



WHITE PAPER

The Benefits of Modern BI: Strategy Companion's Analyzer with Recombinant BI Functionality

Sponsored by: Strategy Companion

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IDC OPINION

Widespread use of business intelligence (BI) tools results when organizational culture, business processes, and technologies are designed and implemented with the goal of improving the strategic, operational, and tactical decision-making capabilities of a range of internal and external stakeholders. The primary challenge facing many organizations is the lack of an organizational culture that encourages and supports data analysis to inform decisions. Certain departments or groups will have their own culture dictating a propensity for BI tools use, but outside these analytically oriented groups, the greater employee and manager population within an organization could benefit from management taking specific steps to proliferate BI usage. One step to take is to ensure the technology in use is more intuitive to users, relevant to users' analytic requirements, and flexible or agile enough to enable new discoveries with limited bottlenecks to time to discovery.

BI solutions with high design quality will have features supporting user self-service. Traditional BI tools made it very difficult to add new data sources without the IT group pre-integrating data sources together, most commonly in a structured data warehouse. But users increasingly need to add new data to trusted, structured data sources, and this new data can come from third-party data providers, locally stored spreadsheets, and traditional transactional sources. For each data source to be added in a traditional BI tools environment, the IT department would have to address each user's change request with custom integration. This greatly increases the time to analysis by the user, increases costs, and ultimately creates a BI environment not conducive to improving business performance.

Strategy Companion's Analyzer BI offering has new functionality called Recombinant BI that was created based on direct feedback from customers seeking more agile BI. This functionality adds several capabilities that on the whole enable more rapid creation of analytic views of data with easy reuse of calculations or dashboard views across different subsets of data as well as the ability to add and relate new data sources so users can create custom filters or discover new insights into business performance. The offering can simultaneously analyze pre-integrated, structured data sources while enabling user self-service and data source additions to address unique analysis requirements without requiring IT to process a change request.

Modern BI tools are better suited to address the needs of business users with visual presentations of analysis, flexible self-service BI, and easy-to-use, intuitive, and mobile interfaces. They still must meet IT requirements for security, scalability, reliability, and lower-cost maintenance. Organizations looking

across the market for modern BI tools should consider Strategy Companion's Analyzer. The BI offering's zero-footprint interface and flexible analysis capabilities position Strategy Companion strongly among the leading and fastest-growing BI tools vendors selling modern BI platforms. Strategy Companion's Analyzer is offered in two versions:

- **Analyzer Enterprise.** Designed for deployment on internal servers, Analyzer Enterprise offers self-service BI functionality and IT administration of BI access and dashboard development rights. It can also be purchased for use as an OEM BI capability for vendors of other enterprise software offerings.
- **Analyzer SaaS.** Designed for multitenant deployment, Analyzer SaaS enables organizations to share BI with customers, suppliers, and partners in addition to their internal employees. This version also enables data service providers to provide Analyzer as the front-end BI tool for use with their data. Strategy Companion itself does not host Analyzer SaaS but offers this version to organizations that need to deploy centralized data to many entities and users.

Additionally, users can access Analyzer's zero-footprint interface through devices with browsers.

IN THIS WHITE PAPER

This white paper discusses the benefits of using BI tools that better address the needs of business users who perform analysis of data to inform decisions on a regular basis. The document compares modern offerings with traditional BI tools and discusses the benefits of self-service BI. Strategy Companion is one of the vendors offering BI solutions in the market, and its BI tool Analyzer with Recombinant BI functionality is described to show its differentiation in the market. An interview with an Analyzer customer, Retail Solutions, provides insight into the use of Strategy Companion's offering.

SITUATION OVERVIEW

Business intelligence tools remain on the list of priority investments for most organizations, and the demand for providing BI functionality to more users continues. This is driven in part by greater evidence that more widely and regularly used BI can provide competitive advantage through support for improved decision making. As demand for BI has increased among business users, from line-of-business managers to customer-facing employees, so too has the need to provide more self-service functionality and a visual environment conducive to discovering meaningful insight in data that better engages business users in analysis of business performance for continued improvement in execution of organizational goals.

