

Buying your BI solution from your ERP vendor, IT convenience or strategic business decision?



Speakers: Vinay Nair & Vuk Trifkovic
Moderated by Max McDonough
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Before we begin the presentation, I would like to review a few housekeeping items with you. The slides for this presentation will be pushed to your screen automatically. If you have any questions throughout the presentation, you can type them into the "Ask A Question" area, located on the right side of the viewing console, and they will be addressed at the end of the presentation. If you have any difficulty reading or viewing the slides, there is an "Enlarge Slide" button that you can click on, which is located just below the slides. And finally, if you experience any technical difficulties with this presentation, there's a "Help" link that you can click on, over on the lower right-hand corner of your screen. With that said, joining me today is Vinay Nair, Market Strategist, IBM Cognos Business Intelligence and Performance Management. Vinay, welcome and take it away!

Vinay Nair: Thanks Max. I appreciate that and good afternoon to everyone on the call today, and thanks for taking the time to attend today's webinar, entitled Sole-Sourcing BI from your ERP vendor, IT convenience or strategic business decision, brought to you by IBM and Ovum Research. So, today what we did is we asked Dr. Vuk Trifkovic, who's a Senior Analyst with Ovum's IT Application Team, who focuses his research on enterprise applications and application infrastructure, to enlighten us on some of the findings of his recent research study that he conducted on customers who sole-sourced their BI from their ERP vendor. A little background on Vuk, so Vuk specializes in Ovum's IT Research Team on competitive benchmarking reports and also conducts a big bulk of his time doing IT strategy advisory to CIOs and IT decisions makers, navigating the complicated vendor selection process. Prior to joining Ovum, Vuk worked as a business analyst for Superscape, where he was in charge of implementing a business intelligence system across his organization, and prior to that he was the Head of Operations for Oxford Arch Digital, which was an ISB specializing in content management solutions. So, he really does bring a lot of end user experience to the table in addition to his analyst insight. Dr. Trifkovic received his doctorate from the University of Oxford and his Masters from Cambridge, and focused on Technology Applications. So, without any further adieu, I'd like to pass over the microphone to Vuk Trifkovic to enlighten us on his findings. Vuk?

Sole-sourcing BI from your ERP vendor: IT convenience or strategic business decision?

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30th September 2009



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Vuk Trifkovic: Vinay, thanks for the introduction and welcome to everybody from me as well. As Vinay has introduced, I'm a Senior Analyst in Ovum IT Applications Team and today I'll be speaking about the results and insight which we gained from a survey into a specific pattern of BI procurement and deployment that we're seeing now in the market.

Agenda: Sole-sourcing BI from your ERP vendor

- Introduction
- BI sole-sourcing selection process
- Information delivery & BI sole-sourcing
- Hidden costs of BI sole-sourcing
- Conclusions
- Recommendations

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So, without further adieu, let me give you a little bit of an agenda for today's presentation. So, after the quick introduction to the topic and explanation of why do I believe that BI sole-sourcing is a pertinent trend in the IT market and why we ought to address it and look into it, I would like to present some of the findings from our research into this particular area and

show some of the implications of BI sole-sourcing which we noticed, especially with regards to information delivery or some of the costs associated with such a decision as well. Finally, after wrapping up a quick summary of the presentation, I would like to offer a few of the quick recommendations that we see fit in this particular area.

Introduction

Introduction

- BI Sole-sourcing is procurement of both BI and enterprise application systems from the same vendor
- Enterprise technology conglomerates were drawn by opportunities in new, fast-growing markets
- After a series of acquisitions in '07-'08 BI sole-sourcing is an option for many organizations

Survey

- The SAP customer base selected as the representative of the broader BI/ERP sole-sourcing trends
- Surveyed 100 SAP customers in the US and EU to understand the implications of sole-sourcing
- Telephone interviews in a conversational style with a mix of closed and open questions
- Respondents have deployed **both** SAP ERP & SAP BW / BI

However, let's talk a little bit about BI, about enterprise applications and about sole-sourcing as well, and if I may ask Max, our operator, if he could actually push some of the poll questions to you so we can collect some of your opinions on some of these questions, that would be very useful.

Max McDonough: Great! Thank you Vuk! Our first poll question for the audience is, "Are you considering BI from your ERP vendor?" The options are, "Yes, already using. Yes, actively considering. Yes, but I'd like to understand the potential impact," and finally, "No, not at this time." Again, the question for the audience is, "Are you considering BI from your ERP vendor? Yes, already using. Yes, actively considering. Yes, but I'd like to understand the potential impact," and, "No, not at this time." If you choose the radio button that corresponds to your answer and click "Submit," we'll push those results shortly, and Vuk, let me know when you'd like to see those results and I'll push them right out.

Vuk Trifkovic: Thank you Max! Now while you're seeing the poll questions, let me actually introduce the topic of today's webinar and let's try to think a little bit about the broader context in which the BI sole-sourcing trend is unfolding. And, I think that all of us would recognize very readily that we are seeing quite an interesting pattern in the IT market, especially when it comes to enterprise applications, and over the last two decades we have witnessed the rise of really very powerful and very large enterprise application vendors which have made extremely successful businesses of providing core enterprise applications, such as ERP or CRM suites as well. As those core enterprise application market segments are getting bigger and as they are getting a bit more mature, it's quite apparent that large enterprise application vendors are looking for sort of adjacent areas and sort of complementary

technologies which they could introduce to their particular portfolios in order to perhaps step into some of the growing areas in technology as well. So basically, their usual areas of core expertise were going still quite successful and going quite well, however due to the maturity they were really pushed into the direction of findings new markets and new horizons as well. In that context, BI was such a logical option and logical solution for enterprise application vendors because it can be very complementary and it can play very well with enterprise applications in general, but also it's an attractive market because it's still in a growing area and it's still an area which even in some tough economic times is attracting quite a lot of attention from enterprise buyers as well. So, what we have actually already witnessed, sort of going on, especially in 2007 and 2008, we witnessed a big wave of vendor consolidation, where enterprise application vendors in particular were all sort of scrambling to acquire significant business intelligence vendors in order to sort of have another string to their bows and in order to offer a sort of complementary technology to their core CRM, ERP and other enterprise application offerings.

Now, given that many of the notable BI vendors are now part of a portfolio of a big enterprise application vendor, and by the way many of these enterprise application vendors were offering BI tools even before that, a situation where an enterprise can get both their BI system and their enterprise application system from the same vendor is now a distinct possibility. It's basically a choice which is clearly on the list for any organization which is looking to deploy business intelligence. So, it's quite an important trend which resulted from some of the consolidation trends in the IT industry. In that particular situation, we really ought to look at the implications of BI sole-sourcing and it's really interesting to me, as somebody who watches market trends and as a market researcher, to really dig a little bit deeper into this particular pattern of deployment where, as I said, BI is being procured from the same people who are offering enterprise application systems as well.

