

**Spotlight On**

# **BI for the Masses: Real World Examples**

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# A Little About Me

**Solution Architect with 18 years experience in business, visual production and technology.**

**AIIM Certified Enterprise Content Management Practitioner**

**Currently IT Project Manager & SharePoint Architect for Skechers USA, a global footwear manufacturer**

**10 Years as a content management specialist for legal and government industries**

**Principal Enthusiast at [SharePointStrategist.com](http://SharePointStrategist.com)**

**Vice Chair of SPUGS.org, non-profit dedicated to promoting SharePoint User Groups**

# Enterprise Balancing Act



# **The Story**

**What it was like...**

**What happened...**

**What it's like now...**

**What you can do...**

# About Skechers USA

- **Leading international footwear manufacturer**
  - Retail, wholesale and distributor channels
- **\$1.3b public company – 16 years old**
- **Driven by marketing and speed to market**
- **A “do it in-house” culture – very little consultative assistance**
- **70 person IT Department including all international operations**
  - Employees have long tenure due to our boss; excellent place to work
- **MOSS 2007 / SQL 2005 deployment – 3 years in production**
- **2 Full Time staff members on SharePoint team; additional ½ FTE for design & data integration; consultants for specific tasks**
- **Fun, Challenging, Rich with Opportunity**

# About Skechers' Enterprise

- All back end sales / order data housed in Informix
- No existing centralized groupware
- Preference for open source
- Existing BI implementation received mixed results
  - New Enterprise BI Manager role created in IT Department to drive revamped implementation
- BI Reporting tools in production are Metacube
  - No longer supported application
- New business requirements driving new solutions
- Distributed, non-technical workforce – HQ Users more advanced
- Serial collaboration via e-mail



# Business Drivers for Change

- CFO executive sponsor required paper based process to be automated
- Desire to have a solution that was:
  - More cost effective – use what we own
  - More easily accessible – minimize training needs
  - Adopted by users
  - Extensible
  - Owned by IT
- Review of comparative business case
- SharePoint selected as solution

# What is Business Intelligence?

My own working definition:

