



Information Management Overview

Overview

The Information Management sector for Point North Consulting includes practices for *Business Intelligence (BI)* and *Enterprise Solutions (ES)*. This paper describes some of the ways Point North is able to assist its clients along with case examples.

- **Business Intelligence (BI)** -- is the creation of improved reports, dynamic business information plus the identification and reporting of key performance metrics (KPM) and indicators (KPI) that can be tailored to meet the needs of specific individuals and business roles.
- **Enterprise Solutions (ES)** -- address an organizations needs for business database application support and migration. Some examples are:
 - **Enterprise Solution Services** – Support for legacy and modern database applications and migrations:
 - **Customer Relationship Management (CRM)** -- that provide support for maintaining a complete marketing, sales and ongoing relationship with clients.
 - **Enterprise Resource Planning (ERP)** – that handle accounting, inventory, business transactions and much more.
 - **Electronic Commerce (eCommerce)** – that includes websites for promoting business products and services as well as accepting online business orders and transactions applied to ERP inventory.
 - **Software-as-a-Service (SaaS)** – is a new technology option that allows companies to utilize enterprise solutions as a hosted service off-site to avoid the usual high-expense and complexity of installing and maintaining applications in their own infrastructure.
 - **Migration Services** – assist business organization transition between different business applications and databases when there is a need for change. Database data and various forms of unstructured data such as electronic documents may need to be converted, re-formatted, scrubbed, ported and loaded into new databases and file systems as well as tested to complete the required change.
 - **Planning, Control and Execution of Enterprise Initiatives** – are important areas where Point North Consulting is able to supplement existing client staff and bring needed expertise to insure success for the new initiative during periods of change when the present staff is already busy running the existing business.

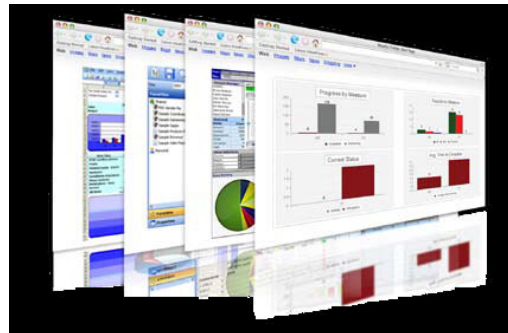
Case Examples:

In order to discuss these topics and provide specific case examples, the examples will be drawn from the following cases and used in the subsequent sections of this paper:

- The Point North Retail Point-of-Sale (POS) and Reporting Application Suite – a customizable Enterprise solution with built-in BI reporting as well as report customization & creation tools.
- Innoapp iHEDIS™ SaaS Quality of Health Care Review & Reporting Solution with built-in BI as well as its own report/dashboard customization & creation tools.
- Popular Enterprise and SaaS solutions such as NetSuite™, Salesforce™, SAP™ and Microsoft Dynamics™ that support primary business needs and information needs for Sales, Accounting, Inventory, Personnel, eCommerce, etc.
- Electronic Document/Content Management and Workflow solutions such as the iDatix iSynergy™ (eDM/eCM) and Progression™ (eWorkflow) products for protecting and processing paper, email, fax and other digital documents and multi-media content.

Business Intelligence (BI)

The Business Intelligence (BI) Practice utilizes defined methodologies and powerful tools that are available for each client’s infrastructure to create reports, interactive dashboards and other displays of key performance metrics and indicators (KPM & KPI). Often the KPM and KPI displays are tailored to the needs of individual users or different types of job roles.



The goal of the Point North Consulting BI Practice is to provide client’s with improved and timely information that they need to do their jobs to better run their business.

Key Performance Metrics (KPM) and Indicators (KPI)

In the not so distant past, one report may have been designed to serve many purposes and many users. With the “something for everyone” approach, reports often became very large stacks of paper that few actually utilized because it was “difficult for all”, but it kept on coming long after its usefulness and original purpose had passed.

