

# “BI” Business Intelligence

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2016 DM2 Connections User Conference  
July 18 – 20, 2016

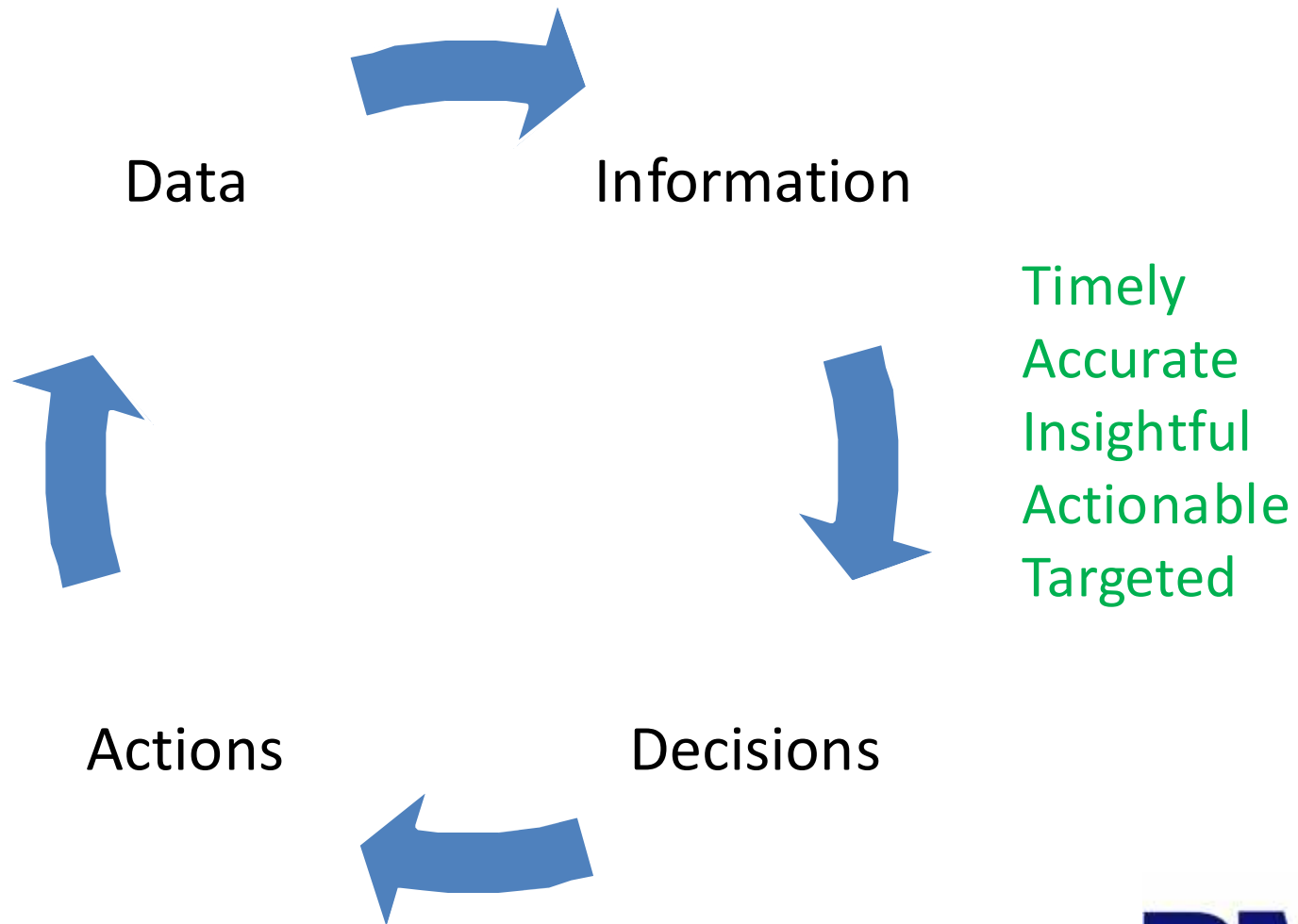
**DM<sup>2</sup>**  
software, inc.

