

BI Radio

Episode 19 – Focus on Forum

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Montage:

- “We’ve certainly seen at recent Forums the attendance has been very significant, increased significantly. I think what’s really increased is customer content.”
- “Can’t wait to meet the people. Everyone involved with this that actually gets to go down can’t wait to talk to customers one on one.”
- “I think it’s really important just to try and get out and meet people and find out what they’re doing, and we keep in touch. And I’ve gotten a lot of technical information that way.”

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Ken Seeley: Hi there, and welcome to BI Radio. I’m Ken Seeley. On the show today, we focus on Forum, that’s IBM Cognos Forum, our annual customer conference taking place this year in Orlando, Florida. IBM General Manager Rob Ashe drops in to share some of his favourite moments from past events. And Kelsey Howarth talks to Forum alumnus and IBM customer David Bergeron about the reasons he’s made the trip for so many years. But first up, what’s on the agenda? Delaney Turner talks with business intelligence track leader Mark Morton about the topics on this year’s program, and learns some important information about BI migration.

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Delaney Turner: Hi, I’m Delaney Turner, with IBM. Today, I’m speaking with Mark Morton. Mark is in the Business Intelligence Product Marketing organization for IBM and is the track leader for business intelligence and migration and upgrade at IBM Cognos Forum in Orlando. Mark, welcome to the show.

Mark Morton: Thanks, Delaney.

Delaney Turner: First things first, Mark, what are three major topic areas among the many in this year’s BI track?

Mark Morton: Well, Delaney, almost all the tracks share a common philosophy, and you’ll find that within any given track, whether it’s migration or business intelligence or the platform, any of the different topic areas in general, we have different kinds of sessions. So one that I think is particularly interesting to most people is the Technical Tips & Techniques. These are the ones you’re going to go to, you’re going to learn how to do something that hopefully you can bring home and put to use right when you get back. There’s also a Deployment Best Practices, so this is going to help you know how to structure things before you do anything even.

Delaney Turner: Okay.

Mark Morton: You know, oh gee, you know, if I go about it in this way, I’m going to learn from what others have done and that’s going to help me do it the right way the first time.

Delaney Turner: Right.

Mark Morton: So that’s worth going to. There’s other sessions then to think about. You know, pretty popular are the Product Introductions. There will be some new products being shown or glimpses of things that are in our labs and things like that we find people like quite a bit. And one other one that you should bear in mind, which is actually a fourth, but I’m in marketing, and I don’t count that well anyway, is Business Strategy discussions.

Delaney Turner: Okay.

Mark Morton: So these are a little more cerebral. They're less about bits and bytes and nuts and bolts, but they are about ways to think about information in your organization, things to do with it. Some really good... we have some industry analysts talking in those areas and things like that. I think people will be interested.

Delaney Turner: Okay. One of the things that I know that IBM Cognos Forum and the track leaders try to do is respond to customer requests from year to year to enhance the value of their investments. What are the changes that we've made from last year's event that returning customers will see at this event?

Mark Morton: We listened to feedback that we got and one of the things we've done you'll see very clearly is more Tips & Techniques, right? Things that we kind of...

Delaney Turner: More hands on.

Mark Morton: More hands on, much more about give me something I can bring back home to the office and put into practice.

Delaney Turner: Right.

Mark Morton: So you'll see that there's a predisposition towards those as a larger share of the tracks actually go to the Tips & Techniques this year as compared with previous years. So we've done a little more in that area. That's the number one.

The other thing that we do pay attention to year over year is what sessions were most popular last year? What can we do to build on that, so that if last year, we taught you the basics of reporting off of cubes, this year we're going to teach you how to do a little more with that.

Delaney Turner: Right.

Mark Morton: So you'll see that again in, for example, in the Business Intelligence track. That's one of the more popular sessions is around that kind of capability.

Delaney Turner: Right. Now integration with the IBM technology stack is also probably a topic that is on a lot of customers' minds. A lot of customers are curious about where the technology is going and how it's going to fit together. Are customers going to be seeing any integrated IBM Cognos solutions?

Mark Morton: You'll see those in a number of places. You'll see them in the main stage. You'll see some cases where we're, by demonstrating the synergy between existing IBM solutions with newer Cognos technologies as well, we're able to take ourselves into a one-plus-one-equals-three outcome. And you'll see that in some of the main-stage presentations and somewhat also in some of the breakout sessions. Now what you will find typically for those in the breakout sessions, what you'll see is a here's how to mix IBM into your Cognos solution or how to mix Cognos into an existing IBM solution. And you'll see those in the tracks and so that you'll be one new piece, but one piece that you already know, depending on how you're coming at that.

