

This sample report shows the entire Key Findings section from the original, plus a few “random” pages from the Detailed Findings. The original report was 55 pages.

XXXXXXXX Business Intelligence
Market Perceptions and Messaging
A multi-national study

Qualitative Research Findings

July 23, 200X



IN - D E P T H
TECHNOLOGY MARKET RESEARCH
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Table of Contents

■	Background	3
■	Key findings	6
■	Detailed findings	
□	Use of BI within the organization	18
□	BI Purchase process	23
□	Key evaluative criteria	32
□	Perceptions of BI competitors	37
□	Response to messaging	44

Background

- XXXXXXXX has identified the BI market as a key element in its business strategy. However, while XXXXXXXX has expanded their BI solution, they have not achieved the desired level of growth.
- The current BI market holds some challenges and some advantages for XXXXXXXX.
 - Challenge: Consolidation has become the watchword of the BI industry. This consolidation is placing established BI tools within larger ERP solutions and may strengthen the barriers to XXXXXXXX XXXXXXXX .
 - Advantage: There appears to be strong interest in tools that XX . Going beyond the traditional BI users – so that operational decision makers are given the benefit of the most current information and analysis.
- *In-Depth Research* was asked to conduct a series of focus groups to provide the BI team with the information and insight they need to increase the company's penetration of the enterprise BI marketplace.

Objectives

- Some of the key learning objectives included gaining a better understanding of the:
 - Penetration/utilization of BI within organizations
 - Role of business and technical decision makers in the purchase process
 - Key criteria used in evaluating a BI solution
 - Perceptions of primary BI competitors
 - Response to existing XXXXXXXX and competitive messaging

Methodology

- A total of 14 focus groups were conducted.
 - A mix of XXXXXXXX and non-XXXXXXX BI users were recruited for each group.
 - US companies had a minimum of XXXXX PCs and UK companies had a minimum of XXX PCs. Company sizes ranged from the minimum to over 100,000 employees.
 - Respondents were participants in their company's BI decision making process.
 - All groups were moderated by Jacob Brown from *In-Depth Research*.

	London Groups	New York Groups	Chicago Groups
XXX	2	1	1
XXX	2	1	1
XXX	2	2	2

Key Findings

There is a XXX in use of BI within organizations.

- The level of penetration and utilization of BI appears to reflect the company's XXX information access and "ownership" more than the capabilities of their BI tools.

BI
XXXXX

BI
Concentration

BI
XXXXX

Organization restricts
XXXXX to senior execs
and small group of analysts.

They fear losing control of
Information – feel it is XXX
and "dangerous".

Use of BI tools is XXX and/or
across a limited horizontal
XXX band.

They believe that wider use
will lead to XXX don't "need"
the
Information waste their time
creating unnecessary reports.

BI tools XXXXXXXXXXXX to
Information workers across
the organization.

They believe greater access
to information will XXXX and
better decision making.

XXXXX initiates the BI search, but IT XXX in XXXXXX.

■ Step 1: Identifying a XXXX

- The Business group identifies a XXXX and voices it to IT. This initial request is often very XXXXXXXXXXXX..

■ Step 2: XXXX the need

- A joint committee is established and IT and Business work XXXX XXXX.
- The user community is surveyed to gain a better XXXX of their XXX, capabilities, and XXXXX.

■ Step 3: XXXX XXX

- IT is charged with identifying potential XXX.
- In XXX IT considers both business needs as well as the solution's fit with the company's information infrastructure.
- IT will refer to XXXX will give equal weight to informal sources such as colleagues or tools used by XXXXXX.

■ Step 4: Vendor XXX

- A joint IT / Business XXXXX process takes place.
- IT leads this XXXX focusing more on integration and implementation.
- BDMs focus on ease of use and satisfying XXXXX .

■ Step 5: Final XX

- IT guides the XXXXXX of integrating BI providers within existing infrastructure.
- Since Business is XXXXX XXXXX the project, infrequently XXXXX will push back and make them aware of the incremental cost, duration, complexity, and risk of the implementation.