So, having that research idea, we sort of thought a little bit in our research team how best to approach the subject and how best to approach the topic, and although it sounded quite interesting to see how this dynamic of procuring and sole-sourcing BI from an enterprise application vendor works across different enterprise application vendors, because there are quite a few options now, we really needed to sort of focus our efforts a little bit more and we really needed to find a typical example of these particular trends and of these particular topics. And for that reason, we really decided to start with the SAP user base. There are quite a lot of reasons why we actually wanted to start with SAP and I think that's sort of an obvious and ready choice. For a start, SAP has built extremely successful business in enterprise applications and by many measures it's holding the lion's share of that particular market, or at least it's holding a very considerable share of that particular market. The second issue, which we thought pertinent to look at SAP, is it did have some NAS and BI capability already built into their enterprise application platform as well, but now that it has acquired business object as well, we are expecting the SAP to basically offer even more BI solutions in the future as well. And, the final thing which really attracted us to the user base of SAP is that they're offering a very successful and rather tightly integrated application platform as well, and they're offering a little bit of a sort of platform choice and a little bit of an ecosystem of choices to the customers as well, and we thought it would be really interesting to explore how this would work when BI is thrown in the mix as well and how do some of these decisions to actually procure enterprise applications and BI from the same vendor in this particular case, SAP, work out as well in the market.

And to that end, we've surveyed about 100 current organizations, current enterprises that are currently using SAP and we surveyed those which are based primarily in the U.S. and the E.U. So, we really wanted to have a good overview of quite mature markets, such as Western Europe and Northern America as well. And in terms of research methodology, we really needed something that is at the same time providing us with sort of some of the survey numbers and sort of quantitative insight, but we wanted a little bit of a soft insight as well. We really wanted to be in position to chart and to hear those IT decision makers which had experience of procuring BI from their ERP or other application vendor and to really see what are the sort of problems they encountered along the way, what are the motivations which led them to adopt such an approach as well. And therefore, we conducted a series of telephone interviews because we thought that this is a good way to actually establish conversation with IT decision makers, and we also thought that this is going to give us a nice way to combine some of the structured questions with some of the sort of loosely structured questions which were really verging on the point of sort of just casual chat and casual conversation as well, because we thought that this could be a really good barometer for the real experiences of practitioners who have actually thought and got their hands dirty with this particular issue as well. And in terms of the SAP user base, just to qualify it a little bit further, we really wanted to reach out to those IT decision makers, IT managers and the CIOs, that had an experience of deploying within their organization both SAP enterprise application platforms and SAP business intelligence tools as well.

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Presentation overview

Selection Process

- Heavily favored the needs of the IT department
- Treated the business user requirements as a secondary consideration

Reliance on Spreadsheets for IT delivery & on IT Department for BI management

- Business users' requirements are not being fully met by the BI system
- Business users still rely on spreadsheets to conduct a large majority of their BI activities
- Business user reliance on IT depts. for day-to-day BI transactions is prevalent and stifling

Hidden Costs

- Customers who purchased BI from ERP vendor expected it to be the most cost-effective option
- The survey found that significant incremental costs were incurred
- Increased IT dept. headcount, budget overruns and project delay costs are the primary culprits

So, having given you a little bit of...sort of an overview of why does sole-sourcing matter, why is this a trend which is actually relevant today, let me talk you through a little bit of a very high level summary of the data and summary of the main points which we are able to sort of glean from this particular survey. And if I am to talk about certain conclusions and if I am to talk about research at this particular point, I'd really want you to think about three main areas and three sort of key points which we will try to address in this particular presentation. The first area which we wanted to address was the area of selection process. So, we really wanted to see how do those BI sole-sourcing decisions get made, what are the motives behind

them and what are the sort of mechanisms in which they sort of proceed as well, and how does the whole process go, so to speak. And in this particular regard, we are seeing that the needs of IT departments were clearly in the sort of the front line when it came to procurement and selection process, but we're also getting some really interesting information, which I hope to share with you in more detail around, around the fact of how did the actual process go and who was considered for deployment and who wasn't and so on as well.

The next area which I'd like to basically pay attention to and give you just a very high level sort of insight into the conclusions as well is regarding some of the experiences of those that have deployed a sole-source BI with regards to information delivery and basically here we presented some of the insights which again I hope to discuss in much more detail further on regarding the reliance on spreadsheets as the main mode of BI information delivery and some interesting points about involvement of IT departments in the process of managing, deploying and also delivering information from a sole-source BI system as well. And here, we are really seeing that there were some issues regarding business users' requirements from the BI systems and we are seeing some of the issues occurring with overreliance of BI users on auxiliary enterprise tools, such as spreadsheets and so on. And, we're also seeing that some of the IT departments are struggling a little bit with maintenance load when trying to actually implement BI sole-source tools, but not just implementing and much more importantly as they're trying to run them and keep them in deployment as well. And, the final section which I'm hoping to present is a little bit about costs of BI sole-sourcing, and this area is really going to adopt in nicely with some of the insights which we're going to present on selection process as well, but generally we are seeing that even though most of the enterprises which have gone for this solution have expected something which will be the most cost-effective option, we are seeing that there were some significant incremental costs occurring along the way as well, particularly with regards to increased IT department head count as well. So, this is just a very sort of rough overview of, first of all, the areas which we want to cover, which are selection process, some of the experiences regarding information delivery and some of the experiences regarding the cost of a sole-source BI system as well, and now I would like to actually go to the next question and dig a little bit deeper into the survey results with regards to the selection process.

Sole-sourcing selection process

So, the key question here is what really were the motivations, beliefs and factors which influenced these particular decisions and which made enterprise IT organizations go with the procurement of a BI system from the same vendor, from which they're procuring their enterprise application system as well. And again, I think this is a good point to actually seek some of your insight as well, so if I might ask Max to push out some of the results.

Max McDonough: Great! Thank you Vuk! If you'd like to see the results for the first poll, we'll push those out right after the second question here for the audience. The question for the audience now is, "What is the primary reason you'd consider your ERP vendor's BI solution over competing vendors? Is it integration with existing ERP applications, most favorable pricing option, strategic supplier status, alignment with business user tools or preference, or self-service capabilities of the product?" Again, the question is, "What is the primary reason you'd consider your ERP vendor's BI solution over competing vendors?" So Vuk, as we allow folks to answer this question, would you like to see the results for the first question and then we can move on to the results to this question here on the screen?

Vuk Trifkovic: Yes, please. Let's quickly see those results and then we can move on with the data.

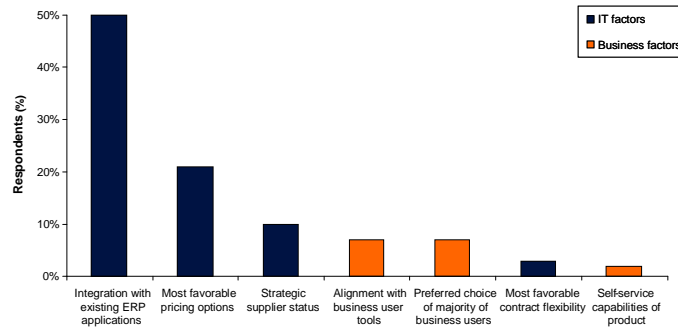
Max McDonough: Great! So, the first question results are pushed out. Let me know when you'd like to see the second question results.