# “Business Intelligence” (BI)

**Business intelligence (BI)** is an umbrella term that includes the applications, infrastructure and tools, and best practices that enable access to and analysis of information to improve and optimize decisions and performance.

-Gartner

# “Business Intelligence” (BI)

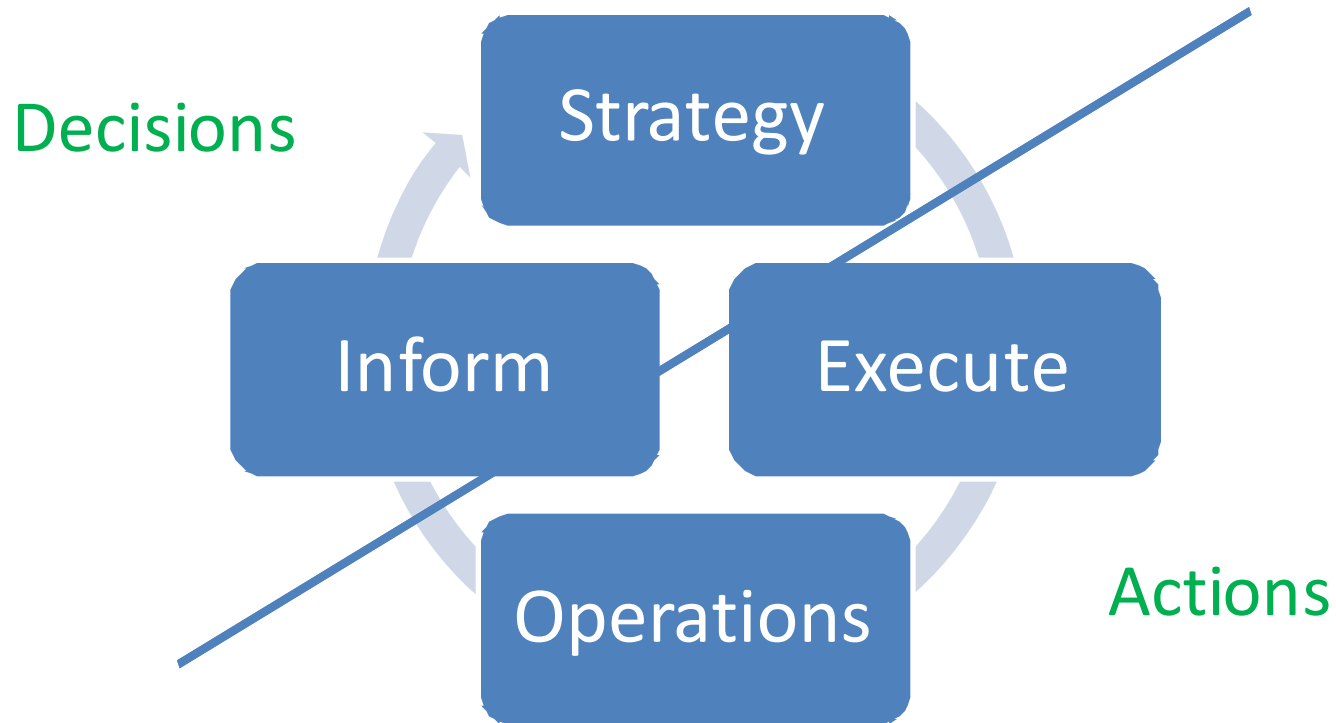


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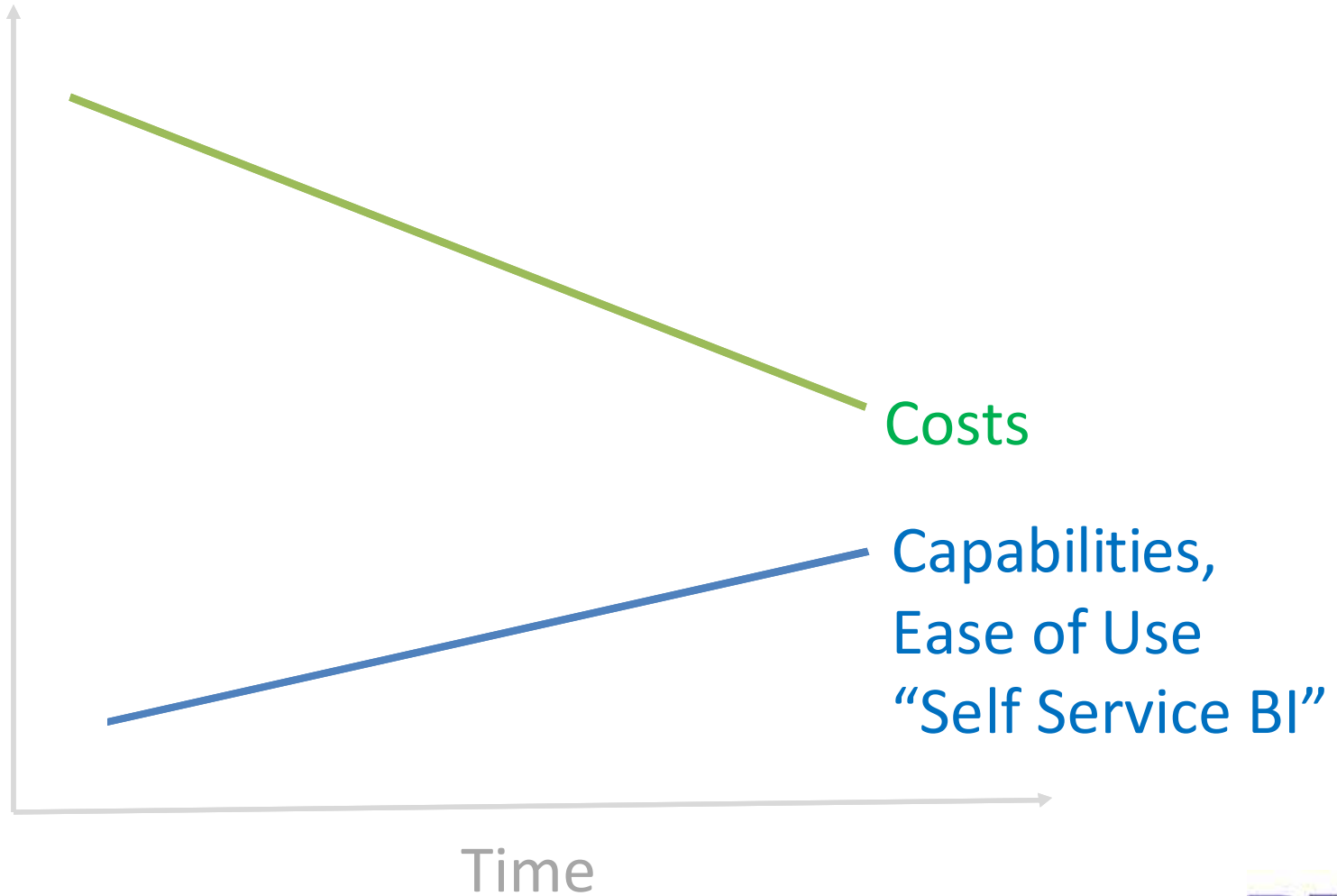


