



# Business Intelligence Round Table

27 November 2008

- Agenda:
- 08:00 Welcome and Breakfast
  - 09:00 First round table
  - 10:45 Break & Coffee
  - 11:00 Second round table
  - 12:45 Lunch
  - 13:45 Third round table
  - 15:30 Break & Coffee
  - 15:45 Fourth Round table
  - 17:30 Cocktails
  - 18:00 Dinner

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## Thank you for participating at our Business Intelligence Round Table Discussion

- Business Intelligence Competence Centers  
(Moderators Philippe Vaessen and Ivan Schotsmans)
- Open Source  
(Moderator Davy Nys)
- Corporate Performance Management  
(Moderator Stijn Vermeulen)
- Trends in Business Intelligence  
(Moderators Eddy Conjaerts and Katty Van Roey)

The aim of the round table is to allow you to meet with your peers and encourage discussion and the sharing of knowledge.

### How does it work?

- Four sessions of 90 minutes
- Each badge has 4 colors, each table has a color
- Switch to next table based upon the color sequence on your badge

### Expectations?

- Each map contains basic information on moderators and topics
- Introduce yourself (1' per person)
- What is your / your company's experience with the topic
- Raise your questions



**BI-Community.org**

## Table: Business Intelligence Trends

### Moderator



#### **Eddy Conjaerts - MicroStrategy**

Eddy Conjaerts is currently the head of MicroStrategy in Belgium. He graduated as a civil engineer at the VUB and started his professional career at Alcatel Bell Telephone where he was responsible for introducing new IT applications such as MRP II and JIT across the production facilities of the group. He switched to the supplier side in the early 80's when Oracle started its business in Belgium.

He held positions in sales and eventually became the sales manager for Oracle Applications and Industry. He also worked several years in the consulting world, with Cimad and in particular for Accenture.

In the new millennium he went back to the software world where he is now at MicroStrategy.

He is in particular interested and enthusiastic about the unlimited potential and opportunities that Business Intelligence still holds for companies of any size to enable better business performance. He is especially intrigued by the role that Business Intelligence can play in the new and innovative business models that are emerging in different industry sectors. Besides his job at MicroStrategy Eddy has another full-time job managing one wife and four growing-up children.

He is probably the only participant to our Round Table event that can bike to this event since he lives in the village next to Peer.



#### **Katty Van Roey - SPSS**

Currently Katty Van Roey is Country Sales Manager at SPSS.

After organizing the Gordel in '95, being a graphical designer for Thyssen Aufzuge 1996, Productmanager at 3P 1996-'98, she started to work in the software world in 1998.

Katty started as a pre-sales consultant in 1998 at Real Software.

In 2000 she started working for SPSS where she has occupied several sales functions. Since 2004 Katty is responsible for the Belgian and Luxemburg market.

Katty has a Master Product Development obtained at the Henri Vandeveld Institute in Antwerp.

Next to taking care of her team, she has a young family to take care of. Her hobbies are: her two children, swimming and reading.

## Table: Business Intelligence Trends

### What will be the business intelligence trends for 2009 and beyond ?

#### Hardware & Software

- Data Warehouse Appliances
- Virtualization
- (Web 2.0 based) visualization
- Next Generation Portals & Dashboards; Mashups
- (already in other work group) Sophisticated Analytics especially Predictive Analytics and Data Mining
- DBMS-based intelligence
- In Memory BI Increasingly Large Data Volumes (Terabytes to Petabytes and beyond)
- Operational BI
- Mobile BI

#### Convergence

(of various technologies, services and business models such as SaaS, increasing popularity of open source adoption, SOA)

- Software as a Service (SaaS) & BI
- Search and Text Analysis & BI
- Open Source & BI
- Enterprise Data Management (EDM) & BI
- (Near) Real Time & BI
- Web 2.0 & BI
- Performance Management, Process Management & BI
- Service Oriented Architecture (SOA), Federated Architectures, & BI

#### Consolidation

(consolidation of companies in the data warehousing and business intelligence industry into a few dominant players, as well as consolidation of DW and BI tools and vendors within a company)

- Consolidation of BI Companies
- Consolidation of BI Tools within an Enterprise
- Consolidation of BI vendors within an Enterprise
- Consolidation of all types of Data Sources  
(Internal/External, Unstructured/Semi-structured/Structured)

#### Other

(increasing need for quality education in the DW and BI industry and stronger alignment of IT with business)

- Adoption of Mature BI practices by Small & Medium Businesses
- Increase in Effectiveness/Automation/Efficiency of Organization to Maximize BI ROI
- Increase in Education of DW/BI Industry
- Increasing Alignment of IT with Business

## Table: Business Intelligence Competence Centers

### Moderator



#### **Philippe Vaessen - Sybase**

Philippe Vaessen was appointed Country Manager of Sybase Belux in December 2004. Before his rising career at this global enterprise software and services company, where he was consequently nominated Sales Manager (November 2000 – December 2001) and Professional Service Manager (July 2001 – June 2005), he was active in such prestigious technology companies as Computer Associates, SAP and Information Builders. It is exactly this broad experience in the IT industry that inspired his hands-on and extremely client focused philosophy which was to lead Sybase Belux to its successful position in the markets of information management and information mobility software.