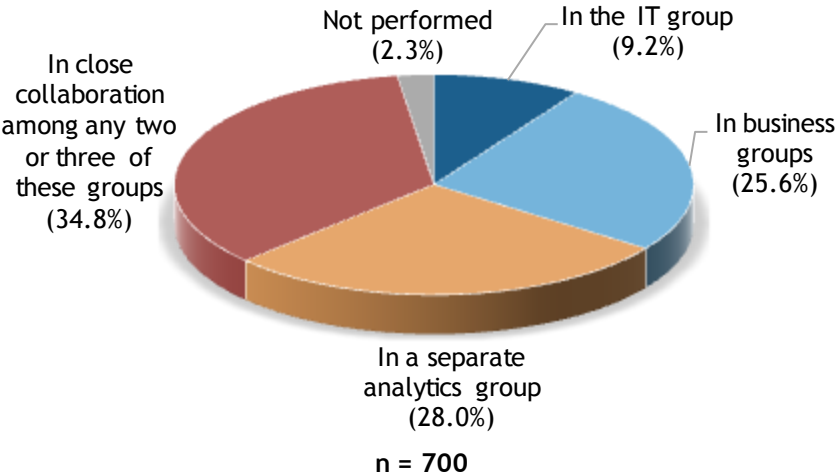
Often, central BI groups have difficulty meeting the varied and constantly changing requirements of business users in a timely manner. While IT can provide a robust information management infrastructure, ensuring the BI requirements of each user puts a strain on resources and causes bottlenecks to performing relevant analysis in a timely manner. Business users who understand the domain within which they work are better suited to identifying and responding to their own analysis needs. But this requires BI tools with self-service features for creating custom calculations and dashboard views and for incorporating other data sources not readily available within an organization's managed information infrastructure. Organizations that treat their business users as customers of

IT-provisioned BI tools will be better prepared to offer increased flexibility in the usage of the tools while focusing on support of data quality, integration, and access control. IT must move more control over the use of BI tools closer to the users of the tools. These users are not centrally located and span multiple functional areas (see Figure 1).

FIGURE 1

Location of BI Users

Q. Where in your organization is data analysis using multidimensional analysis or OLAP, spreadsheets, and visual discovery tools primarily performed?



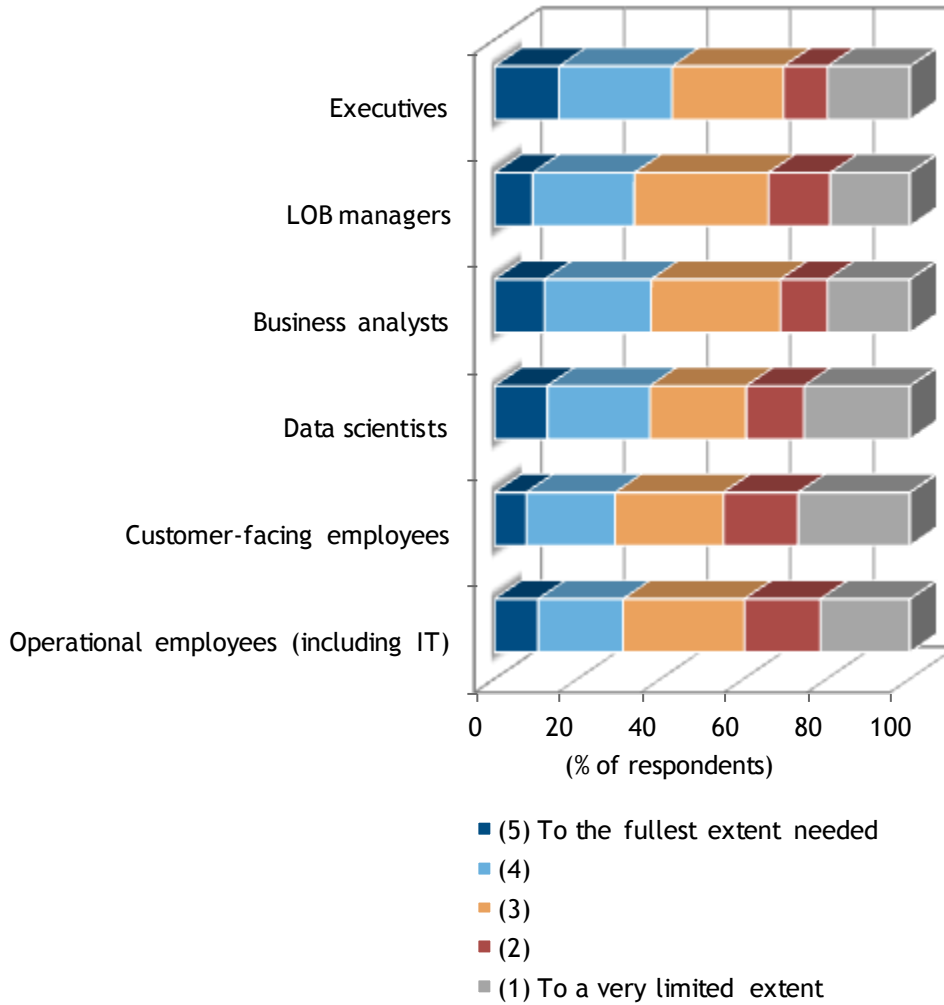
Source: IDC's *Big Data and Analytics Maturity Survey*, 2013

