

Performance Focus Broadsheets™

From the Periodic Table of Business™

1. Business Intelligence Maturity Model

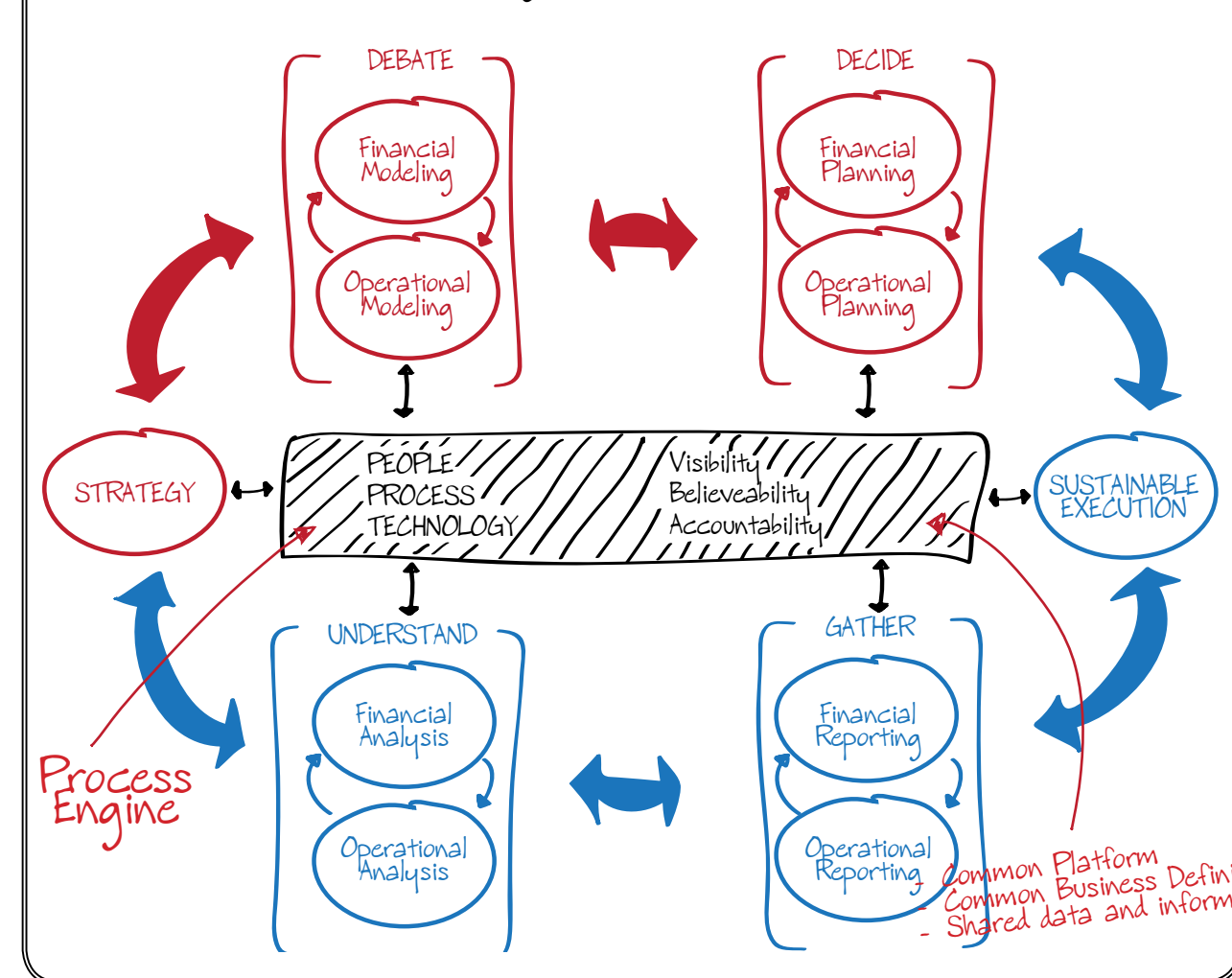
	Stove-Piped	Basic	Standardized	Rationalized	Dynamic
People	IT - leads all BI efforts	Some central control and accountability	Some central control and accountability	IT, Finance & the Business working together	Robust Center of Excellence, High re-use
Process	Departmental & early adopters	Division wide scope	Enterprise Wide	Includes Outside users	
Technology	Multiple, siloed tools	High manual effort	Manual routines automated one-time ETL	Enterprise Data Warehousing Predictive Analytics	Standardized, Integrated, Agile
Data	Financial focus	Departmental metrics	Manual file-out	Master Data Management	Complete & Believable Metrics aligned with Strategy

