BI Radio

Episode 32 – BA [Business Analytics] Forum 2010

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Station ID: This is BI Radio

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Montage:

- The most beneficial times as the customer is to meet other customers. These are things that we always talk about. How are they using the products? What are their lessons learned?
- You're sharing time with people who live with the same challenges, the same opportunities, and are looking for, in many cases, the same answers with very similar questions.
- For us it means the product's been in use in an environment where it's been proven to work.

00:35

Ken Seeley: Hi there, and welcome to BI Radio. I'm Ken Seeley. On the show today, we look ahead to Forum, specifically Business Analytics Forum, starting October 24th at Information on Demand 2010. A better way to do BI. Delaney Turner takes a deep dive into IBM Cognos proven practices with Program Director for Performance Management and Product Interlock, Anna Lynch. And we'll hear about the benefits for customers and partners from customer turned partner, Chad Erman. But first up we'll hear some new soft skills tips from communications consultant and returning host, Mark Jeffries.

01:20

Kelsey Howarth: Hi, I'm Kelsey Howarth. Today you're going to listen in as I speak to Mark Jeffries, the host of IBM Business Analytics Forum. Mark is an executive coach, keynote speaker and consultant to some of the world's largest corporations. He's a regular contributor to NBC's Today Show, CNBC, BBC News, Sky News and Fox Business. He's also the author of two books on soft skills, including *What's Up With Your Handshake*? And *The Art of Business Seduction*, which was released in July 2010. Here he gives us a snapshot of what to expect at Business Analytics Forum, and some great tips on how you can network and make a great first impression at the event.
Hi, Mark. Thank you so much for joining us.

Mark Jeffries: Thank you for having me on.

Kelsey Howarth: You're going to be the host for Business Analytics Forum. Some people listening might not have attended Forum in the past or IOD. Can you paint a bit of a picture of the event for us?

Mark Jeffries: Absolutely. It's one of those amazing events where you feel like you're with people who share your world. And to me there's no greater advantage. You're sharing time with people who live with the same challenges, the same opportunities, and are looking for, in many cases, the same answers with very similar questions. So it's a wonderful opportunity to come together to hear what the organization has to offer, to understand what is state of the art, what's coming up through the pipeline. But also – and to me this is the biggest advantage – it's to share stories with other delegates, other attendees, to share ideas of best practice and try to find solutions together for issues and challenges that we all face. It's unmissable, and the days will just fly past, and of course we're in Vegas, and what could be better than that?

Kelsey Howarth: You've been the host for several years now. What are some of the key messages you'd like to share with our audience this year?

Mark Jeffries: As a host of these events over the years I've always been very, I guess very proud to have shared the ongoing story of, of course, the Cognos products, and now IBM to see the development, and most importantly to see the success that people have enjoyed while both using the software and of course coming to these events. My main message is simply about taking full advantage of the opportunity. This is not just a conference where you sit, you listen, then you go home. This is such an incredible opportunity to be interactive, to learn, to discover, to do some digging yourself, to find answers to questions that maybe you didn't even realize you had. What I see year after year are the same faces and then new faces as well. People come back time and time again. I'm guessing that they wouldn't return to these events, to these incredible forums unless they found wonderful value. So my main message is get really involved. Don't go up to your room and order room service. Be down there, be networking, be involved, ask questions, get answers.

Kelsey Howarth: You mentioned Forum offers some great networking events. Can you give us some more advice on effective networking strategies?

