

Business Intelligence Survey

Use of BI technology and leading edge business practices

Terminology

Reporting – controlled content with precision page placement, with limited/fixed interactivity, and often batch-generated

Ad-hoc analysis – flexible content with the ability to manipulate the presentation and filter/drill on the data, dynamically recalculating numerics, often supporting on-demand updates

Dashboarding – top-line summaries of key business measures often with trend lines and rule-driven alerts, often providing embedded menus and selectors enabling intuitive (zero training) interactivity

Data warehousing / cubes – moving transaction data from application databases into a database designed to optimize Business Intelligence capabilities

Data mining – ad-hoc analysis with the ability to look for patterns and relationships within large data sets

Data enhancement – systematically correcting transaction data (that is out of conformance with business rules) and/or embellishing such data with external reference data (e.g., SIC codes)

Master Data Management – an application (and process) for enabling business owners to manage the lifecycle of fundamental reference data such as product master, territories, customer types, etc.

Do you agree with these definitions?

- 1) Reporting (Check one.)
 - a) Yes
 - b) No
 - c) Don't know
- 2) Ad-hoc analysis (Check one.)
 - a) Yes
 - b) No
 - c) Don't know
- 3) Dashboarding (Check one.)
 - a) Yes
 - b) No
 - c) Don't know
- 4) Data warehousing / cubes (Check one.)
 - a) Yes
 - b) No
 - c) Don't know
- 5) Data mining (Check one.)
 - a) Yes
 - b) No
 - c) Don't know
- 6) Data enhancement (Check one.)
 - a) Yes
 - b) No
 - c) Don't know
- 7) Master Data Management (Check one.)
 - a) Yes
 - b) No
 - c) Don't know

Company Background

- 8) Which of the following best describes your company's industry? (Check one.)
- a) Financial Services
 - b) Health Care
 - c) Manufacturing (Pharmaceuticals)
 - d) Manufacturing (all others)
 - e) Wholesale Trade
 - f) Retail
 - g) Information Services
 - h) Education
 - i) Professional, Scientific, and Technical Services
 - j) Accommodation and Food Services
 - k) Arts and Entertainment
 - l) Other: _____
- 9) Which of the following best describes your company's annual revenues? (Check one.)
- a) < \$250 million
 - b) \$250 - \$500 million
 - c) \$500 - \$750 million
 - d) > \$750 million
- 10) Do your responses to this survey pertain to: (Check one.)
- a) This site / business area
 - b) Your entire company
- 11) What are the major business applications you operate? (Check all that apply and for each name most important vendor.)
- a) CRM Vendor: _____
 - b) ERP Vendor: _____
 - c) Finance Vendor: _____
 - d) HR Vendor: _____
 - e) Sales Vendor: _____
 - f) Other Vendor: _____

- 12) What is your role? (Check one.)
- a) IT Manager / Director
 - b) BI/DW director or manager
 - c) BI/DW architect or developer
 - d) BI/DW administrator or systems analyst
 - e) Business analyst or subject expert
 - f) BI/DW sponsor
 - g) Other: _____
- 13) Where in the organization is your group? (Check one.)
- a) Corporate
 - b) Business unit
 - c) Department (e.g. finance, sales, marketing)
 - d) Other: _____
- 14) Who has ownership of the system and its direction? (Check one.)
- a) IT
 - b) Business
 - c) Both IT and Business
- 15) How many BI/DW FTEs are in your group? (Check one.)
- a) <5
 - b) 5 - 20
 - c) >20
- 16) Over the next 12 months, do you expect your BI/DW headcount staff to grow, shrink or remain the same? (Check one.)
- a) Grow
 - b) Shrink
 - c) Remain the same
- 17) When implementing a BI project do you: (Check one.)
- a) Hire consultants to help lead specific areas
 - b) Hire contractors with certain technical skills
 - c) Use internal staff only

- 18) What priority does BI have in your IT investments this year? (Check one.)
- a) No investments in software, personnel or consulting planned
 - b) More planned in 2009 than 2008
 - c) Less planned in 2009 than 2008
 - d) About the same in 2009 as 2008

- 22) Is BI platform standardization a goal for 2009? (Check one.)
- a) Yes
 - b) No

- 23) What types of users are currently using a BI solution? (Check all that apply for each department.)

