IBM WHITE GLOVE EVENTS

Moderator: Tim O'Brien
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Operator: Good day and welcome to today's web conference. During today's event all participant lines have been muted to prevent background noise. If you require technical support, at any time, please press star then zero on your touchtone phone and someone will assist you. You can also send a chat message to the event host.

This event is being recorded. There will be a question and answer session after the formal comments. You may submit questions electronically throughout today's presentation using the question and answer feature on the web.

To do so you will first need to exit full screen view by pressing the escape key on your keyboard. Select the question and answer option located to the left of your screen under meeting features, then simply type your question into the area provided and submit.

Please note that your web questions are private and only the presenters will see them. To return to full screen view you can press F11. We will gather your questions throughout the presentation and address them as time permits during the Q and A session.

You will also be able to ask questions verbally during the Q and A. At that time, the operator will provide instructions to queue up for questions.

Again, today's session is being recorded. We will pause for a moment to initialize the recording. Please stand by.

We would like to welcome everyone to today's web event titled Performance Blueprints In Action webinar, sales performance management. At this time it is my pleasure to turn the floor over to Mr. Tim O'Brien. Mr. O'Brien, you have the floor.

Tim O'Brien: Thank you very much and welcome everyone to this installment of the IBM Cognos Performance Blueprints In Action monthly webcast. Today's webcast we're featuring the Sales Performance Management Performance Blueprint which we're excited to show you today.

But before we do so, I just wanted to make a few comments about the Innovation Center and who hosts this webcast as well as many other webcasts. And you'll see from this slide a number of live best practices workshops that the Innovation Center delivers literally around the globe. We also deliver a number of different webcasts.

As I mentioned about four every month; a first, second, third and fourth Tuesday of each of month focused on a different practice area within the entire performance management spectrum. And that's things like planning, budgeting and forecasting financially analytics, reporting and analysis, financial management and consolidation, strategy management and score carding in those subject areas.

And we focus on the business practice side of the technologies that IBM has to enable these business practices. And we're not only trying to convey what the best practices are but also what the right practices are for organizations to deploy because a lot of times, as we all know, deploying a best practice at a certain point in time isn't necessarily achievable but optimizing existing practices, whether they're standard or suboptimal, is something that is a good breadcrumb approach to getting to that best practice.

So all of these webcasts, all of these live workshops and other assets that the Innovation Center provide are all intended to help our organizations get the most out of their IBM Cognos solutions. And I'm just flashing up on the

screen some of the live events that we're doing over the course of February in North America.

Of course, if any of those events are coming to your region, you can simply go to IBM dot com forward slash innovation dash center and click on events and you'll see them listed. You can view a detailed invitation and register for those events as well.

Coming next week from the Innovation Center we're going to deploy a multimedia widget that you can access. And we'll make sure this information gets out to you. And the information can come to you via this widget. And you can filter by live events, webcasts, customer success stories, Performance Blueprints, whether they're industry specific or functional.

You can view this through this multimedia widget and there's links there to take you directly to these assets and invitations and what not, depending on what the asset is, directly to there from the widget.

There's also links to our LinkedIn group, our Twitter account and it allows you to simply forward to a friend that you may want to pass the widget onto to help them get an easier look into what's coming out of the Innovation Center. So look for more information on that widget coming to you.

I just wanted to talk briefly about performance management. And we hear these words thrown around and a lot of times we're not exactly sure what we're—what these terms mean. And I guess the question would be how can IBM Cognos solutions help with improving performance.

And, as we know, there's many different factors that affect performance, but one factor that stands out as the most critical is the decision making that happens at every level, every function and every region of your organization, and every one of those decisions is based on the information people have on hand.

And if that information is on target, if it's reliable and easy to consume and timely, better decisions are going to result. And if that information is

inaccessible or incomplete, later, inaccurate, it's going to have a direct and negative impact on decision making and ultimately, business performance.

And when decision makers are looking to find answers they ask three fundamental questions in three fundamental areas. One, is how are we doing? That is, where are we right now? And then they're asking, OK, why? How did we get here? And lastly, what should we be doing to correct this or take advantage and capitalize on this opportunity? Where are we going, that is?

And finding answers to these three questions is relevant in every functional area of an organization of—in every industry. And to find answers to these three questions it requires three basic capabilities. And to answer how we're doing, decision makers have to be able to measure and monitor the business. And to dig down and determine why the situation is what it is you need reporting and analysis capabilities.

They give you the ability to look at historic data and understand trends to look at anomalies to understand why. And then planning's the linchpin between the two. Planning takes the understanding of what's going on and sets a forward looking view of the business which you measure and monitor against actual performance.

Planning answers the question what should we be doing. And the reality is in many organizations executives, managers and other decision makers have issues answering these three questions.

