

Blue River  
Software

Grey  
Wolf  
Systems

# **BENCHMARKING YOUR COMPANY'S PERFORMANCE**

Rick Sundahl

Blue River  
Software

Grey  
Wolf  
Systems

# Agenda

- Introduction
- Industry Landscape
- Business Intelligence Concepts
- Case Studies



Blue River  
Software

Grey  
Wolf  
Systems

- Introduction
- Industry Landscape
- BI Concepts
- Case Studies

Blue River  
Software

 GREY WOLF SYSTEMS  
Making Integration Work

- Software Publisher
- Focus on Data Management products
- Target SX.enterprise and SHIMS users
- Grey Wolf provides implementation, training and support
- Services Provider
- Focus on Software Integration
- Target distributors
- Hosted EDI and Web

Blue River  
Software

Grey  
Wolf  
Systems

# A Few Current Customers



- Introduction
- Industry Landscape
- BI Concepts
- Case Studies

# Company History

- 1991 – Left IBM to join R&D Systems
- 1993 – Microsoft Solution Provider
- 1995 – First Trend (SX.enterprise) customer
- 1996 – First SHIMS customer  
InVue support subcontractor
- 1998 – EDI, SX.intelligence and eSales support  
subcontractor to NxTrend
- 1999 – First Eclipse customer
- 2004 – First TakeStock customer

- Introduction
- Industry  
Landscape
- BI Concepts
- Case Studies

Blue River  
Software

Grey  
Wolf  
Systems

# INDUSTRY LANDSCAPE

Blue River  
Software

Grey  
Wolf  
Systems

# Industry Dynamics

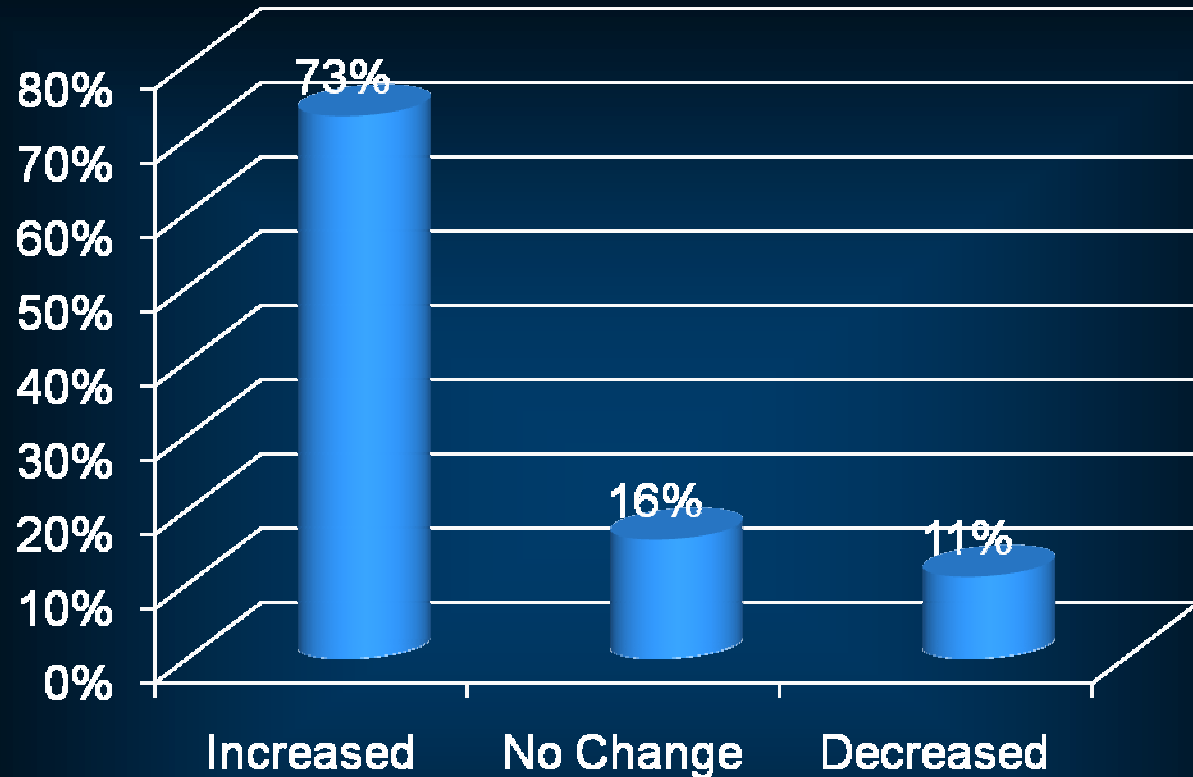
- Consolidation
- Competition
- Lower margins
- SOX
- Service leads