Vuk Trifkovic: Hmm, I can see there are some interesting patterns there and actually a nice spread between those who have already deployed a sole-source BI solution and those who are considering, or those who are just simply there to actually, about a quarter, to understand the potential impact as well.

Max McDonough: Great! So, I'm just pushing out the second results now and then from there you can take it away.

Selection process heavily favors IT criteria

What was the primary reason why you chose your current BI solution over competing vendors?

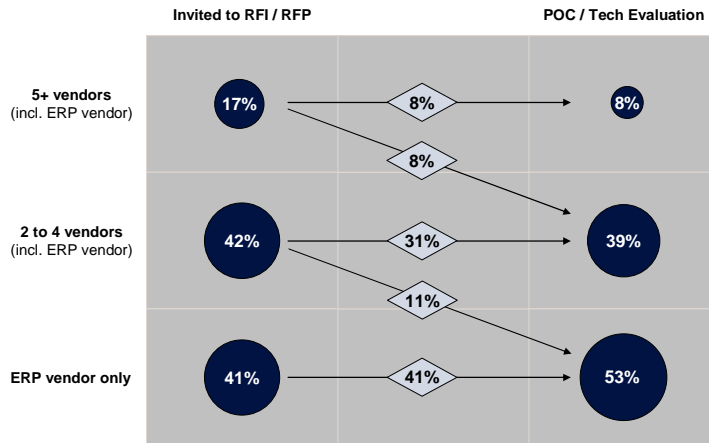


- 73% indicated that price, contract flexibility and integration with ERP were the principal motivations
- Factors important to business users account for just over a quarter of responses

Vuk Trifkovic: Actually, these results are coming very nicely and they're dove tailing very nicely with the next slide which I'm going to present and before I move to that next particular slide, let me just note that I'm seeing that about 62% of those of you who have taken part in this particular poll are claiming that integration with the existing ERP applications is the primary reason why you would actually consider obtaining your BI solution from your ERP vendor as well. And, that's a very interesting point because we are seeing something similar in our results as well. So here in our survey, we asked pretty much the same questions, so what are the primary reasons behind making this particular decision and somehow, and surprisingly, we are seeing that integration with the existing ERP applications is the main driver and is the main motivation. And, in a way, I don't think this is entirely surprising. This is something which is clearly an important factor of why you would potentially want to go down this route and it's also a very good point which many of the application vendors which do offer BI solutions as well are sort of driving home as well. So, I'm no actually surprised that particular answer come up at the top. I am a little bit surprised with the sort of spread and with the pattern in these responses that I'm seeing, both in this particular slide, which I'm showing now, but also in some of your poll results as well. And, what I'm slightly surprised is with the fact that some of the other criteria, especially those criteria which are concerning business users a little bit more clearly, for instance alignment of business users' tools, of preferential choice of majority of business users, or perhaps self-service capabilities, and I clearly expected that they probably are not going to be primary but I perhaps expected a little bit more motivation in this area rather than motivation being clearly in the area which is of basically IT concern, such as ease of integration with the ERP system, such as most favorable pricing options or for instance strategic supply status as well.

An ERP vendor's BI solution is often the default choice

How many BI vendors did you send RFI / RFP to and with how many did you perform POC / tech. eval. ?



So, what I'd like to basically point out in this particular slide and what I'd like to basically say, that this slide shows very nicely, is that clearly the selection process was heavily driven by IT criteria and among those IT criteria the tighter integration with ERP, with enterprise application solutions, was the main sort of idea and main sort of motivation behind going down this route. However, this information gives us only the sort of a little bit of an idea why people are doing it and I'm actually finding it incredibly interesting to explore a little bit more how people are actually going about doing and making this particular sourcing decision.

And here, I'm presenting a slide which is a little bit more complex, and please bear with me for a moment as I'll try to actually talk you through it and explain the motivation for why we actually built it in this way and what we're trying to achieve here. So basically, we wanted to see not just what was leading people into considering BI sole-sourcing, we also wanted to see how did that process actually flow, who was invited to bid, who was invited to provide proof of concept applications, who was invited to technology evaluation as well. So, we decided to divide the procurement process into very rough and simple steps as well. So, we divided it into the preliminary stage, where we are seeing indication to submit information about a particular solution or invitations for RFP, requests for proposal. So, that's basically our preliminary stage, where you're considering a potentially larger number of vendors for your particular technology solution. In this particular case, it would be BI. And then, we also wanted to see the second step in this particular process and wanted to see the second step where you're procuring something and you're perhaps whittling down your choice and you're choosing only a smaller group of vendor solutions to really dig deeper into and conduct more in-depth technology evaluations or proof of concept as well. And then, we wanted to see how many vendors were included at each of those stages. And if I might point your attention to the left-sided column, invited to RFI/RFP, and to the very bottom of it, we're seeing that about 41% of respondents are saying that only their incumbent ERP vendor was actually the only vendor that was invited to provide preliminary information about a BI solution. So, actually I find that number to be somehow surprising. So, it basically means that in four out of ten cases no other vendors would even be considered at the preliminary stage. And when we actually

asked another sort of group of respondents which would actually look at perhaps two to four vendors, including that ERP vendor, however when it really comes to getting their hands dirty and conducting technology evaluations and proof of concept, they would drop out some of those other vendors and focus solely on ERP vendors. This really means, and again as the bottom right-hand side corner of this matrix shows, that over a half of the enterprises surveyed that have decided to sole-source their BI haven't really conducted proper selection procedures with more than their incumbent as well. And, this is a really significant and a really important question to sort of understand and it has clearly important implications further down the line, when we drill into some of the effects of sole-sourcing as well. And, we can clearly see that in many cases the motivation behind going down this route was very IT-driven. And, the second thing that I wanted to bring up, not in every case but in the vast majority of cases, it was basically a quick and easy option and people have decided to look only at their ERP provider for their BI solution as well. So, just an interesting point to remember and perhaps we can try to come back to it later on, when we talk about some of the experiences of those who have deployed a sole-source BI solution as well.

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Information delivery & sole-sourcing

And here, in this second section, I want to move away from sort of the beginning of the process, where we talked about why did people do it and how did the process of selection flow, into some of the experiences of their deployment as well. In the first category, the first set of experiences that I want to have a look at, is information delivery. And, this is quite an important element for the success of any BI initiative because, after all, BI is there to actually serve the needs of line of business users and deliver pertinent information to them at the right place, at the right time so they can actually carry out their particular business tasks the best they can.

Supporting users' BI requirements has proven difficult

Better self-service & the flexibility in the information delivery – most common complaints

"Our business users are finding the tool difficult to use without additional assistance."
Project manager at a US manufacturer.

"SAP BW has been perceived as too transactional and not flexible enough."
Global head of IT with a large energy/ utilities organization in Norway.