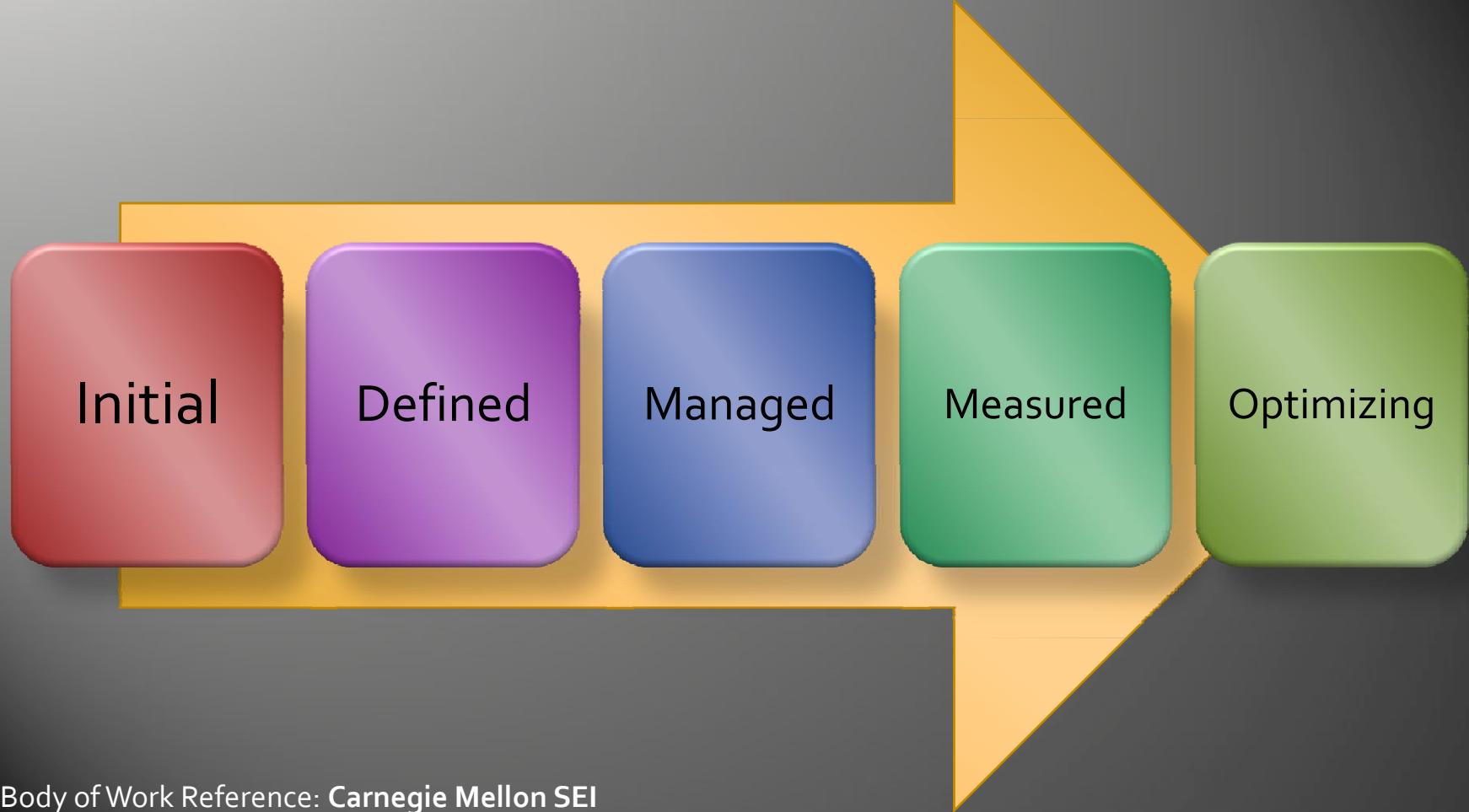
Provides accurate real or near-real time business information in an easily consumable manner to decision makers to enhance their ability to chart the next right action. A system which is incrementally implemented and regularly enhanced to increase speed of delivery, transparency and value to the user base.

Characteristics I look for:

- Scalable
- Compliant
- Accurate
- Integrated
- Governed
- Multiple Consumption Methods  
(reports vs. charts / browser vs. client app)