Finding answers to how are we doing is done manually. For example, the chief marketing officer asks their analysts for an update on penetration in a new market segment. At the same time a director is also manually assembling a scorecard based on different assumptions of the same numbers. And they will likely make slightly different assumptions, use different calculations and maybe even different definitions of things like customer and revenue.

Finding answers to why is usually accomplished with tools like business intelligence. The major issue with BI in organizations is that the tools have been implemented in an ad hoc fashion, both regionally and in different

functions. And, as a result, many organizations are finding answers to why through a patchwork of different applications and tools.

And understandably there's a lack of confidence in the numbers. And when it comes to answering what should we be doing, multiple—multitudes of individually created spreadsheets are the most commonly used approach, commonly known as spreadsheet hell. And this is the reality of how most organizations determine what they should be doing and make decisions about allocating resources to initiatives.

The problem is that there's no way to systematically track or audit, back up and secure the information. And it's truly difficult to maintain and these are high stake risks when answering an agenda setting question such as—of such importance to the business.

And pulling together the information in this way is not only cumbersome and time consuming but also it often results in meetings becoming about where the numbers came from opposed to what to do about them.

And then this approach slows down and confuses the decision making processes that drive performance and it often results in less effective and less timely decision making which can lead to bad decisions.

So finally, performance management is relevant in every functional area of an organization and every industry whether it's top down corporate performance management or department led operational performance management. IBM and IBM Cognos solutions can enable businesses to optimize performance.

So thanks everyone. Hopefully that clarifies, for a lot of you, what it is when we talk about integrated performance management and how organizations can leverage performance management to enable better decision making across the organization.

We get a lot of questions about that and I wanted to make sure that's conveyed to you all. So why don't we get to it. And before I pass over the microphone to my colleague (Sebastian Rivera), I want to ask everyone if they could let us know what products your department or your organization uses.

It always gives us a good idea of what products everyone's using and make sure we address those products in future webcasts through the Performance Blueprints and action webcasts as well as other webcasts that we deliver. So if you all could just answer that and then we can get…

Operator: And we'll give this just one more moment.

Tim O'Brien: Sure. Sure. No problem.

Operator: And I'm going to go ahead and close the poll.

Tim O'Brien: Fantastic. Thanks everyone. And without further ado, it's my pleasure to introduce my colleague, (Sebastian Rivera). (Sebastian), you have the floor.

(Sebastian Rivera): All right, thanks so much, Tim. So welcome, everybody. Today I'm going to be speaking to you about Cognos 8 BI for sales force. And here at Cognos I'm one of the knowledge experts in this area because I am in charge of managing our relationship with Salesforce.com. That encompasses technology, marketing and sales activities.

So today I'm going to be walking through a few different areas. First we're going to cover our alliance relationship, why is this important, then we'll do a quick sales performance management overview, then we're going to dive into the really exciting part which is the sales performance management blueprint. We're going to get a great demo. And lastly, I'm going to show you how a lot of this content can be integrated into your very own sales force navigation.

So I thought it important that I first share with you some of the details about our alliance relationship with Salesforce.com. After cross referencing our customer list with Salesforce, we found that a significant number of our joint customers were already IBM customers somewhere within their organization.

And what we've seen recently is this trend develop, a lot of joint customers coming to us and saying hey I didn't know I could use IBM Cognos for my Salesforce.com reporting. Can you show me how to do this? I would like to

extend from my HR organization or my finance department, wherever I'm currently using Cognos to cover the Salesforce.com data.

As a result of a lot of this happening Salesforce.com recommends Cognos to enterprise environments with extended analytics requirements. And both sides have made significant investments in their relationship. This includes dedicated alliance teams on both sides and significant sponsorship participation at each other's big annual customer events.

So the first thing you might be wondering was why does Salesforce.com need addition BI capabilities when the application itself comes with out of the box analytics. True, Salesforce.com has some great built in operational reporting capabilities. They're very easy to use and have all the bells and whistles one needs to meet many of the operational reporting needs in a CRM environment.

Where the need for extended analytics comes in is when CRM environments reach a level of maturity and complexity that goes beyond the scope of the Salesforce.com out of the box analytics.

So, a few examples of these are comparisons of actual versus goals, reporting on historical trends and performing multi-dimensional analysis.

In addition, the most common extended analytic need that we see as a requirement to incorporate Salesforce.com data with data coming from other applications like ERPs or local databases. So by providing these capabilities IBM Cognos extends the sales analytics capabilities beyond operational reporting into a full blown sales performance management application.