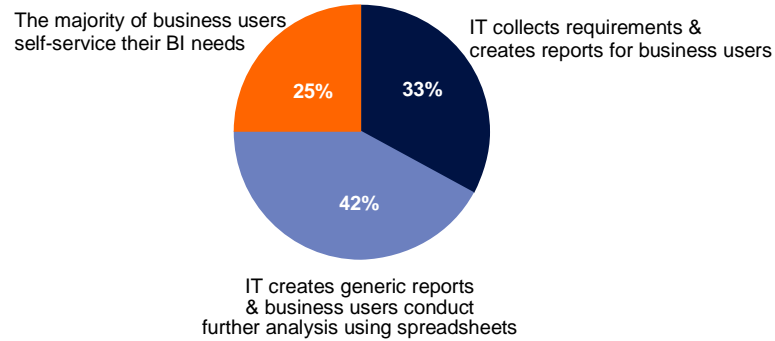
"The intelligence is there, but the presentation, information and the layout issues are yet to meet users' expectation. The information is correct, but the presentation needs to be improved."
Head of IT at a large IT services organization in the Netherlands.

"The system needs lot of improvement because it is IT centric. Our users do not have the ability to do ad-hoc reports, therefore it needs IT involvement."
Director of technology at a US retailer.

Now, when we actually talked a little bit with the IT decision makers which were involved in a sole-sourced BI project, we are getting a lot of familiar sound bites and familiar messages which I am sure you have heard from sort of problems with your friends in this particular industry, and I'm sure that you heard...we all heard about problems, for instance one project manager at a U.S. manufacturer that I talked to, he complained, for instance, that business users are finding the tools slightly difficult to use without additional assistance. Another person that I spoke to was actually praising the system for being highly intelligent and very robust, however he was saying that some of the layout and information management issues were not really worked out and they are yet to meet the users' expectations, and we're seeing generally quite a lot of sound bites along the lines of either highlighting the issues around serving business users or highlighting the issues surrounding user interface and how friendly it really is, or highlighting the overall impression the system is perhaps very good but it is overall very IT-centric as well. Now, I don't want to put a huge amount of weight behind these quotes. They're clearly very important barometers of sentiments, as to how the people who actually deployed BI sole-sourced solutions, how do they feel, but let's actually see whether we can see the same impact sort of with a different length and let's see whether we're seeing the same sort of issues reflected in a quantitative survey as well.

Users remain dependent on IT for information delivery

Who is involved in the creation of BI content for consumption by business users?

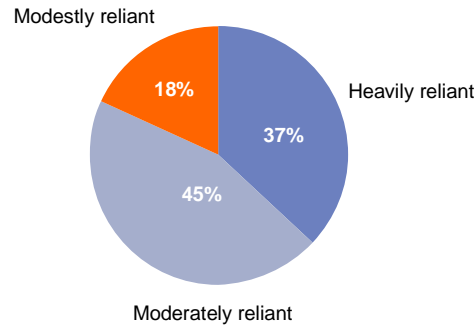


So, here I'm presenting a result from a survey which I think dovetails very well with anecdotal evidence which we saw previously, on a previous slide as well. So, the important thing to really focus on in this particular slide, in this particular graph, is that only in a quarter of the enterprises that we surveyed the majority of business users are self-sufficient with regards to their business needs. So in 75% of the organization, somebody needs to be constantly helping line of business users to carry out their BI tasks as well. Now, that's actually quite a striking number and certainly it's a number which is expected to be in some region of about 75%, which I think is quite considerable, and amongst these sort of 75% I particularly want to highlight this group of 42% of the respondents in which IT does actually allow for certain latitude to their business users, and they do actually allow business users to engage with the data themselves as well.

However, it is quite important to notice the method in which they're doing this as well. And, they're basically doing it by going down the route of a quick workaround, where IT is creating generic reports and then if business users need to have access to any reports beyond that, or if they need to conduct any ad-hoc analysis, then the IT creates separate spreadsheets and hands them over to business users to analyze further. Now, this is an important implication, an important message, because it doesn't just show that IT is involved in the whole process of serving BI information and delivering information to line of business users as well. It's also giving some implications how to actually end up falling back on a default option, of going back to spreadsheets as well.

Users still rely on spreadsheets as primary BI tool

How would you describe the business users' reliance on spreadsheets for creation of reports & analysis?



And then in the next slide, I actually have more data to prove this idea of basically quick workaround, where perhaps if you can't do something yourself as a business user, you will ask your IT department to provide you with a spreadsheet for data dumping, which you can then rely on further. Actually, this workaround is creating a sort of secondary effect, which I believe to be slightly negative as well. So, this particular slide shows the different information but I think it flows very well and it certainly is linking very well with the previous slide, where we're seeing that actually only fewer than one in five enterprises are having the users who are only modestly reliant on spreadsheets.

So what are we seeing, again, in the vast majority? In about 82% of enterprises, line of business users end up being either very heavily reliant or end up relying on the spreadsheets to do the basic BI tasks as well. Now, this is actually quite a striking point. This is quite striking information which I think we all need to sort of think about a little bit, because we can all accept the ubiquitous spreadsheets and we can all sort of accept that they're certainly going to play a part of sort of a broader enterprise application landscape, and that's at a very broad sense, however we are talking here about enterprises which actually deployed BI solutions already yet we are seeing that the reliance on spreadsheets isn't really going away and it's probably as high as it has ever been within an enterprise.

Pitfalls of using spreadsheets are often ignored

Using spreadsheets as BI system surrogate is fraught with difficulty

- Spreadsheets are not suitable for vast range of tasks, particularly those tasks that require:
 - A broader audience of users or collaborators;
 - Repeated engagement.

Pro:	Contra:
Familiar interface Flexibility	Lack of data integrity enforcement Awkward updating & synchronisation No audit control No unified view of the data

And really, I want to basically dig deep around this issue about spreadsheets and about their continuous and persistent...not just use. I think use of spreadsheets is completely fine but perhaps continuous reliance on spreadsheets, and it seems to me that by now we all talked about in the industry, especially in the BI segment, by now we all talked about the sort of pros and cons, about good sides and bad sides of using spreadsheets as well. However, what I don't think we're really seeing in the market out there, especially with those which have deployed sole-sourced BI systems is we're not quite seeing some of the lessons about where to use spreadsheets and where not to use them are being learned. And, certainly I wouldn't like to come across somebody who would like to banish them altogether. Spreadsheets certainly do have their role and do have their place in a workplace, however not when we're seeing situations where they're becoming really a point of reliance with an organization as well, especially when it comes to BI systems as well. So, I can accept that some people want familiar interfaces of spreadsheets. I can accept that some of the spreadsheets give you quite nice flexibility and allow you for latitude to really use whatever you want and really develop models in any which way you want as well, but I think we really ought to remember that spreadsheets still have huge amounts of problems associated with them, especially when it comes to issues such as data integrity, such as updating and synchronizing data, let alone some of the issues which are perhaps not obvious to the end users, for instance surrounding issues of auditing controls or surrounding the issues where once you start to sort of take your information core of enterprises and sort of chip it away into smaller portions and smaller packages eventually you're going to come to that position where you're going to lose the unified view of the data, which you might have once you actually constructed your BI system as well.

