

NEWSLETTER ISSUE 9, FEBRUARY 2010

Welcome to the first newsletter for 2010. We hope that you had a restful break and wish you success for the year ahead.

Top of mind is the appointment of David Ives as a director at IS Partners. He will be heading up our Knowledge Management and Business Intelligence divisions, and brings more than 10 years' experience in both these fields to our operation. David joins us from Microsoft, where he was previously Communication sector lead.

IS Partners is also announcing the establishment of a new division. The new division, Progneo, brings added focus to our Corporate Performance Management offering, and combines key expertise in technology and finance.

You will also find our usual mix of news, developments and industry insights.

As always, your feedback is encouraged.

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Ives to take up key position at Microsoft partner, IS Partners

Communication sector lead at Microsoft South Africa, David Ives, will be leaving the company to join Microsoft Gold Certified partner, IS Partners, in February.

Involved in the BI market for over ten years, Ives fulfilled a number of executive positions at Microsoft. He was also involved in Business Intelligence (BI), Knowledge Management (KM) and solution architecture at Dimension Data previously.

He will be heading up the BI and KM divisions as a director at IS Partners.

In his previous executive role at Microsoft, Ives worked closely with the Developer Community and Independent Software Vendors in enterprise and solution sales. In his tenure, he has assisted many customers with key Microsoft Offerings, including large-scale BI and KM implementations.

Ives says he is not moving far from home. “BI is a key focus area for Microsoft, and opportunities to add value to clients are delivered through partners,” he says.

Through his association with IS Partner over a number of years, he played a significant part in joint solution wins, including some large, well-known South African brands.

“Information is a critical asset, particularly in an unstable economic climate where there is a dire need for companies to manage their businesses better,” he says.

Ives’s adds that, as a result, the growth opportunity for BI is vast. “Prospects for new ways of thinking, such as in-memory BI, as well as the business need for BI and KM are greater today than in the past. Most organisations have a burgeoning amount of data, but are not always able to access insight on their information. A lack of general skills in the market also opens up the scope for comprehensive KM and BI solutions. There is no doubt that customers are looking for ways of working smarter,” Ives says.

“IS Partners is a leader in this space, and has the potential to also be a major player across Africa through the products and solutions they are developing.”

Caron Mooney, director at IS Partners, says that Ives brings an understanding not only of the Microsoft BI and KM platforms and toolsets, but extensive experience in solution selling, which will ensure that value is unlocked for customers.

BI and KM are closely knitted, complementary technologies. Ives combines experience in both these areas and will allow IS Partners to execute on its strategic group initiatives, she adds.

“We welcome David to IS Partners and believe this appointment will continue in building on the company’s successes.”

NEWSFLASH – Progneo, a new division of IS Partners

IS Partners has recently established a new division to meet the needs of the Office of Finance. Called Progneo, it will provide specialist financial consulting services as well as solutions that support the changing requirements of the CFO.

The new division was born out of the relationship between IS Partners and global Corporate Performance Management specialist, Clarity Systems. “This relationship expanded IS Partners’ existing CPM product offering, and through the combination of Microsoft technology with Clarity’s toolsets, we can offer customers exceptional value not previously met by more traditional technology providers,” says Pierre Naude, General Manager at Progneo.

Progneo supports the CFO’s operational and financial game-plan, and strives to bring an expert and innovative perspective to the CFO role through more efficient and effective financial processes, Naude adds.

“We bring together finance and technology to transform the way finance departments operate. Our expertise ensures optimisation of the finance function and enables more efficient and effective financial processes. Innovative solutions will further allow the Office of Finance to focus on strategic financial analysis and rapidly adapt to constantly changing business conditions.”

Progneo brings its experience in automating finance best practices to Annual Budgets; Driver based Rolling Forecasts; Fast Close Management Reporting; Statutory & Regulatory Reporting; Statutory Consolidations; Business Process Automation; and, Portals and Collaborations.

Case Study: SAMRO fine tunes processes with Data Management solution

The Southern African Music Rights Organisation (SAMRO) has implemented a bespoke data management solution to optimise the distribution of Mechanical Rights royalties to its members.–The solution was designed and implemented by Microsoft Gold Certified partner, IS Partners.

