



Singularity Consulting
Intelligent Relationship Management

Intelligent Relationship Management Solutions

IRM Strategy

Program Portfolio Management

 **Business Intelligence Strategy**

Business Intelligence Implementation

Business Intelligence Strategy

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Business Intelligence Strategy

Purpose

Success in IRM, CRM or BI requires that organizations approach these initiatives not just as technology implementations but also as the foundation for a relationship-centric business. Successful IRM programs are a part of the corporate culture, business process and organizational intelligence. The insight they provide about how to care for customers, product and customer lifecycle trends, profitability, and numerous other indicators of performance are extremely valuable. Because of the breadth impact and volume of data, these efforts can be significant undertakings that are best approached in a phased implementation.

The purpose of the Business Intelligence Strategy is to lay the groundwork for implementation and usage of business intelligence software within the enterprise. These technologies help to establish, disseminate quantifiable performance metrics and initiate organizational responses. This intelligence is critical to the completion of the feedback loop, fundamental to a successful IRM program.

The Business Intelligence Strategy also lets organizations evaluate their level of customer knowledge and technological and organizational readiness to focus on clients and client relationships. This assessment can then lead to an effort to develop the technology programs & plans to provide greater customer intelligence. The strategy will also include specific goals and objectives and the definition of metrics to measure success and progress. Finally, the current state of the organization is assessed along technology, organization and process dimensions and a roadmap is developed for the transformation process. Modules in the IRM Business Intelligence Strategy include the following.

BI Vision and Strategy

Features & Benefits

The BI Vision and Strategy consolidates the result of the work effort, as applicable and described below. It provides the strategic framework and guidelines for the enterprise's use of business intelligence software with a focus on supporting customer relationship strategies and objectives. In addition, it also provides a means of communicating this piece of technology strategy across the organization.



Business Strategy Module

Features

- Custom tailored process to distill strategic goals and vision
- The Business Intelligence **Matrix** is a questionnaire that captures the input of senior executives and key personnel in sales, marketing, customer care and technology organizations on the state of the enterprise and opportunities for transformation.
- The Business Intelligence **Scorecard** presents the results of matrix questionnaires to identify needs and opportunities and formulate a high level set of priorities.

Benefits

- Rapidly capture gaps and opportunities in business intelligence.
- Diagnose issues of strategy, technology, process and organization.
- Establish high level priorities for current and future initiatives.
- Identify issues in current business intelligence efforts and projects
- Creates the foundation for the business call to action
- Definition and prioritization of performance measurements (CSF's and KPI's)

Activities

- Background review
- Senior executive interviews
- Key staff interviews
- Customer intelligence questionnaire
- Vision workshop



Technology Assessment

Features

- The **Enterprise BI Architecture** provides a high level view of the BI system and application architectures. It captures the technology framework (platforms, tools, vendors, etc.) for future technology efforts based on current state and the desired technology architecture.
- The **Context Model** establishes the functional relationship among various components of the BI enterprise application space.
- The **Gap Analysis** captures people, process and technology issues in the technology environment.
- The **ROI Analysis** establishes or captures high-level ROI models for existing BI technologies and documents the potential ROI from complementary technology applications.
- The **Usage analysis** provides a complete view of the effectiveness, efficiency, adoption and value-added from the use of existing BI technology.
- The Emerging technology outlook identifies opportunities and trends that complement your business objectives.

Benefits

- Establishes a technical and financial framework for future technology efforts in line with business strategy
- Identifies critical gaps in functionality and usage.
- Identifies any issues in the technology decision making and implementation processes.
- Identification of first mover opportunities and reduction of risk.

Activities

- Background review
- Technology management and team interviews
- Product Management interviews
- Marketing management interviews
- Customer care interviews
- Sales management interviews
- Operational management interviews
- Technology document reviews
- Market research



Business Intelligence Data Model (BIDM)

Features

- Relevant to BI only, the **Conceptual Data Model** captures and organizes the static definition of the enterprise, its customers and the relationship parameters in a visual diagram.
- The **Data Dictionary** captures additional information about the type and source of the data.
- The Data Process Mapping identifies critical data inputs and outputs.
- The **Gap Analysis** captures inconsistencies in the business processes and lack of alignment with corporate and IRM strategy.

Benefits

- Identify and document data elements, sources and processes critical to the customer experience and the strategic direction of the enterprise.
- Establish the data and information foundation for current and future technologies.
- Begin a dialogue within the enterprise on what customer information needs to be captured.
- Establish baseline processes documentation for automation projects.
- Identify inefficient, inconsistent and ineffective processes.
- Establish clear ownership and responsibility for processes.
- Capture data requirements for critical processes.
- Identify candidate for process automation.

Activities

- Key staff interviews
- Product management interviews
- Marketing management interviews
- Customer care interviews
- Sales management interviews
- Technology management interviews
- Operational management interviews
- Technology document reviews
- Process document reviews



Organizational Readiness Module

Note: Business process and technology assessments will need to be included to provide a total enterprise assessment of BI readiness.

Features

- The **Organizational Structure Analysis** captures inconsistencies between business strategy and goals and the current organizational structure. The analysis will lead to recommendations for realigning organizational structure to better deliver on the customer-focused strategy and provide improved enterprise customer intelligence.
- The **Knowledge and Skill Analysis** examines professional and technical skills of the your BI user communities to identify training and professional development opportunities to improve value realization and customer intelligence.
- The **Change Management Analysis** examines issues of organizational culture, communication and compensation and makes transformation recommendations

Benefits

- Identify the people and knowledge requirements for long term implementation success and ROI.

Activities

- Key staff interviews
- Vision workshop
- Product management interviews
- Marketing management interviews
- Customer care interviews
- Sales management interviews
- Technology management interviews
- Operational management interviews



Customer Intelligence Model

Features

- The **Customer Knowledge Analysis** captures the current state, location and usage of customer information. It represents the business abstraction of the technical BIDM.
- The **GAP Analysis** captures people, process and technology issues in the customer intelligence environment.
- The **Customer Intelligence Scorecard** distills the information from the Customer Knowledge and Gap Analysis into a set of recommendations for developing the knowledge capture, feedback usage guidelines and measurements for improving customer intelligence.

Benefits

- Identify current usage of customer information.
- Documents the customer knowledge needed to enable the BI/IRM vision.
- Provides a baseline model for monitoring level and rate of change.

Activities

- Background review
- Senior executive interviews
- Relationship maturity questionnaire
- Key staff interviews
- Customer interviews
- Vision workshop
- Product management interviews
- Marketing management interviews
- Customer care interviews
- Customer care interviews
- Sales management interviews
- Technology management interviews
- Operational management interviews
- Process document reviews



Vendor Selection Module

Features

- **Market research** to identify potential vendors.
- The development of appropriate **vendor questionnaires** leading to **RFI or RFP** development.
- The development of **scorecards and rating systems** for evaluating vendor products and services.

Benefits

- Selection process input from subject matter experts
- Uniform criteria for vendor selection
- Establish common understanding of enterprise requirements and priorities
- Reduction of total risk (technical & financial)
- Improved technical / solution fit
- Improved time to value
- Establish criteria for positive vendor relationship

Activities

- Current Technology background review
- Key staff interviews
- Customer interviews
- Vision workshop
- Product management interviews
- Marketing management interviews
- Customer care interviews
- Sales management interviews
- Technology management interviews
- Operational management interviews
- Process document reviews
- Market research
- Vendor scorecard development
- RFI/RFP preparation
- Vendor Interviews



Engagement Process

Business Intelligence Strategy
 Engagement Process