Today’s modern information technology and reporting make individualized reports and exception reporting a practical and cost-effective reality. As we go about the task of providing individualized reports and electronic dashboards to serve the needs of specific executives and staff members as well as specific job-functions, the primary question is:

“What are the key metrics and indicators needed by this individual or job-role to make effective decisions and take timely action?”

Typically, this question is harder to answer than you might initially think – several key metrics and indicators may roll easily off the tongue, but then: “... I do a lot of different things and unexpected things come up all the time, ... “. At this point, an objective business analyst from Point North Consulting can often help your organization to define and synchronize individual needs at various levels and job-roles with the overall organization’s goals and needs.

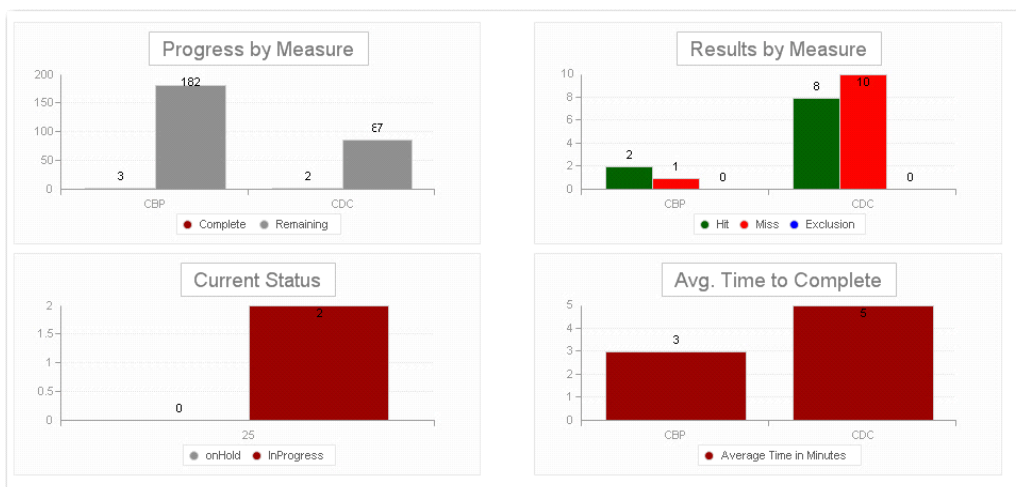
Determining KPM/KPI needs plus how accurate data can be captured and derived as well the best way to present it to each individual effectively can be a difficult task. Once the right KPM/KPI measures and reporting are in place, individuals must also know how to use them. Similarly, this process must be revisited periodically to maintain an effective and relevant KPM/KPI as the organization’s business needs change over time.

Dashboards

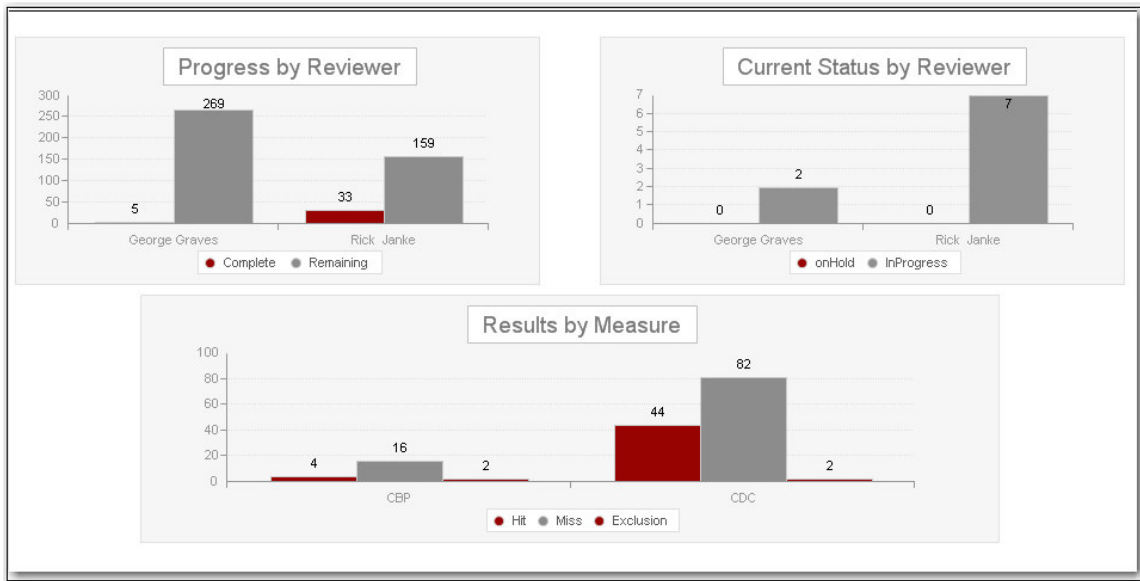
Once the key performance metrics and indicators have been identified, electronic Dashboards are an effective means for keeping these mission-critical factors in clear view to inform and allow users to act upon timely information.