Reliance on spreadsheets can be indicative of BI failure

Reliance on spreadsheets:

- Indicates failure of the BI system to engage business users;
- Undermines the very reason to invest in the BI systems;
- Creates a significant drain on resources;
- Expose the organization to risk due to the absence of a unified view on the data;
- Adds to the user support and maintenance burden;
- **Undermines the very reason to invest in the BI system.**

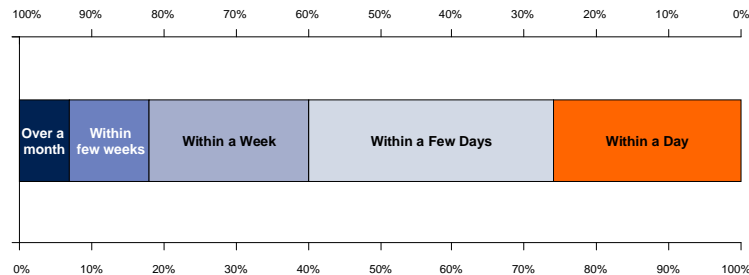
So, it seems to me that we're hitting on a paradox with the spreadsheets, where we're clearly seeing that they're important and we're clearly seeing that they have a role to play within the broader enterprise IT landscape, however when we're talking about reliance on spreadsheets in BI systems, to me that implies that something is going slightly wrong and to me that's a slight signal of some of the issues and some of the structures which are not being really looked at and addressed in BI deployment. So, for instance, there are a few issues which we can think in this particular regard, in this particular way. For a start, for me, any time which we have reliance on spreadsheets, to me that screams to the fact that there is somehow disconnect between the IT and between the people running BI systems, and those people which are meant to be using them. So for whatever reasons, and I think there is usually a multitude, somehow business users are not fully engaged by BI tools as well. And, I think this isn't just the case of indicator, of perhaps failing rollout, in terms of failing to reach your mass audience. I think that reliance on spreadsheets can create some really serious problems as well. And again, I want to just point to the fact that, for instance, just continuing to maintain the spreadsheet's role and continuing to sort of think about problems which reliance on them might cause actually undermines some of the key points of why you're actually investing in BI in the first place. So, I would just like to come back to that point about the single view of the data. So, surely one of the points, why you're actually deploying your BI system, is to have that central repository and have a much better handle on where the data is, who is accessing it and which reports are people actually getting, and there is a huge amount of benefit simply in the fact that everybody who is engaging with a BI system is actually getting the same view of the data as well. So if you're going down the route of creating huge spreadsheets scrolls and if you're going down the route of fragmenting that core of informational assets within organizations, you can, I think, legitimately say, "Why have we actually deployed BI systems if we keep being reliant on spreadsheets as well?"

But, there is an important other element which I also want to highlight. It's not just the case that you are perhaps exposing yourself to risk by using spreadsheets but also I want to say that spreadsheets might look like an easy thing to do but eventually they will always escalate

the problems with, say, user support and maintenance burden as well. So, this is something which...this issue of maintenance burden, I want to address in the next section, but for now I just want to basically say that clearly we're seeing the overreliance on spreadsheets in those enterprises which have deployed sole-source BI solutions and I think there are many reasons to think why is that happening.

Poor self-service pushes users to demand spreadsheets

How long does it take on average to generate a BI report using your current BI & PM system?



But, this particular result from our survey I think is showing us a very good pointer in one possible direction, in a direction which I clearly suspect to be one of the main problems and one of the main reasons why people are still falling back on spreadsheets, and that's basically the fact that some of the BI systems are simply not responsive enough and they're not basically adopted to the needs of business users. So, what ends up happening is that somehow you need to have a sort of an auxiliary mode of operation. You need to have a sort of fallback mechanism, which in most cases ends up being spreadsheets, simply because they're so ubiquitous and they're so well understand and easy to sort of produce.

And here, I'm showing some of the results from our survey, which actually demonstrate statistics that only in a quarter of enterprises that we talked to can change reports within a day. So again, in about three-quarters of the enterprises which have deployed sole-sourced BI, and which we talked to as well, it would take you a few days. It would take you sometimes within a week or, in some extreme cases, longer than that to actually change the report as well. And again, given how dynamic the business environment is at the moment and given the importance of getting up-to-date information and getting the right information to the right point within the enterprise as well, clearly we're seeing that breakdown in responsiveness of the IT in the sole-sourced BI system, which is then leading to overreliance on spreadsheets, which we all kind of understand on an intuitive level but which we all end up living with on some level as well. And, this particular setup I think leads us into a very good jumper point for further discussion of what does this actually mean for some of the costs of a sole-sourced of BI solution as well.

Hidden costs of sole-sourcing

So far, we have seen that people have mainly opted for sole-sourced BI because it looked like a good idea from the IT perspective. It was aligning them more with a strategic vendor. Perhaps, it had some pricing benefits as well. But most importantly, it promised better alignment with ERP systems as well. But when it comes to information delivery, we are seeing that in most of the cases, for whatever reason, we're not seeing that necessary level of engagement of business users as well, which then leads to perhaps some of the suboptimal practices and some of the workarounds, which then eventually leads to the situation where up to 37% of the enterprises that we surveyed claimed that their users are heavily reliant on spreadsheets as well.

Sole-sourced BI: behind schedule, over budget

Spreadsheets as replacement for BI systems are fraught with difficulty

- 46% of the BI deployments sole-sourced from ERP vendors **over the budget**
- 56% of the BI deployments sole-sourced from ERP vendors **delivered late**
- 29% of the BI deployments sole-sourced from ERP vendors **delivered 6 months late or more**

Yet

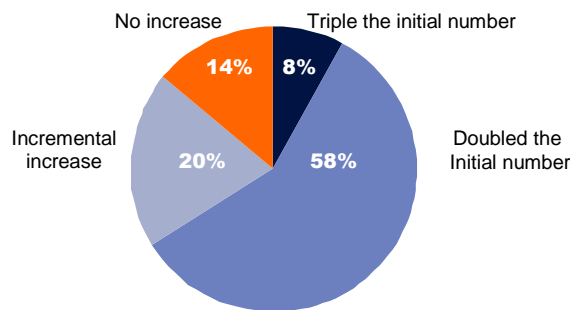
- The central tenant behind sole-sourcing BI from ERP vendors is:
 - accelerated time to value based on the tight integration BI / transactional apps integration.