BI Maturity

- 19) Which BI technologies are in use today? (Check all that apply.)
- a) None
 - b) Reporting
 - c) Ad-hoc analysis
 - d) Dashboarding
 - e) Data warehousing / cubes
 - f) Data mining
 - g) Data enhancement (data quality)
 - h) Master Data Management
- 20) What server platforms do your BI systems run on? (Check all that apply.)
- a) Windows
 - b) Linux
 - c) Sun Solaris
 - d) IBM AIX
 - e) HP UX
 - f) Other: _____

| | Line staff | Line mgmt. | Line analysts | Executive mgmt. | Strategic analysts | Other: _____ |
|---------------------------------|------------|------------|---------------|-----------------|--------------------|--------------|
| Customer and sales | | | | | | |
| Financial and planning | | | | | | |
| Support and service | | | | | | |
| Operational and fulfillment | | | | | | |
| HR and management | | | | | | |
| Facilities, plant and equipment | | | | | | |

- 21) Which BI technologies are planned in the next 6 months? (Check all that apply.)
- a) None
 - b) Reporting
 - c) Ad-hoc analysis
 - d) Dashboarding
 - e) Data warehousing / cubes
 - f) Data mining
 - g) Data enhancement (data quality)
 - h) Master Data Management

24) In the next six months, what types of users will be using a BI solution? (Check all that apply for each department.)

| | Line staff | Line mgmt. | Line analysts | Executive mgmt. | Strategic analysts | Other: |
|---------------------------------|------------|------------|---------------|-----------------|--------------------|--------|
| Customer and sales | | | | | | |
| Financial and planning | | | | | | |
| Support and service | | | | | | |
| Operational and fulfillment | | | | | | |
| HR and management | | | | | | |
| Facilities, plant and equipment | | | | | | |

25) How does your senior management perceive the BI/DW system? (Check one.)

- a) Tactical resource - to assist decision-making
- b) Critical resource - for running business operations
- c) Strategic resource - for assessing performance objectives
- d) Competitive differentiator

BI Project Challenges

26) What are the most important BI issues that you have today? (Check all that apply.)

- a) None – the BI systems meet the business and user needs
- b) Need more business self-service, IT is a bottleneck
- c) Need to make more intuitive and easy to use
- d) Need to deliver more relevant data and information
- e) Need to improve data quality issues
- f) Need to make reliable and production class
- g) Need to reduce the cost of ownership

27) What are the most important challenges that your BI projects face? (Check all that apply.)

- a) None
- b) Insufficient sponsorship / funding
- c) Cost overruns, project never completes
- d) Lack of participation or support by the business
- e) Incomplete understanding of the business needs
- f) Poor understanding of the data and its quality
- g) Lack of skills to execute the project
- h) Lack of adoption by end users – too complex
- i) Lack of adoption by end users – breaking old habits

Reporting Maturity

28) Which audiences are served by reporting? (Check all that apply.)

- a) None today
- b) Internal employees
- c) External customers
- d) OEM / embed BI with our market product

29) How broad is the use of reporting? (Check one.)

- a) None today
- b) Local (specific function in a department)
- c) Department wide (all functions in a department)
- d) Company (or business unit) wide

- 30) How ingrained is the use of reporting? (Check one.)
- a) None today
 - b) Mission-critical: embedded in our business processes
 - c) Essential: used systematically
 - d) Complementary: used casually

- 31) What technology is used for reporting? (Check all that apply.)
- a) Cognos
 - b) Oracle Hyperion
 - c) Oracle Discoverer
 - d) Business Objects
 - e) Microsoft Reporting / Analysis Services
 - f) Microsoft Access / Microsoft Excel
 - g) Embedded in the business applications
 - h) Custom application
 - i) Other: _____

- 32) Are you happy with these reporting products? (Check one.)
- a) Yes
 - b) No Why not? _____

Ad Hoc Analysis Maturity

- 33) Which audiences are served by ad hoc analysis? (Check all that apply.)
- a) None today
 - b) Internal employees
 - c) External customers
 - d) OEM / embed BI with our market product
- 34) How broad is the use of ad hoc analysis? (Check one.)
- a) None today
 - b) Local (specific function in a department)
 - c) Department wide (all functions in a department)
 - d) Company (or business unit) wide