The electronic Dashboard (eDashboard) is a window area that summarizes and displays key metrics and indicators conveniently in view while frequently refreshing them with the latest status as you work with your computerized applications. In some cases, these status updates are in near real-time. A few case examples using dashboards are shown below.

HEDIS Nurse Quality of Care Reviewers, using the Innoapp solution, are able to conveniently view their current progress against their assigned work in “Their Reviewer Progress eDashboard” as they are performing their reviews as shown in the eDashboard below:

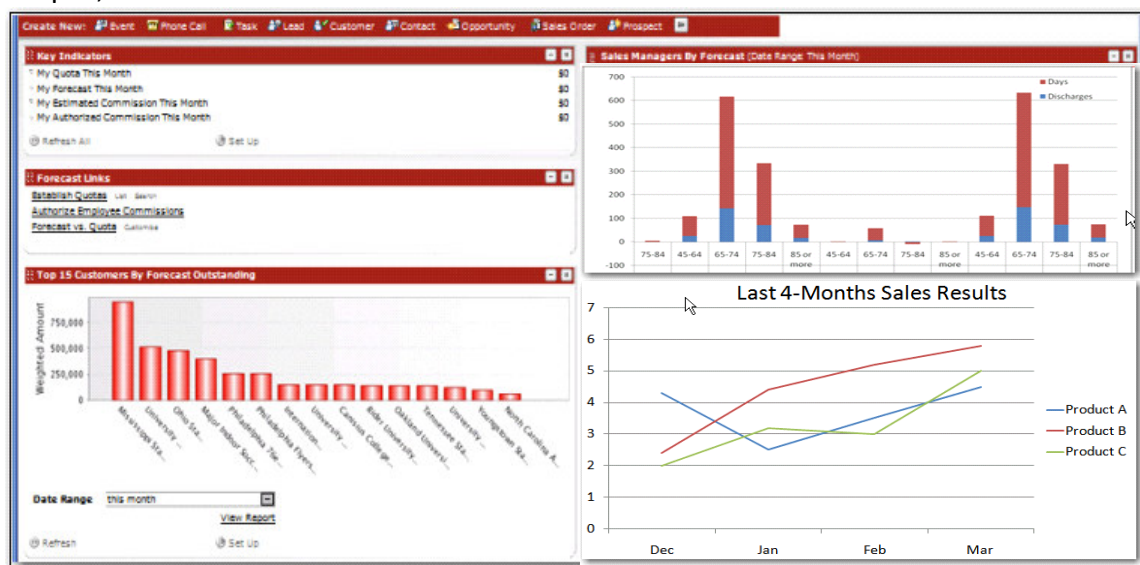


At the same time, Review Supervisors and Managers are able to view and compare the near real-time progress of all of their assigned Quality of Care Review Nurses as they are performing their management duties as shown in their eDashboard below:



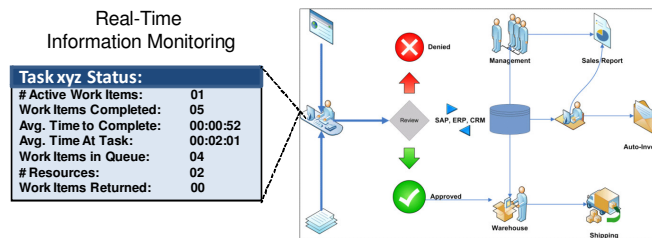
The ability to summarize and display multiple KPM/KPI information perspectives in an easy-to-view and understand presentation that is automatically being updated can help each user to understand and control their business responsibilities better and react in a timely manner.