So we've made efforts to demonstrate that where appropriate in all of the different tracks, actually.

Delaney Turner: You're also the head of the migration and upgrade tracks at IBM Cognos Forum. Obviously with such a large customer base, there are going to be customers there who are on the latest and greatest. There are also going to be some customers who are happier with previous versions and perhaps even Series 7.

Migration is a big issue, so what are we providing customers to help them choose the right path for them in their future deployments?

Mark Morton: A couple of key sessions in this. One's called IBM Cognos 8 BI Power Play: Should You Migrate? So that's a session that's going to look at... The pre-registrations, we know there's a fair bit of interest in it, but we're going to show you what it is, in case you haven't seen it, and then let you understand the factors that help you decide: Okay, should I go to this? Should I not? Should I wait? What matters? And we're going to try and show that to you and certainly in a session.

Another very popular one which is kind of new this year for us is thinking quite severely about upgrading to the next release of Cognos Planning. And we see a lot of interest in it in the pre-registrations. So we know people are people and saying oh, what are the factors involved? So that'll be there. Now there's a lot of other stuff there too. There are Migration Assistants that are part of our solution now. We're going to

demonstrate that for people in sessions. People should also take a look at some of the Demo Theatres. There's some interesting stuff going on there, both for migration and for BI as a whole, all the different topics. It's another place to pay attention to. You can pre-register for the Demo Theatres to make sure you get a spot. And based on attendance we can add more or less of tracks, you know, of sessions and demonstrations. So for the Migration and Upgrade track as a whole, we've taken a look at case studies we have involved, so you can actually hear from customers. Here's what we did. Here's what worked for us. Here's what did not. Here's what we would do better. We've gone to efforts to make sure we have that there for you. We've got some of our consulting and business services people there to help explain how to think about this. We have materials on our web. If you actually Google IBM Cognos Migration through Google, you'll come very quickly to a single page on our support site that has all the information in one place for you.

Delaney Turner: Excellent.

Mark Morton: And we're pretty happy about having learned to do that.

Delaney Turner: Now, just on a final note, you've been with the Cognos segment now for quite a while. You've been to a lot of previously Cognos Forum events. What do you look forward to when you get down there, or when you're preparing these tracks and thinking about the event?

Mark Morton: Can't wait to meet the people.

Delaney Turner: Yes.

Mark Morton: Everyone involved with this that actually gets to go down can't wait to talk to customers one on one. There's sort of what you think of as the pod area where we actually have the products around and things. And some folks think you're going to go there and see a demo. We actually don't think of it that way. We think of it as a chance for people to come and engage someone that really knows the product well and ask about their particular issues. So whether that person's a product manager, a developer or one of my marketing friends, we actually very much care about what matters to you in your specific instance. What are you trying to do? What are the things that work for you, don't work for you? That gets us very excited, because the better we understand that, the better we can prepare our products to be better at doing that for you, and everyone I know is pretty turned on about that idea. Another thing that for me personally, I'm really looking forward to, I just love to present. I have so much fun. I get a bunch of people in a room, we get to talk about some things that I enthuse about and I get to learn from them the kinds of things that matter to them. I have so much fun in those sessions that it's a personal thing for me. I just really, really enjoy it. Something I would like to mention for people that we don't always get as much attendance on it that I'd like is the Birds of a Feather Lunches. You know, we have a topic, various topics and things. And this is not where I'm going to tell you everything I know because I'm an expert so much as we share amongst ourselves different insights and different ways of doing things; because for the folks like myself it's a chance for us to learn and share ideas with people and it turns out to be a pretty good thing.

Delaney Turner: So you're looking forward to it again this year?

Mark Morton: I sure am.

Delaney Turner: Excellent. Mark Morton, with Business Intelligence Product Marketing at IBM, thank you very much for talking to us.

Mark Morton: Thanks, Delaney.

Delaney Turner: Thank you.

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Station ID: Interviews, insights and opinions on performance management. You're listening to BI radio.

