Reporting & Hot Topic Quick Flow Demo Card

SMA-X 2017.11

**Background**

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| Key Messages | * SMA-X is built on a Big Data platform which provides unique reporting and analytics capabilities * Built for purpose – by not taking a generic record or platform approach, SMA-X provides out of the box reports and analytics for all your processes, including KPIs and recommendations on what to do first in order to improve * Do not worry about performance impact of your reports and busy dashboards as SMA-X is not using the transactional database to calculate the analytic reports |
| Customer Challenge | * Having the right visibility on productivity and performance * Doing Continuous Improvement of the IT Processes and of the Services IT delivers * Enabling each user to have actionable insights and to configure its dashboard and reports without requiring development skills |
| Engage Them | * Do you know an ITSM system where creating a report is easier than Excel? * Are you able to do sentiment analysis on your user’s survey answers? * Can you do proactive problem management? * Do you know what knowledge or catalog offering you are missing and that your end users are searching for? * Do you have KPIs and metrics directly calculated for you, and if you do not achieve your goals, recommendations on what to do to improve? |
| Differentiators | * Easy to create reports and dashboard layout * Reports run against a separate reporting database so don’t impact user transaction performance * Big Data Analytics for knowledge, user searches, incidents, changes, proposals, and surveys provide unique insight and suggest actions to improve your processes. These are not just reports, they are data insight and recommendations. |

**Quick Flow**

The goal of the Quick Flow demo card is to provide a benefit oriented *overview*, to *introduce* the customer to value and solution. It should be completed in ~5-10 minutes; optional sub-flows to demonstrate more of the solution may be included below. Make sure your demo environment is ready – see demo set up below – as well as Survey setup in the Customer Satisfaction demo card. After practicing and perfecting the flow, you might want to copy and paste the rightmost Cheat Sheet column (below) to serve as a printed or electronic guide during the demo.