The following CRM application is a SaaS-hosted application, but it is able to present its essential KPM/KPI information that has been tailored for a specific user as a dashboard that uses different types of reporting methods: Tabular-Summaries, Line-Graphs, Bar-Graphs, etc.



In addition, an eDashboard can also be configured with dynamic controls that allow the user to expand or narrow the range of information dates and other criteria that are to be included in the summary displays or further drill-down into the supporting details once a KPM/KPI reports a result of concern or interest.

Electronic Document/Content Management and Workflow solutions are available in many organizations to store and process documents, emails, faxes and other types of unstructured digital media. The iDatix Progression™ electronic workflow solution provides visual workflow design, real-time viewing of operations work for each business process that is: *Pending*, *In-Process* and *Completed* with a simple click on one of its workflow objects as shown in the diagram below.



Advanced functionality allows supervisors and managers to dynamically reassign staff resources by re-allocating them in near real-time to a selected business process on-the-fly for a temporary interval of time or permanently.

Identifying the KPM/KPI for individuals and job-roles as well as finding effective ways to capture and present this information for timely action on eDashboards is a challenging and ongoing task with which Point North Consulting can help.

Reporting

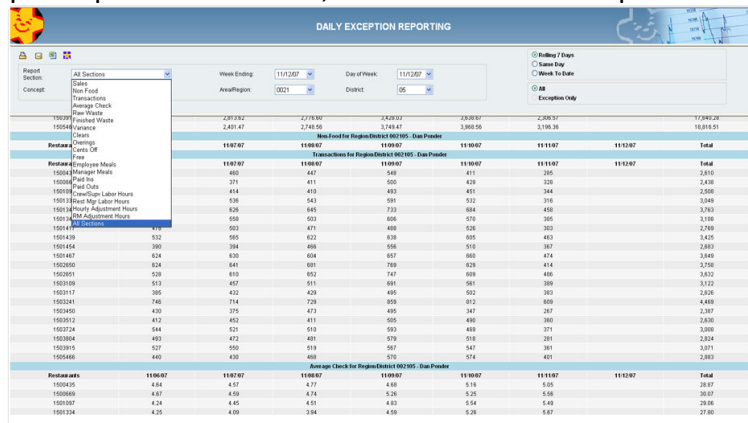
Many in-house-installed and hosted-SaaS applications today contain built-in reports as well as their own built-in BI Reporting tools. Likewise, many powerful BI reporting tools are available or in use currently to meet present and future reporting needs such as: Business Objects BI Platform™, Cognos BI Products™, Seagate Crystal Reports™ to name just a few.

Also OLAP (On-Line Analytical Processing) information systems and Data Warehouse solutions that provide multi-dimensional reporting and pre-processed levels of summary and detailed data that are designed to make dynamic requests for analysis and reporting of data rapid and responsive.

As a special case of SaaS, a new trend toward Information-as-a-Service (IaaS) is now emerging where reporting, OLAP and Data Warehouse technologies are being offered as hosted on-demand services. IaaS allows organizations of all business sizes to avoid costly IT and infrastructure investments by paying for the reporting and analysis services they need as they are used while also becoming more agile and scalable.

Although, many reporting needs are recurring and well-defined to produce the information, reports and statements needed to conduct routine business. Other more dynamic and changing needs for information also exist that require support for timely and effective decisions and actions.

The Point North Consulting Retail Point-of-Sale (POS) Application Suite includes built-in BI reports that can be viewed on screen as well as printed. Convenient parametric controls are built into the reporting window to allow the user to select the desired report plus further refine its date-range and query-criteria to include in the report by selecting appropriate parameter values, as shown in the example below.