- 35) How ingrained is the use of ad hoc analysis? (Check one.)
- a) None today
 - b) Mission-critical: embedded in our business processes
 - c) Essential: used systematically
 - d) Complementary: used casually

- 36) What technology is used for ad hoc analysis? (Check all that apply.)
- a) Cognos
 - b) Oracle Hyperion
 - c) Oracle Discoverer
 - d) Business Objects
 - e) Microsoft Reporting / Analysis Services
 - f) Microsoft Access / Microsoft Excel
 - g) Embedded in the business applications
 - h) Custom application
 - i) Other: _____

- 37) Are you happy with these ad hoc analysis products? (Check one.)
- a) Yes
 - b) No Why not? _____

Dashboarding Maturity

- 38) Which audiences are served by dashboarding? (Check all that apply.)
- a) None today
 - b) Internal employees
 - c) External customers
 - d) OEM / embed BI with our market product
- 39) How broad is the use of dashboarding? (Check one.)
- a) None today
 - b) Local (specific function in a department)
 - c) Department wide (all functions in a department)
 - d) Company (or business unit) wide

- 40) How ingrained is the use of dashboarding? (Check one.)
- a) None today
 - b) Mission-critical: embedded in our business processes
 - c) Essential: used systematically
 - d) Complementary: used casually
- 41) What technology is used for dashboarding? (Check all that apply.)
- a) Cognos
 - b) Oracle Hyperion
 - c) Oracle Discoverer
 - d) Business Objects
 - e) Microsoft Reporting / Analysis Services
 - f) Microsoft Access / Microsoft Excel
 - g) Embedded in the business applications
 - h) Custom application
 - i) Other: _____
- 42) Are you happy with these dashboarding products? (Check one.)
- a) Yes
 - b) No Why not? _____

Data Warehousing Maturity

- 43) What BI databases (marts, warehouses, etc.) are deployed? (Check all that apply.)
- a) Enterprise – provides a business unit or company-wide view of data across all functional areas
 - b) One or more departmental – provides a functional view (e.g., finance, sales, etc.)
 - c) One or more tactical – narrow in support of an isolated activity

- 44) What was the main purpose of the BI database? (Check all that apply.)
- a) To speed up report processing
 - b) To strip report processing away from production applications
 - c) To simplify developing BI content (reports, etc.)
 - d) To improve data and simplify data for BI consumption
- 45) What single factor most prevents wider application of BI-specific databases? (Check one.)
- a) Cost / inability to justify funding
 - b) Skills / focus / competing IT priorities
 - c) Previous failures make it a tough internal sell
 - d) Other: _____
- 46) What ETL technology is used? (Check all that apply.)
- a) Cognos
 - b) Oracle Hyperion Essbase
 - c) Oracle warehouse builder
 - d) Business Objects Data Integrator
 - e) Microsoft SSIS
 - f) Informatica
 - g) Ascential (IBM)
 - h) Custom application
 - i) Other: _____
- 47) Are you happy with these ETL products? (Check one.)
- a) Yes
 - b) No Why not? _____

Data Enhancement Maturity

- 48) What are you doing about data quality? (Check all that apply.)
- a) Ignoring it
 - b) Fixing it at the point of entry
 - c) Fixing it periodically (e.g., quarterly)
 - d) Using commercial tools Vendor: _____
 - e) Building custom tools

- 49) What data enhancement issues do you need to address?
- a) Need to eliminate gaps in the accuracy and completeness in our data
 - b) Need to enhance data quality, especially customer and prospect information
 - c) Need to complement our data with external sources (e.g., D&B codes)

Master Data Management Maturity

- 50) How do you manage master data today? (Check all that apply.)
- a) We don't, we aren't aware of any problems
 - b) We don't, but we know it is causing data accuracy problems
 - c) We use manual methods (e.g., hand-correcting data) to try and align our data/reports
 - d) We use automated methods/tools with clear organizational ownership
 - e) We developed our own tool
 - f) We use a vendor tool: _____
- 51) If no Master Data Management system is in place today, what initiatives are planned in the next 6 months? (Check one.)
- a) None
 - b) We will assess and define the problem
 - c) We plan to have started an implementation project
- Products considered:

- 52) If a Master Data Management system is in place, what data domains are being managed (e.g., product, territory, customer type, etc.)? (Name top three.)
- a) First: _____
 - b) Second: _____
 - c) Third: _____