So now let me tell you what the sales performance management overview is. As you saw from Tim's slide, you got an overview of the overall performance management framework. So sales performance manager really applies to the sales function. It's an integrated framework that enables sales organizations to plan and model their sales strategies to ensure the timely execution of their sales plan, the initiatives that go along with that and, while at the same time, providing all the constituents, clear visibility and performance.

The three components are, you know, reporting and analysis, planning, and measuring and monitor. But the core requirement across all of these functions is a need to understand the organizational metrics as well as the key drivers that affect them.

So the main focus of the solution we're presenting today applies to this very segment; the reporting and analysis segment. So when applied to sales this is usually referred to as sales performance analytics.

So to support the sales planning and forecasting processes, sales organizations need full visibility of historical sales data and real time pipeline. They'll want to understand all of the intricacies of their sales data as well as run comparisons to goals and historical results to see where they currently stand.

They will also want to drill down into that data to understand the key drivers and determining how to make any mid course corrections. Performing this type of sales analysis, without specialized tools, makes for a very slow and cumbersome process to—with too much time spent on crunching numbers and you end up relying on outdated data. The result is that any plans or adjustments made will have a much lower probability of success.

So IBM Cognos has two products specialized for sales performance analytics with Salesforce.com. IBM Cognos 8 BI is the recommended solution for the majority of scenarios but we also have a very specialized product called Cognos Now for environments where real time reporting is a priority, like for example a high volume call center.

Now picture a heart monitor type of streaming chart with second by second updates for call volumes complete with alerts to know the other BI bells and whistles.

Now you may not know this but all of us here at IBM Cognos are very familiar with the Salesforce.com CRM application. We actually use their sales and marketing modules internally. We have about 2,800 users and are one of their largest customers. And we also use our own Cognos 8 BI application on top of our Salesforce.com data.

At the last Salesforce.com Dreamforce event, the one last year, we had a—we had a presentation and it was by far the most popular one at the event. It was you know how to use BI on top of Salesforce.com.

So I also want to tell you about a couple other customers using these solutions. First is Aon insurance. They use Cognos 8 BI for reporting on top of Salesforce and they've been a great reference for us.

I just mentioned that the Cognos internal use case study was the most popular session at last year's dream force event, well they Aon case study was the most popular session at the equivalent European event.

The key capabilities highlighted at Aon are the Cognos ability to pull data from multiple data sources as well as the ability to access Cognos seamlessly from within their Salesforce navigation by incorporating single sign on.

MDS Pharma is another great reference. In this case highlighting the benefits of IBM Cognos now for Salesforce.com. MDS Pharma had a real time monitoring requirement for operational metrics as well a need to incorporate multiple data sources, both of which were addressed by the IBM Cognos Now solution.

So now that we've covered the stand sales reporting capabilities I'd like to introduce you to the exciting solution we have developed to give our customers using Salesforce.com a jump start to sales performance analytics with Cognos 8 BI.

So first I'd like to frame this problem for you. Now, having spent several years at sales op functions and partner operations functions, this particular problem is near and dear to my heart. So this is a visual. One of the most common sales analytics problems across most companies.

So you can see we have a—we have a map representing regions. And on this map we have overlaid some other dimensions that are relevant. For example, we have account sizes and enterprise large SMB. We also have verticals and we also have product focus.

So these are the different dimensions that exist within our organization. And how these are relevant is when we look at our particular metrics, and in this case the sales metrics are our pipeline revenue, forecasts and goals, we don't look at those metrics just simply by asking well what's my pipeline, right.

We usually ask what is my pipeline for this region, for this product within this vertical, right. So these questions get very complex very quickly. And when—you know when we start asking what is my pipeline in this region, in this—in this customer size, for this product, as compared to how my pipeline was in this very same segment last year, that gets really complex.

So you know the whole concept multidimensional analysis a very complex problem. So we—you know we saw that a lot of our customers were doing these kinds of things with salseforce.com so we decided to go and help them out by building a blueprint.

So introducing the blueprint to you, this, like I mentioned, is our way of helping our customers get a jump start with Cognos 8 BI for Salesforce.com. We built some content to help them out. And the very first thing that we started with is a model. So we took and we built the Cognos model and this is mapped to a key Salesforce.com data element like accounts, opportunities.

As is the nature of the blueprints, the model is easily extended to include additional Salesforce.com objects as well as external data sources. And just to show that capability, we went ahead and added an additional data source to the blueprint that you'll see in the demo.

The other thing that the model can do is report directly off of Salesforce.com, let's say real time, or it can use a cached model where the blueprint caches the data and then reports off the cached data.

The second component of the blueprint is a dashboard. We've set up a multiple page dashboard with some prebuilt report content that addresses the key metrics related to sales performance. We have pipeline reports giving us multidimensional perspectives, revenue reports giving us some historical reporting and trending and, lastly, a forecasting page that this is where we

incorporate that additional data source and then compare that to the data at Salesforce.com.