But, I want to now have a look at where is this leading us, in terms of resources? Where is this leading us in terms of total cost of ownership of the sole-sourced of BI solutions as well? The first thing I want to look at is the sort of performance track record, in terms of deployment and installation of a sole-sourced BI system, and here we are seeing that, for instance, around a half, just under a half of the enterprises which have decided to sole-source their BI systems had their original project slightly over-budget or over-budget, and then we are also seeing that over a half, so even a higher numbers, so about 56% of enterprises that have deployed their BIs from their ERP vendors are delivered late. And in quite a lot of cases, in about 29%, so almost in a third of the cases we're seeing that some of those delays are non-trivial at all. So, we're seeing those delays of six months and more. Now, hand on heart who hasn't been involved with a project in IT which hasn't been sometimes over-budget and sometimes over-deadline as well. So if you can say, "Well, we can really judge it in a broader sense as well, and I can clearly see the point on not being too harsh on these statistics and I can clearly see that us as a discipline, as IT practitioners, are not really practiced at this way of sticking to budgets and sticking to deadlines as well, however I was slightly struck by these particular numbers, given the context that we are talking about sole-source BI deployments, which are often motivated by the promise of having something which can tightly integrate your back office systems with your front office systems, with your BI applications as well. And given the fact that this was an IT decision which holds a lot of ideas and holds a lot of promise of something which should be easier to do and it should be easy to basically implement and run with as well. So, I certainly don't want to be too harsh with these statistics but given the fact that many sole-sourcing decisions have been made on the point of ease of deployment and ease of integration, I think that this is indicating that perhaps not everything worked out perfectly in all of the cases as well.

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Those who sole-source BI invest significantly in IT staff

How many FTEs did you assign for the initial BI project deployment and how many did you have to add to administer / manage your BI project?



But much more importantly than the experiences of those which have perhaps implemented the stuff in the projects late but then perhaps were happy with how they are running, let's look at some of the information about sort of the runtime performance of these sole-sourced

BI systems as well. And here, I really found a very surprising result in the survey and we basically wanted to know what's going to be the net effect of rolling out a sole-sourced BI system and what is the impact on the number of full-time employees dedicated to managing your sole-sourced BI project, and I was clearly surprised with some of the results I got here. For a start, I'm clearly surprised that only in 14% of the cases there has been no increase in full-time employees dedicated to maintaining BI systems and I was surprised that 58% had to actually double the number of full-time employees as well. And actually, almost one in ten had to triple that number as well. So overall, I expected perhaps some increase in certain cases but clearly this isn't just a case of incremental additions of some full-time employees here and there. There seems to be quite a lot investment going on in full-time employees with the BI sole-sourced solution as well. Now, you might actually ask, "Wait a second. Is this effect connected to the fact that perhaps sole-sourced BI systems are connecting a larger number of users and that we are basically rolling out BI from a departmental specialist application, departmental specialist rollout into sort of an enterprise-wide rollout as well?"

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TCO of sole-sourced BI can be higher than anticipated

Increased cost: Savings in licenses offset by increases in far more costly headcount:

- FTE expansion exceeds the rate of expansion of the BI user base;
- Required skills sets can be rare, driving up the cost of hiring or training.

Spreadsheet creep: Resource creep is far higher if managing spreadsheet estate is included

- Management of spreadsheet sprawl;
- Risk of error propagation in spreadsheets;
- Lack of single version of the truth.

IT Strain: Spiraling resources needed to run sole-sourced BI fuelled by overreliance on IT

Failure to deliver additional performance: untenable given that:

- Sole-sourcing promised tighter integration between BI and transactional systems.

And, that's certainly the case however we specifically looked at that relationship between increase in users which are being served with the increase in full-time employees and, as I will show on the next slide, we are seeing that basically the pace of full-time employee expansion clearly outstrips the expansion of the BI user base by some multiple as well. So, we are clearly seeing that people are not just adding more full-time employees because there are more users to serve but there does seem to be the need for a larger amount of people to actually serve these sole-sourced BI systems as well.

Now, an important thing to bring up here is that this has an obvious implication on total cost of ownership of a sole-sourced BI solution and it clearly increases the cost. Now, the point which I want to make here is to basically remind you that this isn't simply a generic increase in a certain generic IT head count as well and that you also need to think that some of these skills link to BI in general, link to enterprise applications in particular or, much more importantly, link to the combination of the two, are not that ubiquitous and certainly a

resource crunch on those people who can help you maintain your systems, which are being basically sole-sourced by your ERP application provider as well. So, it's not just the case that you're adding more IT guys. It's really the case of adding more quite rare and quite sought after IT guys as well. And even if you don't have access to skills immediately, you either need to hire more people in the market, which often costs a certain penalty with it, in terms of hiring costs, or you need to go through some of the training processes as well. So, all I'm saying is it's not just the case of getting more bodies in. It's the case of finding those very competent bodies to take care of this particular problem.

But actually, I would argue that actually the increase in the sort of amount of effort which goes into maintaining these systems is slightly higher than simply getting more full-time employees to take care of your sole-sourced BI system as well. I think that another sort of hidden cost here really is the total amount of maintenance effort, of time wasted, which goes with maintaining this spreadsheet creep which is also created as well. So, we saw high reliance on spreadsheets. We saw a clear increase in full-time employees as well, in maintaining and managing BI systems as well, but I think there are some extra numbers here flying under the radar as well, especially given that you have to manage that spreadsheet scroll, that you have risk of error propagation in spreadsheets which somehow somebody has to mitigate. It might not be the IT department. It might be people in the line of business departments as well. Or, you might have those problems which you need to reconcile and work out simply because sometimes you'll be working out of data repositories which are out of synch as well. So all taken together, this is clearly putting a strain on IT resources and sort of in a spiraling fashion as well, which again isn't completely unknown in the IT world hand on heart, but it's quite interesting to see that this seems to be almost an opposite effect of what people expected when they went to procure a sole-sourcing BI solution, and when we actually saw that perhaps ease of deployment, closer alignment with transactional enterprise application systems was one of the very strong motives for going for these kind of options as well. So again, I think this is a quite interesting experience of those people who have deployed sole-sourced BI systems and we are clearly seeing that some of the initial ideas which were there in the procurement stage didn't really translate fully and as comprehensively as we're seeing them later on, when the deployments actually happen and when we are having a running and living BI systems as well.

Conclusion & Recommendations

Sole-sourcing could hinder the potential impact of BI

Business managers are involved in the selection but BI sole-sourcing is motivated by:

- **Ease of procurement** from the incumbent enterprise application vendor;
- **Tighter integration** with transactional applications.

While sole-sourcing BI promises tighter integration and IT convenience:

- Accelerated time-to-value is not apparent, projects are still delayed and over budget;
- IT is excessively involved in running the BI system, particularly in reporting and information delivery;
- Reliance on spreadsheets as a substitute for business user self-service goes against BI principles;
- Spiraling needs for dedicated IT maintenance staff increases total cost of ownership.

So, let me actually now bring this particular segment to close and talk a little bit about conclusions from this particular endeavor, this particular research that we've done, and I think I've actually tried to mention some of the points already so I'm not going to labor on them too much, but I just want to remind you that what we're seeing, that we had some business management involvement in these sole-sourcing BI decisions but we're still seeing that there are quite a lot of IT factors behind them as well, and we're seeing that ease of procurement and we're seeing that tighter integrations with clear motives when people went down this particular path. Once we clearly see that there could be some benefit in doing this,

when we actually look at some of the experiences, we are seeing that perhaps some of the accelerated time to value issues were not quite there when the projects were once deployed, especially when it comes to the projects being on-budget and on-schedule as well. We are seeing that there is still quite a lot of involvement by IT in these particular sole-sourced BI systems as well and that even if they are involved in some of this serving and delivering information to business users, this is sometimes done through spreadsheets and through certain auxiliary systems as well, which can create a whole raft and whole sort of secondary level of problems, which I think we are all very familiar with, so I don't want to basically talk about it too much. But, what we're basically seeing eventually is the sort of spiraling need for dedicated IT staff to keep these systems running as well.