# Executive Information System

Owners, VPs, CFOs, Controllers,  
Directors, Managers, and Analysts

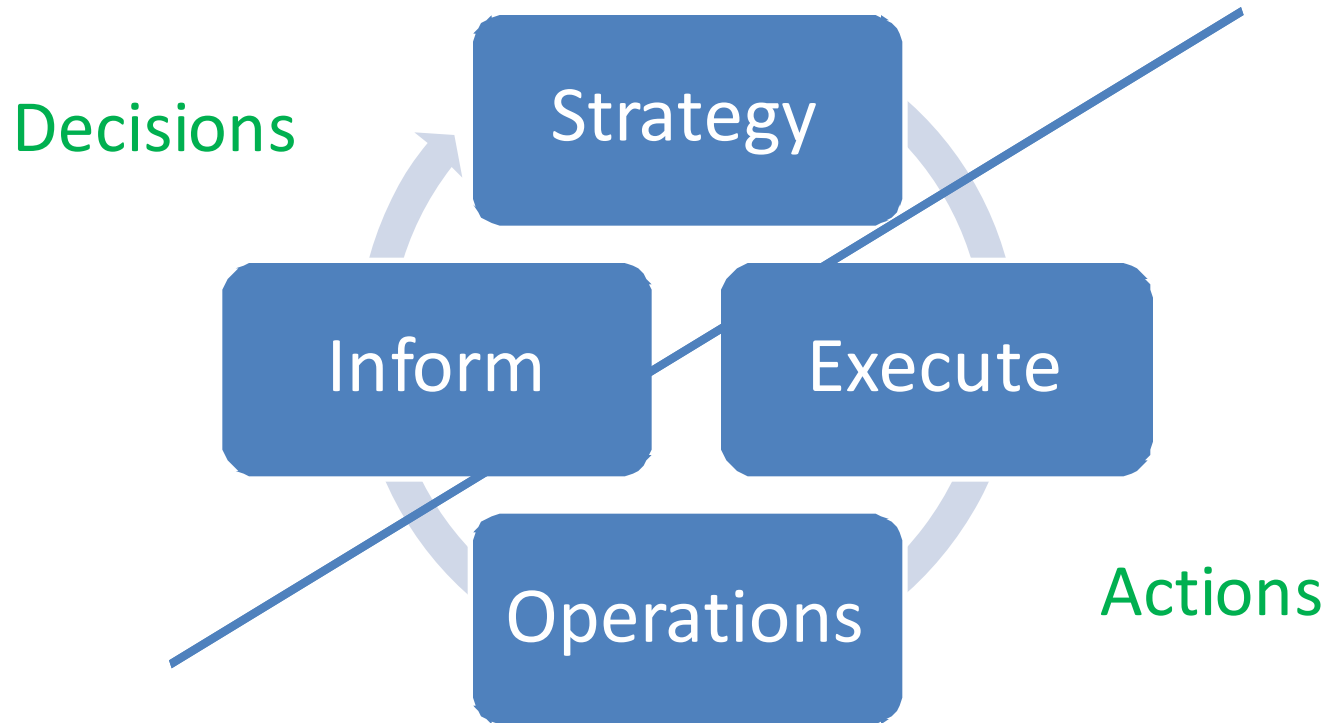


# BI Trends



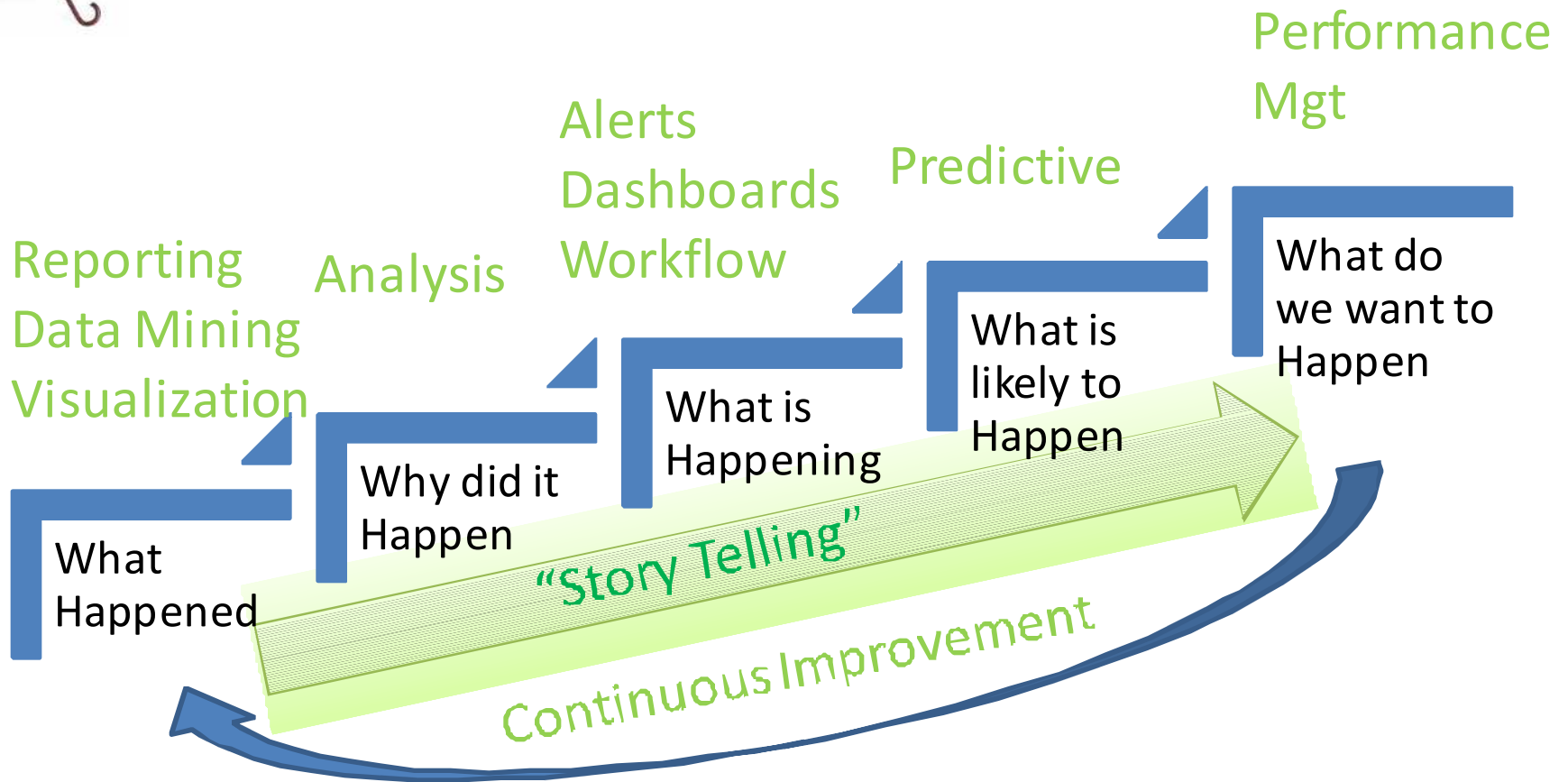
# “The Promise of BI”

Dispatchers, Collection Agents, Inventory Clerks,  
Billers, SalesPeople





# BI Types Overview



The Implied "Did Not"

# Business Intelligence Tools

Almost Free	Thousands	Tens of Thousands
<p><b>BIE</b></p> <p><b>ProfitLink</b></p> <p><b>Excel/SQL</b></p> <p>Crystal Reports</p> <p>SO Gross Profit Exceptn's</p> <p>SO Dispatch Mgr</p> <p>CRM</p> <p><b>Excel Power Addons</b></p>	<p><b>Sage Alerts</b></p> <p><b>Sage Intelligence</b></p> <p>Sage Inventory Advisor</p> <p>WebSitePipeline Portal</p> <p>Credit Alerts</p> <p>CRM</p> <p>MS Power BI</p>	<p>Tableau</p> <p>DataSelf</p> <p>BizNet</p> <p>MicroStrategy</p> <p>QlikView</p> <p>Any SQL/ODBC compliant solution</p>