So you'll see, you know, out of Salesforce.com we're having a forecast and out of this third party data source we're having the goals. And then on the screen we compare, you know, what's our forecast versus our goals, our percentage of attainment and are we green, yellow or red; that type of—that type of comparison.

So, now for the exciting part; the demo. Just to frame the demo for you, we have a fictional company called (Intronix) Company. They're an electronics retailer in the middle of their annual sales cycle and they need to accomplish a few things.

They want to monitor their business in order to make any necessary adjustments. They want to measure against their goals to insure things are going according to plan. And they want to analyze and understand the results so they can begin laying the ground work for next year's revenue plan. So they're going to utilize the blueprint to do—to do all of this analysis and monitoring.

So, with that, I'd like to turn it over to (Edson Angoria) to provide the demo for us.

(Edson Angoria): Welcome everyone. Let me just start off with sharing them—a small diagram with the technology—the architectural components of the blueprint. I believe most of us are familiar with the IBM Cognos 8 BI infrastructure; however, for this blueprint we are incorporating two new components. And I believe it is worth just to spend a couple of minutes just to give you guys a brief introduction into them.

One of them is IBM Cognos Virtual View Manager which basically allows to create a view of the database that is optimized for IBM Cognos 8 consumption. And then you use Framework Manager to model the database view and create a single business view.

Virtual View Manager enhances performance when acquiring heterogeneous data sources. And the IBM Cognos 8 components, including Framework Manager, uses ODBC interface to access a Virtual View Manager data service.

Virtual View Manager accesses data sources through JDBC, Java API, ODBC, OS File Systems or (SO OP). And the last component is the IBM Cognos data adapter for sales force which basically brings the power of Cognos 8 reporting analysis, score carding, dashboards and business event management to the Salesforce CRM solution.

It allows business users to access data in Salesforce and combine it, as we can see later in the—during the demo, with current and historical data from other transactional systems and third party sources.

With that being said, I'd like just to go into the dashboard components that we are providing with the blueprint. And as Sebastian said, we are—we are providing three main dashboard components. It's basically pipeline, revenue and goals and forecasts analysis.

Additional to that we have two more—two more dashboards which allows you to do some additional analysis for gross to date revenue and again across multiple dimensions. And some (inaudible) dashboards to allow you to get a better understanding on what—how updated is the data and also execute every single report object that you'll see later on each dashboard.

With that being said, I'm going to just launch out the pipeline dashboard. And before I go into the pipeline components, for the pipeline and revenue dashboards (they're constantly out). It's been created with the same user feeling with—which basically allows—on the left hand side we'll see all the parameters that we can use to slice and dice the data that is being displayed on the right hand side. And you see that we have a multiple parameter that's available at this time by geography sector and industry channels, products and previous—previous and also we have the number of ranking items that we would like to display if we are looking at (areas) for ranking.

All of these parameters apply to every single object that is displayed on the right hand side. I believe at this time we are looking at pipeline by sales stages. And the goal of this dashboard report is to allow sort of multidimensional view of the organization's pipeline.

The key report is in the top part of the dashboard and it's—there's a summary table which provides a high level view of the most relevant quarters for a sales manager. You see that for the purpose of the blueprint we are focusing and the data was—it's frozen as of 2009 Q3. So we provide Q3 data and we go back one quarter, to provide a previous quarter results, and also the next three quarters, which give us a perspective of longer term outlook.

Additional to these in the—in the bottom part of the screen we have multiple (soft) tabs that provides a different business view of the same numbers that we're looking at the top part. For instance, we are looking at by region, how is—how are the regions contributing to these pipelines.

And, at this time, we—you can see that the regions that we have been—are being displayed it's only Canada and U.S.A. because on the left hand side, in the geography parameter, we have said let's display the data for all the geographies.

And additional to that we have another view, it's by product. And I'm just going to click onto every single tab to get every single report executed. And when we go through it it's already executed.

So now we can go into a (pipeline) by product where we can see how close the products dimension, how the (pipeline) is evolved and how was the (pipeline) for Q2, Q3 and how is the outlook for the next quarters. And—

You know and we see, as I said, with the geography dimension we're looking at the source level of the products dimension, which when I expand the products here you'll see that the first level is basically consumer electronics, entertainment media and so forth.

And if we decide to slice the data and just analyze a specific product line we could do so. And the changes in the parameters will take effect in—effect in all the report objects being displayed in the pipeline dashboard.