Mark Jeffries: Well for most people the concept of networking feels a bit uncomfortable, meeting with strangers, people you've never actually met before, striking up conversations. For some people that's quite difficult and a bit awkward. But the beauty of this event is that we're all there for the same reason. And so you can walk up to anyone you like and create conversation because everyone's interested. Everybody wants to know what everybody else does, and we're all trying to learn and to grow. This is why we're here. This is why we're investing time. I have lots of networking tips. In my latest book, *The Art of Business Seduction*, and the book before that, *What's Up With Your Handshake?* Lots of networking tips, things you can do to make your networking life a little bit easier. Something that is very, very important, I believe, is how you follow up after you've met somebody because every single day at Forum and at IOD you're going to be building up your collection of business cards. Let's face facts. You're going to have tonnes of these things. And there's no point in just having them sat on your desk in a corner for a year. So within a week of meeting somebody new, you must deploy what I call the three Rs of networking, the three Rs of connecting. R number one stands for radar. R number two is recall, and R number three is reward. So R number one is very easy. Within a week, send them an email. Send them a message reminding them that you exist because they might forget. Then R number two, this is recall, this is really important. Try to remember something they said to you. Remember an element of conversation where perhaps they revealed to you that they really like something. Maybe they were big fans of the Texas Hold'em poker game in the casino. Maybe they revealed that to you. Now if they have told you that little thing, you simply repeating it in an email gives you big points when it comes to creating a great networked connection. And then we reach our third R, this is reward. In that email where you put yourself on the radar; you've remembered what they've said, send them a link maybe to a website about cool poker strategies, just for fun. And what you're doing is you're rewarding them for reading your email. These three Rs guarantee you a great connection. You might not have someone who brings you business or offers you a job, but you're definitely going to reply and someone who is then added to your network, and as we've established over the years, your network is your personal brand, and it's a crucial element of who you are. And it's a living, breathing entity, and you've just got to keep feeding it and keep growing it.

Kelsey Howarth: For me nothing fills me with more dread than walking into a reception and seeing a wall of people I don't know.

Mark Jeffries: I know.

Kelsey Howarth: What would be a good approach here?

Mark Jeffries: It's really hard. There's a bunch of approaches you can use. It's important when you're networking you don't hang out with your friend. If you're there with someone and the two of you just stand together, pointing and laughing at people, that doesn't get you anywhere. You really should try to, in many ways, be on your own. However, you can ask for help from people you do know. So let's say you see someone you know, go up to them in a very open fashion. Say hi, how are you? They're with somebody else at the same time, they will have to introduce you to the other person. It's a forced introduction, and it helps you create conversation. Then there's what I call the situational experience, and this is where if you're sharing the same situation, maybe the guy who's serving wine at the little breakout event you've gone to has just run out of wine, you can say to the guy next to you:Do you know what? They always run out when I get close. I'm sure it's a message. Say some comment about the situation you've both just observed together; it gives you a shared element of networking, and the conversation will flow much easier. And then of course there's always my tried and trusted sidle-up-and-eavesdrop approach. And this is where you are on your own. Perhaps you've got a drink in your hand, you've got your BlackBerry in the other hand or whatever messaging device you use, and you're pretending to read messages, but what you're actually doing is listening to a conversation very close to you. This is your sidling up bit. You're eavesdropping. And then as soon as you hear something you can comment on, be brave, be strong, bust in and say I'm so sorry to interrupt, but I heard what you were just saying, and I couldn't agree more. Now because you are becoming involved in the conversation, 99 per cent of the time this little group who you were listening into will welcome you in to join them. Unless they're really rude and nasty and they tell you to get lost, in which case pretend you just got another message on your BlackBerry and walk away quite swiftly. We're all there basically in the same boat, and that removes so many barriers. And so you don't have – you actually don't have anything to fear or worry about. And I think it's actually part of our personal growth. Every time you push yourself out of your comfort zone, you try something, whether it works or it doesn't work, it just doesn't matter. That's irrelevant. The fact is you tried it, and you learned something new, and either you made a new connection or you realized well, that's something I'm not going to try again.

Kelsey Howarth: Great.

Kelsey Howarth: For more information on Mark Jeffries, please visit markjeffries. com.

09:50

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10:20

Station ID: From business intelligence to business analytics and all points in between, this is BI Radio.

