

SHAPE THE ROADMAP: REPORTING & BUSINESS INTELLIGENCE TOOLS

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OBJECTIVES

- Learn about standard features that are available in standard Business Intelligence (BI) solutions in the market today.
- Be involved in the BI tool selection process by providing the Avionté Product Team with your best ideas.
- Learn a new way to determine value in your business by becoming a Product Owner (for an hour).

WARNING:

This class requires interaction with
your fellow attendees



INTRODUCTIONS

PRESENTERS

Marta Cooke Business Analyst

- Started with Avionté March 2012 as a Project Manager

Anne Pike Manager of UX

- Started with Avionté June 2018

Jami Klotz VP of Product Management

- Started with Avionté May 2016

AGENDA

- Business Intelligence Tools: Feature Review
- Reporting and BI Tool Requirement Gathering
 - Value generation exercise to generate ideas
- Wrap-up

VALUE EXERCISE PRACTICE

- Write BI Tool **METRICS** that you would find **valuable**:
 - 1 metric per post-it
 - 3 metrics per person, if you can!
 - No duplicates at the table
- As they're completed, deliver them to the whiteboard.

Examples:

Card 1: I need to see how the number of sales calls translate to Gross Profit dollars, per salesperson.

Card 2: I need to see how many placements were made out of the applicants recruited by each recruiter, per week.

BUSINESS INTELLIGENCE TOOLS: FEATURE REVIEW



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BI Tool Features: Dashboards

- **Self-serve** Widgets modified by/per user/user group, or managed by local administrator.
- **Library** Support pre-built library of dashboards and respective widgets for users to access.
- **Visualizations** Scorecards, Tables, Charts/Graphs, Gauges, Maps/Hotspots, Tickers/News Scroll.
- **Drill-down** Ability to click into the graphic to get to the root data.
- **Drag-and-drop** Add data to a chart, or update chart format with drag-and-drop.
- **Natural language search** Software builds best-fit graphic based on search words.
- **Multi-tab/Paged** Widgets on multiple pages.
- **Comments** Users can comment/tag other people directly in the widget.
- **Export/Email** Send another user the graphic directly from the dashboard – either a stagnant screenshot or share a working/live widget.

BI Tool Features: Reporting

- **Ad-hoc/Self-Serve** Users can build, format and share on the fly.
- **Library** Support pre-built library of reports for users to access.
- **Multi-sourced** Plug-in data sources other than Avionté.
- **Automate/Schedule** Users can schedule delivery of their own reports to external or internal users.
- **Import** Data from other sources.
- **B2B Reporting** Invoices, newsletters, etc.

BI Tool Features: Other

- **Predictive Analytics/Forecasting** Based on present trends, determine company health at any time in the future; plan for ramp-ups.
- **Gamification** All-user notifications when a sale/placement is made.
- **Mobility** Analytics are available on any device.
- **Enterprise analytics** Administrators can see who is using what visualization how often – allows them to change out any that aren't useful.
- **Built-in chat** Users can create discussion streams and invite specific users, making the conversation public or private.

REPORTING AND BI TOOL REQUIREMENT GATHERING

Value Exercise - Redux

- Write BI Tool **FEATURES** that you would find **valuable**:
 - 1 feature per post-it
 - 3 features per person, if you can!
 - No duplicates at the table
- As they're completed, deliver them to the whiteboard.

Examples:

Card 1: I need a visualization that shows my trending Gross Profit next month.

Card 2: I need to see the geographic location of billing customers, with the color changing according to their YTD billing.

Whole Room

1. Everyone in the room take **one** feature post-it from the whiteboard.
2. Randomly **compare** your post-it with someone else's.
3. Discuss which feature is most **valuable**, and how much **more** valuable it is than the other.
4. On the **back** of each post-it, write a number from 1-6; the total of both **must equal 7**. Leave enough space for five numbers.
5. **Trade** post-its and move to another partner.
6. **Repeat** from number 2.
7. **Total** the numbers on the back.
8. Write the result on the **front** and return the post-it to the whiteboard.

RESULTS REVIEW DISCUSSION



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