A day in the life of an empowered executive

How to get Business Information out of the hands of IT and into the hands that need it.

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A DAY IN THE LIFE OF THE EMPOWERED EXECUTIVE

Mark Sutherland, President of Blue Ridge Manufacturing, arrives early on a Wednesday morning. The slower pace of the past two years is behind him, and the plant is now working two shifts to keep up with the demand for products.

Drilling down further into the detail of the 75% and above probability opportunities, Mark finds five opportunities that he thinks can be closed in the next 48 hours.

As soon as Mark turns on his computer, his KPI dashboard, which helps him keep track of the pulse of the business, pops up. He first checks to see if any of his department heads have flagged any areas of concern. Clicking on the highlighted flag for the #1 manufacturing line, he reads the message left by the line supervisor describing a problem with one of the machines and what the supervisor is doing to correct the problem.

Mark recalls that this particular unit has caused problems before. He drills down into the maintenance records to display a graph of this machine's uptime versus total time. From the graph, it's clear that this machine needs a major overhaul. He opens his email window to send a note to his manufacturing executive to look into the problem.

On Mark's dashboard graph of finished goods inventory (sorted by product line), he notes that he has plenty of products to sell. He checks the order backlog on his dashboard to see how that matches to the inventory. Orders are clearly lagging.

Clicking the sales funnel icon, Mark drills down into the sales department's new business funnel. This three-dimensional graph shows him what volumes of business by product are in the various stages of the sales cycle. Drilling down further into the detail of the 75% and above probability opportunities, Mark finds five opportunities that he thinks can be closed in the next 48 hours. He accesses the proposal file for each of these five opportunities to view the details of the potential orders.

Mark again opens his email window to send a message to the sales executive, Joan, to take a look at the orders versus inventory numbers on her own dashboard. He also "encourages" Joan to take aggressive action to close the five 'hot' opportunities.

Clicking on the work-in-process icon, Mark checks the latest status of WIP. Drilling down into the specifics of each product line, he sees the details of how many more man-hours, raw goods inventory and calendar time will be required to finish each product line's current WIP. The sales requirements icon builds a cube where all sales opportunities, 50% probability and above, are charted against current finished goods and WIP inventories by required date to see where any shortfalls might occur. The significant shortfalls are automatically highlighted so Mark can focus on potential issues.

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Next, Mark looks at the cash flow meter on his dashboard. He is concerned that the cash balances are a little low. Drilling down into the open receivables, he checks on who has significant payments due. Correspondence files are attached to the records, so that Mark can see what letters or emails have been sent about payments. Mark sends an email to his Vice President of Finance asking her to follow up on a couple of accounts.

The customer satisfaction meter on Mark's dashboard has dropped since he checked the same meter on his PDA last night. Drilling down into the detail to determine what happened, Mark finds that a frustrated customer logged a complaint about an order through the Blue Ridge's web site. Mark sends a personal reply to the customer apologizing for the mix-up and assuring quick resolution.

REALITY!!

Your company has spent a fortune on very elaborate ERP and sales automation systems. You know the data you need is in there somewhere. You just can't get to it.

When you go to your IT department, they spend weeks or months and a big chunk of your budget to prepare a special report for you...if they even have time to do it in the first place. Or, you spend hours culling through reams of standard ERP data dumps to get the numbers you need and then reenter them into a spreadsheet that you spend more hours to build. Does it really have to be so hard to get the information you need?

The fundamental capability which enables our fictional Mark's dashboard and his ability to drill down into the details is data integration...a special kind of data integration that is normally very hard to achieve because the information comes from diverse and incompatible sources.

In the case of dashboards, the underlying data might reside in the accounting system (cash balances, inventory balances, accounts receivables), sales force automation files (sales funnel, CRM), email and word processing files (correspondence, customer proposals), spreadsheets or custom databases (quality control information, maintenance records, work-in-process requirements).

And, unlike the big system tools that do similar things, it's a very small fraction of their cost and a lot easier to implement and use.

Imagine the programming effort to integrate this information to produce the management reports in the many required formats. Further, imagine how hard it would be to replicate and customize the information and reports across the breadth of accounting, ERP and CRM systems in use in today's businesses, worldwide. Of course, the users want the information in their preferred format: graphs, tables, OLAP cubes, etc.

And, now, add the requirement for this data to be updated in real-time for timely decision making. To further complicate the picture, demand that all this information be accessible on the Internet and under strict security protocols.

For these, and other reasons, the *ad hoc* reporting and management dashboards implied by our scenario are mostly far off dreams for most executives.

Do they have to be dreams? Aren't these reasonable requests and real needs for an informed management?

A NEW APPROACH

It's called ClickBase, and it's being used by a large number of people for just the kind of uses in our little scenario. And, unlike the big system tools that do similar things, it's a very small fraction of their cost and a lot easier to implement and use.

ClickBase can consolidate disparate databases across the Internet in real-time - a perfect solution for situations where multiple offices are running different databases but want a consistent view of all data in one place.

Succinctly stated, ClickBase is a tool to access, analyze and present information from any number of sources, whether they be compatible or not. ClickBase is the ultimate business intelligence tool to provide *ad hoc* inquiry any time, from anywhere, in any desired format.

The power of ClickBase starts with integration. As long as there have been computer users, there has been the need for a user to have access to information. If that information is created and stored in a single database, then the information is generally easy to access and to manipulate. Unfortunately, that ease is an elusive goal.

ClickBase solves two problems. One is the ability to reference structured information like databases, spreadsheets and structured text files, while the other is to bring the unstructured information like word documents, pictures and other user-generated files into the same mix, thereby creating a more powerful solution than any of those isolated silos would be on their own. And ClickBase does this without replicating the data in another database that needs to be maintained and updated. ClickBase directly accesses the data where they reside. This allows for real-time information when it's needed.

It's the ultimate value proposition: ClickBase is the ideal tool to embed into a total system where incompatible information files need to be integrated, especially in real-time and through an Internet portal, in a wide variety of *ad hoc* report formats.

Management does not have to be deprived of the information they need, when they need it and in the format they want. The elusive goal is readily solved through this unique and clever management information tool.

Call us today for a free demonstration at 888-682-0001 or e-mail sales@clickbase.com or visit www.clickbase.com.

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