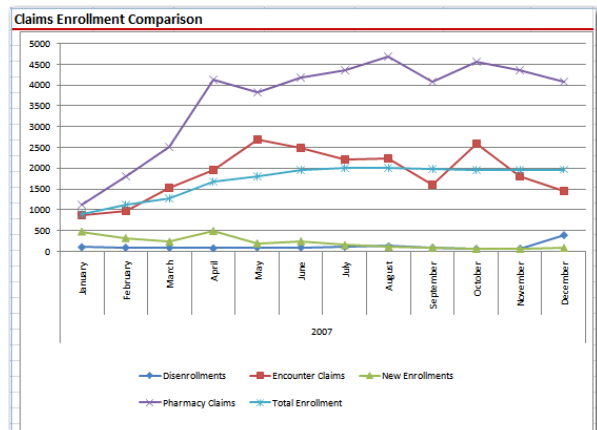
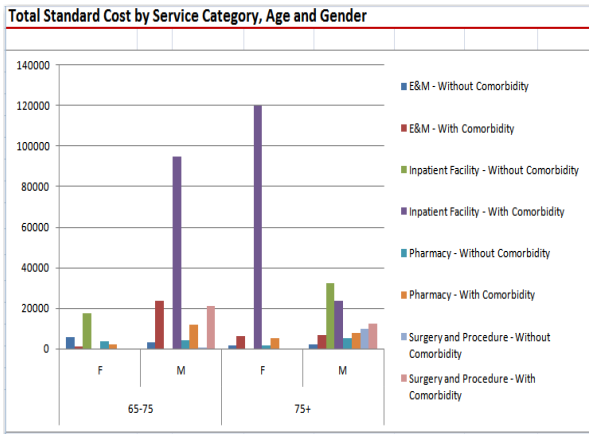
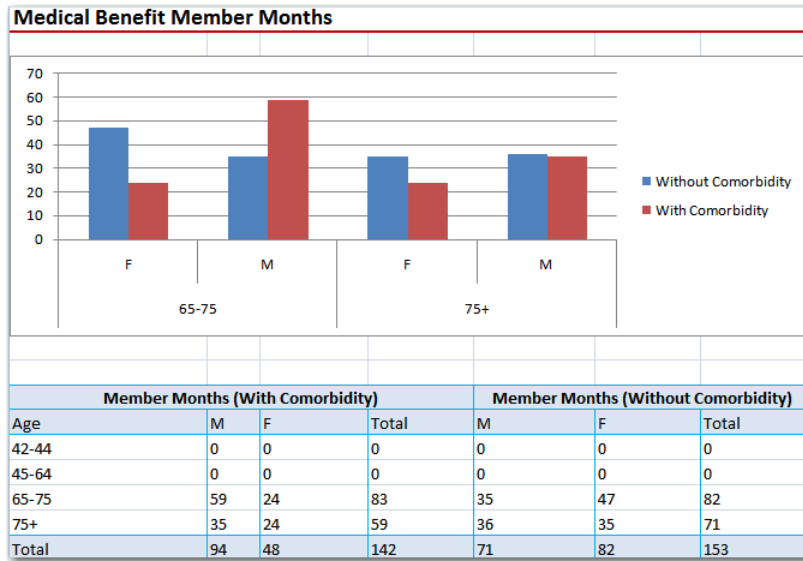


Report Section	Week Ending	Day of Week	Average Check	District	Exception Only
150000	11/12/07	11/12/07	2,207.57	05	17,942.28
150001	11/12/07	11/12/07	2,431.47	05	18,818.51
150002	11/12/07	11/12/07	1,666.62	05	11,107.07
150003	11/12/07	11/12/07	1,197.67	05	7,342.28
150004	11/12/07	11/12/07	892.47	05	5,818.51
150005	11/12/07	11/12/07	771.47	05	5,107.07
150006	11/12/07	11/12/07	614.47	05	4,107.07
150007	11/12/07	11/12/07	508.47	05	3,407.07
150008	11/12/07	11/12/07	428.47	05	2,807.07
150009	11/12/07	11/12/07	358.47	05	2,307.07
150010	11/12/07	11/12/07	298.47	05	1,907.07
150011	11/12/07	11/12/07	248.47	05	1,607.07
150012	11/12/07	11/12/07	208.47	05	1,307.07
150013	11/12/07	11/12/07	178.47	05	1,107.07
150014	11/12/07	11/12/07	148.47	05	907.07
150015	11/12/07	11/12/07	118.47	05	707.07
150016	11/12/07	11/12/07	88.47	05	507.07
150017	11/12/07	11/12/07	58.47	05	307.07
150018	11/12/07	11/12/07	28.47	05	107.07
150019	11/12/07	11/12/07	18.47	05	707.07
150020	11/12/07	11/12/07	8.47	05	307.07