BDMs and TDMs XXXXX XXXXXX XXX for evaluation.

- BDMs and IT professionals consistently generated the same set of key evaluative criteria.
 - **Most important BDM criteria**
 - XXXXXX for end users
 - Works with our XXXXX data
 - **Most important TDM criteria**
 - Ease of use XXXX
 - Works with our XXXX data
 - Ease of XXX
 - **Motherhood criteria** (criteria that will show up around any technology purchase)
 - Cost
 - XXX of the vendor
 - Ability of the XXX to meet our XXX
 - XXX

The market has very similar perceptions of XXX, XXXX, and XXXXXX.

- XXXXX three primary BI competitors had very similar perceptions.
 - All three were seen as strong in:
 - Enterprise XXX
 - Providing a XXXXX feature set
 - XXX well (XXXX and XX)
 - Weak areas included:
 - Ease of Xx
 - Affordability
 - Integrates XXX (XXX)

XXXXXXX has many important strengths.

- Strengths

- Most XXX solution.
- Costs can be XXXX within existing licensing structure.
- Very easy XXX (within a XXXXXXXX environment).
- Easiest to XXXX it delivers tools within the familiar XXXXXXXX.

- Weaknesses

- Doubts over XXX ability to XX well across the wide variety of platforms and databases that exist within large XXX environments.
- General perception of XXXXXXXX as a XXXX player rather than a true enterprise provider.
 - There was a strong consensus among TDMs that XXXXXXXX has become much more “XXXX Ready” in the past two years.
- Perception that the XXXXXXXX tools are not as XXXXX as competitors’.

The XXXXXXXX messaging was not seen as compelling.

- The XXXXXXXX messaging that was tested was consistently seen as:
 - Directed at Business
 - Using technical sounding words (e.g., highly aligned applications, all on a single BI platform) that some Business users would find intimidating.
 - Lacking in higher level or “aspirational” content on the benefit of the XXXXXXXX BI solution.
 - Lacking in technical content useful to TDMs.
- TDMs consistently preferred the XX message.
 - Had most technical information.
- BDMs generally preferred XX or XX content.
 - Business friendly language
 - Emphasizes the benefit of the product
- Please note the tested XXXXXXXX messaging was actually only the Messaging Framework – and not a fully developed and refined piece of communication. This may have put the XXXXXXXX messaging at a disadvantage relative to the other three companies.

Conclusions

- TDMs are the driving force in determining the XXXXXX.
 - While BDMs provide both the budget and the business need, they actually play a relatively small role in determining the actual provider.
 - IT maintains a near veto power on any provider, based on their judgment of a solution's:
 - Ease of implementation.
 - Risk of deployment failure.
 - Ability to integrate with existing information and technology assets.
 - TCO.
- Four messaging elements were consistently seen as important and distinct XXXXXXXX strengths.
 - Ease of use – users already know how to use XXXX.
 - Ease of implementation (within XXXXXXXX XXXXXXXX).
 - Ease of XXXXX (e.g., XXX desktop/information worker tools, infrastructure technology and databases, leverages XXX).
 - Cost XXXX.

Conclusions (Contd.)

- XXXXXXX continues to be associated with some weaknesses. It is perceived as:
 - Less “XXXX XXXX” (though this perception is improving rapidly).
 - Having a less XXXX tool set.
 - Less viable in a complex XXX environment.
- The current XXXXXXX messaging “straddles the fence” between IT and BDM. The test messaging:
 - Lacks XXXX elements for BDMs (benefit of BI / BI from XXXXXXX).
 - Contains too much XXXXXXX XXX for BDMs.
 - Does not contain enough XXXX detail for TDMs.
 - Does not position XXXXXXX as an XXX ready solution
- A “XXXX BI strategy” is not significantly driving market growth.
 - Most companies continue to XXXX the use of BI within a relatively XXX XXX of horizontal functions or vertical departments.
 - Most companies seem to doubt the XXXX of implementing a XXX use of BI.
 - Those embracing pervasive BI do it for XXX or cultural reasons.
 - XXXXX technology is the most well suited to those looking for a broader deployment of BI technology.