You can see on the right hand side there is a pipeline train by products. We can have a better understanding on which product lines are performing better or worse. And let us go into the—by industry and channel which tells us you know how is the pipeline performing for every sector and industry, which one is the sector we should be focusing on, which sector has got the most—which sector's got the sales (inaudible) distributed in such a way that we can get the best advantage out of it.

And on the right hand side we'll see the same data displayed but by channel. So it gives us again the view of which channel is performing better, which channel should we be focusing on to improve it.

On the last tab we can see a short listed view of the top five opportunities across all the parameters selected from the left hand side and also give us a view of OK, according to what I've selected in my parameters, which are the top five campaigns and which are the—who are the top five partners.

And, again, this is basically all interactive. Depending on the values you select on the left hand side the data will be basically—the context will be changed in all the report objects displayed in the pipeline—in the pipeline dashboard.

Let us go into the revenue dashboard. And, again, the concept in the revenue dashboard is exactly the same as in the pipeline dashboard page. You have all the parameters. So we can slice and dice the data on the left hand side and the right hand side we get the report content.

Different to the pipeline dashboard, in the revenue dashboard, we decided to get a different feeling and is that we don't have any soft tabs you know. You know some customers like the (soft tabs); some other customers would like just to have every—have one single view of everything and be able to slice and dice as they—as they wish.

The goal of the revenue dashboard is to allow us for trending and multidimensional analysis of the organizational historical revenue. For revenue we thought that it was best just to display the current quarter, which again for the purpose of the blueprint is 2009 Q3, the previous quarter and then the next quarter, which instead of displaying the revenue itself it might be focusing on how the pipeline is going to be evolving.

And we have two different view of the—of the revenue. On the left hand side we get the bar chart. On the right hand side we get just across that view with all the numbers that provide you know what is the total revenue for each region, what are the number of opportunities that are being closed in each region and what is the average size of the deal.

And additional to that, we have different perspective; you know which are the top five opportunities for closed deals. There's a difference in top five opportunities for revenue and top five opportunities for pipeline.

In the pipeline dashboard page we display top five opportunities no—without considering what is the (inaudible) state that opportunity is at. In the revenue page we display the top five opportunities that have been—have been closed already.

So, and the same apply for campaigns. Campaigns—top five campaigns displayed in the revenue page will take into account that all the opportunities have been closed—all opportunities associated with those campaigns are closed at this time.

And we also display the top five partners. And then we have some additional revenue trends by geography channels and by products; all of them always with the same context displayed exactly the same (inaudible) that are being displayed on the top chart.

And for this one, again, we can just you know say OK, let me analyze just the revenue for consulting partners. I just want to take a look at consulting partners and also just for Canada. And if you—if we were to execute the

dashboard you can see the pipeline's we're executing as well because the context is maintained across the two dashboards.

So pipeline is going to be execute, revenue (inaudible) is going to be executed and then we get a single view of revenue and a single view of pipeline.

Yes, let's wait for a couple. I believe that it's just going to take like 15 to 20 seconds to execute the multiple queries being created for the dashboard. I believe we have three, six, nine queries executed for revenue and around 10 to 11 queries executed for pipeline.

So considering that this is going to take 30 to 45 seconds, and this is going through all the data stored—either stored in Salesforce.com or cache depending on—you know for multiple purposes we say if we have dimensions—and we don't want to be querying the same dimensions that don't change you know every so often in Salesforce.

It's better for us just to cache those dimensions. For that purpose the queries are going to be executed inside Virtual View Manager with a cache data. And for all the queries that require some data to come directly from Salesforce—you know Virtual View Manager will know exactly which objects are associated directly to Salesforce.com tables and will query them and get the data back into a Cognos 8 environment.

Male: Hey (Edson). While this is coming up I wanted to add a comment on—you know both in the pipeline and revenue screens you showed campaigns and partners. And this is an area—you know, this is—this is just to show the simple connection to the campaign objects and the partner objects but really at the end of the day, if we wanted to blow this out and, let's say, make a marketing (MRM) type of blueprint that shows a campaign from—for every dollar I invested what is the result in total pipeline or total revenue, the capability is there.

Right. So really exciting to be able to tap into those campaign objects. And then similarly, the partner function, you know a full PRM reporting—and you know, imagine all the pipeline and revenue reports we have here, but you can view everything by a particular partner or particular partner segment; like you

know my resellers versus my OEM partners versus you know some other type of alliance partner or something.

But just wanted to add that in there because it's really exciting stuff that we didn't want to, you know, fill up this blueprint with but it's definitely a possibility.

(Edson Angoria): Yes. Thank you. And now the report came up. And we can see that now the context has changed. Now we see in the top part of it the regions are updated by just the Canada regions. And also the context are—the filtering option allow us to just take a look at this time at just the consulting partner sector that have been selected previously.