SAMRO represents composers, authors and publishers and administers for their members’ benefit the performing, broadcasting and transmission rights as well as the reproduction rights of their copyrighted works.

Business Situation

SAMRO established a separate business unit in 2008 to deal exclusively with mechanical (i.e. reproduction) rights collection and the subsequent distribution of royalties that have been accrued by members from CD, DVD and related sales. Royalties are paid by licensees to SAMRO who, in turn, ensures timely payments are made to its members.

SAMRO receives sales files twice a year from recording companies. This data needs to be validated before a distribution run can be created.

SAMRO did not have systems in place that could (without significant amendment) effectively handle the administrative processes to identify and match rights holders with royalties collected. The organisation receives files in different formats from the various recording companies. Information was previously taken from the mainframe and “dumped” into a format that could be read in Excel. Matching and linking of composers to music titles was then done manually.

“The process of extracting data from Excel took between six and eight staff members four weeks to achieve a 50% distribution,” explains [Greg Peach, Manager: Project Office at SAMRO].

Automation of the manual system would create better distribution for royalties to go out to rights holders in the quickest possible time.

Solutions implementation

Due to the complex nature of the business, no off-the-shelf solutions were available and the need for a bespoke solution originated. “SAMRO first decided to develop an in-house solution but realised that the scope of the project was far larger than expected. The sheer volume of data meant that the manual process resulted in capacity problems and an inefficient percentage of distributable amounts.

“Our frustrations included the lengthy time spent on the exercise of matching payments to rights holders as well as the low distributable percentage,” [Peach] says. “We needed a solution that would automate the process to ensure a more cost-effective approach in terms of human resources and time.”

SAMRO required the implementation of a Microsoft SQL Server database to ensure that information could be extracted from the mainframe for automatic matching of mechanical reproductions to composers and facilitate royalty distribution.

Once collated, reports are created to match data from the recording companies prior to royalty distribution.

Business Benefits

The solution has ensured a 20% increase in the number of matches being created. “We are matching more artists than before, with an overall improvement on what was being done before in much quicker timeframe with far fewer people,” says [Peach].

Based on statistics from the previous period, he says that there has been a marked increase from 48% to 76% in distribution.

“In terms of our distribution data, auto-matching ensures a more accurate result with less human intervention and more checks and balances in place. This ultimately ensures greater, measurable quality.”

Productivity improvements and a reduced requirement for human resources translate into a direct cost saving for SAMRO. “We needed to deploy a solution rapidly, but it also had to be flexible and manageable. The solution, developed by IS Partners, offered us this capability. SQL Server ensures flexibility as well as the ability to create and extract line-of-management reports more quickly. Reports allow us to determine which payments need to be distributed, what has been matched as well as obtain payment approvals from senior management,” he adds.

“IS Partners further demonstrated leading expertise in working with data sourced from our proprietary mainframe environment, and delivered on-time and within budget.”

SDPS offers strategic approach to SharePoint deployment

IS Partners has announced its certification on the Microsoft SharePoint Deployment Planning Services (SDPS) programme. The initiative allows Microsoft customers to use their Software Assurance Benefits with certified partners for SharePoint deployment and upgrade services.

“SDPS ensures that customers can leverage best practices and plan an effective deployment of SharePoint Server 2007, or plan their upgrade to SharePoint Server 2010,” says Ryan Jamieson, director at IS Partners.

SDPS offers customers three options. These include:

- SharePoint Deployment Planning, which helps customers develop customised SharePoint 2007 deployment plans to address their unique needs.
- SharePoint 2010 Upgrade Planning, designed for customers who have already deployed SharePoint 2007. The 2010 upgrade offer focuses on helping customers discover the value of upgrading, and planning their upgrades early by building a customised migration plan.
- SharePoint Internet Business Planning, which assists customers in the use of Office SharePoint Server to deliver an end-to-end web platform with web content management, digital asset management, search and commerce.



Certification requirements for partners to register with the programme include at least two Microsoft Certified Professionals and at least three customer references for projects that feature the integration of products, technology and services to align resources and business activities using SharePoint.

