

TECHNOLOGY AUDIT

WebFOCUS Performance Management Framework v5







Information Builders




BUTLER GROUP VIEW

ABSTRACT

The WebFOCUS Performance Management Framework (PMF) is an application suite for enterprise metrics management and Business Intelligence (BI). Using PMF, business strategies can be measured and tracked and 'owners' are automatically linked to their business objectives. Built entirely on the WebFOCUS BI platform, PMF offers built-in multi-dimensional support. Organisations can benefit from PMF's rapid start-up and simple customisation capabilities and need not be existing customers as the solution is also offered through an application-limited licence. This means that organisations committed to BI platforms from other vendors can adopt PMF without the need to first deploy WebFOCUS BI. Information Builders continues to excel in Operational Performance Management (metrics, dashboards, and scorecards), and in conjunction with partners is able to address Financial Performance Management too. Pervasive performance management is the mantra of Information Builders and to this end the company places significant emphasis on accessibility and usability. By utilising offline tools, such as interactive PDFs and HTML files, PMF can extend the reach and range of enterprise-wide Performance Management initiatives. An independent software vendor, Information Builders' core products are the WebFOCUS BI platform and iWay integration software.

KEY FINDINGS

- | | |
|--|--|
|  A relatively quick solution to implement and well suited to rapid customisation. |  Very strong Operational Performance Management solution. |
|  The PMF application bundle will appeal to medium-sized organisations. |  Good use of Web 2.0 technologies and support for mobile/offline working. |
|  Still building relationships with major System Integrators and developers. |  Commitment to the WebFOCUS BI stack is not a PMF prerequisite. |

Key:  Product Strength  Product Weakness  Point of Information

LOOK AHEAD

Future plans for PMF included integration with industry-specific offerings for Insurance, Healthcare, and Higher Education. New third-party partner solutions are expected for Supply Chain benchmark performance and Budgeting/Consolidation performance.

FUNCTIONALITY

During the last four or five years, the notion of performance management has become more closely connected to the Business Intelligence (BI) market, although it continues to exist in a number of different guises. Depending on the vendor angle, Enterprise Performance Management, Corporate Performance Management, Business Performance Management, or Business Performance Software may be the term of choice; however, the basic tenet remains the same: BI products and solutions can be extended to incorporate budgeting, planning, and monitoring so as to provide the organisations with an holistic view of performance across operational activities and departments, thereby establishing a link between strategy and associated performance metrics.

At a high level, conversations about performance management often help to present a better understanding of BI. Ask someone what they understand by BI and they will typically respond with “reports, queries, and analysis”. While this may indeed be a sufficient level of understanding for the typical business manager, Butler Group believes that a deeper appreciation of BI is needed for ‘businesses’ to operate with greater ‘intelligence’.

Although BI accurately describes what the technology is trying to achieve, the term’s legacy frequently restricts its use to relate to these basic fundamentals. Performance management, rather than just focusing on creating reports, handling queries, and carrying out analysis, offers what BI has always promised: it enables organisations to measure and monitor performance across the business, but also to link this into business cycles and strategies that govern their overall direction.

Performance management recognises that whilst Enterprise Applications can help organisations become more efficient, particularly with their inherent processing and workflow capabilities, they offer little with regards to increasing enterprise efficiency. This is the source of the scorn and disappointment that has accompanied many Enterprise Resource Planning (ERP) and Customer Relationship Management (CRM) application deployments.

Butler Group believes that the days of analysing data and information from isolated operational units are over. Different departments and business functions need access to data that may have been generated or manipulated on the other side of the world. Thus, the remit for intelligence tools and technologies has grown, and this demand is being increasingly addressed by solutions such as those offered by Information Builders.

Product Analysis

WebFOCUS and iWay are the product brands of Information Builders’ business intelligence software and integration software. As well as performance management, the company also offers solutions around Enterprise Search, and also has a range of vertical solutions (Insurance, Government, Healthcare, Manufacturing, and Higher Education).

Information Builders provides enterprise-level BI functionality from its WebFOCUS product set. The BI offering is built upon a highly scalable, Service Oriented Architecture (SOA), which can be used to deliver ‘actionable BI’ and insight to a broad range of users and communities located on the company Intranet or beyond. A key strength of the WebFOCUS platform is its ability to work with a wide range of enterprise data sources and the rapid application development capabilities that this solution has to offer. Designed to be a pervasive rather than an invasive set of technologies, the WebFOCUS product set enables organisations to deliver relevant, consistent, and believable information in a format that, and through channels which, best suits the business user. This includes channels such as e-mail, and devices other than traditional PCs, such as mobile phones for example.