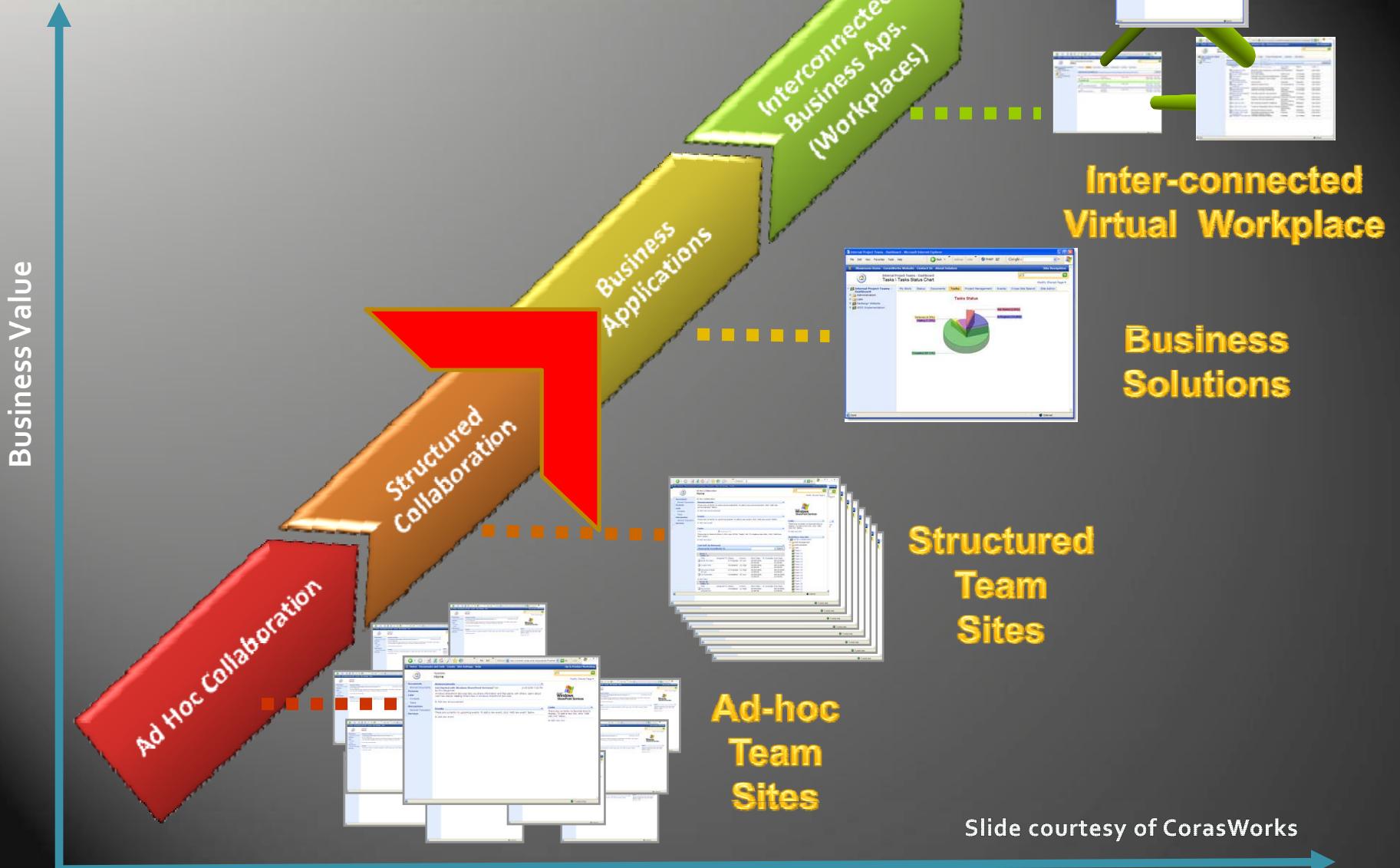


# Capability Maturity Model (CMMI)



Body of Work Reference: Carnegie Mellon SEI  
<http://www.sei.cmu.edu/cmmi/general>

# The Goal - Integration



# Iterative Deployment

- ◆ SSAS Cubes
- ◆ PPS – Dashboards, Scorecards, Reports
- ◆ SSIS – Data cleansing, transformation, import
- ◆ SSRS – Reporting Services in Integrated Mode
- ◆ Excel Services
- ◆ SharePoint Lists & Libraries & Web Parts



Use a broader definition of BI than vendors and analysts tell you.

