Mobile Business Intelligence
A manager perspective – Corporate Navigator App

Miami Beach, 9th February 2016
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IT conceptual changes in the last 15 years

Current changes

Firstly, digital natives increasingly populate organizations' management along with digital immigrants, who learned to engage with IS and developed into IT users over the years.

Secondly, technical progress has been made in recent years, so that even senior managers should be able to handle their IT themselves.

Thirdly, IT use factors are gaining importance as IT design should not limit its scope to deployment, but include the use and impact perspectives as well.
Agenda

1. Requirements analysis – Business and Technical
2. Business/IT framework – Corporate Navigator
3. Live demo – Corporate Navigator prototype and “Finance apps” as starters
4. Practical Tips & Tricks for Implementation
1 Requirements analysis – Business and Technical

2 Business/IT framework – Corporate Navigator

3 Live demo – Corporate Navigator prototype and “Finance apps” as starters

4 Practical Tips & Tricks
Accommodating functional and non-functional requirements

Client Cases

- **Inconsistent data**
  - "Despite efforts to standardize, the figures from financial accounting and management accounting are still inconsistent in several areas"
  - "Our production use their own reports to conduct "shadow accounting" on their operational R/3; data do not correspond to our group reporting"

- **Unreliable content**
  - "Generally, only about 50% of the information from the reports we use is relevant for my decision making. For important decisions, I often have my assistant conduct special analyses"

- **Poor information overview and uncomfortable system handling**
  - "Creating reports in SAP remains complex. I need 2 IT people so that I don't have to rely on group IT. Report creation must become easier"

- **Bad cost-benefit-ratio**
  - "The board doesn’t understand why group reporting requires so many people and costs so much. I'm supposed to cut costs, but the demands are growing"
... more concrete on mobile IT design for use

Current interviews with managers

Get online without log-on

“When I leave the plane, I want to be “online” right away, without a complicated log-on process”

"On the road" with one-pagers

“When I’m traveling, I need “one-pagers”: What’s happening, deviations from plan, alternatives to decide on – hard numbers ... and my assistants’ comments on all that”

Getting it right the first time matters

“I won’t spend a lot of time trying to get my MSS to work or on training – IT is not my hobby!”

Complexity to be mastered

“Our leadership team is very diverse – from our back-grounds to our working styles. How will you find a single MSS solution that suits all of us?”
... and latest feedback from our Finance apps

Prototyping

Modern graphics – use sparklines to present information at a glance and complement them with tooltips to retrieve details

Driver trees – support economic value-added concepts with sliders and make them more valuable with self-service analysis: EBIT decomposition is gaining importance

Collaboration: to harvest the knowledge of different users, integrate collaboration capabilities into the MSS: direct emails with “at the push of a button” screenshots, commenting with “wipe-in” bars

Exception reporting – draw managers’ attention to critical events in real-time by sending notifications to their smart devices, setting the right alerts and proactive push-function for alerts

Mobile – Consider even mobile offline use situations (sitting in a plane, train means mobile offline), predefined analysis, align different information media with managers’ devices (pdf, webbrowser, app)
Technical Requirements

Crucial Success Factors

• Offline Functionality – *Pre-Caching, Slice Selectors*

• High Performance – *Intelligent Cubes per Use Case*

• Fragmentation – *Balanced RAM Usage*

• Dynamic Navigation Functionality – *Interactive Layers*

• Multi Device support – *Manage Views, Standard Graphs*

• Collaboration Support and Simulation – *Write Back Functionality*
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The Corporate Navigator - business-to-IT approach to design mobile BI

Four design layers and three levels of reporting

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<tr>
<th>Design layers</th>
<th>Regulatory compliance</th>
<th>Strategic leadership with an increasing focus on operations</th>
<th>Communicate with capital markets</th>
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<td>Strategic positioning</td>
<td>Legal requirements, Voluntary Guidelines</td>
<td>Vision, Level of information, Decision making, Strategic program</td>
<td>Capital markets, Financial institutions</td>
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<td>Conceptual design</td>
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<td>Business/IT alignment</td>
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<td>IT components</td>
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Strategic position with an increasing focus on operations:

- Vision
- Decision making
- Strategic program

Levels of information:

- Strategic program
- Capital markets
- Financial institutions

One-Page reporting:

- Financial accounting
- Management accounting
- Compliance management
- Program management
- Cash flow- and liquidity management

Domains, applications, enterprise services, and capabilities:

- Software: software components and data structures
- IT infrastructure: hardware and networks

[1] Strategic Positioning, Conceptual design Business/IT Alignment, IT components
[2] Corporate Portfolio, Corporate Dashboard, and Corporate Analyses
Corporate Portfolio

Performance of business units using three (financial) KPIs

- **Reward**: ROCE [%]
- **Investment**: Capital employed [EUR m]
- **Risk**: EBIT deviation [%]

Drill-down to the Corporate Dashboard

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Corporate Dashboard

Comprehensive one-pager with five information clusters and drill-downs by request

- Financial accounting
- Management accounting
- Compliance management
- Cash & liquidity management
- Program management

Drill-down to the Corporate Analyses (example)

Corporate Analyses

Cover the most important review of both financial and non-financial KPIs

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Finance Apps

Our “best of” DAX reports and analysis – all included within the Corporate Navigator prototype

Drillable value-driver tree and regional analysis

“Value-driver tree with “EBIT after capital cost” with easy-to-handle drill-downs into details such as EBIT deviation analysis, SBU comparison”

“A regional analysis has to apply a geo map as well as a waterfall diagram type to expose insights by regions”

CUPID (“customer profitability indication”)

“Easy-to-handle sales reporting to expose the profitability of customer groups by sales, EBIT per customer, return on sales”
BASF- Magic Mobile

App provides a drillable value driver tree (VDT) and a flexible regional analysis

Client situation

- **Client**
  - Largest chemical group in Europe

- **Challenges**
  - Managers miss IT acceptance due to insufficient user friendliness

Approach

- **Eight weeks project**
  - "Re-design board intro discussion about EBIT after cost of capital and net sales analysis"
    - Focus on information need analysis with business department (one week):
      - Agile "blueprint" and step-by-step prototyping to increase manager identification "right from the beginning" (seven weeks)

Client impact

- **New mobile reporting at a glance to compare with existing paper-based reporting**
  - Two frequently used dashboards with a much easier information and navigation design than the current solution
  - Integration of **new IT-enablers** such as collaboration (comment, share, write-back) to bring even consumer managers to self-service IS support
## Continental CUPID (Customer Profitability Indication)

Customer profitability indication by sales, profit indication, return on sales, and ROS

### Client situation

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<td>One of the largest automotive suppliers</td>
<td>Tech-averse board members and managers more and more “on the road” asked for a “ready-to-go” mobile solution</td>
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<td>They choose a &quot;customer profitability indication&quot;, no financial report</td>
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### Approach

**Eight weeks project**

"Re-design their customer profitability indication"

- Focus on information need analysis with business department (one week)
- Agile “blueprint” and step-by-step prototyping to increase manager identification "right from the beginning" (seven weeks)

### Client impact

- New customer profitability report — much easier — information and navigation design than the current MS Excel, cross-analysis by customer groups, customer brands, and geo map by slider
- Hands-on example to bring even consumer managers to self-service IS support
- Starting point towards a situated MSS design "IT design for use"
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Try the Corporate Navigator app

Getting started

How to get started with the new Corporate Navigator

• Install the MicroStrategy Mobile for iPad app from the Apple App Store

• Download the Corporate Navigator by following the link from the MicroStrategy homepage

• After viewing all screens of the Corporate Navigator the data is cached and the app can be used offline in „airplane mode“
Question & Answers
Thank you for joining this session