10:30

Kelsey Howarth: Hi, I'm Kelsey Howarth. What does IBM Business Analytics Forum mean to customers and partners? Today you're in for a rare treat as we get both perspectives from Chad Erman. Over the past 13 years Chad has become a proven expert in the areas of performance management, BI and data warehousing, with three enterprise-wide implementations for three industry leaders under his belt. This year he joined IBM partner LPA Systems to share his expertise with a wide range of clients. Here Chad and I discuss why he liked attending the event as a client, some tips for success, and what LPA Systems has in store for the event.

11:21

Kelsey Howarth: You've attended Forum a number of times as a customer and this year as a partner. From a customer perspective, what were some of the benefits of the event?

Chad Erman: Well, the most beneficial times as a customer attending an event is the ability to meet other customers. These are the things that we always talk about, but it's truly getting to know other customers. How are they using the products? How are their implementations going? What are their lessons learned? What are the good, what are the bad? Sometimes it's how to navigate the political waters within their organization. It's great to have a bird of a feather and to understand those types of activities. The other thing I like to do is a really deep dive, get into understanding what new innovations and technologies are IBM throwing out? What's the new cool stuff? Everybody wants to see what's going on and the sooner you can grab a hold of it, the better. Also one of the best things I've done is I've wanted to know other people in the performance leaders' program. Get to know what some of the most successful people are doing with the products, and how they're doing it so you can kind of replicate that. That would be the best benefits I've ever received as a customer.

Kelsey Howarth: Any lessons learned at Forum in years past that really stick out in your mind?

Chad Erman: Absolutely. The first and foremost, you have to be proactive. Know what you want to accomplish, give yourself some goals for the event. What do I want to learn? What do I want to achieve with my time at Forum? Be proactive. If you want a question answered from IBM, go find that person. If you want to meet another customer that's in your industry, go find that person. Find a way to network. Also, ask questions during the sessions. People who give presentations, they're fantastic presentations. And it's amazing how many people just go to a session and then walk out. They could have five questions. They never get those answered. It's amazing what kind of interactivity you get from the Q&A sessions.

Kelsey Howarth: As a Forum veteran, any tips for first timers on how to get the most out of the event?

Chad Erman: You'll hear me – and this is a common theme with me:be proactive. Be proactive to meet others. Be proactive to find out the new technologies. But again, be proactive. The ones that really struggle are the ones that sit around and wait for something to come to them. Also, go to the performance leader lounge. I'll repeat this a few times, but it allows a nice, very comfortable setting where you kind of go to rub elbows with, and learn from the best. That way you're able to go have a nice soft drink and relax and talk and just learn. You don't always have to do the speaking all the time.

Kelsey Howarth: Since last year you changed jobs. Can you tell us a bit about LPA? Any customer implementations that you're particularly proud of?

Chad Erman: Yes. So last year I have changed jobs. For my whole career I was on the customer side and had a lot of fun getting to know other customers. It was a new challenge and environment. I found myself helping out so many other customers and answering so many questions that I wanted to help even more people. So I chose to join a partner organization, LPA Systems. This allows me to make new friends, come in contact with more people, and help more people. As a result it's been a huge success. We've had several customer implementations that have gone very, very well. We've covered organizations that are in healthcare, manufacturing, higher education, and amazingly in a down economy, we've had very successful implementations in hospitality. One example of our customer implementations has been a small healthcare organization here in Texas. It's a group of doctors, they want to transform the way they do healthcare. They're using Cognos literally in their examination rooms to understand their patients better, to understand their problems, to be able to get a very accurate diagnosis, get their metrics and their scorecards immediately on the screen at examination time so they can give them and provide better care.

Kelsey Howarth: This year you're attending Forum as a partner with LPA. What are some of your core goals from the event?

Chad Erman: To help people. We truly want to help people. We want to understand the additional questions. Every day we talk to our customers, we talk to people in the business, and we understand how they're trying to change their business, what goals that they're trying to achieve. And we want to understand even more of those. You learn something new every day, especially in times that people need to manage their financial status even closer in an economy, that's even more paramount. Also, as a partner, we're technologists. We want to see the latest innovations that they have with a product. We work very tightly with IBM. We're a beta tester for a lot of the new functionalities. But we like to see it when the customers see it. That way we can see the reaction. Here are the questions. Be able to provide some of those answers and truly help other customers.