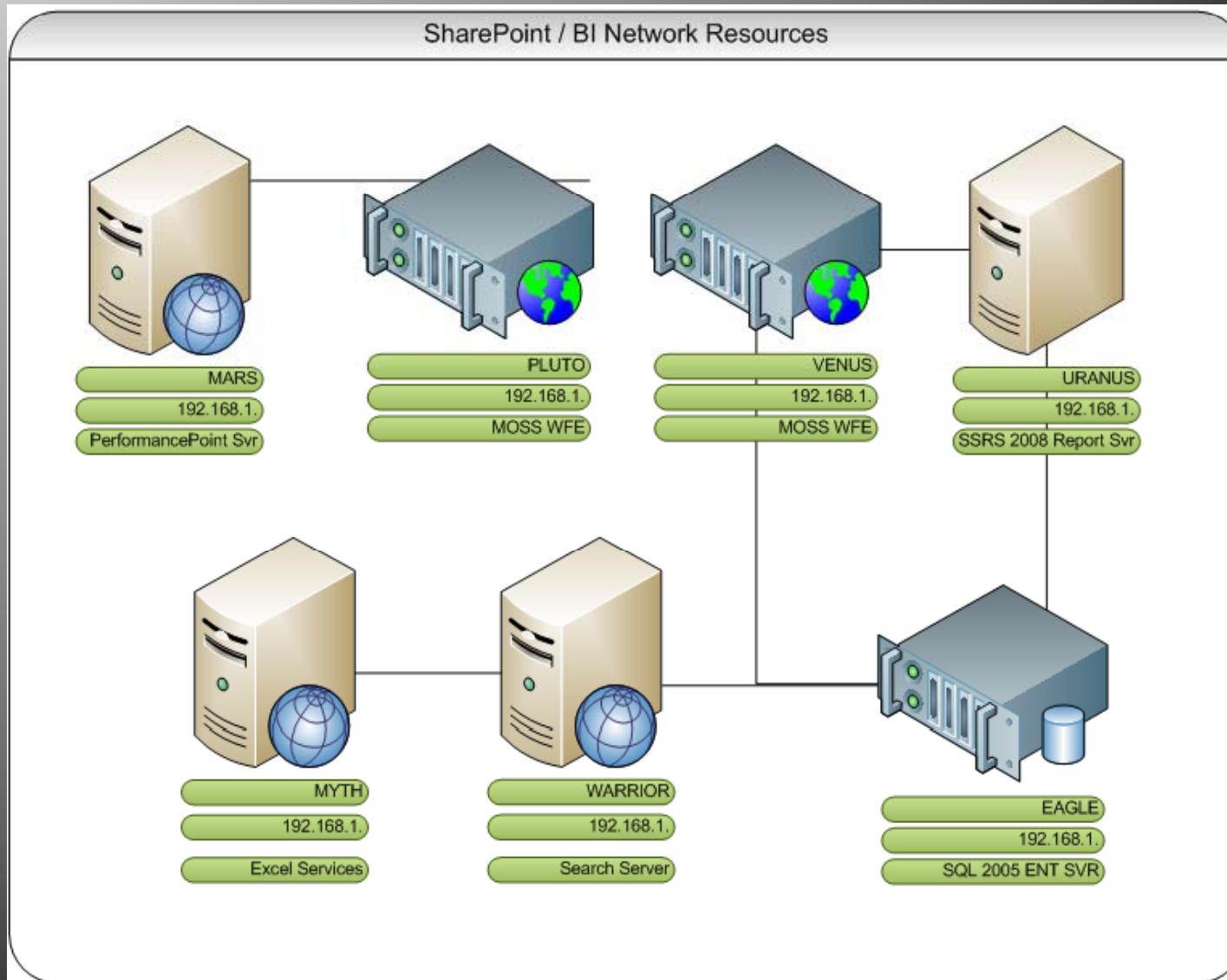
All tools can provide insight and be used in business decision making.