WebFOCUS Performance Management Framework (PMF) is itself a WebFOCUS application, and so is able to fully exploit the underlying WebFOCUS platform. This means excellent Web-based reporting in the form of Active Reports, HTML, DHTML, and SWF for Adobe's FLEX; navigable Portable Document Format (PDF) 'books'; and the mandatory fully formatted Excel spreadsheets. By offering business users information in the 'format' and 'container' that best suits their needs, PMF allows users to work with information in many different ways and so drives pervasive use.

Although Information Builders has been around since 1975, it is operating in a very mature market. It has become increasingly difficult for BI vendors to differentiate their wares over the last couple of years, and yet Information Builders continues to do so. PMF integrates and delivers metrics management, scorecard management, dashboard management, and role management in a single, user-managed system. Using Information Builders' solution, business managers – not the IT department – can capture metrics, organise them into scorecards, and deploy role-based dashboards to stakeholders both inside and outside of the organisation. This is especially pertinent at this time, as organisations in both the public and private sector are being increasingly asked to provide more information relating to operational as well as strategic business matters. PMF provides alignment systems between strategic and operational objectives and allows analysis and reporting discovery for any role or user of the system.

Product Operation

Information Builders believes that the most important driving force for a successful organisation is good communication, and so as one would expect, PMF Dashboards provide a set of easily assembled information gadgets – pre-built grids, graphs, and tools that provide one-glance status on key performance metrics and strategies. With one click, end users can tell from each gadget exactly what they need to know.

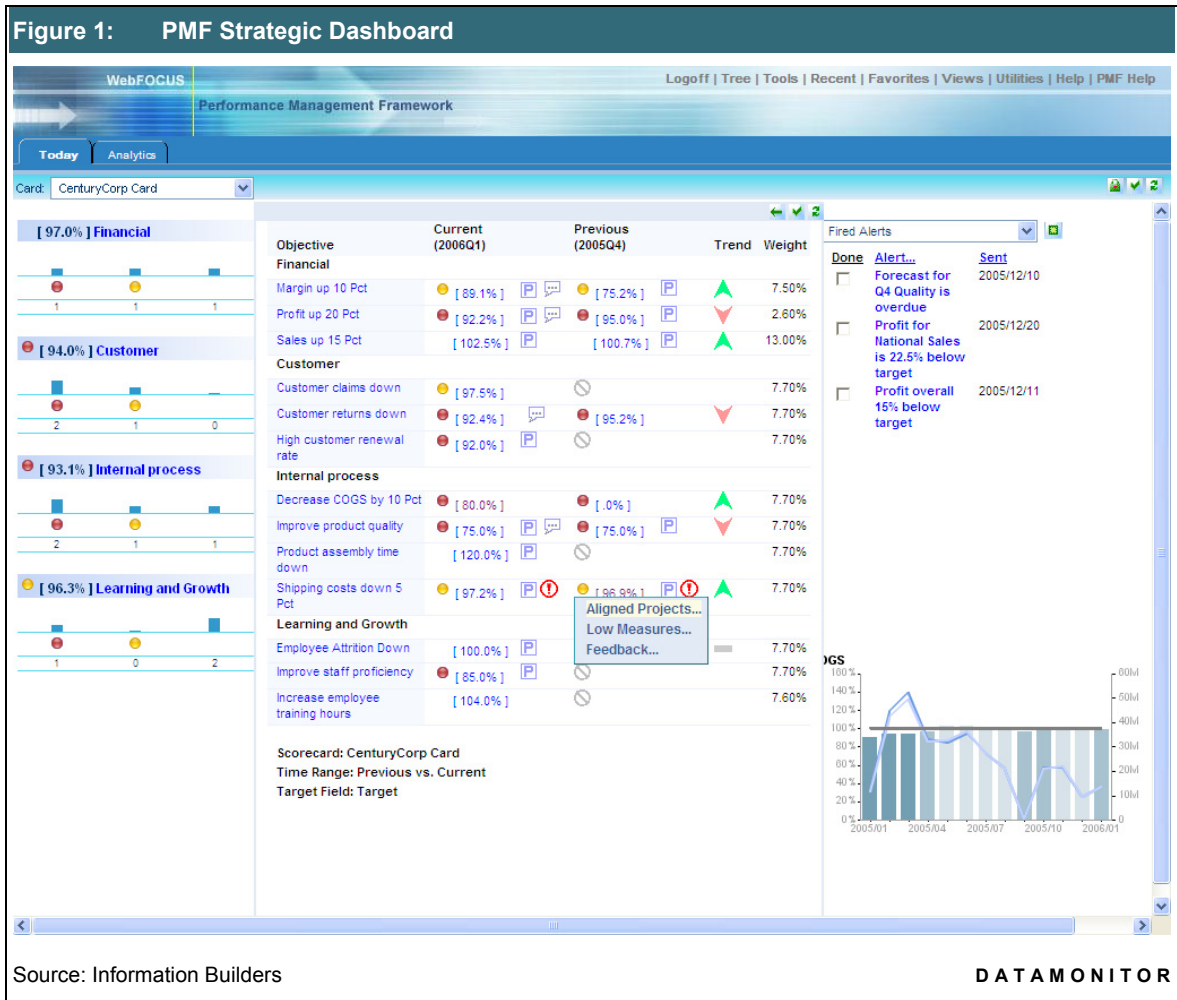
PMF comes with over 400 industry metrics, and over 100 dashboards, reports, and graphs. Moreover, the company provides several industry starter kits, making PMF especially attractive to those organisations seeking to instigate Performance Management initiatives quickly. With wizards for creating scorecards, metrics, and data refresh schedules, PMF is very much a business-owned solution; requiring relatively low levels of IT involvement.