Kelsey Howarth: You mentioned your customers. What sort of information are you helping to bring back to them?

Chad Erman: We've received quite a few questions from our customers. Many times it's how can we solve our business problems using the newest and latest, greatest tools from a company like IBM? We deal with this on a day-to-day basis, but every day technology makes further and further advancements, and you can do things quicker, faster and easier. Also, people are asking a lot of questions, existing customers. For example, how is the BI integration with TM1? That's still a relatively new merger between the companies. How is the integration happening? How tight is the integration? How easy is that integration? Are there any lessons learned from that from other customers? Also, what is the future path of Cognos Express? It's been a fairly new product. People have a lot of questions. What's the future going to hold? There are a lot of happy people today, but what's next? People want to know that. Also, SPSS, where does that all play in the mix? Where's that play in relation to BI and TM1? And where exactly does IBM see the future of that? Again, people really want to know what's next. They always love to see the latest and greatest things.

Kelsey Howarth: Any big news or important messages that LPA wants to share at Forum?

Chad Erman: Yes. I would love to announce that LPA has a big release, big piece of functionality that we're going to offer our new customers and prospective customers. I would encourage anybody that attends the partner expo or the convention floor to stop by the LPA Systems booth and see what we have in store. I think you'll be very, very surprised and very, very intrigued. Look me up personally. My name's Chad Erman and I would love to be able to help you out, answer any questions you may have.

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Kelsey Howarth: For more information on LPA Systems, please visit lpa. com.

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19:30

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19:40

Delaney Turner: Hi. I'm Delaney Turner with IBM. Today I'm speaking with Anna Lynch. Anna is Program Director for Performance Management and Product Interlock. And today we'll be speaking about IBM Cognos proven practices. Anna, welcome to the show.

Anna Lynch: Oh, thank you. Thanks for inviting me and I'm so happy to be here to talk to you about the proven practice area.

Delaney Turner: A lot of people in the industry think of best practices. How is a proven practice different, and how do we define it?

Anna Lynch: So proven practices are really documents that we've written based on experience. We've changed the name from best practices. We gave a lot of thought to using best practices versus proven practices, and best practices, after our full analysis, came for us to understand that someone had to make a decision that it was best. And given the various different environments our customers use our products on, it was hard for us to come up with the best solution. So what we've decided to do is call them proven, and for us it means that the product's been in use in an environment where it's been proven to work. So this would give the customers the confidence that whatever we're delivering in the information is actually in fact something that someone's using.

Delaney Turner: Do you get people getting confused? Do you have to explain that distinction?

Anna Lynch: Well we did initially when we first started out with the proven practice group, and oh gosh, it's probably around four years old now that we've been around with the proven practices. Now they know what they're all about and they're accustomed to the information that's there.

Delaney Turner: Where do proven practices come from? Are they from the customers? Are they dreamed up in a lab? Maybe a bit of both?

Anna Lynch: Yes. Yes and yes. So the information that we have is material collected from various different sources. We use experiences from our product reviews, so we have a proven practice team that works with the products before they're released and during the time when they're released. So it's all about the experience that we've encountered. Before the release it's the use of the product, and what the proven practice team has formally – sorry, their experiences with the product in the past, and they apply it to this new product that hasn't been released just yet. And they determine what's new in it, what should customers be aware of or what people should be aware of. We take that same experience and members of the proven practice team, our services team spend time with our customers, whether it be through a beta or through customer engagements in various different formats and files that we receive the information in, and then we collect them, format them, and make them available to our customers.

Delaney Turner: How many of these do we have?

Anna Lynch: We have just over 600 documents.

Delaney Turner: Six hundred documents.

Anna Lynch: Available through the developer work site. And we have them in categories. So the categories are development, financial management, infrastructure, modelling, performance, report design, security, upgrade and migration.