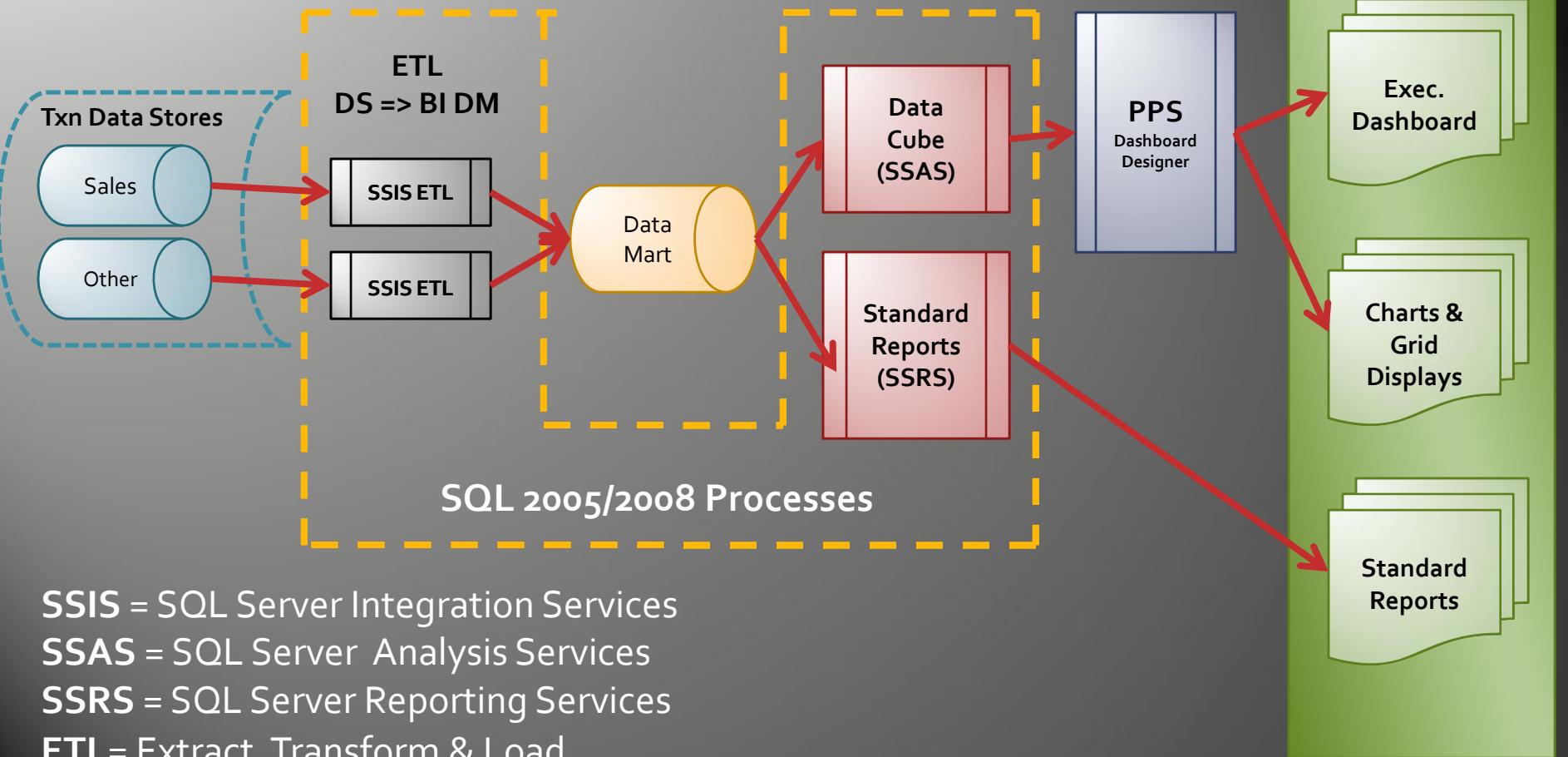
# The Process for Success



# Example Architecture



# Example Data Flow



**SSIS** = SQL Server Integration Services

**SSAS** = SQL Server Analysis Services

**SSRS** = SQL Server Reporting Services

**ETL** = Extract, Transform & Load

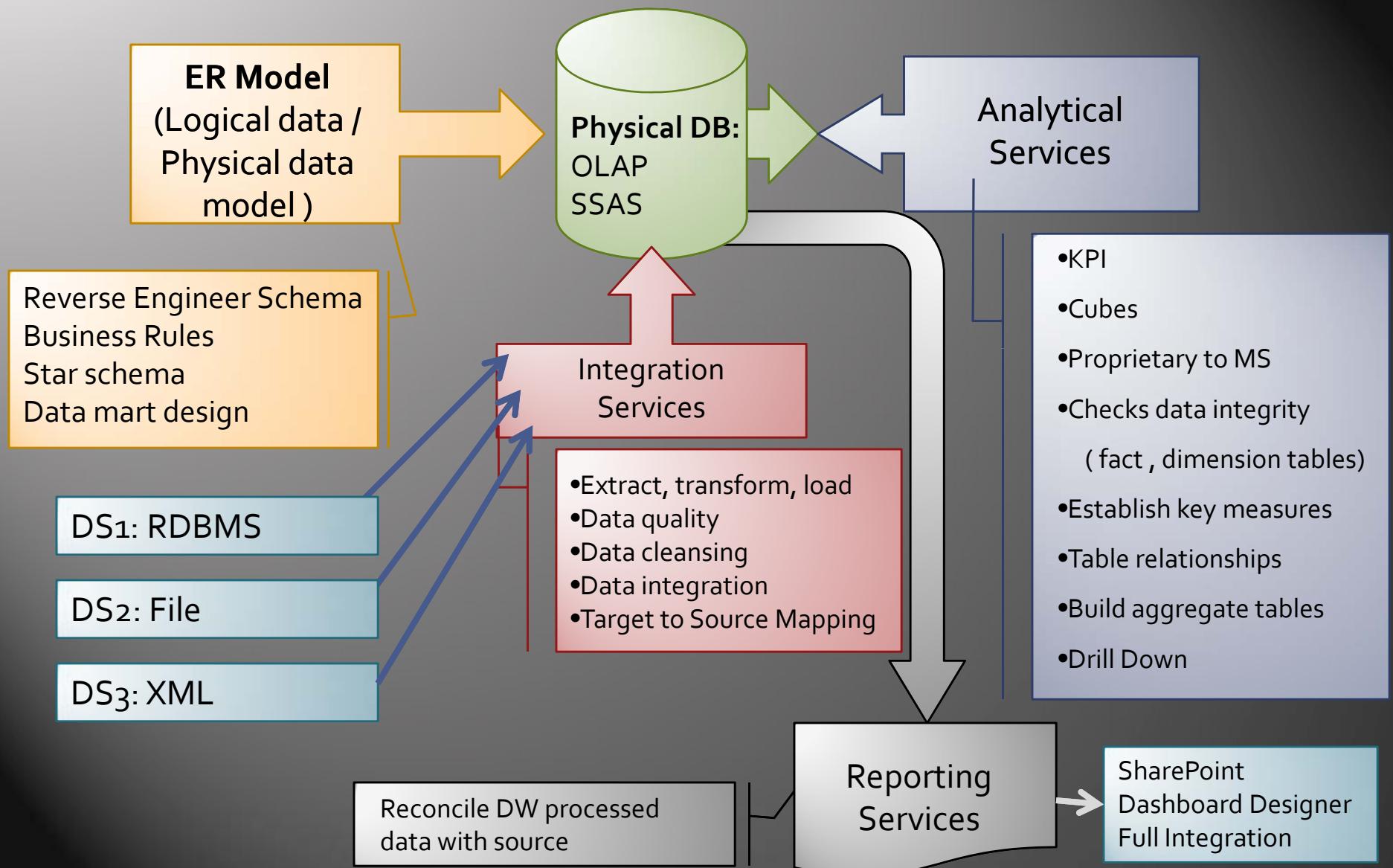
**DS** = Data Store

**DM** = Data Mart

**TXN** = Transactional



# Dba Focus: Process Flow Diagram



# Skechers Implementation

demo



# Select Tools – Excel Services

## □ Excel & Excel Services

- Collaboration on WIP spreadsheets
- Publishing reports to team groups
- Leverage KPI's built into SharePoint
- Excel Services allows for publishing & view by teams
- Good for finance workgroups – nuts and bolts users