And so a very interactive way to select the parameters across pipeline and revenue allows you to go back and forth across the two dashboards and analyze the data in a better way than just, you know, having all the spreadsheet with all the numbers, crunching them and just you know once they (pull) earliest view.

And not only that, you can—you can see that I have a—this time in revenue we have two, three, four—actually six, seven different views of the data, and in pipeline we have our own—our own seven to eight. So we were thinking about 15 different views of the same data. I think for certain, you know, this is going to give you a very good insight into the business.

Let us go into the forecast—goals and forecast analysis page. And there's a little change into the approach we use for the goals forecast analysis and the goals date and forecast analysis pages. The idea was to allow no more parameters to be set but instead of that allow the user to start using the drill up and drill down capabilities which basically tell us that we are providing, with the content and the blueprint, not only the relational business model but also the dimensional business model.

And with that—with the dimensional business model we get the capability of just you know clicking to one item and allow us to go into—drill down into U.S.A. for instance which I click onto right now.

And so the goal of the forecast dashboard is to highlight the comparison between forecast data from Salesforce.com and goals data coming from our external data source. For the purpose of a blueprint we use a simple SQL server database but it could have been anything that we have storing any database or any transactional system.

The key report of this page is in the very—in the very top with just a main table that provides a comparison of a different forecast metrics to the quarterly goal.

The quarterly goal, at this time, is just in the column called goals. And then we see the closer date which basically (inaudible) up to date—you know what is it, the revenue up to date and we can say OK, that payment for this specific region, which is central, then we have—OK, it's green, we have—obviously there is some condition of formatting to let us be solely—to let us see where the color coding—you know in which region we should be focusing to improve the business or which one is not performing as good as we expect it to be performing.

We also have this (media) forecast which is you know every sales agent or person will be submitting what they think will be basic—will be closing and they have a probability associated to it.

And we also have the weight—the weighted forecast which is basically that is allowing us to display in a simple chart the different calculations based on different probabilities and allow us to get a different perspective to their submitted forecast is what the sales agent thinks—think about I'm going to be a—I'm going to be—I'm going to be closing this amount of revenue for—this is my forecast.

And then the weighted forecast could be just a corporate view of—you know, based on the historical performance we can say that across all the sales stages the probability of closing every single deal is this specific amount.

Again, a great feature of this page is the probability to drill down and drill up, and not only that but be able to see, for every specific region, how is

performing the next level. Additional to that, we see this small list here that give us a great insight into which are the worst cities—were the worst performing cities and which are the best performing cities.

And so they can be updated quickly. And then also we have some sort of a metrics view on the left hand side that you know it set up the goal and give us some sort of range and total so you can have a better idea into where is this specific state or city, depending on the level you are at in the dimension, where is this specific item performing at? Is it, you know, above the goal? Is it between the goal? Is it performing well?

And so we have two different clues here; one in the left hand side we will have the bar chart and the cross tab we have this color coding to allow us to see what is the attainment for each of the—each of the forecasts.

And then in the bottom part we can see the contribution. Let us go just one level up. In the bottom chart we can see how is the contribution for the next level into each of the geographic regions. We see OK, for the goals we say—in the U.S.A goals we have a central region, it's accounting for 60 percent of the goals. However, in the close to date central region it's only 26 percent.

So what is that telling us? Is it—is something happening in the central region that we should be focusing on? So, again, you know, give us some key points that we need to focus on for the analysis; that is a forecast analysis page.

And then additional to that, we have a forecast analysis based on—with additional capability that can focus on each of the products. And once we get it up we'll see—we'll see two different ways to do the forecast analysis; either by seeing the bar charts or by just selecting the cross tab and looking at the actual numbers.

And the key factor of this close to date and forecast analysis page is the ability that we have to start drilling down in specific dimension and keep the context across all the report objects displayed in the page.

So to better explain these, for instance I can go and say let us see for U.S.A—let us go into U.S.A. and we know the close to date is 10,890—yes, it's close

to 10,890. Once we—the (inaudible) comes up we'll see that all the report context is being changed to U.S.A. and now we see forecasts by products but for only the U.S.A.—only for the U.S.A. then we see the marketing campaigns only for U.S.A.; and, again, sector geographic channels only for the previously selected item.

And so—and then we can say OK, now let us go into our home office. So now we are just focusing to U.S.A. and home office. So allows us to do a slice—what I call aggregated, a slicing and dicing of the report objects. And I'm pretty sure this could you know provide some insight into the person—or the user doing the analysis for the forecast.

And the good thing is that we can go even to the single SPU—single items, like, I don't know, DVD, CDs and see how the DVDs or CDs are performing. What is the forecast for CDs and DVDs across all the business dimensions?