- Introduction
- Industry  
Landscape
- BI Concepts
- Case Studies

- Introduction
- Industry Landscape
- BI Concepts
- Case Studies

## During the Past 2 Years the Number of Lines

Source – The Wholesaler – February 2007



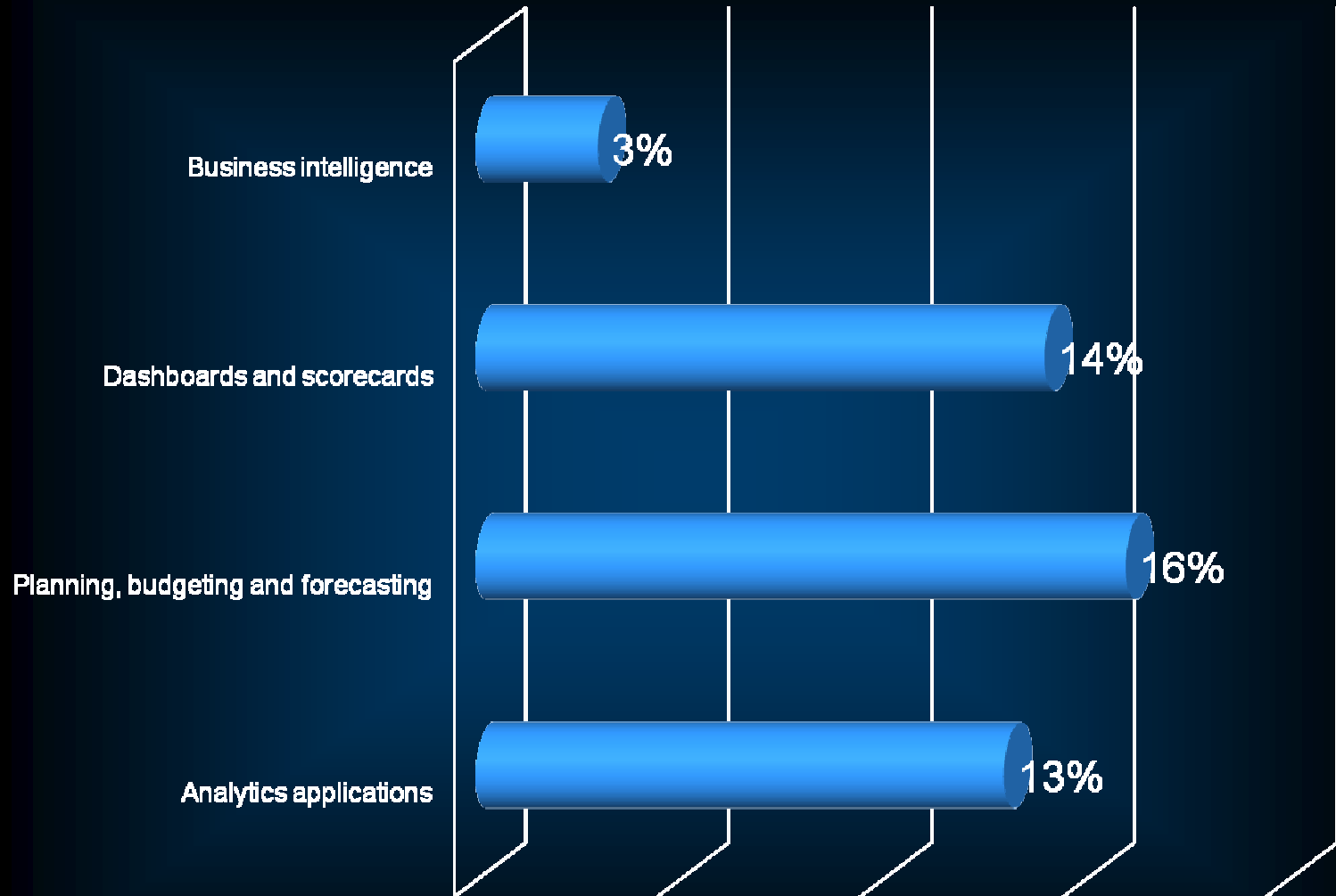
Blue River  
Software

Grey  
Wolf  
Systems

- Introduction
- Industry Landscape
- BI Concepts
- Case Studies

# BI/PM Software Growth (2006-07)

Source – AMR Research



- Introduction
- Industry  
Landscape
- BI Concepts
- Case Studies

# Metrics that Matter

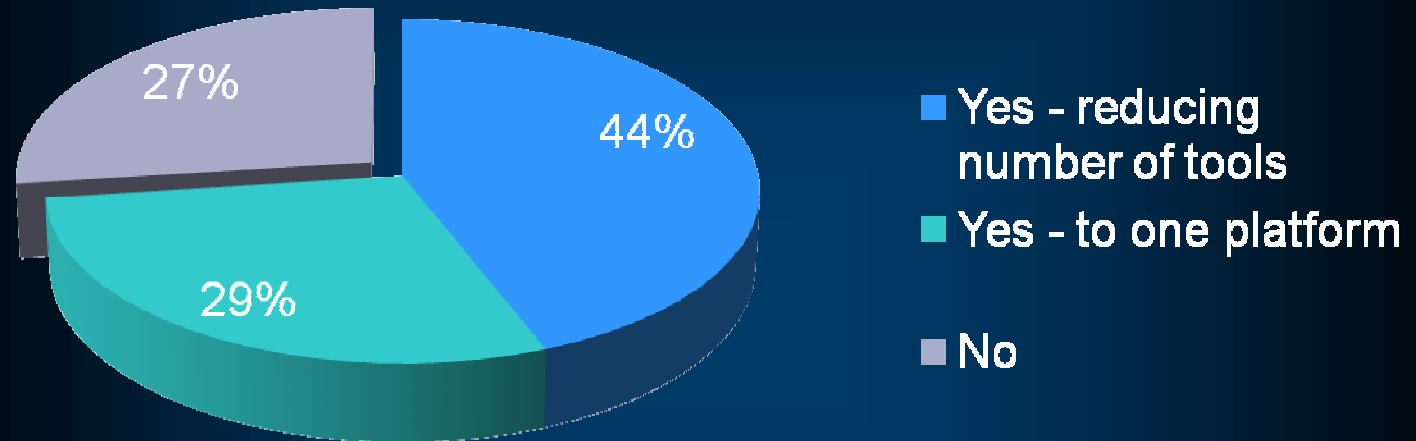
MESA Plant2Enterprise Conference – October 2006

- 80% of Business Movers who improved significantly against financial metrics also improved significantly on operations KPIs
- Over 70% measure on-time delivery
- One in three plan to buy dashboards in the next 12 months.