Select Tools

# Select Tools - SSRS

- SQL Server Reporting Services
  - Run in integrated mode with SharePoint
  - Commonly deployed for custom reports via portal
  - Reports created in BI Studio & deployed to portal
  - Select for conversion of reports that are e-mailed, generated in other systems or maintained in spreadsheets.
  - Training required to create reports – not OOTB user friendly



Select Tools

# Select Tools - SSRS

Sales Dept. Reports

Type	Name	Title	Modified
Category : Travel Calendar (5)			
	Travel Calendar - ALL	All Groups Travel Calendar	3/16/2009 11:27 AM
	Travel Calendar - Exceptions	Missing Travel Calendar Report	3/16/2009 11:27 AM
	Travel Calendar - KAE_TM	KAE and TM Report	3/16/2009 11:27 AM
	Travel Calendar - Managers	Managers Report	3/16/2009 11:27 AM
	Travel Calendar - VMC	Visual Merchandising Coordinators	3/16/2009 11:27 AM
Category : Weekly Reports (3)			
	Combined Report	Combined Weekly Sales Reports	12/2/2008 8:07 PM
	Last Submissions Report	Weekly Reports submitted between Tues 12 Noon & Thurs 12 Noon	12/2/2008 8:07 PM
	Weekly Exceptions Report	Reports not submitted as of due date & time	12/2/2008 8:08 PM

## Data Connections

The Data Connection Library makes it easy to share files that enable users to connect to external data sources.

New | Upload | Actions | Settings

Type	Title	Name	Description
	Data Source for Travel Calendar	SKXTools_Production	DYLAN Sql Server Data
	Production SKXTools Database Access	SKXTools	DYLAN SQL Server data
	Production SpendingApproval DB Connection	SpendingApproval	DYLAN SQL Server Data