More information on Sybase and its end-to-end solutions for the Unwired Enterprise, including enterprise infrastructure business solutions, mobile software solutions for information management, development, and integration can be found on [www.sybase.be](http://www.sybase.be).



#### **Ivan Schotsmans - BI-Community.org**

Ivan Schotsmans is active Reporting since 1984, his first contact with SAS software. During several years he was active in reporting for a sales department.

In 1993, Ivan started his career in consultancy still using SAS and working for insurance and banking.

With Origin, in 1997, Ivan made the move to international consultancy and in 2000 he joined Deloitte. With Deloitte his career changed from a technical to a more business approach using SAP BW. He became the point of contact for Deloitte's European Center of Excellence for data warehousing.

After Deloitte, Ivan became Head of Information Management at Mobistar focusing on strategic projects and defining Mobistar's BI-strategy. But after 1,5 year he returned to consultancy with his own company. Most of the time Ivan is active as subject matter expert in business intelligence and data quality.

Ivan is active (founder) of several user organizations (DAMA Benelux, IAIDQ, TDWI Benelux Chapter). He is also the driving force behind [www.bi-community.org](http://www.bi-community.org), a market place for business intelligence professionals.

# Table: Business Intelligence Competence Centers

## Possible definition

### Information definition

Data turned into intelligence, trusted by everyone in the organization and used for effective decision making)

### BI definition

Getting the right information to the right people at the right time

The use of information that enables organizations to best lead, decide, measure, manage and optimize performance to achieve efficiency and financial benefit

BI is a strategic initiative by which organizations measure and drive the effectiveness of their competitive strategy

- A cross-functional team with a permanent, formal organizational structure
- It has well-defined specific tasks, roles, responsibilities and processes for supporting and promoting the effective use of BI across the organization

## Challenges in Exploiting BI



### Data challenges

- Required data (many data sources)
- Time and effort required to collect it
- Ensure accuracy (reduce lack of quality)

***Include data steward function in BICC, concerning data quality topics***

### Technology challenges

- Disconnected, non-integrated, information silos (different departments all using their IT infrastructure)
- Skills which are scattered (TCO being higher)

***Often the success of a BI part relies on what precedes it in the value chain  
The BICC can address the entire value chain***

### **Process challenges**

- BI is a process, not just a software product
- Processes can be changed, measured, documented

***Making them repeatable and able to adapt to changing business requirements***

### **Strategy challenges**

- Different groups have different BI needs, results in starting individual, non-coordinated BI projects
- Aligning all BI initiatives, so they support the organizational goals = the aim

***BICC manages both management needs and operations needs = BI strategy***

### **Users challenges**

***BICC is helping to identify the different audiences, their needs, training & coaching them***

### **Cultural challenges**

- Culture should encourage fact-based decision making

***BICC helps in ensuring that the strategic use of information becomes a core competency for the organization***

## Table: Corporate Performance Management

### Moderator



#### **Stijn Vermeulen - Element61**

Working in these areas since 1991, Stijn Vermeulen (40) is an expert in Performance Management in terms of both vendors and product offerings and the practical project implementation of these technologies. Stijn has a Commercial Engineer in Management Informatics- degree (KULeuven, Belgium) and an MBA in Applied Marketing (Institut d'Administration des Entreprises, Aix-en-Provence, France).

In 1994, he introduced Business Intelligence technology at the Marketing & Sales departments of Henkel Benelux. After 2 years, he was called to the Corporate Headquarters in Germany to head the international Marketing & Sales Data warehouse-project of Henkel Group. After having gained experience in business development of Business Intelligence technology at Gentia Software, he joined start-up Norkom Technologies in 1998 as first employee outside Ireland. Stijn served as Regional Director at this leading Analytical CRM company.