Since few organizations have moved to provide self-service BI to their users, it is not surprising that they are unable to meet the needs of these users (see Figure 2). The combination of centrally managed BI tools with low self-service capabilities and the unique requirements of a varied user population has resulted in inappropriate technology solutions for organizations' BI needs. Organizations failing to meet demand for user change requests to BI capabilities should consider how self-service BI could reduce the burden on IT and increase the flexibility of their BI solution.

FIGURE 2

Meeting User Requirements

Q. To what extent does the business analytics technology your organization has in place meet the decision support requirements of the following user groups?



n = 700

Source: IDC's *Big Data and Analytics Maturity Survey*, 2013

Analyzer SaaS in Use at Retail Solutions

Retail Solutions provides BI data to the consumer packaged goods (CPG) industry, collected from retailer point-of-sale systems and supplier data. It adds vertical industry-specific analysis to support critical use cases and provide key performance indicators to its CPG customers. This data resides in a private cloud that services all of Retail Solutions' customers. End users access the data through Strategy Companion's Analyzer and are typically analysts or operations managers tasked with

improving sales of products through their retail channels. The strategies for doing so are as varied as the analysis requirements of many users across many different organizations.

With Strategy Companion's Analyzer, Retail Solutions provides its customers with a means to address unique analysis requirements that often involve combining new data sources specific to a single CPG organization with the data in the analysis cube provided by Retail Solutions. Retail Solutions is in a sense acting as a centralized information and analysis infrastructure provider while enabling its end users to have more control and flexibility in the analysis and discovery they perform. The problem Retail Solutions solves for its customers is complex when considering the myriad analysis requirements faced by CPG business users:

