In terms of resources and time, what did it take to get you through Phase 1 and Phase 2?

Stephen Crocco: Phase 1 started around the end of January. And we had a working model into April. Now I know there were some challenges on our side; there were a couple of times when we had to pull resources to work on some production problems that we were dealing with at that time, so it wasn't 100% allocation. The planning started shortly after that so it started in mid-April and we had a fairly good working model by, I would say, the beginning of July.

And during that time, again, there was a bunch of training where we were starting to get a lot of the knowledge ourselves on how to use the tool. So a lot of those interactive sessions were us working on the tool and Accumetrics stepping back at his point and providing more leadership and technical knowledge. So that is why they took a little bit longer than we first anticipated.

Dan Potter: And in terms of resources from an Everlink perspective, how many people on the IT side did you have engaged?

Stephen Crocco: Well, again, I'm going to describe some of the roles. When we say "IT" we don't really have a traditional IT shop. We have people who play technical roles. So even on the user side of the house, the folks managing the call center, they have enough technical knowledge to participate in these discussions but they don't take it down to the database level. So we had say three users from the user community that had technical knowledge and then what I would consider pure IT, the people that manage the hardware and the server, the databases, and backup and that kind of thing, we had another three. And then we had three people within our development shop; so these are the people that actually do development for applications for our customers. So they would be the ones creating reports based on the project. So there were nine, plus myself.

Dan Potter: I think that is one of the interesting things about this application as well; you are not only providing reports and insight internal to Everlink. An important part of this is providing that information to your end user customers as well. Can you talk a little bit about that and the value that has brought?

Stephen Crocco: So most of the reporting we have done up until now is reporting this internally. But a lot of those reports are in support of our SLAs with our customers. There are plans in the near future to be able to provide that reporting out to our customers in some sort of a dashboard, more applicable to the users as opposed to internal. So most of the ones right now are all internal.

Dan Potter: And is that part of the Phase 3, moving to pushing that out to end users as well as the more advanced analytics?

Stephen Crocco: Correct, absolutely.

Dan Potter: Don, do you want to tell us a little about the role of Accumetrics in this implementation?

Don Richardson: Certainly. I think first and foremost was the technical leadership in terms of the Cognos Express Tool and how they can leverage that to meet their requirements, as well as guidance initially, I think, in terms of helping them understand that we can do this in phases and why starting with reporting helps them address that need, but how it is going to facilitate and feed into the planning in the future so that they can understand how this is going to grow with them.

I think one of the key things that Stephen mentioned that we feel is very important, especially in the mid market is the knowledge transfer. Most mid-sized companies aren't in a position to have a team of consultants onsite for years to come. So we have this very clear vision where we are going to help you at the beginning. We are going to facilitate and we are going to ensure that we do the training and the knowledge transfer so that when you are in stage 3 and stage 4, as Stephen has indicated, they are going to roll out some more reporting, there is going to be very little involvement from Accumetrics at that stage because it becomes purely a reporting exercise and we have transferred the skills. When they are looking at the next phase or the next modeling engagement, then they might have us come back in, again, as a facilitator to make sure that they are going through it the right way, et cetera. So I think that is primarily sort of our role has been the facilitator and the provider of the knowledge for them to be self-sufficient going forward.

Dan Potter: Do you want to share with us a little bit more about Accumetrics and some of the other things that you do?

Don Richardson: Sure, we are an advance IBM business partner. We are focused on performance management using the Cognos software solution. We have clients across North America, east coast, west coast, Canada, US. We also have this focus on mid-size companies then that is very much sort of our comfort zone. Most of our employees come from actually a business background, not a programming background, which is a little bit odd. But what it brings to the table is the ability to help the business understand or to understand the business and translate that into technical requirements, if you will.

I think with that focus we are really excited about Cognos Express. We are seeing a lot of benefits and we are getting a lot of demand in the marketplace simply because it is all the essential things that a mid-sized company needs to report on their business and understand where they are, drill down and do analysis to understand what is driving that and then being able to go into a planning solution and adjust and realign resources to meet those new needs. So it has been really, really successful for us as well as for our clients.

Dan Potter: So let's talk specifically about some of the benefits to date. I know, Stephen, you are early in Phase 2 of a three phase implementation and I'm sure it will probably extend out to other phases over time, but share with us, if you will, some of the benefits that you have seen so far.

Stephen Crocco: Well, it took us [away] because a lot of the reporting we were doing before, there was no real way to schedule; the distribution was fairly difficult. Now with this tool it allows us to create views that are customized by group and allows them to pull the information whenever they need to. And it also, the biggest benefit, too, is pulling data from multiple data sources and bringing it together in one either dashboard or report.

Dan Potter: So Stephen, in terms of the impact that this has had so far on the business users, what has been the experience so far from their perspective?

Stephen Crocco: Well they are starting to see a little bit of some of the value of the tool. We had a business requirement that one of the project members took on. And what we have to do is on a monthly basis we have to validate some of the reporting that we get from some of our contractors. So what he did was build a small, not a very pretty app, but an app that allows one of the business users in finance that had really limited training on the tool to be able to go in, run a report that would normally require one of the reporting analysts to do it on a current OLAP database. So it gave him a really user-friendly interface for creating these small one-offs with a report.