“We have met and exceeded these requirements and believe that participating in the programme will give customers confidence that partners are able to deliver successful SharePoint implementations through improved planning and tailor-made solutions,” Jamieson adds.

“In conjunction with our current Business Value Planning Services (BVPS) for SharePoint, we now have a complete SharePoint offering.”

SBV moves to adaptive financial planning with Clarity 6

Security Group, SBV, has signed an agreement for the implementation of a budgeting and forecasting solution from Progneo, a division of Microsoft Gold Certified partner, IS Partners.

Progneo provides specialist finance and consulting services. The company's Corporate Performance Management solution, Clarity 6, will replace the existing Cognos TM1 system to address SBV's requirement for a more integrated solution that will streamline budget, reporting and strategic planning processes. More detailed Capex and HR budgeting will further ensure more accurate insight into the costs of running the business.

“SBV have been looking at ways to become more dynamic and responsive to change in a volatile market. This necessitated the move to a more adaptive means of financial planning and corporate performance management,” explains Pierre Naude, General Manager at Progneo.

With a rolling forecast model, SBV will be able to take full advantage of market opportunities in a timelier manner, as information required for business decisions will be available at short notice. SBV will also be able to determine the financial impact of business decisions throughout the year.

Clarity 6 will further ensure that reporting is fully integrated into the financial and operational systems to ensure a more efficient process. Workflow and audit trails will enable SBV to identify bottlenecks in the financial processes, and also track changes made to plans, thereby improving overall process governance, explains Naude.

“SBV had a strong business requirement to move to an integrated and automated budgeting and reporting solution. This will result in the more efficient use of financial and operational resources, which will spend less time on the collation and management of data and more time on strategic analysis and value-added tasks,” he says.

“What-if” scenario analysis will also assist in the strategic focus of the office of finance within the organisation.

BI is a journey, not a destination

While a Business Intelligence Competency Centre (BICC) promises to smooth the way for the new processes and layers of administration that are introduced with a new BI implementation, the scope for mismanagement is vast.

Caron Mooney, director at Microsoft Gold certified partner, IS Partners, says where organisations are creating what they call a BICC, the upshot in reality is ad-hoc development of new systems, responses to Exco queries and report production to appease user demands. However, because these functions are not fully understood, typical BICCs are not organised to meet the demands placed on them. Under-delivery, user dissatisfaction, lack of progress and over-stress is the result.

A BICC should be structured to account for various user needs, with three clear-cut divisions, the aim of which is to ensure that all your users are getting value from the system and using it, Mooney says.

“Gartner indicates that IT is out of touch with what users’ and business’ BI requirements, in fact, are. With any new BI implementation, IT should be cooperating with management to ensure that these users are obtaining the expected value from the system,” she says.

As with any new system, the BI solution will require a continuous investment to ensure ongoing value. “Your budget needs to account for ongoing training as one component, and the support structure that forms the basis for the BICC. The same rules, in fact, apply as with any other information system implementation.”

A continual training budget will ensure that people within the organisation who mature into the system can learn and grow through more advanced training and also derive ongoing value from their education.

“Users who are not given assistance until they become self-sufficient will ultimately abandon the system. Exco also needs to obtain the answers they want quickly enough,” Mooney says

This applies equally to people within the organisation who simply do not have time to wait for information, such as the marketing department, for example. As these pressures start mounting and pulling resources in all directions, organisations might find themselves pressed for a solution.

Mooney says the BICC can go a long way to alleviating the burden, providing that it is structured and resourced with the correct skills, according to users’ needs. “Support forms an integral component of the BI investment. By creating three distinct groups, companies need to ensure that dedicated resources are allocated to firstly support users up to a management level. These users have to be given access to available data, while the existing environment has to be used to generate new reports and dashboards” she says.

A second team that has a higher understanding of the business needs to be established to respond to the needs of marketing and the Exco. This team could, for example, consist of marketing people themselves and must incorporate a high level of technical expertise within the group. This group will be in a position to create new business measures and dimensions based on the business taxonomy that is communicated from the Exco.