It has already been stated that PMF is a WebFOCUS application, built from the ground up using native WebFOCUS platform facilities. This being the case, PMF inherits all of the data access and scalability strengths of WebFOCUS, and also allows full customisation and expandability. For non-WebFOCUS customers, Information Builders offers an application-limited WebFOCUS licence for those organisations interested in PMF but not requiring the full WebFOCUS BI platform. This a very innovative approach from Information Builders, and one likely to attract interest from some organisations that are currently running other BI platforms but have not yet decided which performance management route to take.

The Performance Management Framework leverages key WebFOCUS features, such as customisable presentation and interface; information delivery and management; financial reporting/consolidation; Balanced Scorecard capabilities; enterprise business intelligence; excellent data access; real-time analytics; and enterprise scalability.

PMF uses a relational data model to integrate a metrics cube, a logical scorecard model, and other tables to manage roles and content. This data model can be implemented in which ever Relational Database Management System (RDBMS) system an organisation has in place.

Information Builders is very aware of the work pressures impacting today's information workers, and so wherever possible PMF tries to offer one-click access to answers. Certified by the Balanced Scorecard Collaborative, PMF ships with lots of metric and scorecard dashboards as one might expect, and these are amongst the most advanced on the market today in terms of user interface design.



Source: Information Builders

DATAMONITOR

Business unit managers can choose to have a more operational dashboard, focusing on specific metrics and projects. Multi-drill capabilities allow users to get answers in only a few clicks, thus making PMF especially well suited to those organisations that wish to extend these capabilities to partners, suppliers, and citizens. Although PMF is offered with its own portal facility, the solution integrates well with portals from the likes of IBM, Microsoft, and SAP.

PMF a customisable framework that provides immediate, out-of-the-box functionality. The offering is extremely adaptable in the way it deals with roles, thereby enabling organisations to structure the offering around existing hierarchies and corporate boundaries. PMF embraces the social concepts with Web 2.0. Any KPI can be blogged, so users at any level within the organisation can participate by contributing additional knowledge, information, and insight.

For the 'Power Users' requiring analytical capabilities, PMF provides direct access to analytic and discovery tools, and these tools will certainly be of value to many business users.

From the perspective of roles, PMF addresses three distinct constituencies: Consumers, Authors, and Administrators. Consumers can easily choose different dashboards and configure and customise them themselves. Authors can define a pool of metrics and master data that underlie an unlimited number of scorecards, dashboards, users, departments, or extended enterprise consumers. Administrators can create additional customised roles with complete granularity of capabilities, dashboards, or data access authorisation.

Product Emphasis

Although performance management is very much a business discipline, IT facilities currently form an important part of any performance management programme. Many organisations have tried to implement their performance management strategies using only documents and spreadsheets, but found that they needed a purpose-built tool to automate performance management processes. Performance management technology typically offers functionality to support elements of budgeting, planning, monitoring, and measuring and analysis of performance. There is a good deal of overlap with Business Intelligence (BI) applications and that is why many BI software vendors, such as Information Builders, are also vendors of performance management solutions.