Delaney Turner: Wow!

Anna Lynch: It's information that goes beyond any of our documentation, any of our education material, and it's how the products are used within specific environments.

Performance, for example, is a hot topic. A lot of people want to make sure that their models, their reports, are as efficient as possible. And therefore we document some of the things that we've used in the past with other customers, what has been proven to work in other areas, and make that available so that other people can benefit from them.

Delaney Turner: So if I'm a customer and I'm listening to this, and I've come up with a great way that I think could be a proven practice, what would be the process that I would go through for that to have become a proven practice, and then what kind of criteria does your team apply when they're accepting or rejecting something?

Anna Lynch: Definitely anybody can contribute to the proven practice area. It's simply an email to the proven practice team that's found on the developer works site in the area itself. So definitely anybody can submit information. What we look for is specific product information that is unique. So it cannot be copied from any other documentation. It could be a tip or a technique, a style that they've used. It could be code as well. What the key is it has to be original and from the originating author as well. Our team will work with the customer or whoever's submitted the document to understand. If it's code, we like to have some sort of description of what the code will do. And what benefit it'll bring to other people. So obviously any formatted document is fine, but the idea is give enough information so that we can understand the purpose, the benefits, and obviously the technique or code that you're providing.

Delaney Turner: So the procedure, we've gone over that essentially, if you had it, you prepare some documentation, email it to the team.

Anna Lynch: Right.

Delaney Turner: What would the email be?

Anna Lynch: The email is cscogpp@ca. ibm. com.

Delaney Turner: Okay. And these are all available free on the developer worksite?

Anna Lynch: Yes, they are. They're all available there for the general public on www. ibm. com. To make it easy for people we have a vanity URL, it's called, which is called www. ibm. com/cognos/support. Look for something under the featured links called Cognos Proven Practices.

Delaney Turner: Are there any in the pipeline that you can give us a hint to? Any sort of new ones that are coming out?

Anna Lynch: There's a lot of focus in and around our FPM products, our financial performance management products. And the group is working on increasing the number of documents within the TM1 space as well.

Delaney Turner: Right. And how big is the team?

Anna Lynch: The team is made up of 11 people. They are situated here in Canada, U. S., and then in the European countries.

Delaney Turner: So what type of documents are we talking about or do we have?

Anna Lynch: Okay. First the document starts out with a guideline created by the team, okay? Or someone who has experience with the product. And those guidelines are just generally the theory on how things work. Now just remember they're outside of any documentation that we already provide or education material. Then once the document starts to be used, we get feedback on has it been successful or not? And then it gets updated to be what's called a proven practice. So the theory actually now applied within the environment. We also have information around troubleshooting. And any sort of tips and techniques that are beyond something that you'd find in our regular knowledge base are now called tech notes. And they're usually tips and techniques that are beyond, let's say a page or two long.

Delaney Turner: Right. Okay.

Anna Lynch: You know what I mean, a longer type of technique that can be implemented.

Delaney Turner: Well, it's certainly a fascinating and dynamic area of the software, and one that we don't get to hear about very often. Anna Lynch, thanks for talking with us today.

Anna Lynch: Thank you. I hope you visit the Proven Practice area within Developer Works. And, please, if there's any feedback that you have that is worth sharing with us, just make sure to contact us with the email that's there.

Delaney Turner: Excellent. Thank you.

Anna Lynch: Thanks.

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28:20

Ken Seeley: Well, that's a wrap. I'd like to thank our guests today:communications consultant, Mark Jeffries; from LPA Systems, Chad Erman; and finally from IBM, Anna Lynch. Thanks as well to our segment producers, Kelsey Howarth and Delaney Turner, and to our head producer, composer and audio engineer, Derek Schraner. Visit us at radiocognos. com. You can also follow us on Twitter at Twitter. com/IBMcognos. And be sure to check us at our new Business Analytics community pages at ibm. com/software/analytics/community. I thank you for listening. I'm Ken Seeley. And we'll see you in about six weeks.

29:10

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