- Respondents using dashboards are over twice as likely to have improved significantly in cash-to-cash cycle times and total inventory on hand.

- Introduction
- Industry Landscape
- BI Concepts
- Case Studies

# Are You Consolidating the Number of Query and Reporting Tools in Your Organization?

Source – IDC – 2006



Blue River  
Software

Grey  
Wolf  
Systems

# **BUSINESS INTELLIGENCE CONCEPTS**

Blue River  
Software

Grey  
Wolf  
Systems

# What to Measure

- Sales
- Inventory
- Pricing
- General Ledger

- Introduction
- Industry  
Landscape
- **BI Concepts**
- Case Studies

# How to Measure

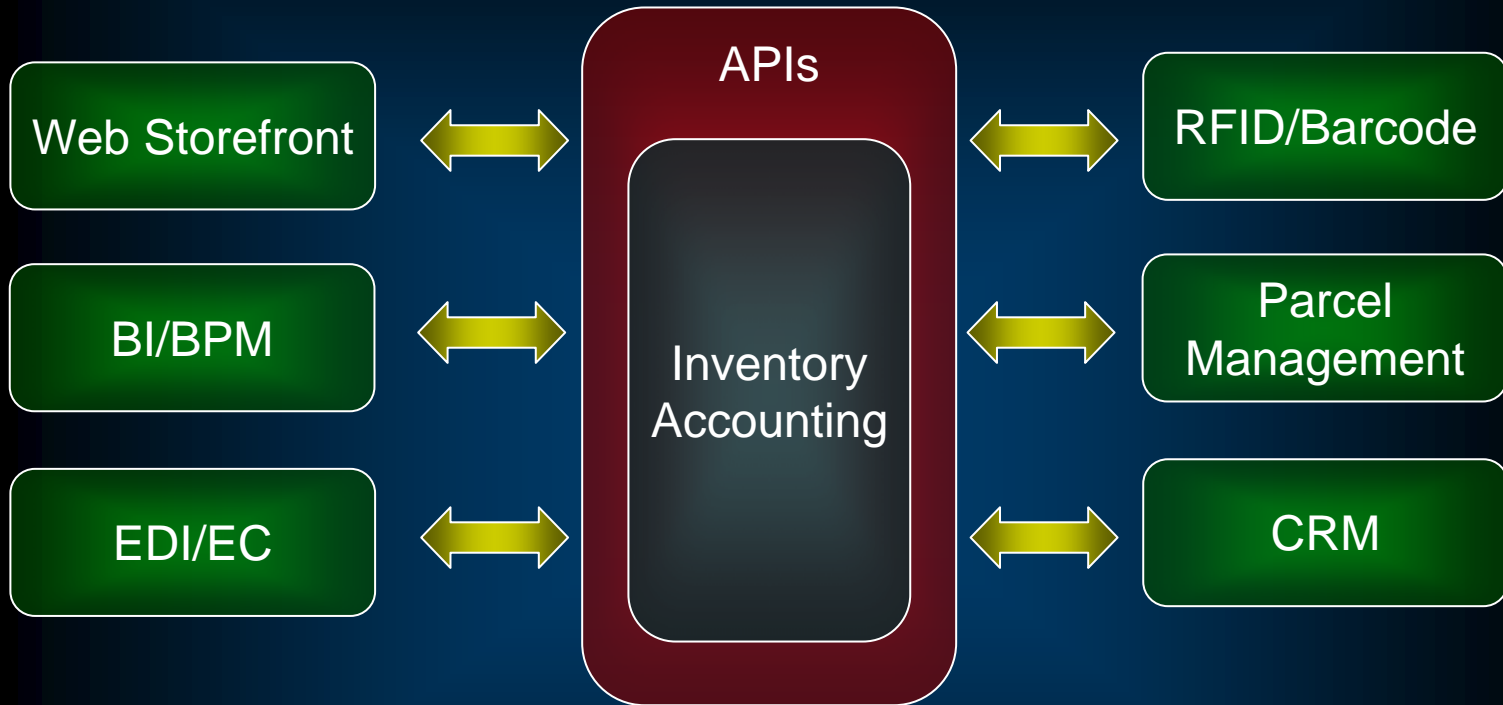
- Open Data Base Connectivity (ODBC)
- Extract-Transform-Load (ETL)
- Application Programming Interfaces (APIs)
- Datawarehouse
- Key Performance Indicators (KPIs)
- Dashboards
- Scorecards