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Recommendations

- **Reconsider** procurement practices find the best way to cater to the needs of **business users**.
- **Participatory & Pervasive** adoption by the business users ensures the success of a BI initiative.
- **Devolve** responsibility through self-service facilities to optimize your IT department's workload.
- **Evaluate alternatives** as benefits of sole-sourcing BI are not compelling as they may appear.
- **Conduct** thorough evaluations of application-independent BI vendors to ensure that the solution.

Now, these are the conclusions from the survey which we've done but now I would like to basically leave you with some of the quick recommendations which we have as well. Basically, the main, key point, which I can't stress enough and which I think should be the real key takeaway from here is that you really need to reconsider your procurement practices and you really need to find the best way to cater to the needs of business users as well, because after all, only if we're having participatory and pervasive adoption, only if we're getting BI everywhere to serve the needs of business users and line of business people as well can we actually have a successful BI initiative. And, I think there are many ways to do that and one obvious way in your BI strategy is to think about a way in which you can actually give some of this responsibility for say information delivery and for analysis back to business users, and basically try to take the middleman of IT out of the equation, and perhaps try to find the systems which won't rely on sort of auxiliary and secondary methods, such as spreadsheets as well. The one thing which I again really urge you to consider is to basically think about alternatives and think beyond simple, easy and obvious choice of sole-sourcing BI. We're not saying that there is no absolute value in going down this route but all I'm saying is it just strikes me as impossible that really half of those who have deployed the sole-sourced BI have done so without really considering any other alternative and any other option as well. And as we can see, this sometimes can perhaps lead to some of the problems and

perhaps the expectations which some of the people went in with in the beginning regarding quick time to deployment, quick time to integration, didn't really fully come through at the later stages of the project as well. And, I think that the best way to avoid perhaps some of those pitfalls definitely isn't eliminating enterprise applications vendors from the picture but it's just basically conducting more thorough evaluations and really thinking about what are the business problems that your BI ought to solve and who is in position, be it an enterprise application vendor who offers BI, be it an application-independent vendor who offers BI. Who is in the best position to solve some of your business issues and who is in the best position to serve the needs of your business users as well? So, you basically need to think about the needs of the business users. You need to think about some systems which are designed from the ground up for self-service and for empowerment of those business users, and something which can perhaps interoperate with the totality of enterprise application landscapes, not just very important core ERP and CRM systems but often the sort of specialist line of business vertical applications which exist there as well. And finally, I really urge you to consider whenever you're making these evaluations and procurement decisions, your medium-term BI strategy and your long-term BI strategy as well, and not just think about basically quick options of what can actually firefight your problems today but what is the best system which can evolve with your business needs and which can eventually put you in a position where your business really ought to be as well.

So, that's the summary of some of the recommendations regarding this survey we had. So at this point, if I can hand it back over to Vinay and I think he can perhaps add a few words in the very end as well.



Summary

- **Purchasing decisions are made for IT convenience**
 - Not necessarily aligned with business user requirements
- **Spreadsheet Sprawl Still Prevalent**
 - Goes against the original reason to invest in BI/PM
 - Multiple Versions of Truth continue to reduce productivity and increase risk.
- **IT Strain Continues to Grow**
 - More time supporting business users changing needs
 - Integration is not always apparent
 - Deployment times continue to be delayed
 - Projects still over budget
- **Number of Full-Time Employees to support BI project increase**
 - Costs of skills much more expensive than license
 - Especially when there is a shortage

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Vinay Nair: Thank's Vuk! That was a lot of very, very good information! So, what I thought I would do before we...just to kind of set the stage for the Q&A, was do a quick summary of some of the key points that I was able to garner from the presentation and from the research, and then kind of give you an idea of kind of how the value add that IBM Cognos delivers to address some of the gaps here that were presented.

So, some of the key points that Vuk brought up in his presentation, one was when he started off talking about the purchasing decisions that are made when sole-sourcing decisions are made in the first place, and it's pretty important to kind of look at that, to kind of see what is the mentality, what's the rationale behind why SAP customers specifically try to sole-source their BI solution, and we saw that it wasn't always aligned to business requirements. We saw that IT convenience was definitely one of the top considerations for these professionals in making the decisions and, as a result, we started to see some of the ripple down effects, if you will, when you see the prevalence of spreadsheets still being used by business users and heavily reliant in their business intelligence performance management processes. So, what this tells us is that even though there has been a lot of investment in this BIPM system, just the way in terms of how the tools are used, it's difficult for users to be able to manipulate the system to get the analysis that they want. So, they still kind of rely on spreadsheets, which goes against the original reason to invest in the first place but, more importantly, it still allows for the multiple versions of truth (ph) to be circulating in the environment, which creates more risk to the organization as a whole, in the whole process.

And in the third area is IT strain. It continues to grow. So even though these decisions are made in order to alleviate some of the IT integration issues and some of the backbreaking work that's involved with maintaining these systems, we're still seeing that they're still spending a lot more time supporting business users' needs. The integration was not always apparent and deployment times continued to be delayed as well as budgets continued to be overrun. So, we're still seeing that it wasn't the silver bullet kind of solution to all of the IT departments' woes.

And lastly, which I thought was a very important point, is the number of full-time employees to support BI projects still increased, in some cases, 58% of the cases, it doubled. So, we're seeing that even though there might be some cost alleviation on the front end, from a licensing point of view, there are still a lot of costs in the back end which were incurred from a skills acquisition point of view. And, this is something that needs to be considered when looking at the overall project and the cost in the overall project, that it might not be the cheaper option even though it might seem to be on the front end.

IBM Cognos BI/PM solutions offer...

3 Take Aways:

- **Application-Independent BI/PM Platform:** designed to embrace, enhance and extend your existing SAP investments AND other applications in the LOB.
- **Innovation-Led PM Roadmap:** A consistent and comprehensive roadmap focused on innovation NOT integration.
- **Better Self-Service:** A USER-FRIENDLY BI/PM solution that has intuitive interfaces that emulates business user's existing excel-based workflows to enable better SELF-SERVICE

So if we move to the next slide, what I wanted to do is kind of give three key takeaways before we go into Q&A about what IBM Cognos delivers to SAP customers or even to customers considering a BI solution that needs to be tightly integrated with their ERP solution. First of all there's the application-independent BI platform, and Vuk mentioned this in his presentation a few times, the importance of having a BI solution that is independent of applications but is still able to embrace, enhance and extend your investments that you've made in the SAP environment, because it's definitely a very important investment for you and it's something that you need to leverage. But at the same time, as you start to look past your medium-term requirements and moving to your long-term requirements, from a BI perspective, you need to start looking into how you pool into information in other lines of businesses, which may or may not be SAP, and that's where an application-independent platform that's fully integrated with each other, from a BI and a PM perspective, can kind of cut across your organization and really be able to leverage the investments you've made in your organization, and make sure that it's tightly aligned to business user requirements.