In June 2001, Stijn joined Cognos as Managing Director Belgium & Luxembourg. During his 5 years at Cognos Belux, Stijn doubled revenues from 8 million € to 16 million €, the team grew from 15 to about 40 people and market share increased from 15% in the Business Intelligence Market to over 25% in the combined Business Intelligence & Financial Analytic Applications (CPM) market space. In May 2006, Stijn left Cognos for a sabbatical of 8 months, following which he co-founded element61, where he focuses on business development, marketing & general management, next to delivering strategic consulting & senior management coaching. element61 is the thought-leading performance management consulting company in the Belgian marketplace, currently employing 17 consultants with an average experience of 8.9 years in BI & PM.

Stijn's focus areas are Performance Management Roadmaps & Architecture, as part of broader ICT roadmaps, and Performance Management software vendor roadmaps as vendors integrate their PM solution suites.

## Table: Corporate Performance Management

### The birth of “Performance Management” – 2007 Consolidation of an entire industry

2007 has been quite an amazing year for the market of Business Intelligence and Corporate Performance Management. More than 15 billion \$ was spent in Mergers & Acquisitions, mainly by the software industry giants SAP, Oracle & IBM, to acquire the crown jewels of the BI & CPM market. Rarely a complete industry consolidated that quickly, but then again ... the stakes are high.

In this “Insight”, we reflect on the sequence of events & the drivers for the consolidation. In a second part, we will dive into the impact this will have on our profession & our Performance Management initiatives in the short term.

### The “ancient times”

The industry of Business intelligence & CPM has always known “mega” (compared to the size of the market back then) - Mergers & Acquisitions :

- In 1995, Oracle acquired Information Resources’ Express-software as the basis for its BI platform. In the next decade the lack of interest of the company in BI would bring it from its then market-leading position to a third tier PM-player
- As early as 1998, Arbor Software, the company behind the Essbase OLAP technology acquired (“merged”) with the financial consolidation vendor Hyperion, adopting Hyperion as the new name for a then 350 million \$ company. The company formed in fact the first “Performance Management” vendor, combining a Financial Analytical Applications-offering with Business Intelligence
- In a busy July 2003, the same Hyperion acquired Brio Software to complement its CPM-suite with additional Business Intelligence functionality while Business Objects acquired Crystal Decisions, the then leading operational reporting vendor, who was preparing an IPO, to counter the launch of ReportNet by Cognos, creating a 736 million \$ company
- Another important acquisition, in hindsight, was the acquisition of Ascential, then a 250 million \$ company, by IBM in 2005

People looking at the industry from a distance, might think that 2007 was just another year of M&A activity very similar to the preceding 5 years. However, 2 different waves –each with their own & very distinct drivers- can clearly be distinguished.

The first wave primarily had to do with Business Intelligence converging with CPM, the second wave was all about the software giants getting interested in the promise & market potential of Performance Management as a whole.

## The first wave : Business Intelligence converging with CPM

Indeed, if we look at the main M&A activity since 2001, we can see the major “pure” players in BI & CPM completing their offering in those areas in which they were still weak in order to create a more complete Performance Management platform :

- Business Objects acquired Acta Technology in 2002 for its ETL-technology, SRC Software in 2005 for its Planning & Budgeting software, Firstlogic in 2006 for data quality software and ALG Software, ABC software in 2007
- Cognos acquired Adaytum in 2003 for its Planning & Budgeting software, Frango in 2004, for its consolidation solution and Applix TM/1 in 2007 for its in-memory OLAP & ABC functionality
- Hyperion acquired, next to Brio Software (see earlier), QIQ Solutions for additional BI functionality (dashboarding) in 2003
- SAS acquired ABC Technologies in 2002 for its leading activity based costing technology
- Cartesis acquired Inea Corporation, Planning & Budgeting software, in 2005

Marking more or less the end of the first wave, Business Objects acquired Cartesis for consolidation functionality in April 2007. Meanwhile, it’s an industry secret that another interesting merger was on the table during 2007, but did not materialize: Information Builders being acquired by Hyperion.

## The second wave : giants getting interested in Performance Management

And then, in a matter of a few months the software giants SAP, Oracle & IBM awake :

- March 2007 : Oracle acquired Hyperion for 3.3 billion \$
- October 2007 : SAP AG acquired Business Objects for 5.3 billion \$ (net), after acquiring Outlooksoft for est. 300 million \$ in May 2007 (the latter being a planning & execution mistake as future might tell us ?)
- November 2007 : IBM acquired Cognos for 4.9 billion \$ (net)

Contrary to common believe, these acquisitions were not the pure result of intelligent homework and “due diligence” of the giants in terms of future potential of the market space. It takes “2 to Tango” and only where a buyer and a seller meet, there is a transaction. Industry watchers know that the sale of Business Objects was a direct consequence of the wish of Bernard Liautaud, founder and major shareholder of Business Objects, to retire and that Cognos was “offered” to IBM by the Cognos CEO Rob Ashe, most probably pushed by the Cognos shareholders, seeing the attractive multiples of the Hyperion & Business Objects’ acquisitions. The same reasons, most probably, make that SAS Institute and Information Builders will remain independent for the foreseeable future. Their founders and main shareholders are not planning to retire in the short term.