# Simplifying BI

## The Traditional Business Intelligence Approach



# Business Intelligence Skills

## Multi-Disciplinary

Strategy, Operations, Functions

SQL, Excel, Power Addons, Database  
Structure, Data Models, Pivot Tables

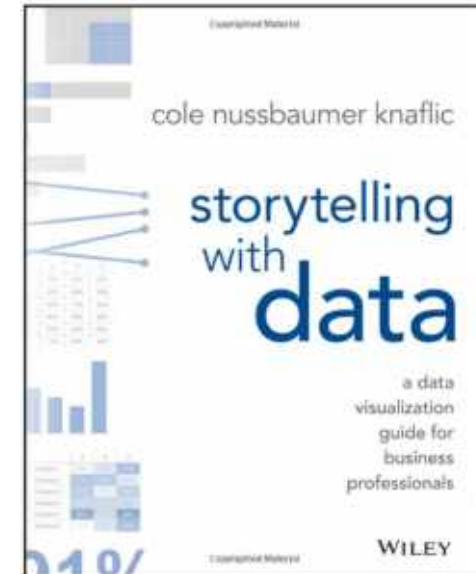
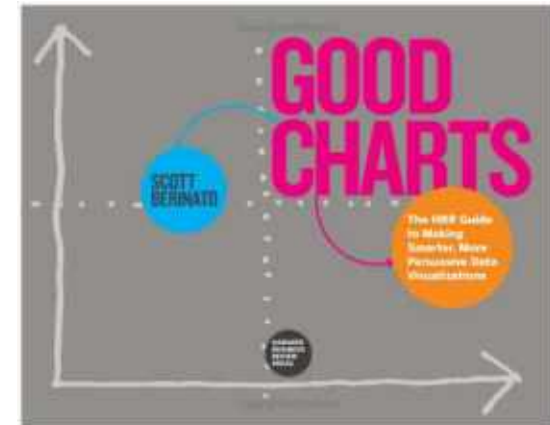
Analysis, DataViz, Story Telling,  
Presentation

## Resources

LinkedIn Groups, Blogs, Mailing Lists,

Books, YouTube, Vendor Sites

Peers/Study Groups, Vendors



# BI Story Example (From SalesDet)

## Welcome to Generic Example Distributing!

For 2015 our Management Team operated 10 Business Units across 13 States.

From our 32 Warehouse Locations, we distributed 56 Product Lines to 31 Customer Segments.

Our 36 Sales People sold 1120 Products to 3010 Customers across 423 Zip Codes.

Our Team of 105 Drivers piloted our 79 Truck Fleet to make 49399 Deliveries to 4692 Locations and 6306 Tanks.

Together We Accomplished:

	2014	2015	Change	
Total Gallons	67,547,823	69,576,581	2,028,757	1
Gal per Delivery	1,350	1,408	58	-4
CPG	1.0021	0.7901	-0.2119	-3
GM per Delivery	\$1,353.25	\$1,112.86	(\$240.39)	5
Distinct Cust Types	27	31		4

# Data Model for Tankwagon

Fuel - Tankwagon - Commercial						
Dimensions						
Detail	Group		Facts	Calculations	Measures	KPIs
System Dims		dBusinessLine				
syInvoiceNo	diInvoiceDate				Total No of Dels	
syDate	ca<CalGroups>		fQty		Total Gallons	
syLineType (Prod, Frt, Fee)			fUnitCost	cExtCost	Total Gal Ext Cost	
			fUnitPrice	cExtPrice	Total Gal Ext Price	
Internal Resource Dims			fUnitGM	cExtGM	Total Gal Ext GM	
diSalesRep					Avg CPG	
diProduct	di ProductLine				Avg Gal/Del	
diTruck	diFleet					
dDispatcher						
diDriver	diShift		fTankSize			
diWhs	diWhsGrp		fOptDelGal	cOptDel%		
External Dims						
deCustCode	deDivision					
deShipToCode						
deTankNo	deRoute					
deCustomerName	deCustomerType					
deZipCode	deState					

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# Business Intelligence Agenda

## Session1

### ✓ Intro

BIE (Business Insights Explorer – Operations)

ProfitLink (Daily Tool)