The second thing is we have an innovation led PM roadmap, performance management roadmap. What I mean by this is we've seen a lot of acquisitions in the industry over the last few years, a lot of consolidation happening in the industry, and this is inevitable but the acquisitions that we've made in our portfolio have had little or no overlap, in terms of the solutions that we provide to the marketplace. We focus less time, or less of our customers' time, on integration issues and more of their time on innovation within their environment and really trying to push the BI and the wonders of BI to the users themselves. And then last but not least, better self-service. Our solutions are really built by the users for the users. It is meant to emulate the spreadsheet-based workflows that they're currently using in their environments and be able to provide an end-to-end tool that they would be able to drag, click and drop, and then be able to manipulate the data the way they want to. So, it's really about aligning to the business user requirements first.

Questions and Answer time ...



Please submit your questions now.

Without any further adieu, I know we're running out of time so I wanted to kind of address some of the questions that came up, so if we could open up Vuk's line. We've got a number of questions so I'm going to have to skip through this.

First of all, there were some questions, Vuk, just around some of the methodology issues of the survey, like how many people were surveyed and what type of SAP versions they're running. Can you just kind of give a quick overview of the number of respondents in the survey as well as the type of applications they were using?

Vuk Trifkovic: Absolutely, so let me reiterate that we interviewed hundreds of IT decision makers, so CIOs or IT managers, in the U.S. and E.U. that have deployed SAP enterprise applications and SAP business intelligence products as well, meaning BWBI, so that's the user base that we sort of reached out to.

Vinay Nair: OK, great! Another question that we got here is, "Is Vuk's point that sole-source BI products are not easy and underestimated or is he trying to say that sole-source project take longer than BI projects which are not sole-sourced?"

Vuk Trifkovic: Actually, that's a very good point and I can't really claim that because we haven't done the parallel comparison between the sole-sourced against non-sole-sourced. That's basically an area which I can't demonstrate to you a quantitative difference there. What I can actually demonstrate, based on the ongoing surveys in BI and in other areas, is that we are expecting that a good proportion, a good chunk of all projects, including BI projects and including the totality of BI projects, whether they're sole-sourced or whether they're not sole-sourced, are going to fail. And, I think this is basically an inevitable process of the dynamics with the the now particular ecosystem between vendors, implementers and customers as well. What I'm actually highlighting in this particular survey is given the expectations surrounding the ease of deployment and given the expectations of tight alignment with some key transactional systems, I am not seeing order of magnitude better

performance when it came to on-time and on-budget metrics as well. So, I can't actually draw any comparisons between the different types of BI solutions but given the expectations that were shown in the outset of the survey, when we talked about what were the primary drivers behind going down the sole-sourcing solutions and when we compared that with the performance of how on-time and on-budget they were, I'm not seeing the sort of killer blow for that argument.

Vinay Nair: OK and I have another question here which I thought was a very good one. "Is going with a best of breed or specialist BI vendor, or application-independent vendor going to be more expensive than buying from your ERP vendor?"

Vuk Trifkovic: It's a good question and frankly it depends. First of all, it depends which vendor, which application-independent BI vendor you're actually acquiring from and what are their terms and conditions, what is their tool, and so on. So, I don't think that there is really any way to actually quantify that but what I think what's important to think about in this particular regard is perhaps to think about the much longer lifecycle of your particular solution, whatever it might be, and I really stress that one of the key points which I want to make, I think the main thing which I drew from this is I was surprised at how many enterprises that we surveyed went with an incumbent vendor. What I want to say is that you're clearly going to have a BI tool which needs to, first of all, respond to the requirements of business units which are going to be using them, b) align with those needs in the medium term as well and c) present compelling value, not just at the point of purchase, where perhaps you might be getting some benefits from the same vendors and some benefit there, but you really just need to think and calculate very carefully and closely, as you should anyway, how much of perhaps follow-on costs you're going to have, perhaps through your potential ability to support line of business users, potential ability to provide them with self-service capabilities and tools, how much of sort of integration you think it might take, how much of maintenance it might take in longer-term, and not just the maintenance of the core system but the maintenance of all systems which are currently fulfilling the job that BI tools should be fulfilling as well. So, I know that this is a longwinded answer and I know that it's one of those "depends" answers, but the real thing that I want to drive through here and I think that really shines, or should shine from the survey, is that your costs should be calculated over the lifespan of that particular application and you need to factor in whether some of the benefits you might be getting at the front of the cycle in procurement is going to filter through and give you enough of a boost through the rest of the cycle as well.

Vinay Nair: OK, great! I have a question here, more on future requirements type of question. This respondent say, "I see a large number of sole-source BI projects that essentially failed. Do you have the statistics on how that compares to all BI projects in general?"

Vuk Trifkovic: Yes, and this is actually...or rather, no, this is very...yes, in so far as this is an interesting question and I think I've actually answered it in part previously, because I don't have a parallel set of numbers next to each other I can't really say whether the performance rates of application-independent, non-sole-sourced BI systems, how well they're faring as well. As I say, from the sense from the overall IT data, in a variety of different technology areas, it seems to me that even if sole-sourcing BI is performing at an industry average it's probably underperforming slightly with regards to the benefits which it promises in the beginning of the cycle as well and with the potential to reduce some of the issues regarding integration and so on. So, I'd like to just basically point you to think about issues internally, not just how does it compare with non-sole-sourced as well but also how does it

compare with the expectations set at the beginning of the projects with the expectations at the end as well. So, I don't want to be too damning of BI sole-sourcing because I'm pretty certain that non-sole-sourced systems fail as well but it's just how does that dynamic work overall within your particular system that you ought to be looking at.



Thank you for your time!

For More Information:

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Vinay Nair: OK. There are a lot of questions here from the audience and unfortunately we're running over time now so we're going to have to wrap it up. But, the slides will be made available to all of the attendees and I'll let Max go into the details as to where they can find those. Other than that, I'd like to thank all of the participants for coming here today and listening to what Vuk has to say. It was definitely some very enlightening research and definitely good food for thought when you're considering sole-sourcing your BI solution. Without any further adieu, I'd like to thank you all for coming and I'll hand it back to Max.

Max McDonough: Great! Thank you! That concludes today's presentation, Buying your BI solution from your ERP vendor, IT convenience or strategic business decision? If you'd like to review today's material at some later date, an archived version of this event will be made available on our SearchDataManagement.com webcast library. For all of today's live attendees who are interested in seeing a PDF version of the slides, we will make that PDF available in the additional links section starting tomorrow for the on-demand portion of this event. Again, I would like to thank Vuk Trifkovic and Vinay Nair for taking the time to be a part of today's presentation and I'd also like to thank IBM for sponsoring this event. And, as always, thanks so much for joining us today!