This Retail-Store package includes a full range of built-in reports that support both the POS-driven front-end and back-end retail business as well as built-in report generation and customization tools. Since the retail application database is SQL-based, a variety of other BI tools may also be utilized for reporting and analysis.

The Innoapp interactive application contains a large number of reports required for HEDIS Compliance: H e a l t h c a r e E f f e c t i v e n e s s D a t a and I n f o r m a t i o n S e t (HEDIS). HEDIS is the United States NCQA (National Committee for Quality Assurance) standard that makes it possible to effectively compare quality of results among different health plans.

Health care plans may each report and submit the results of their annual HEDIS Audits to NCQA for comparison and publication using required reporting formats as well as produce predefined and custom reports for their own use such as some of following examples.



Extensive on-demand reports are defined and others may be created with high-level report generation tools by business analysts and/or knowledgeable operational staff.

With the wide-range of BI tools available as choices coupled with the dynamic and rapid-changing nature of business today, your information needs along with the many options must be frequently re-considered and addressed. This is where Point North can help by bringing its expertise and objectivity to assist you with reporting choices and devising the best methods for obtaining the necessary data and presenting essential information.

Enterprise Solutions

Enterprise Solutions (ES) address an organization's needs for business database application support and migration that is discussed in the following sections.

- **Enterprise Solutions Services:**
 - **Customer Relationship Management (CRM)**
 - **Enterprise Resource Planning (ERP)**
 - **Electronic Commerce (eCommerce)**
- **Software-as-a-Service (SaaS)**
- **Migration Services**
- **Planning, Control and Execution of Enterprise Initiatives**

Thousands of small companies run their business on Intuit's QuickBooks products, but as their growth expands beyond 20 seats, they often feel that these application products hit the wall. Similar scalability and technical limitations plus the cost and expertise to staff and maintain other Information Technology (IT) applications and products presents a serious distraction for clients from their primary business goals.

This lack of scalability presents new opportunities for growing small to medium-sized (SMB) businesses for much more scalable products and related services at a moderate on-going support cost.

Enterprise Solutions Services

Point North Consulting brings its expertise and experience to assist clients with assessments, business analysis, requirements, selection, project planning and control to ensure successful results and augment existing staffs.

The Point North Consulting Mergers & Acquisitions (M&A) practice is called upon by client executives to participate with its legal and financial consultant teams to plan and execute a contemplated merger or acquisition. Once the deal is completed, then comes the hard work of assimilating and merging different organizations, staff, infrastructure, computer systems, business processes and applications with all the attendant morale, logistical, technical and other practical considerations that follow – Not the least of these are the Enterprise Solutions and Business Processes plus training and transition issues.

Projects may involve legacy systems, modern installed or hosted-SaaS solutions as well as other infrastructures involved in change and modernization such as CRM, ERP and eCommerce. Point North Consulting brings its expertise and experience to assist clients with assessments, requirements, selection, project planning and control to ensure successful results and augment existing staffs.

Customer Relationship Management (CRM)

Customer Relationship Management (CRM) is a software application designed to provide support for maintaining a complete marketing, sales and ongoing relationship with clients complete with an integrated database, extensible user interface and eDashboards as well as built-in reports and report generators.

Enterprise Resource Planning (ERP)

Enterprise Resource Planning (ERP) is a software application that is designed to handle accounting, inventory, personnel, business transactions and much more. It comes with an integrated database, extensible user interface and eDashboards as well as built-in reports and report generators.