And just to highlight the key capability of this page is the ability to the user—of the users to select from many filtering options and apply them to all the report objects in the page and, you know, have two different views by cross tab or just by the bar chart.

The last dashboard page we have available in the content is a three part dashboard page and it provides us—the first one will provide us ability to – instead of going into the (inaudible) dashboard I just want to go and execute one simple report object.

So you know we have all the report objects to navigate, and so we can execute them because you know obviously depending on the context set in the parameters we're seeing in the top part of the report.

We also have live versus cached which basically is some sort of a way to show—to show what is the difference between executing a report that is live data versus cache data. I'm not going to execute it because at this time it'll take some time to execute the live data depending on the selections.

And the last page will be (SSDC) data load status which given that we know or we determine a certain time that it was best for us to cache data for a

specific entities, as I mentioned before, for dimensions you know they don't change that you know every day or every so often. So we can say let us set up a strategy to cache a dimension.

Every week I'm just going to go after Salesforce and say hey, give me all the updates for the accounts, give me all the updates for the partners. So we can set up that Virtual View Manager, we can somehow schedule that update for the cache data and then Virtual View Manager will provide us—provide us with what I call the data load status.

You know, at this time, the data up to date are going to be very high because again this blueprint was released almost two month and a half ago and at that time we did a refresh of the data. But the key point is, the key factor here that we can see at a specific time, how are my business facts right now cached? Are they up to date or should I just go and execute them?

And the same for the business I mentioned. How are they—you know are my accounts up to date or you know should I just create different strategies for different business dimensions and different strategies for different business facts.

For instance, my current quarter data should be updated every other two hours or so. But my previous quarter I don't need to be updating that. I just you know set up the—kind of based on the data (inaudible) or the last time this data is going to be updated is every, you know, three months or so.

Anyhow, that's a key factor if you do dashboards. It gives you an insight into how the data is being managed somehow within Virtual View Manager, provides you a report navigation and gives you some examples between live and cache data reporting.

And that basically concludes the demonstration. I'm going to just return the floor to (Sebastian) for some other remarks about integration with Salesforce.com.

(Sebastian Rivera): Thanks (Edson). So yes, now I want to share with you some of the other exciting integration points that a lot of our customers are interested in.

So the first of these is a screen shot of the Cognos portal being accessed from—within the Salesforce.com navigation. Note, around the top the familiar interface and then the additional Cognos tab there at the top.

The beauty here is that the Cognos—the customer has already deployed somewhere else internally. It can be integrated and exposed within their Salesforce.com navigation. Now, as I show you these screenshots, the same concept applies to all the blueprint content we just viewed.

So in case, you know, somebody wants to use ad hoc analysis studio and they want to make this available within the Salesforce navigation as well, to—you know just as easy, add a tab and integrate the analysis studio.

You have the full complex multidimensional analysis that you know we've had (review) of without even logging off the Salesforce navigation. Now the really cool integration point and where it applies to a lot of the blueprint content is the ability to incorporate Cognos report objects; so take a table, a chart, any single object or even the multi tab report and then go in and embed that into a Salesforce.com object.

We recently had a great presentation from one of our customers at the very last dream force event where they were doing invoicing history and invoicing data coming out of one of their backend applications and then taking Cognos and rendering that information in the Salesforce account page to provide that information to their sales reps while they were reviewing their account history, right.

Similarly, if a customer wanted to put certain call center volume reports on there or support status or assets owned for cross selling purposes and so on, accounts receivable status to know if a customer's paid up before they put a call into them, all that type of data you can report on with the Cognos and therefore you can then take that report object and put it right into the Salesforce navigation.

And then lastly, you know, you probably have a question about well how does security integration happen. And we have a few different methods to address

security. You know the most—the most comprehensive is single sign on, which I mentioned our customer, Aon, is using.

So that concludes our presentation. Just to summarize; you know IBM Cognos extends the value of the Salesforce.com both to help customers get more out of their usage and also to insure that the analytics they have with out of the box are complimented with Cognos extended analytics.

We talked about sales performance analytics. This again is that pain of too much time spent on crunching the numbers rather than analyzing data because the real need is to understand the market drivers so that you can more accurately plan and then once you're executing your sales plan to make mid course corrections.

And the solution we have to support this is the sales performance management blueprint that has a prebuilt IBM Cognos model, based on the Salesforce.com tables, and then ability to extend that model to incorporate additional data sources and then the dashboard with all the content on there for the key sales metrics for pipeline revenue and forecasts, and then, lastly, the ability to integrate all that great content into the Salesforce.com navigation.

So I think now we move into the Q and A section. And, Tim, I will hand it back to you.