Excel/SQL Datawarehouse

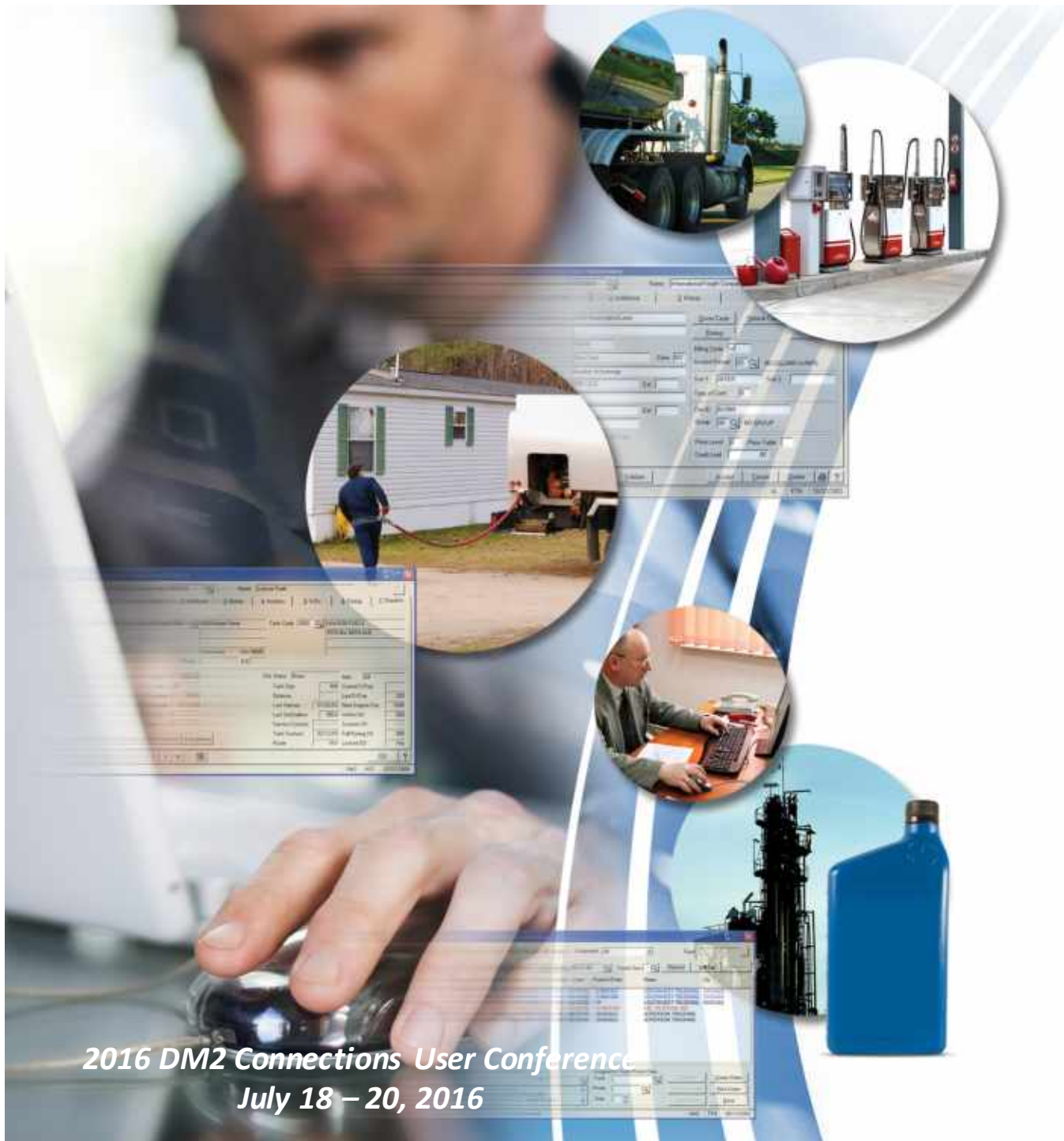
## Session 2

Sage Alerts (Data Driven Business)

## Session 3

Sage Intelligence (Excel on Steroids)





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