Although Information Builders is committed to developing and extending its WebFOCUS BI platform, the company is clearly focusing on the experience that the business user has when using its applications. The IT department is also shown some consideration too, as rapid-start, easy deployment, and easy customisation feature high on Information Builders' design priority list. Support for collaboration and enterprise mashups are also features of PMF in this fifth release.

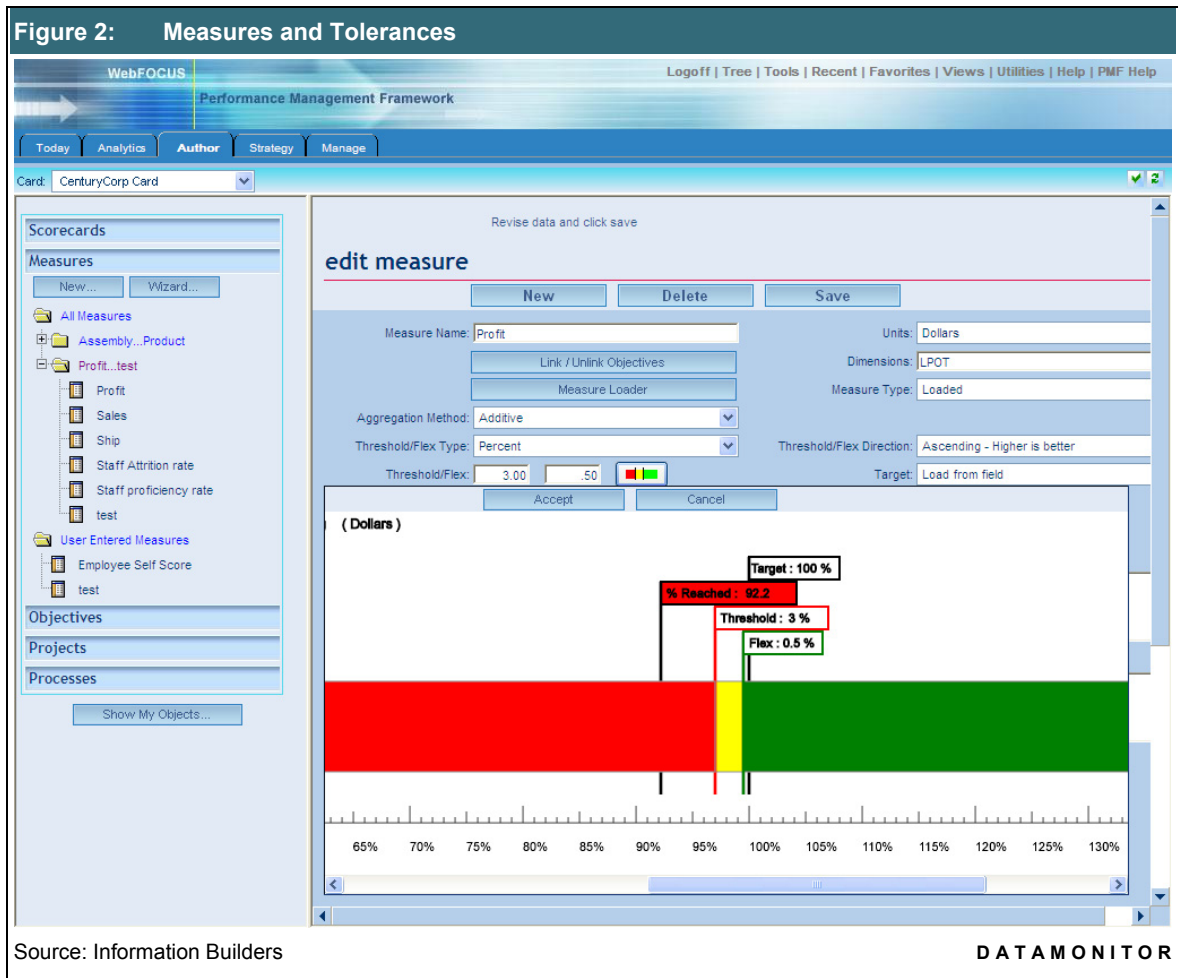
Information Builders believes that Operational Performance Management is emerging as a major interest in current economic times, and Butler Group would wholeheartedly agree. Initially concerned with only financial performance management, the market is now maturing to encompass many more facets of performance management.