Recommendations

Based on this research, several possible recommendations emerged.

1. Focus the sales effort on the XXXX

- XXXXXXXX already has a strong relationship with IT.
- TDMs, not XXXX, drive the brand decision for BI purchases.
- It is much easier to sell to XXX (who come with a budget to purchase a solution) than to convince XXX to sponsor a XXXXX initiative.

2. Look for “soft” targets

- A low risk of XXX failure is an important factor in selecting a solution.
- XXXXX want to integrate and leverage existing XXX rather than replace them.
- Successful sales efforts favors organizations that have:
 - An XXXXX that is more obviously compatible with a XXXXXXXX solution.
 - A pro XXXXXXXX culture.
 - A strong competitive or cultural push to make BI XXXXX

3. Recognize market barriers

- Sales at very large companies will continue to be XXXX until perceptions improve concerning XXXX ability to function at the XXX of large, complex, XX organizations.
 - Changing these perceptions will require a concerted effort to address the concerns of the IT departments who will implement/manage the solution. This is a task beyond the scope of XXXX XX XXXX.
- Consolidation within the industry has allowed major ERP vendors to “XXXXX ” BI within their solution. This:
 - Presents IT with a XXXXX solution.
 - Is consistent with IT’s desire to XXXX enterprise applications XXXXX.

4. Revise the messaging to emphasize XXX strengths

- Other major providers are all seen as very similar. Providing the same set of capabilities/benefits/problems. There is little perceived difference in XXXX sets.
- In contrast, XXXXXXXX has several important points of differences that are widely understood by both BDMs and TDMs (e.g., XXXX, etc.).

Detailed Findings

The following are a series of random pages I selected from the Detailed Findings section of the report

XXXXX and XXX work together to formalize the business need.

- The exact scope and context of the business need must be fully defined before any action is taken.
- XXXXX form a joint action committee to finalize the scope of the need.

Sometimes they don't know what they have or what they need – we can help.

- Interviews are conducted with the user communities to get a define:
 - Areas of XXXXX with existing solutions
 - User aspirations

The departments tell us what they want to be able to do – they don't know how, but they can tell us what the end information should be.

- User XXX levels
- What the users think XXXXXXXXXXXX want

We looked at all the BI helpdesk requests and used that to understand what the Business Side needed.

Factors that can impact the XXXXX

- XXXXX

- In some cases the brand of BI is driven by a desire to XXXX on a limited number of XXX.

SAP is our corporate standard. We only look outside of SAP if they don't have the capability.

We're an Oracle shop.

- Prior experience

- A senior technology executive may try to drive through a XXXXX with that company at a previous job.

The CIO used it at his last job.

They had experienced in a previous organization, or sometimes in the same organization, they could have recommended what system is good for us, just from experience.

- Legacy

- Frequently the need to tie in data that resides on a legacy system drives the purchase process. The strong desire not to build a middleware layer to interface with legacy data often dramatically restricts the number of possible BI providers.

Events that often initiate the XXXX process. (Contd.)

- Support issues
 - The current version of the tool is no longer being supported by the manufacturer.
We're doing the upgrade to Cognos 8 and its such a massive undertaking that we felt we might as well take the opportunity to look around.
- Cost
 - The existing solution may simply cost too much money or utilize too many IT resources to maintain.
- New XXX Solutions
 - The introduction of new XXX presents a window for evaluating new XXXX providers.
We moved to SAP as our ERP provider.

Response to Company X Messaging

- Key message

- The message was seen as highly strategic, emphasizing the company's leadership.

Everybody in the organization inputting and cooperating. Breaking down silos. Sharing information and people don't work in isolation.

They understand vertical markets...they understand my business.

World leaders.

Optimize your existing investment.

- Who they're talking to

- Nearly all respondents felt that this message was addressed to a business target.

This is for the business people

They're talking to the business people.

Business users.