Roundtable #2 – Data, Business Intelligence and the Future of Operations and Financial Reporting

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OPERA PHILADELPHIA
Data

Structured, Internal, Siloed
- Accounting
- Tessitura
- SQL

Unstructured, External
- Text Heavy information
- Wikipedia
- Facebook

Hybrid, Integrated
- On Premise to Cloud

Increase analytics maturity by:
- Analyzing new data sources
- Broadening your portfolio of analytic capabilities
- Applying analytics to more decisions, faster
Decisions

Structured, Internal, Siloed
  ◦ Accounting
  ◦ Tessitura
  ◦ SQL

Unstructured, External
  ◦ Text Heavy information
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Hybrid, Integrated
  ◦ On Premise to Cloud

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Gartner
Analytics

Descriptive: What Happened?
Diagnostic: Why Did It Happen?
Predictive: What Will Happen?
Prescriptive: What Should I Do?
Decision Support
Decision Automation
Decision
Action

Built on Descriptive and Predictive Analytics
Suggests decisions and shows the implications to those decisions
Implements decisions automatically
Business Intelligence

Increase analytics maturity by:
- Analyzing new data sources
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Data
- Hybrid, integrated
- Unstructured, external
- Structured, internal, siloed

Decision Analytics
- Descriptive
- Diagnostic
- Predictive
- Prescriptive

Ad hoc, batch, offline analytics
Pervasive, real-time, embedded analytics

Systems
Training
Culture
Acumen
Gartner Magic Quadrant for Business Intelligence and Analytics

As of February 2017
Power BI


$5,000 Annual Azure Credit

$3 Per User
Future of BI

Cloud Computing
Data Scientist capabilities on the Front Line
Onslaught of Unstructured Data
Machine Learning
CFO as the CDO (Chief Data Officer)
# Scalable Systems

<table>
<thead>
<tr>
<th>System</th>
<th>Software</th>
<th>Level</th>
<th>Cost</th>
<th>Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>CRM – Customer Relationship Management</td>
<td>Tessitura/Tessitura Consortium</td>
<td>1 – 4</td>
<td>Variable. The Consortium is better for smaller companies</td>
<td><a href="https://www.tessitanetwork.com/">https://www.tessitanetwork.com/</a></td>
</tr>
<tr>
<td>ERP – Level 3 &amp; 4</td>
<td>QuickBooks</td>
<td>3 &amp; 4</td>
<td>Low price for small organization</td>
<td><a href="https://quickbooks.intuit.com/online/">https://quickbooks.intuit.com/online/</a></td>
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<tr>
<td>ERP – Level 1 &amp; 2</td>
<td>ActivityHD or Sage Intacct</td>
<td>1 &amp; 2</td>
<td>Medium Price range. Software depends on the needs of the organization and the financial acumen of your finance department</td>
<td><a href="https://nqativ.com/products/activityhd">https://nqativ.com/products/activityhd</a> <a href="https://www.sageintacct.com/">https://www.sageintacct.com/</a></td>
</tr>
<tr>
<td>Contract Signing</td>
<td>Docusign</td>
<td>1 – 4</td>
<td>Drives efficiency with contract signing</td>
<td><a href="https://docusign.com">https://docusign.com</a></td>
</tr>
<tr>
<td>Productivity Suite</td>
<td>Office 365</td>
<td>1 – 4</td>
<td>E5 license gives you the ability scale your organization to any level with low prices</td>
<td><a href="https://www.office.com/">https://www.office.com/</a></td>
</tr>
</tbody>
</table>
Questions for the group

How are you driving BI in your company?

How is your culture changing in order to support BI?

What systems are you going to put in place in the next couple of years in order to support your BI needs?