However, it also is clear that SAP, Oracle & IBM have strategic reasons to invest in the Performance Management space.

For all three, their acquisitions were considerable in size & mark a shift in strategy in some way:

- For Oracle, the Hyperion acquisition marked the re-entry in (Corporate) Performance Management, following the loss of its CPM-market share it once had with Financial & Sales Analyser and following the rebranding of the BI offering from Siebel (Siebel Analytics) as its new Business Intelligence platform.
- For SAP, Business Objects was by far its biggest acquisition ever, marking a significant shift in strategy from mainly developing all its technology itself and only acquiring small companies for point technology. BO's development teams are estimated to be 5 times what SAP used to have itself in the area of Performance Management. It also seems an acknowledgement of the remaining challenges of implementing SAP's current solutions for BI & CPM (BW, SEM, BPS, BCS, ...).
- For IBM, Cognos was its biggest acquisition ever and is potentially marking a change of strategy to again become involved in more end-user oriented, enterprise applications. Cognos 8 completes in an excellent way IBM's "Information On Demand" and SOA- strategy.

None of the above, would have happened without the giants being serious about "Performance Management". Finally also "peer pressure" and the risk of being left without a potential good "acquisition candidate" (the fate of HP ?) will have made all of these moves happen so quickly, almost as if they were orchestrated.

As a final proof of the second wave Microsoft launched its own PerformancePoint Server at the end of 2007. PerformancePoint Server is a new offering, based on Microsoft's own initial attempt in Scorecarding, Business Scorecard Manager, its self-developed functionality for Planning & Consolidation and the technology from ProClarity, which it acquired back in 2006. Even though further acquisitions, especially in the area of Planning & Consolidation, cannot be excluded the combination of PerformancePoint Server with the upcoming MS SQL Server 2008 completes Microsoft's offering in Performance Management.

## Table: Open Source

### Moderator



#### **Davy Nys - Pentaho**

Davy Nys, joined Pentaho in 2007 and is currently the Manager of Sales, driving Pentaho's Direct and OEM Sales efforts in Europe, Middle East and Africa. The past 4 years, Davy has held International Sales and Business Development positions at Datawatch, a niche Business Intelligence and ECM solution provider. Davy started his career developing billing and business intelligence systems at a telecom provider now part of Versatel.

# Table: Open Source

## Open Source Intro

Business intelligence (BI) is a well-established and generally well-known software category that spans a wide range of functional capabilities. Specific definitions will vary from customer to customer and vendor to vendor, but most will agree that business intelligence typically refers to the challenge of providing business users with meaningful information from company data sources to help those users make better, more informed business decisions.

Traditionally, it has been time-consuming and expensive for a given customer to evaluate, select, purchase, and maintain the right BI technology to address their needs. While information on BI is readily available from many different sources, customers still face significant challenges relative to time, expense, and accuracy throughout BI technology investigation, vendor engagement, and final technology selection and deployment. Commercial open source BI radically alters the economics of all three of these phases in a way that reduces costs and risks for prospective BI users. This does not suggest that open source BI will be the right choice for every organization in every BI deployment. However, it does suggest that the economics of evaluation heavily favor open source BI, and that pragmatic organizations should increasingly consider open source BI first, and only initiate a traditional, high-risk, high-cost evaluation and implementation of proprietary BI when and if they determine that the business requirement cannot be satisfied using an open source alternative.

- What's generally available via open-source BI today
- What you may have heard -- hear all, believe half!
- When and where to deploy open-source solutions
- How to evaluate and match the right open-source solution for your needs
- Why deploying open-source solutions can be a career differentiator
- Going beyond buy vs build
- How to use and deploy open source software to leverage the existing BI infrastructure?
  - Discussing different deployment models
    - Greenfield
    - Co-deployment
    - Co-existence
    - Replacements
- Open source BI: from new to maturing in 2009?
- Community edition vs Enterprise edition
- Open source license consequences
- Open source and the source code
- Myths and misconceptions about open source BI
- What are the (additional) risks?
- Value for money
- Open source = freeware?