Information Builders is marketing its offerings very aggressively at the moment, as it believes the recent acquisitions of Cognos and Business Objects have created something of a hiatus within the market. Here again Butler Group is inclined to agree with this view. However, with IT budgets cut and companies reluctant to spend money on new initiatives, this may work to the advantage of the leading players in the market.

DEPLOYMENT

PMF was designed to be fully supportable and maintainable with little or no IT resources. However, PMF is a WebFOCUS application, and so for existing customers deployment will be more akin to rolling out yet another WebFOCUS application.

For those considering the WebFOCUS BI platform, this can be installed and implemented by IT personnel in any company. Information Builders provides over 200 trained professional services consultants to aid whenever necessary. WebFOCUS can be deployed in two ways: either a pure application development mode where WebFOCUS can be accessed via Java API set, or Web Services equivalent, or called via a URL (in this fashion it can easily be embedded into any Web application – Java, .Net, or HTML, ASP, etc., and represents around half of all deployments) or as BI deployment, where the WebFOCUS stack enables organisations to create a user-driven environment instead of applications.



The PMF application is architected as a normal best practices WebFOCUS application. It utilises a WebFOCUS Server at the database end and a Web Application server on the client end. All user interactions are browser based and there is no desktop software required.

While PMF utilises and exposes many WebFOCUS runtime capabilities, it does not expose any of the native WebFOCUS query or ad hoc tools. PMF itself provides all consumer, authoring, ad hoc, and administrative capabilities. PMF is a turnkey PM application.

PFM is a WebFOCUS application, and as such utilise the WebFOCUS platform which offers a complete development environment which does not require third-party tools to implement. As a framework, PMF can be extended through the facilities afforded by the WebFOCUS environment, and applications are typically created by small development teams. As with any data-centric product technology, organisations implementing any BI-based solution will need a skilled Database Administrator (DBA) and individuals with specific knowledge of the data sources being accessed. Network administrators will need to be aware of the WebFOCUS server, and are usually involved in the configuration of a multi-tier environment. In general, independent research suggests that WebFOCUS requires fewer resources for implementation than similar solutions from competing vendors.

PMF is designed to require few IT resources. After it is installed, and sources of metric data are made available to PMF through normal WebFOCUS facilities, PMF can be entirely managed by the business group pursuing a performance management project. PMF can use existing Lightweight Directory Access Protocol (LDAP) or Active Directory systems, or security information can be defined within PMF itself.

PMF comes with wizards and libraries of industry metrics, and examples of scorecard and dashboard deployments. The business group needs only to know the business science of performance management and they will know PMF.

PMF utilises the integration and data access platform of Information Builders' iWay Software subsidiary, which provides access to more than 300 data and application sources. This ensures that any metric can be monitored and managed from PMF. PMF can also integrate with existing applications. These include any industry portal, database, planning/budgeting system, process or project management system, and operating platform.

PRODUCT STRATEGY

In 2008, Information Builders campaigns were around the message "Everyone Makes Decisions". This allowed Information Builders to articulate its strengths and align its offerings with C-level executives. The company is increasing spend on advertising and awareness, and this will complement a strong direct marketing and event-based marketing strategy.

PMF is designed to support any vertical or horizontal performance management effort. It comes with six vertical and two horizontal starter kits that include example metrics, scorecards, and dashboards. Information Builders has a wide range of customer usages of PMF: Healthcare, Manufacturing, Supply Chain, Vendor Management, Portfolio Management, and Government systems.

The large enterprise market continues to be a highly active domain for Information Builders. Although the company has seen organisations moving toward single vendor solutions, in general most continue to settle for fewer vendors. This, together with new PMF packaging options, provides Information Builders with plenty of opportunity to sell its performance management offerings into non-WebFOCUS accounts. Information Builders has also noted an increase in replacement opportunities, especially with Business Objects customers, as many organisations are on older releases and struggle with compatibility issues. The acquisition of Business Objects by SAP and Cognos by IBM presents opportunities for all BI vendors, as it encourages organisations to re-think their strategies.

Information Builders has increased its marketing activities in the mid-market (Microsoft's traditional stomping ground), and this is where the majority of new name customers are being acquired. Information Builders competes with Microsoft, Oracle, and QlickTech in this market segment. The majority of deals are sold directly by the company's worldwide sales force. There is a significant commitment to the channel and Information Builders has hundreds of partners.