Electronic Commerce (eCommerce)

Electronic Commerce (eCommerce) software provides internet websites for promoting business products and services as well as accepting online business orders and transactions applied to ERP inventory. It comes with an integrated database, extensible user interface and eDashboards as well as built-in reports and report generators.

Software-as-a-Service (SaaS)

SaaS is a new technology option that allows companies to utilize enterprise solutions as a hosted service off-site to avoid the usual high-expense and complexity of installing and maintaining applications in their own infrastructure. With SaaS technology, applications are paid for based on how much you use them and can be flexibly scaled to meet actual needs as your demand increases or decreases.

- Business Applications are accessible from virtually anywhere via the internet.
- Hosted SaaS takes the infrastructure and operational burden off of the client and the IT organization as well as typically accelerate deployment that can improve your time-to-market.
- SaaS insulates the client and to some extent the Point North staff from technical issues related to hardware and software allowing both to be more focused on key business issues.
- This offloading of technical issues can result in lower initial and on-going maintenance costs as well as enhanced functionality and flexible scalability that are needed by most SMB clients. The SaaS vendor or a third-party provides the technical installation and on-going operational support for all its SaaS clients.
- The Point North business consultants deliver the expertise to help its client's make a smooth transition and business process optimization to the new applications and other improvements.

An initial area of client anxiety with SaaS solutions is the potential loss of access (i.e., downtime) and security concerns about storing vital enterprise data outside the control of their physical facilities on hosted servers.

However, there are clear signs that SaaS technology along with network architectures have matured and SaaS applications are continuing to be delivered in increasing frequency by major players in the software applications industry such as Microsoft, NetSuite, Salesforce, and others plus is being utilized by corporations of all sizes from small to large.

Industry predictions are that hosted-SaaS solutions will soon exceed installed solutions in the next few years. SaaS solutions offer SMB companies the opportunity to be free of underfunded and limited IT staffing to quickly gain access to enterprise-class technology with low up-front costs and flexible scalability.

Point North is currently affiliated with the Innoapp iHEDIS SaaS solution for doing audits and reporting on the quality of care for major health plans. Point North can also assist clients with the selection, planning, data migration and project management of SaaS solution implementations.

Migration Services

Point North can assist business organization as they make the transition between different business applications and databases when there is a need for change. Database data and various forms of unstructured data such as electronic documents may need to be converted, re-formatted, scrubbed, ported and loaded into new databases and file systems as well as tested to complete the required change.

When migrating to SaaS applications much of the actual effort is ETL work where existing data is **Extracted** for its current database(s), **Transformed** to insure it is clean and formatted to meet the requirements for its new destination and then **Loaded** into the new database(s). The SaaS vendor will create the installed solution and maintain it on their hosting servers and networks freeing the client from these tasks.

Planning, Control and Execution of Enterprise Initiatives

The project management tasks for Planning, Control and Execution of new enterprise initiatives are important areas where Point North Consulting is able to supplement existing client staff and bring needed expertise to insure success during periods of change when the present staff is already busy running the existing business.

Point North brings PMI-trained and experienced staff to help you accomplish a new initiative that will stress the need for involved Executive Sponsorship and the creation of a Change Review board composed of client staff to insure a balance in staff involvement and commitment for success.

Conclusion

This overview and case study has provided you with an introduction as to how some of the Point North Consulting *Information Management Services* may be of benefit to your organization.

The companion Point North *Consulting Business Process Optimization Overview* white paper can provide you insight into some of the many ways Point North Consulting is able to help you do assessment, analysis and establish a vision for new business opportunities and solutions.

Likewise, the Point North Consulting *electronic Document Management (eDM) and Workflow (eWorkflow) Overview* white paper describes how an organization can begin to automate its business processes and progress to the selection, integration and implementation of a secure and efficient system for the capture, storing, retrieval, processing and sharing of all kinds of business documents in electronic file format as well as electronic workflow processing with real-time control of business operations for a single department or your entire enterprise.