- **High data volume, velocity, and variety.** CPG organizations deal with extensive amounts of data just from daily product sales. But to gain meaningful insight into sales volumes, these organizations must analyze many details, including promotions of new product introductions, price, inventory, and more. Additionally, the time frames for which these products or promotions are active vary. Demographic data, product assortment, and even packaging may play a role in improving sales performance, demanding constant analysis of rapidly changing, varied data.
- **Data discovery.** CPG organizations conduct many product promotions simultaneously in different regions with different characteristics specific to each market. The full story of success may not be readily available in sales data. Many variables can be adjusted in a given product to make it more successful in specific retail segments. A CPG organization selling sweetened packaged food products may wish to evaluate whether high-fructose corn syrup sells better or worse than cane sugar in a given product. Combining product sales data with key product attributes is possible through Analyzer, enabling the CPG organization to discover if ingredient variables are useful in lifting the performance of a product's sales, for example.
- **Pervasive analysis.** Through the widespread use of BI tools and practiced data-driven decision making, analysis can become more pervasive in an organization. While disseminating insights through dashboards will be beneficial, consider the dissemination of a specific analysis created by a user for use with other data. For example, a product manager creates a filter by product ingredient to examine preferences by sweetener type. The user can make this calculation and data source available to others who can quickly add it to data about products they manage and conduct their own data discovery. At the same time, another user may have added information on product packaging colors, another on demographics by zip code, and so forth. The sharing of new analysis becomes many to many, broadening the relevancy of the tool, which results in an environment for extremely pervasive BI tools use. This capability is made possible through Strategy Companion's Recombinant BI functionality within Analyzer.

Flexibility in Analysis Better Addresses the Unique Needs of Users

It would be very difficult to plan for and implement all of the master data that could be required by a user within a CPG firm to have fully flexible BI capabilities. With Recombinant BI, users can identify and filter as needed by combining new attributes with trusted data sources. In addition to adding new data sources as filters, users can also apply analysis over varied time frames. With traditional BI and reporting, historical sales would likely be shown over a de facto standard period such as one business week or operating quarter. Performance of product promotions, however, needs to be measured at different time frames. While the promotion is active, the impact on sales must be monitored, but more importantly, the downstream effect that promotion had on attracting longer-term product buyers must

also be understood. Having the flexibility to look at promotion effects over varied time frames is extremely beneficial to CPG product managers.

This capability also highlights how the needs of business users vary substantially. For example, the finance department would want structured, controlled time frames in its reports because that better suits the way in which the department manages accounting operations and financial management. If finance is making the purchase decision for BI tools across an organization, it may value enterprise reporting more than ad hoc query, data discovery, and self-service features, which are more in demand among the general business user base. Multidimensional analysis, most commonly OLAP, has its uses where highly structured analysis cubes are required for reporting or supporting known analysis requirements within a specific domain or for a specific purpose. Multidimensional analysis can fall short in supporting ad hoc queries and self-service addition of data sources, which has led to a rise in product offerings that address this segment. Traditional BI will long have a role in an organization, and the infrastructure built to support it can be accessed and combined with other data by a business user to support more flexible analysis.

CHALLENGES/OPPORTUNITIES

Strategy Companion will struggle, as other vendors do, to differentiate itself in a BI tools market that is crowded with offerings that span a range of capabilities. Prospects must be made aware of the different use case requirements between traditional BI focused on reporting and performance monitoring over regular time periods and tools that offer more ad hoc query for data discovery and self-service BI.

The opportunity for Strategy Companion is strong as it competes in a market IDC refers to as query, reporting, and analysis tools software, which was \$9.0 billion in 2012 and will grow at a forecast compound annual growth rate of 9.2% to reach \$14.0 billion in 2017. The healthy demand for BI tools will continue, supported in part by the need for multiple analytics solutions within the same organization to address varying use cases. Self-service BI tools are just one such solution that will be purchased and deployed by organizations of all sizes and across industries. Strategy Companion's customers that reference success with Analyzer are helping the company achieve improved recognition, and Strategy Companion's Recombinant BI functionality is a differentiator in the marketplace that will further aid in growth.

CONCLUSION

Organizations embarking or continuing on their path toward making BI more pervasively available and used among their business user population should consider tools with self-service capabilities. Technologies, business processes, and organizational culture will impact the success of a BI initiative, and organizations can improve their chances of success by choosing the appropriate technology for a given target user. Reducing the bottlenecks to conducting analysis means reducing the burden on IT, and a self-service BI tool with a zero-footprint interface can help alleviate the burden. As more business users demand ubiquitous access and flexible capabilities, BI tools must give users freedom of access points, whether mobile or other, and freedom of analytical discovery, whether the data exists centrally or not.

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