| **Do** | **Say** | **Cheat Sheet** |
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| **Dashboard**   * Login as [Jennifer.falconmf](mailto:Jennifer.falconhpe@gmail.com) * Dashboard showing the various update times at the bottom of each chart * Easily move one somewhere else by drag and drop | * Start with a dashboard you can easily configure with charts and tables, operational or analytical. The refresh time tells you when they were last calculated. Do not worry about adding too many of those, SMA-X will calculate all those outside of the transactional database, thus not impacting agent taking calls or other users. | * Dashboard * Move widget around with drag and drop |
| **Add a chart to the dashboard**   * + Click to add (at bottom) * Type ‘stock’ in the report search bar * Select the ‘Stock Financial for Device’ report * Click add * Show the new chart | * Let’s see how we can add a chart easily on the dashboard. In 2 clicks, with a very easy interface to browse for report or review what they will display. | * New chart * Stock Financials for Device |
| **Filter and Drill-down**   * Show Support Requests by Group * Maximize * Click on the Low square in the legend to filter out the value * Click back to revert back * Minimize * Switch to table view * Sort by Count to get the highest on top * Drill down by clicking on the left drill down icon on this first row | * Those reports are easy to manipulate, filter further, look at the aggregated data behind the report, or from the chart of the data, you can drill down to this slice in its application and work on those records. | * Support Request by Group * Maximize * Filter legend * Back, table view, sort, drill down |
| **Analytical (over time) report properties**   * Dashboard * Incidents closure over time, review trend * Edit Report to review Report properties to group over time (trend) * Show tabular view (table) | * Trending reports, such as the Incidents Closure over time, show the volume of incident we are closing over time. Very easily I can get my volume of incident day over day, or month over month. This report is going to be calculated periodically so I don’t have to worry about it, it will always appear instantly when I need it.   *Note to presenter: The demo data is loaded without real creation dates so they show with no creation date. You can filter for Incidents created after the initial load day to remove them from the chart.* | * Dashboard * Incident Closure over time * Report properties * Chart and tabular view |
| **Create a new Operational report**   * (\*New) Create new Operational chart in the drop down * Name=Label=Device by country * Record type=Device * Group By=Location.Country (select Location, then click +related then select country) * 2nd Group by: Subtype * Function: Count * 2nd Function: Percent per group by Count * 3rd function: Sum of Total amount * Chart type=Stacked Bar * Save * Show chart and tabular view * Settings, Export to CSV | * Now we need a real time view of where our assets are. Easily I can see how many I have by country, by getting a report joining the location and the request entities. I can add more information like more breakdowns, and more functions, and visualize it in a chart or in a table. This was fast! I see right away how my assets are spread across geo and how much I have worth in each country. One click and I can get that to Excel to share, or even to do further chart representation. | * New, Operational * Name=Label=Device by country * Record type=Device * Group By=Location.Country * 2nd Group by: Subtype * Function: Count * 2nd Function: Percent per group by Count * 3rd function: Sum of Total amount * Chart type=Stacked Bar * Show chart and tabular view * Export |
| **Hot Topics**   * Go to Knowledge/Hot topics * User searches * Click on mobile phone (or one of the Hot Topic areas. Note that these will change from demo to demo according to use) * Select a few searches and click create a support offering * Show that we could look at requests or user questions or user searches as well | * Having reporting and analytics on structured data that simply is great, yet on unstructured data it is even more amazing. By looking at hot topics across the unstructured text being searched by your users on the portal, we can understand what they are looking for, allowing IT to find out what is missing either from the catalog or in the knowledge base. Here SMA-X is leveraging Big Data to help you with the largest issue in knowledge management: Finding what is missing! * As easily you could look at the Q&A or the request your users are creating to understand trends, for instance like BYOD and which new devices (Smart watches?) are becoming more popular. | * KM/Hot topics * Searches * Mobile phone * Q&A |
| **Survey Analytics**   * Go to Survey, drill down to the IT Support Sat survey * Reports Tab, can drill down on charts * Hot Topics tab * Modify the Primary survey rating filter and select the 2 most negative rating values. * Click ‘Response’ (or some Hot Topic area, as these can change from demo to demo) | * Even more interesting is to use pattern matching to understand what your IT customers are really thinking. While our SMA-X survey allows you to get a number of charts to understand the answers you got from those users, SMA-X allows you to analyze the open questions where your users could enter free text. Instead of going one by one, you can direct see the common pattern or analyze their sentiment. Guess now you would like to have the same on Amazon ratings! | * Survey * IT Support Sat * Reports tab * Hot Topics tab * Rating filter for negative responses * Heat map drill down |
| **Proposal Analytics**   * Go to Idea & Proposal Mgmt, Proposal Analytics * Select a few bubbles (control click) for low cost (left half of x axis), high value (larger bubbles), low risk (bottom half of y axis) * Show the value vs cost in the right side bar | * SMA-X knows your processes and comes out of the box with the best visualization and settings for what you will need. In proposal management, the bubble chart allows you to create your scenario visually and understand where you need to place your bets. | * Proposal Analytics * Select a few proposals * See the cost versus business value and cost by business unit in the right side bar. |
| **Change Analytics**   * Change/Change analytics * Click Success rate trend icon on left side of the success rate gauge * Click view suggested action points | * Last, getting actionable insights from reports and analytics is great, but what about having SMA-X directly suggests you how to improve. * In our Change Analytics, SMA-X is showing various KPIs and you can set the thresholds and see how you are doing over time, and slice the data by adding different filters. It will also give you a number of suggestions on where you need to start your journey to improve. * Reporting allows measuring your performance and your maturity, with its analytics and suggestions, SMA-X goes beyond to help you continuously improve your process maturity and your services. | * Change Analytics * Trend icon for success rate * View Suggested Action points |

**Optional Sub Flows**

Customer intrigued after seeing this overview? Want to show more of the solution? Ideas for possible sub-flows/drill-downs:

| **Do** | **Say** |
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**Demo Preparation**

Demo data prep includes initial set-up tasks and items that must be checked before each demo (e.g., demo data changes over time, or to return to the pre-demo state). Be mindful of whether the changes are appropriate or needed for the demo tenant you’re using – e.g., for the shared demos, initial set-up is probably already done, and some changes shouldn’t be applied (e.g., theme)

Initial Set-up

Pre-demo Checklist (in addition to above)