- Introduction
- Industry  
Landscape
- **BI Concepts**
- Case Studies

Blue River  
Software

# Best-of-Breed

Grey  
Wolf  
Systems



- Introduction
- Industry Landscape
- BI Concepts
- Case Studies

# 11 Steps to Successful Data Warehousing

Source: Phillip Blackwood - October 2006

- Introduction
- Industry Landscape
- **BI Concepts**
- Case Studies

- Recognize that the job is probably harder than you expect. (30-50% of the information is in error)
- Understand the data in your existing systems.
- Be sure to recognize equivalent entities.
- Use metadata to support data quality.
- Select the right data transformation tools.
- Take advantage of external resources.
- Use new information distribution methods.
- Focus on high-payback marketing applications.
- Emphasize early wins to build support throughout the organization.
- Don't underestimate hardware requirements.
- Consider outsourcing your data warehouse development and maintenance.

- Introduction
- Industry Landscape
- **BI Concepts**
- Case Studies

# Keys to Effective Dashboards

Source: DM Review – July 2007

- Proper Metrics
  - “Excel is often an ideal tool for beginning a dashboard initiative; as the program evolves, a more sophisticated tool can be considered.”
- Executive Support
- Simplicity
  - “Dashboard initiatives often fail because of unrealistic expectations, lack of support and lack of relevance.”

# Minimum Standards of the Back-End Architecture

Source – DM Review – July 2007

- Database naming standards for the datawarehouse
- Extract-Transform-Load standards
- Operating system and security standards
- Develop processes for architecture components
- Data quality and exception handling
- Methodologies for maintaining dimension and fact tables for maintenance and performance

- Introduction
- Industry Landscape
- **BI Concepts**
- Case Studies

Blue River  
Software

Grey  
Wolf  
Systems

# CASE STUDIES

- Introduction
- Industry  
Landscape
- BI Concepts
- Case Studies

# Case Study

## Digital Dashboard

- Company – Techline
- Issues
  - Sales, gross profit and gross profit percentage reporting
  - Drill-down capability
- Solution
  - Extract information via APIs for SX to datawarehouse
  - SQL Server Reporting Services as query and reporting tool
- Demonstration

# Case Study

## Freight Charge-backs

- Company – Bearing Service
- Issues
  - Freight for orders not charged to customers
  - Reporting to sales reps of charge-backs
- Solution
  - Extract information via APIs for SX to datawarehouse
  - Excel 2007 as query and reporting tool

- Introduction
- Industry  
Landscape
- BI Concepts
- **Case Studies**

- Introduction
- Industry  
Landscape
- BI Concepts
- Case Studies

# Case Study

## Sales Reporting

- Company – United Pipe and Steel
- Issues
  - Sales reporting for managers
  - Sales analysis for sales reps
  - Disconnected users
- Solution
  - Extract information via APIs for SHIMS to datawarehouse
  - Excel 2007 as query and reporting tool
- Demonstration

Blue River  
Software

Grey  
Wolf  
Systems

**THANK YOU**

Rick Sundahl  
ricks@greywolf.com  
719.264.9653