Tim O'Brien: Super, super. Thanks, (Sebastian). Let's see, we've got about five minutes and there's a few questions here. The first one I see is so this blueprint can be deployed to shortcut report and metadata development within Cognos as a starting position for any Cognos BI customer. And then in parenthesis "assume not including non SF.com sources.

Does that make sense guys?

(Edson Angoria): Yes, it does. It's they are looking toward a similar solution to (days) but not all Salesforce.com connectivity. And the answer is yes. The answer is yes, it'll need to be customized for data specific data source.

But you know all the—given that we are using Virtual View Manager is we can find a way to match all the item or entities created in Virtual View Manager with that other transactional system, the blueprint should work just exactly the same way.

Tim O'Brien: OK. Another question; in the blueprint are there capabilities that address the concept of, in quotes, "as of", end quote, a certain date. SF.com is real time, but for the purposes of reporting historical change, this notion is desirable.

An example would be as of 10 days ago we had a revenue gap of X million, as of five days ago we had an X to Y million change. Make sense?

(Sebastian Rivera): Yes. So I think, you know, this is—this is something definitely applicable. We didn't get to that in the scope of the blueprint but it's definitely doable and you know good question but it's just not in the scope of the blueprint right now.

Tim O'Brien: OK. And how are the data sources managed? There's obviously data stored in a local data warehouse or ODS as well at Salesforce.com. Does the framework manager—framework model include a data source that hits Salesforce.com and real time?

(Sebastian Rivera): Yes, and…

(Edson Angoria): Yes. Go ahead Sebastian.

(Sebastian Rivera): Go ahead.

(Edson Angoria): Yes, it does. You know as a matter of fact it includes both.

Tim O'Brien: Yes.

(Edson Angoria): Access direct—direct access, live access to Salesforce and also access to cache data from Salesforce. So you know both options are included and it's up to the customer to decide which option will be used within the blueprint.

Tim O'Brien: OK, great. How does Virtual View Manager studio fall into the Cognos BI product mix? In other words, when Framework Manager executes SQL

against a data source, what is it hitting, the core Salesforce database or a standalone view of the data created?

(Edson Angoria): Yes. There are multiple approaches to this. The approach we follow with the blueprint is to heed only one source which is all the exposed data from Virtual View Manager. So anything that comes out of framework manager will go and be processed by Virtual View Manager.

If there is anything that needs to be sent to third party sources, Virtual View Manager will take care of it. Send it, get the data and get it joined together and get it back into the (inaudible) boss to render the report.

Tim O'Brien: OK. All right, and what Cognos software do we need to own in order to use the blueprint?

(Sebastian Rivera): Well that's Cognos 8 BI. This blueprint was developed specifically with version 8.4. Connectivity to Salesforce is needed from 8.2 on. It's just a particular blueprint was developed on 8.4.

And just, I saw another question specific to this which is do I need to buy an additional connector or something?

Tim O'Brien: Right.

(Sebastian Rivera): No. The functionality is in the application. If you buy standard Cognos 8.4 it comes shipped with that. You just need to install the Virtual View Manager function.

Tim O'Brien: OK. And is this something that organizations can implement on their own or do they need professional services, consulting services to deploy this? How easy is it to deploy?

(Sebastian Rivera): Sure. Let's say they have Cognos running already in house. (Edson) has developed a set of step by step instructions to get this up and running. Now naturally the model of Salesforce that they might have might be customized to some extent, right.

We modeled this based on out of the box Salesforce.com which is not necessarily what folks out there have. So there's some customizations they've done to their Salesforce model that they'll need to go into this model and match.

And so there's a little bit of an architecture function. So if they have a BI group that supports that internally, it shouldn't be a problem. If they don't, you know we have a services organization and we have lots of partners that are really ready and willing to help get this up and running.

Tim O'Brien: And last question here. Are you considering doing a blueprint for any other CRM functions?

(Sebastian Rivera): Yes. Right now we're in the—in the planning stages for a blueprint for a Salesforce.com call center. And if there are, you know, any suggestions from folks on this call of other things they'd like to see, anything from marketing or PRN or any other function, we'd love to hear from them.

You see my email address is on the –on the slide. And glad to hear from you and take any suggestions.

Tim O'Brien: Excellent, excellent. Thanks, Sebastian; thanks you—thank you, (Edson) for your great presentations today. Thank you, everyone, for joining. As I mentioned earlier, to find out about other webcasts the Innovation Center's delivering, as well as live events and access best practices, and other thought leadership, please go to IBM dot com forward slash Cognos forward slash Innovation dash Center and you'll find all information about different webcasts, live events and such.

Thanks again for everyone. Enjoy the rest of your day.

(Sebastian Rivera): Thank you. Bye.

Operator: This concludes today's presentation. You may now disconnect.

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