00:10:18

Kelsey Howarth: Hi. I'm Kelsey Howarth. What does Cognos Forum mean to our customers? Here you're going to listen in as I speak with David Bergeron, Global Cognos Administrator at Merial Limited. Merial is a world-leading animal health company. They are a forward-looking company with a proven track record, producing pharmaceutical products and vaccines for livestock, pets and wildlife. In this segment, David shares why he keeps coming back to Forum year after year. Thanks for joining us, David.

David Bergeron: You're welcome.

Kelsey Howarth: Could you tell us a little bit about your role within Merial and your BI implementation?

David Bergeron: Well, I am the Global Cognos Administrator and we have a very large development QA and production environment in the U.S. We also have Cognos applications installed worldwide. We have large applications in France, Brazil, Australia, Singapore and Canada; and we are attempting to consolidate all those on the U.S. infrastructure. And that's our BI infrastructure. We also have a global planning infrastructure. We have a set of servers in the U.S. and we are migrating our global users all on that platform now.

Kelsey Howarth: Now, in your move to 8.4, what key capabilities were really of interest to you?

David Bergeron: Well, we moved to 8.4 in November 2008 really before 8.4 was released in full, and there were two main reasons for that. The first one is that we started using Oracle, I believe it was Oracle 11 as our database and we needed to make sure that Cognos fully supported our version of Oracle. The second part was that we were extremely interested in Cognos PowerPlay. We used the old series 7 PowerPlay and for our early Cognos 8 implementations we had to create links between Cognos 8 and our old Cognos Series 7. And even though that was transparent to the users, we really wanted it all wrapped up within one technical architecture. So we moved forward with PowerPlay 8. And in fact, in my production 8.4 system right, now we run about 1,500 to 1,600 reports a day. However, last week we had a peak where we ran about 3,000 reports. And we also build 15 to 20 cubes every day. And those cubes and all of my burst reports are always done by 8:00 a.m. and we have no performance issues with the system.

Kelsey Howarth: You'll be presenting at Cognos Forum this year in Orlando. Can you share with us your topic and what you'll cover?

David Bergeron: Well, our topic this year is a case study of how we implemented our 8.4 rollout globally. So we upgraded our entire system in November using 8.4 FCS. So that was a version of 8.4 before the general release. And we just felt like we had a lot to share about going to this new release, a lot of the things we did right and a lot that we did wrong. We have some technical tips. We reverse engineered the content store to give us a lot more information. We feel like we've added a lot of value by writing our own administrative dashboard, and we feel like we are adding value to the Cognos community as a whole with a lot of the technical tips and techniques that we're using.

Kelsey Howarth: What do you feel will be the three big takeaways from your presentation?

David Bergeron: I think three of the big things, maybe I'll even cover more than that, but three of the big things were probably how we engineered our architecture, how we installed all the Cognos products on the servers, how our servers are set up, what Cognos components we installed where. And again, as I just mentioned, I think our administration dashboard and some of the things we got out of the content store. And I think just a lot of the technical tricks that we use to get the most out of Cognos.

Kelsey Howarth: Along with presenting, you'll also be attending the event. What do you hope to learn more about?

David Bergeron: Well, every year I kind of have a checklist. When I go to Forum I have a checklist of the things that I want to know. I try and look real carefully at the syllabus, you know, all the conference sessions. I don't try to attend too much, okay? I try and get a list of the sessions that are most applicable to me, and I really highlight those. And if there are two that I really want to go to, but they're at the same time, I don't feel bad about going to one, and if it's not what I was expecting, about getting up and trying to attend the other. And the other thing is I think it's really important just to try and get out and to meet people and find out what they're doing, and then write them after the show. I e-mail them after the show

and we keep in touch and I've gotten a lot of technical information that way; because maybe six months down the road when I'm trying to decide well, what's the best practices for this new implementation that I'm doing, chances are somebody's already done it. And if I can find out somebody who's already done it and find out what they did right and what they did wrong, that'll save me a lot of time on all of my future implementations.

Kelsey Howarth: Having attended Forum four times, is there a memorable moment that you can share with us?

David Bergeron: Is there a memorable moment from any of the Cognos Forums that I've attended? There were, I guess, a couple. One of them was meeting Rob Ashe and having him put his arm around me at the Cognos Performance Leaders' Reception last year, and I even have a picture of that. So that was a memorable moment. But I think that some of the other memorable moments, I think also at a Performance Leaders' Roundtable I remember sitting last year and meeting a couple of users and they had already done some of the things and already hit some of the roadblocks that we were experiencing, trying to consolidate our planning and our BI. And just finding out exactly what they had done and why saved me a lot of time. And I knew after I got that information, I could go back and justify the cost of attending Cognos Forum and probably even justify attending it this year simply on the basis of that one.