Select Tools



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# Select Tools - SSIS

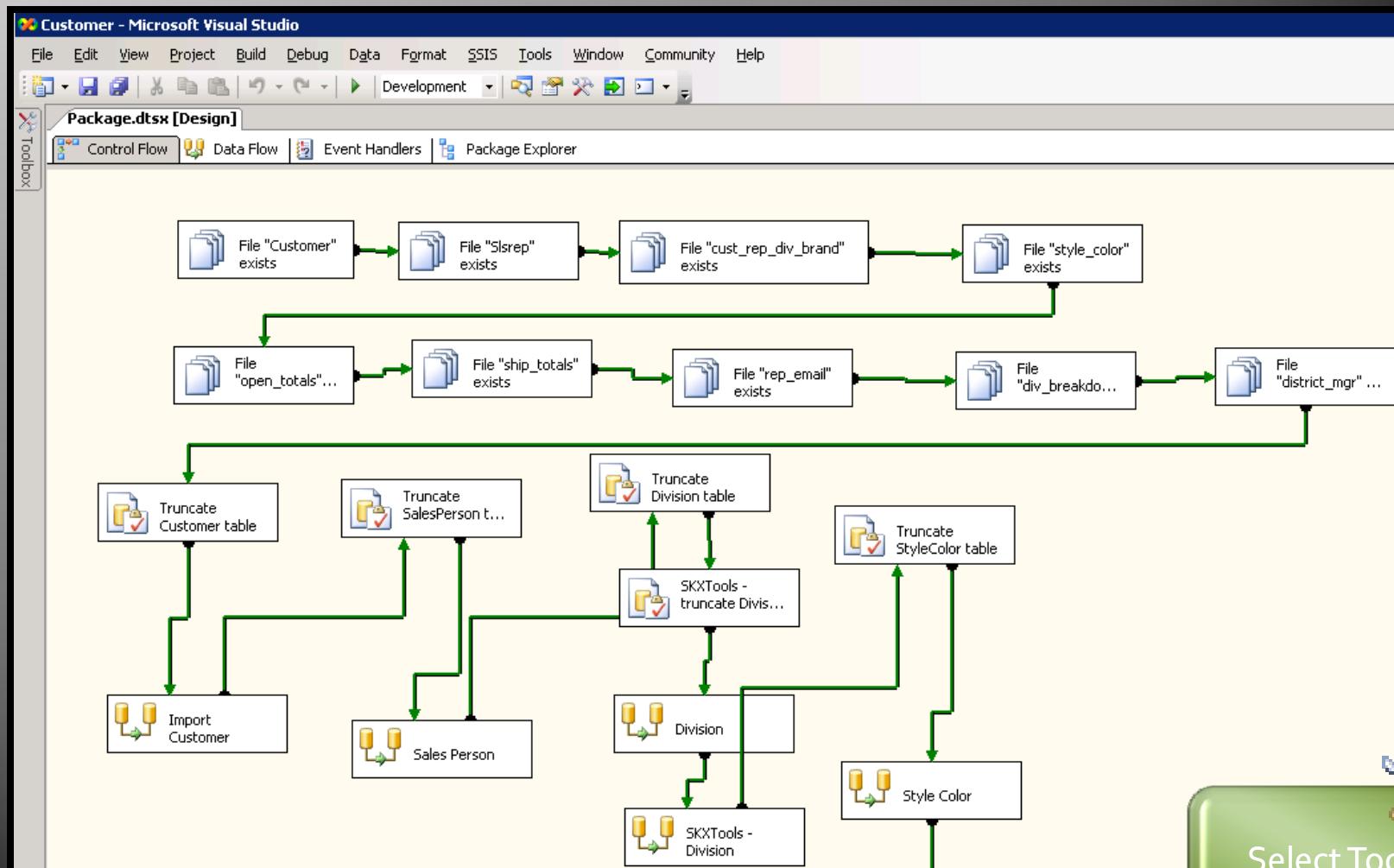
## □ SQL Server Integration Services

- Run various data import & cleansing batches
- Define jobs like a workflow with various steps
- Define jobs in SQL Server Management Tool
- Run at server level
- Ex: Import base tables of customer names or divisions instead of making connection to legacy system
- Ex: Convert column data types on import



Select Tools

# Select Tools - SSIS



Select Tools

# Select Tools - SSAS

- SQL Server Analysis Services
  - Delivers **OLAP** (On Line Analytical Processing) capability
    - Create MDM files – multi dimensional model files used as data sources
  - Data mining functionality
    - Create models from external data sources
  - Ex: **ETL** (Extract, Transform, Load)
    - Import base tables of customer names or divisions instead of making connection to legacy system
  - Ex: **DTS** (Data Transformation Services)
    - Convert column data types on import



Select Tools

# Select Tools – PerformancePoint

- Scorecards that support KPIs (measured values and targets)
- Dashboard Designer giving design capability to users in basic interface
- Publish to SharePoint portal
- Security Trimmed
- Ad-hoc analytics to help users determine root cause for under-performing metrics
- Drill-Down/Up, Drill-Across and Drill-to-Detail to help users understand issues or performance characteristics



Select Tools

# Rules for the Road

- Eat your own dog food but don't drink the Kool Aid
  - ♦ Be an enthusiast not a fanatic
- Find and nurture and executive sponsor
- BI systems are as good as the data that populates them
- Use incremental BI enhancements as an opportunity to engineer your underlying processes
- Define your audience for the specific tool
- Build a Proof of Concept to familiarize yourself and audience with the tools.
- Plan for training & continuous improvement process



# What You Can Do

- Find / Nurture your executive sponsor
- Pick a BI Proof of Concept and implement
  - Use the broad definition of the term
- Get Involved! Blog, tweet and attend user groups
- Build a team – they will make you successful
- Invest in yourself through continued education



**Don't Forget Your...**

# **Enthusiasm**

**Contagious  
Actionable  
Quantifiable  
Repeatable**

**An Essential Management Principle**