Information Builders has seen a rekindled interest from major integrators who are no longer interested in dealing with Cognos now that they are part of the IBM stack. The company is building an increased number of regional integrator partners. Information Builders is also aggressively seeking application developers and solution providers who want to embed BI within their Web-based applications. Many of these vendors would historically use Crystal Reports, but are no longer interested since the acquisition by SAP. Many of these application providers view SAP as competitive or potentially competitive. Information Builders is also aggressively approaching Software-as-a-Service vendors, as it believes there is strong potential here to build a revenue sharing model.

COMPANY PROFILE

Founded in 1975, Information Builders is a privately held company that provides enterprise integrated solutions, business intelligence, and reporting software. The company also provides consulting and other services. The company primarily operates in the US, Australia, Asia Pacific, and Europe. It is headquartered in New York City, New York and employs 1,400 people.

The company provides BI solutions and offers real-time information delivery over the Web. It owns iWay Software and also runs a service organisation. Information Builders' services organisation helps customers to understand their information delivery and reporting requirements and implement solutions for the WebFOCUS and iWay Software products.

In addition to WebFOCUS Performance Management Framework, the company's competitive offerings include its flagship WebFOCUS BI platform, which offers capabilities such as enterprise reporting, ad hoc query and On-Line Analytical Processing (OLAP) analysis, information delivery and management, portal integration, development tools, administration and security, and closed-loop business intelligence. In addition, the company's FOCUS systems provide application development and reporting tools for host-based reporting.

Information Builders' solutions are provided to a range of businesses and organisations across the Banking and Financial Services, Energy and Utilities, Government, Healthcare and Pharmaceutical, Higher Education, Insurance, Manufacturing, and Telecommunications industries.

The subsidiary iWay Software provides solutions for the deployment and risk management of a range of integration projects, including composite applications, Web services deployments, business-to-business interactions using XML and EDI, Extract, Transform, and Load (ETL), data integration, enterprise information integration initiatives, business process automation, and enterprise information management.

SUMMARY

WebFOCUS Performance Management Framework takes an operational standpoint to performance management and offers enhanced communications across the organisation using rich Web 2.0 functionality and predictive analysis. A modular performance management framework, PMF is easily tailored to enable anyone within the organisation to participate in what Information Builders calls "a culture of accountability." Building on the highly regarded WebFOCUS BI platform or runtime equivalent, the solution can be tailored to present highly personalised, visually appealing dashboards. Collaboration features are built in, and Web 2.0 technologies and enterprise social networking memes, such as blogging, are featured. PMF offers print-quality publishing, mobile alerts, deep analytics, and strategy authoring. Accessible through browsers, mobile phones, and familiar end-user tools, PMF is well suited to large and medium-sized organisations.

Table 1: Contact Details	
<p>Information Builders UK Ltd. Beaufort House Cricket Field Road Uxbridge, UB8 1QG UK Tel: +44 (0)845 658 8484 Fax: +44 (0)845 658 8383 www.informationbuilders.co.uk</p>	<p>Information Builders, Inc. Two Penn Plaza New York NY 10121-2898 USA Tel: + 1 (212) 736 4433 Fax: + 1 (212) 967 6406 www.informationbuilders.com</p>
Source: Information Builders	DATAMONITOR

Headquarters

Shirethorn House,
 37/43 Prospect Street,
 Kingston upon Hull,
 HU2 8PX, UK
 Tel: +44 (0)1482 586149
 Fax: +44 (0)1482 323577

Butler Direct Pty Ltd.

Level 46, Citigroup Building,
 2 Park Street, Sydney,
 NSW, 2000,
 Australia
 Tel: + 61 (02) 8705 6960
 Fax: + 61 (02) 8705 6961

Butler Group

245 Fifth Avenue,
 4th Floor, New York,
 NY 10016,
 USA
 Tel: +1 212 652 5302
 Fax: +1 212 202 4684

Important Notice

This report contains data and information up-to-date and correct to the best of our knowledge at the time of preparation. The data and information comes from a variety of sources outside our direct control, therefore Butler Direct Limited cannot give any guarantees relating to the content of this report. Ultimate responsibility for all interpretations of, and use of, data, information and commentary in this report remains with you. Butler Direct Limited will not be liable for any interpretations or decisions made by you.

For more information on Butler Group's Subscription Services please contact one of the local offices above.