Kelsey Howarth: In a turbulent economy, many companies are limiting travel budgets and conferences. Why do you feel this conference is a wise investment?

David Bergeron: Well, it's a wise investment; you get out of it what you put into it. And if you go in with a specific list of things that you want to accomplish and you can get that done, then you can save yourself a lot of time and money in the development process. And again, instead of repeating the same mistakes that everybody else did, you have a leg up because you already know what to do and what not to do. And not only that, you can find some people in similar situations with you and when you find out their successes, you can decide if that's applicable to your company. And if it is, you can get some information out of them. And especially in these tough times when we're trying to get a lot more return off of our BI investment, if you can find a couple of success stories, or even one that applies to you, you can have a huge payoff for yourself.

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Station ID: Insights on performance management from the people who shape the industry.

00:19:23

Delaney Turner: Hi. I'm Delaney Turner with IBM. Today I'm privileged to be speaking to Rob Ashe. Rob Ashe is the Vice President and General Manager of Business Intelligence and Performance Management at IBM. Rob, welcome back to BI Radio.

Rob Ashe: Thank you, Delaney.

Delaney Turner: Today we're talking about IBM Cognos Forum, the annual event for our customers and partners. Attending Forum is a significant event for our customers to make. It's days away from the office, there's a financial outlay. Why is it an important investment for customers to make?

Rob Ashe: Well, it's definitely a significant investment. Customers, as you say, they get in airplanes and they come and join us, this year in Florida. But I tell you, I really think it's a worthwhile investment to make. And I felt that for the 15-some years I've been going to Forum. We've certainly seen at recent Forums the attendance has been very significant, increased significantly. I think what's really increased is customer content, which is great, and customers want to hear from customers.

Delaney Turner: Right.

Rob Ashe: You know, how they're using the capabilities and solutions. I'm struck over the last several years the solution orientation, increase in the number of customer presentations, a lot to learn from other customers. So the number-one reason is to get there, to meet with other customers and see how they're doing, how they're using solutions to gain advantage in their business in some way.

Delaney Turner: Right.

Rob Ashe: I think this year... you know, this is a year that you could easily say, hey, the economy's tough. I think I'll take a pause. But I think more than ever, you know, this is a time to understand how you can get the most out of your BI and performance management investment. A difficult environment out there. You know, more difficult for some industries than others. But at any moment, some industries are kind of in different places than others. But there are similar themes that we hear from our customers in times like this: how to best allocate resources; how to understand where I'm spending money; how to better plan for the future; how am I going to understand my performance more quickly so I can course correct, take advantage of opportunity, whatever it might be.

Delaney Turner: Right.

Rob Ashe: So I think this year more than ever the fact that, well, you know, I never like to say we're recession-proof in terms of what we do, but certainly if you look at kind of what our customers have accomplished through recessions over the last 15 years, we have so many evangelists out there that tell us this is the place to be understanding where you can get the most value. So Forum is a great place for customers to come out and understand that, to interact with other customers, and obviously to see what we've been up to; you know, new innovation.

Delaney Turner: Yes.

Rob Ashe: We introduced Cognos 8 version 4 back in the fall. This will be a good opportunity for customers to really get under the covers. Cognos 8 version 4, PowerPlay 8. You know, a big, big memory of mine in Forum is PowerPlay customers looking for that next step in Cognos 8. And it's there now and it's in Cognos 8 version 4 and seeing what the customers are doing and how they're migrating, doing with it and how they're migrating to it.

Delaney Turner: Right.

Rob Ashe: There's just a lot of good reasons to get to Forum this year, and I'm certainly hoping I'm going to see a lot of my old friends there.

Delaney Turner: Let's go even further forward a little bit and think about after the event. So people are getting back on their airplanes, they're going back to their offices. What messages do you want them to be bringing back to their colleagues and what do you want them get out of that?

Rob Ashe: Well, I mean, the key message that I think that I want them bringing back to their colleagues is now is the time to drive business intelligence and performance management. This is a capability that we all know lends itself to quick results, high return. That's exactly what their bosses, their sponsors are going to be looking for. In this kind of environment people think about how can I get a return in six, nine, 12 months, not three, four years, right?