So now that user is not reliant on your traditional IT group to run his report. He can go and do it himself. So it really saves him time and now he is getting the information in a more timely manner.

Dan Potter: And now that you have empowered the business users with tools that they are starting to feel comfortable with are they getting more creative in terms of thinking about how to apply them to different projects and different sources of data?

Stephen Crocco: Absolutely. We had a couple of instances within the finance group themselves saying, "Wow, this is what they can do with time tracking. Well what about maybe settlement reporting? Maybe about some of the reporting we have to report to FIS on a monthly basis." So they are starting to really put on their little thinking caps and thinking of other ways we can leverage the tool.

Dan Potter: And I'm sure the finance organization is probably looking at this and thinking about how they can really expand on what they are doing from a planning/budgeting/forecasting perspective?

Stephen Crocco: Absolutely because that is the Phase 2. A lot of the forecasting we do right now is done in Excel spreadsheets and maintaining these links is fairly difficult. So now what is happening is we are able to get more consistency out of the reporting that we are doing.

Dan Potter: So Don, from your perspective as a business partner, what have you seen so far in terms of the implementation and the benefits that it has had with Everlink?

Don Richardson: Oh, I think mostly from a success point of view is the last couple weeks ago, I was talking to Stephen, and when he mentioned just that scenario, where all of a sudden there are other parts of the business asking to be able to start using the tool. But also the users taking it and running with it

and building reports; that is, in my opinion, the beginnings of real success. It is not going to be shelf-ware obviously at Everlink.

I think a lot of that has to do with how Stephen has also managed the project. First of all, they defined the scope, they understood they were going to do this in stages and they stuck to that. They said, "Let's finish reporting before we run off and start doing the planning parts of Stage 2," even though there was a bit of demand pushing that way. Also, bringing in the business. So the business was very much a part of this project from the very beginning. So that means that when the solution rolls out the business is aware of what is coming. They have been participating in it so that when it is presented to them it is not new; it is not, "Oh my goodness, what is this thing? I don't like I; I don't want to be a part of it." They have already bought in. So that when it rolls out they have already bought in. So that when it rolls out they have already started to take ownership and I just think that the way that Everlink has managed that and engaged the business has driven the success that we are starting to see.

Dan Potter: So getting back to the theme of the presentation, the "Think Big, Start Small," it really sounds like you are well on your way through the phased implementation approach and starting to bring it all together, the reporting, the analysis and planning into that one integrated solution that was talked about earlier today, the integrated business planning.

Let's end the session and I will ask you both for recommendations, a little bit about what you have learned so far in this implementation and any guidance that you would give other mid-sized organizations that are just thinking about how they tackle some of their own challenges within their organization. And, Stephen, I will start with you.

Stephen Crocco: Well, I really like the approach that we have taken. Again, that's the whole start with a smaller project first, limit the number of users. Maybe limit the reporting to one data source. Because it that is where projects in a lot of organizations fall flat is they try to get too aggressive right off the bat. So you are better off to get a small, simple report. Get the users out there using it and it gives them a better feel for what the requirements are, as well. Because I find sometimes if you try to analyze things, you get into "Analysis Paralysis." This way here, if you get a little prototype out there, you get it out and running and start to see the benefits right off the bat, then they get a better feel for the tool because nothing with Accumetrics, but with any presentation they always look so good. It's when you actually start to apply those, that is when you get the real demo.

And then as you are starting to roll out the tool, it really is engaging all of your functional areas so that the benefits are seen across the organization. And the last recommendation that I have is make sure that when you are deploying a tool like Cognos, understanding that the tool itself is a very, very powerful tool and you are going to get, whatever you put into the tool you are going to get out of the tool. So you have to make sure that you are willing to spend the time to really understand the tool, get it setup properly and be able to support it on a timely basis. So, for my organization I had participation right across the board which was very good. We had nine people participating in the iterative approach and that is one of the

reasons why it was successful. So just make sure that you are willing to spend the time to make the project successful.

Don Richardson: If I were just to segue off of that a little bit is one of the issues we often encounter is selling the budget. So we want to have this reporting and planning solution and when you make it very big at the beginning there is going to be resistance. Whereas if you do this "Start Small" we are able to limit how much money you are going to spend on software and services at the beginning. We are going to be able to do some focused training so that the people are skilled up. And we are going to get a win quickly. And that just makes it so much easier to go back to management and say, "Okay, we are ready for Phase 2." So I'm not saying that you don't identify what the Phase 1, Phase 2, Phase 3 approach looks like, but by doing this they are able to make a certain level of commitment, validate that they are going to get value from it, and then commit the next step.

So, I think from that phase that is always a consideration for somebody who wants to bring in a new solution into a business.

Dan Potter: Well with that I would like to thank you both very much for sharing the story of Everlink. Stephen from Everlink, thank you very much, and Don from Accumetrics.   And I would like to encourage all of the listeners in this session to attend some of the other sessions that you will hear in today's Summit. So thank you very much.