A third group, says Mooney, would handle any new BI projects and can be constituted if and when required. “This group always understands that BI is a journey and never just a single project. They would also be responsible for road-mapping the future BI direction and obtain input from the other support groups to ensure users are getting what they need.

“By focusing skills in right place, and setting the correct boundaries for each support group within the BICC, organisations will have a much more successful BI programme and more useful platform on which to base business decisions.”

When hosted CRM makes sense

IS Partners has introduced Hosted CRM, giving organisations flexibility in the choice of on-premise or an online CRM solution.

A hosted solution gives organisations the ability to take advantage of the Microsoft Dynamics CRM platform in instances where capital outlay is unachievable or IT resources inaccessible.

“As the first Microsoft Dynamics CRM Partner in South Africa, and a leading CRM provider throughout Africa, our online CRM service enables organisations to rapidly switch-on their CRM strategy as a monthly managed service on demand,” says Heath Turner, CRM director at IS Partners.

“Our online CRM offering addresses the requirements of operational areas as well vertical industries. We are able to provide solutions on the Dynamics CRM platform to meet organisation’s individual needs and ensure CRM success,” he adds.

A number of hosted solutions are available, each addressing unique industry and operational requirements. Solution for sales streamlines sales processes and enables sales people to create a single view of their customers. “This ensures a shorter sales cycle, higher close rates and improved customer retention. It automates key stages of the sales process and provides the facility for successful leads and pipeline management, measuring and forecasting sales activity and tracking customer interactions,” Turner says.

Solution for marketing gives marketing professionals robust data cleansing and segmentation tools, leading campaign management features and insightful marketing analytics. This ensures increased effectiveness of marketing programs, improved efficiencies and tracking of key metrics. The solution provides a comprehensive set of marketing capabilities to target customers more effectively.

CRM Analytics enables rich Business Intelligence for your Dynamics CRM application. It offers flexibility and ease-of-use to gain a more dynamic insight into the business. It allows for data analysis according to users’ specific requirements and includes customisable reports with drag and drop functionality. KPIs can be created and displayed in easy to read graphic formats.

“A hosted solution offers organisations additional benefits in that the CRM environment is fully managed, while all licence fees and support are included. It offers fast deployment and the flexibility to give users access to the system as the need arises. Functionality can also be added on demand,” Turner adds.

“Our enterprise-class infrastructure and processes further ensures a hosted solution of the highest standard.”

Strategic approach to KM ensures value from knowledge assets

Addressing the need for organisations to harness and use their knowledge to its full potential, IS Partners has introduced a streamlined Knowledge Management (KM) implementation methodology.

Melanie Sutton, Knowledge Management Consultant at IS Partners, explains that through a KM programme approach, an environment is created through which knowledge can flow freely across the organisation.

It consists of a number of phases through which the elements of the KM framework are implemented. The elements are inter-relational and based on a structured hierarchy.

Culture and behaviour form the foundation of any KM initiative, says Sutton. This element of the implementation methodology focuses on people who, ultimately, are the key to the success of any KM initiative. It also shapes the processes by which new knowledge is created, legitimised and distributed across an organisation.

The Knowledge Skill and Competence stage of the implementation defines a personal competency plan for individuals to develop the critical skills required to become an effective knowledge worker. “This will support the KM enabled process and KM initiatives,” she says.

The next stage focuses on embedding knowledge processes within typical business processes to ensure that KM activities are not perceived as “more work”.

The organisation's ability to identify, store, access, classify and manage their explicit assets, such as research material, methodologies, patents and processes also needs to be identified, Sutton says.

While knowledge comprises the major asset that drives strategic growth, innovation applies knowledge to realise its commercial potential. "This element of the implementation methodology forms organisational structures and systems that encourage creative solutions to difficult problems, and developing these innovations into economically feasible applications," she adds

The need for Knowledge Portals will also be identified to seamlessly provide content and connections to data, information, people, partners, clients and knowledge within and external to the organisation. An enabling platform must further allow people to extract the information they want and allow them to contribute to the system, in order to execute on the KM programme.

"The programme, ultimately, must be aligned to, support and enable the delivery of the business strategy, and focus on the organisation's core competencies leveraged across the organisation," she adds.