Delaney Turner: Right.

Rob Ashe: So we're enabling people to drive those quick returns and make that impact on their business. So the first thing I'd like them to think about when they're getting back on that plane is, boy, I can make an impact on my business, even in these challenging times. And maybe more so than ever in these challenging times I can make an impact on my business.

Delaney Turner: Right.

Rob Ashe: I want them to get onto airplanes and get home with the message that we are continuing to innovate in a very significant way, here at IBM, IBM Cognos. A question that customers had for me last year in Vegas was, you know, would we be able to continue to innovate? Would we be able to continue to invest? Right? Well, we've rolled out Cognos 8 version 4. We've brought Cognos 8 to the z platform, rolled out new

dashboards, PowerPlay 8 I mentioned earlier, our new Business Viewpoint product, applications for credit risk management, new applications for financial. I mean, the list goes on and on.

Delaney Turner: Yes.

Rob Ashe: And they're going to see that, and so I want them to leave thinking, boy, Cognos is still at the leading edge of innovation in the area of BI and performance management.

Delaney Turner: Right.

Rob Ashe: So those are really the two messages. Make an impact and the innovation's still rolling out.

Delaney Turner: We've talked about industries being under pressure to deliver results quicker. What about government agencies and the role of say Cognos software in recovery spending, in stimulus spending and things like that?

Rob Ashe: Well, I mean, that's right up our alley. So I think for those public-sector organizations that are wondering how they're going to solve the problem of both spending the money and keeping track of it, I think there'll be a lot of good conversation at Forum for them.

Delaney Turner: Just one more question finally on Forum. If you could think back – you've been going to these for quite a while, 15 years maybe – what are some of the memorable moments that really stick out in your mind when you think back about these events?

Rob Ashe: There's lots of memorable moments. I mean, you know, to start off with, it's just great to connect with so many customers that I've known for many years, and new customers that we've acquired. It's great to see them; it's great to see them in such large numbers. There's always such a warm reception that our customers give us, it's terrific. And so I'm always really thrilled, I have all kinds, too many to mention, you know, memorable moments, because frankly at that Forum myself and all my executives are very accessible. We invite all our customers to come see us after stage presentations, make an appointment with us. It's an opportunity for us too, to meet customers and find out what they're doing and hear directly from customers. So that kind of, for starters. I think developing solutions like Cognos develops is a very rewarding place to be. It's very rewarding because we can really see the outcome of our work when a customer stands up and says, here's how I manage risk so that cycle from the idea or conceiving an idea about how to solve a problem with a solution and then seeing a customer take advantage of it.

Delaney Turner: Right.

Rob Ashe: So I think about the ReportNet Introduction, I think about Cognos 8. I think about introducing Adaytum Now, Cognos Planning to our audience. I think about the acquisition of TM1. I think about these really big moments in bringing a new solution to market, seeing customer reaction. I mean, I like to go to some of the sessions and hang around and kind of sit in the back and just see how customers are responding. And a memorable moment there was the PowerPlay customers frankly not being completely thrilled with their upgrade path and us going back using that input and going back and creating PowerPlay 8 which we're now delivering to them.

Delaney Turner: Right.

Rob Ashe: That's a very memorable moment for me. And of course, at night there's all kinds of fun stuff that happens, whether it be Universal Studios or whatever we might do. Last year, it was in Las Vegas, we joined a number of customers at the Cirque du Soleil. That's fun too, right? All those things collectively I think make Forum a wonderful place for all of us to get to.

Delaney Turner: Excellent. Well the continued investment, Smarter Planet and good times at Cognos Forum, IBM Cognos Forum. Rob Ashe, thanks for talking to us today.

Rob Ashe: Thank you.

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Ken Seeley: Well, that's a wrap. I'd like to thank our guests today: from Merial, David Bergeron; and from IBM, Rob Ashe and Mark Morton. Thanks as well to our segment producers, Kelsey Howarth and Delaney Turner. And finally, to our head producer and audio engineer, Derek Schraner. A reminder to check us out online at radiocognos.com where you can listen to previous shows, download individual segments and view the transcript of each broadcast. You can also follow us on Twitter at twitter.com/ibmcognos. Or, if you care to comment about anything you hear on the show, email us at biradio@ca.ibm.com. I thank you for listening. I'm Ken Seeley. We'll see you in about six weeks.

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