

IBM Software Demos Lotus ActiveInsight

IBM Lotus ActiveInsight provides the most effective way to link corporate objectives to business information. This solution is comprised of scorecard and dashboard tools that can help an organization improve decision quality, speed execution, and monitor and improve daily operations.

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Dennis Michaels is the Chief Executive Officer of the **Renovations** Company. He is using **ActiveInsight**'s scorecards and dashboards to monitor performance on a broad scope of deliverables.

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On Dennis' Scorecard are the key strategic focus areas for the company. These areas are defined through objectives, which reflect the goals and business commitments of his executive team.

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Objectives can be percentages, numbers, currency, yes/no, or even a simple red/yellow/green status. They may also be supported by initiatives, or plans for achieving an objective.

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These objectives and initiatives are updated on a regular basis with data from the company's various business systems, enabling Dennis to see their status at-a-glance, no matter where the data resides. He can also view additional details, such as due date or previous numbers, by hovering over individual values.

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Dennis can drill into these objectives to view relevant business data using his Executive dashboard.

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Dashboards increase his visibility into business operations by aggregating data into role-based, actionable views. Data may come from multiple sources, including **Domino**, **DB2**, **SAP**, and relational databases.

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Lotus ActiveInsight is role-based, and built upon patented profiling technology which automatically adapts to each user, and presents only the appropriate and desired information.

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Ronnie Espinosa, **Renovations**' Chief Operations Officer, uses her **ActiveInsight** scorecard to review her personal objectives.

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Ronnie notices that one of her revenue objectives is in the red and getting worse. She decides to investigate further by reviewing the objective's Status Map.

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Like Dennis, Ronnie is dependent on others in the organization to meet her objectives. With **ActiveInsight** she can show these dependencies and aggregate their status.

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Inside the status map, she drills into the revenue objective to determine the root cause of the low performance, and finds that Stan Carrow, the Americas Sales VP, is failing to meet his revenue goals.

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She looks to see what steps Stan and his team are taking to relieve the situation, and learns that he has an initiative in place that should help him reach this objective.

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Simply by clicking on the objective, Ronnie can also chat with Stan, send him an e-mail, or even access his Scorecard.

<3:11>

She also sees that Stan has an indirect dependency on Customer Satisfaction ratings, which are also performing poorly. This shows the cause-effect relationship that satisfaction can have on sales figures.

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Using the status map, Ronnie is able to easily identify potential risks, and manage by exception. She can focus on the areas that need her attention, see what plans are being put in place, and collaborate with peers, all without leaving the page.

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Now that she knows there are sales problems in the Americas and lower satisfaction scores, she wants to get more detail and take appropriate action.

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Her Revenue objective is linked to her Sales Dashboard, which contains data on both sales and opportunities.

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The “Opportunities” portlet initially shows a nationwide view, and dashboard filtering capabilities allow information from different regions to be displayed.

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Ronnie can also customize the view of her data, and even chat with individual sales representatives, right from the dashboard.

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Since the status map showed a relationship between customer satisfaction and sales - both of which are performing poorly - Ronnie decides to view these 2 sets of data in context to each other on her Sales dashboard. To do this, she adds a Customer Satisfaction portlet to the page, simply by dragging it from the integrated content palette.

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This allows her to view the business data in a format that helps her better understand the problem, and make a faster, more informed decision on how to resolve it.

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Seeing that the current Customer Satisfaction rating is lower than in previous years, she decides to leave a comment for Stan.

<5:09>

This comment will appear to Stan as an alert on his dashboard.

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Ronnie takes advantage of **ActiveInsight's** integration with the **Renovations** enterprise **LDAP** directory to find his address information.

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She also has the option of attaching supporting files to her comment.

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Later, Stan sees the new alert on his dashboard.

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Other alerts are present as well, as a result of Stan subscribing to specific business data. An integrated alert engine - a core component of dashboards - provides this capability, which ensures that users are proactively alerted, in real time, to the important issues and events that affect them.

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<5:56>

Using a built-in personalization function, Stan can select the types of alerts he wants to receive and the way he wants to be notified, including e-mail and SMS message.

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He can customize other dashboard data in addition to alerts. Dashboards are easily customized by administrators and end users, enabling them to get exactly the right information they need, at the right time.

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For example, Stan can customize this Active Opportunities portlet, simply by invoking the same function used earlier with the alert, and then selecting the desired data display options.

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Here, he removes a column from the table, and changes the chart type used to display the data.

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The changes are reflected in the portlet immediately.

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He can also use portlet utilities to print or download this data to a spreadsheet.

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Stan agrees that the sales and customer satisfaction situation is cause for concern. He uses the team calendar to schedule a meeting with his team to discuss options for addressing the problem.

<7:09>

Meeting key performance objectives is a challenge many companies must face. **IBM Lotus ActiveInsight** helps companies address critical issues at all organizational levels before they become problems, and allows them to act on and resolve these issues before important business objectives are missed.