2. Strategic Goals/Initiatives

Strategic Goals
 10% Profitable Revenue Growth
 Customer Satisfaction up 3% to 85%
 Product innovation and introduction

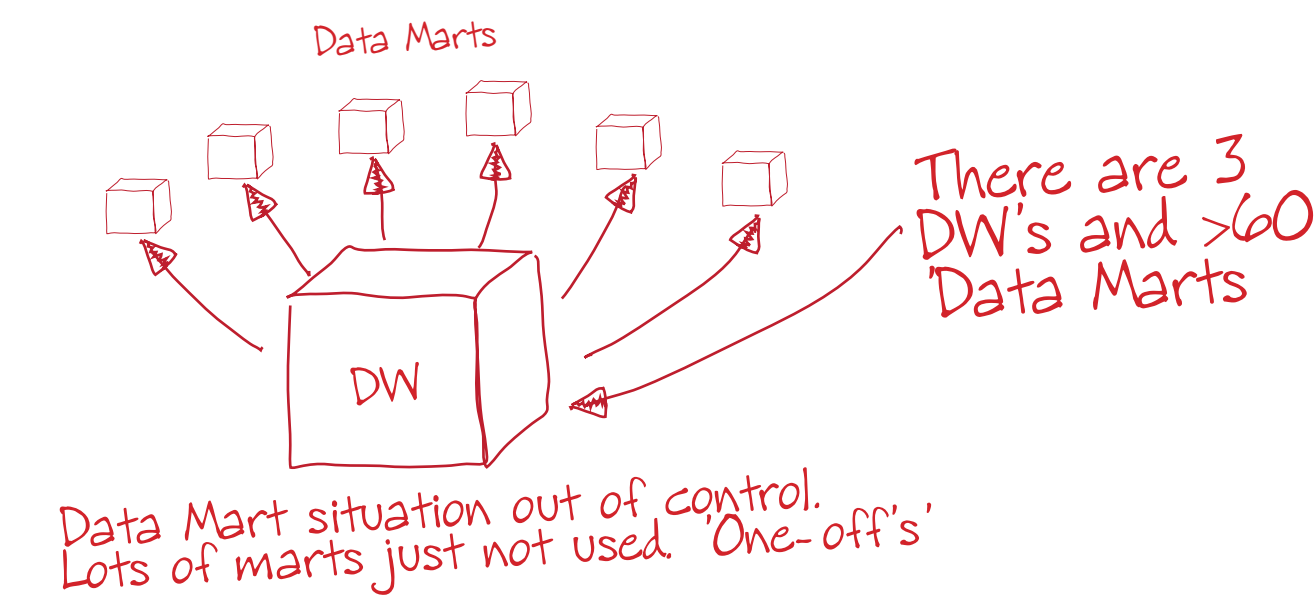
Strategic Initiatives
 The Platinum Program
 Right Revenue Program
 2010 and Beyond, (innovation initiative)

3. Sustaining Focus



NOTES & OBSERVATIONS

- No sharing of data across the business functions
- Sales analytics are an issue - getting sales actuals back to CRM not possible
- Lots of departments doing their own thing
- Some processes broken or not well defined



Lots of disconnected spreadsheets being used for analytics/reporting etc.

4. Value Drivers & Metric Decomposition

Sales & Marketing	Operations	People	Finance	Top Strategic Objective	Sales & Marketing	Development - Support Operations	People	Finance
<ul style="list-style-type: none"> Market Share Customer Satisfaction Competition Revenue Pricing Channel Effectiveness Brand Demand Generation 	<ul style="list-style-type: none"> Service Quality Product Quality Customer satisfaction Innovation Supply Chain Efficiency Production Cost Inventory Safety 	<ul style="list-style-type: none"> People Quality Productivity Revenue Per Head Recruitment Cycle Diversity Labor Costs Employee Satisfaction Commissionable Revenue 	<ul style="list-style-type: none"> Recognized Revenue Working Capital Gross Margin EPS Compliance Forecast Accuracy Asset Utilization CapEx 	<p>10% Profitable Revenue Growth</p> <ul style="list-style-type: none"> Strategic Analysis Strategy Visualization Tailored Applications Executive Dashboard Information Portal Management Reporting Financial Reporting Goal Visualization Balanced Scorecard Board Pack 	<ul style="list-style-type: none"> Revenue Brand Price Discounts (by product) Competition 	<ul style="list-style-type: none"> Support Costs Customer Satisfaction Product Quality (by product) 	<ul style="list-style-type: none"> Retention Attraction Headcount Skills Index Training 	<ul style="list-style-type: none"> Recognized Revenue COGS Margin (by product) EPS DSO
<ul style="list-style-type: none"> Forecast Accuracy Productivity Discounts Quality of Leads Average Selling Price Conversion Ratio Demand Generation Customer Incentives 	<ul style="list-style-type: none"> Forecast Accuracy Margin Returns Compliance Design Issues Asset Utilization Skills & Certifications Customer Service 	<ul style="list-style-type: none"> Forecast Accuracy Succession Safety Outsourcing Rewards & Recognition Employee Attraction Employee Retention Turnover 	<ul style="list-style-type: none"> Product Profitability Average Selling Price Revenue Per Head Cost Allocations Debtors/Creditors Days Sales Outstanding Days Payable Outstanding 	<ul style="list-style-type: none"> Tailored Applications Management Dashboard Information Portal Quarterly Review Pack Scorecard Interactive Analysis Departmental Reporting Financial Reporting Goal Visualization Operational Reporting 	<ul style="list-style-type: none"> Booked Revenue Renewals Competition Licences Won/Lost Calls Pipeline Campaign Effectiveness Campaigns 	<ul style="list-style-type: none"> # Support Calls Customer Satisfaction Product Quality (by product) 	<ul style="list-style-type: none"> Retention Attraction Headcount Skills Index Training 	<ul style="list-style-type: none"> DSO
<ul style="list-style-type: none"> Volume Up Sell/Cross Sell Qualified Leads Average Customer Spend Campaign Effectiveness Field Readiness Sales/Marketing Expense T&E 	<ul style="list-style-type: none"> Field Readiness Time to Delivery Call Volume Production Capacity Asset Life Support Efficiency Backlog Availability 	<ul style="list-style-type: none"> Overtime HR Costs Absenteeism Employee Acquisition Cost New Hire Quality Benefits Cost Time to Fill Cost Per Hire 	<ul style="list-style-type: none"> Headcount Close Time Days in Inventory Finance Effectiveness Risk & Exposure Licensing & Royalties Cash Flow Hedging 	<ul style="list-style-type: none"> Off-line reporting Interactive Analysis Departmental Reporting Information Portal Operational Dashboard Decision Support Purpose-Built BI Application Data Mining Slice & Dice Data 	<ul style="list-style-type: none"> Booked Revenue Renewals Competition Licences Won/Lost Calls Pipeline Campaign Effectiveness Campaigns 	<ul style="list-style-type: none"> Product Quality (by product) Customer Satisfaction # Support Calls 	<ul style="list-style-type: none"> Retention Attraction Headcount Skills Index Training 	<ul style="list-style-type: none"> DSO

OVERALL WORKSHOP OBJECTIVES

1. Identify & prioritize potential high-value initiatives & plan next steps
2. Align people, processes and technology with value drivers of the business

POTENTIAL THEMES/INITIATIVES

- Reduce Costs
- Drive Growth
- Optimize Cash Flow
- Improve Asset Utilization

BUSINESS ENABLERS

- Visibility
- Focus
- Alignment
- Accountability

NEXT STEPS

Mock up the 'Right Revenue' Dashboard (align with Strategic Initiatives) with Revenue, Customer Satisfaction, Production Quality & Skills. By [date] by [name]. Then validate with Sr. managers.

When approved, begin systems design.

DATE, CLIENT & LOCATION:	2009, Smith Technology Inc., Mississauga, Canada
EXECUTIVE SPONSOR(S):	Bill Smith, CFO and Kerry Dilancy, CIO
OPERATIONAL SPONSOR(S):	Robert Wiley, VP IT
INDUSTRY:	High Tech/Software
WORKSHOP DATE:	April 29, 2009
NEXT STEP DATE:	May 10, 2009
NOTES/COMMENTS:	Need to involve all cross functional executives in the project to get more holistic POV in order to focus on execution of new strategy

