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Today's webinar

Aligning Marketing and Sales: Making Your Business Intelligence (BI) Investment Pay Out

Joe Bellini, CEO of Symphony Marketing Solutions, and Peter Bendor-Samuel, CEO of Everest, will explore the barriers to empowering sales and marketing and introduce a unique solution for leveraging KPO as a service to overcome these challenges. They will also highlight how an integrated approach to BI can improve sales, reduce the cost of insight and innovation, and unlock the return on BI investments.

Presented by



About Outsourcing Center

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- Database of over 81,000 opt-in subscribers
- Relevant media including editorials, research, whitepapers, and the annual Outsourcing Excellence Awards

For more information, contact Peter Bowes at pbowes@everestgrp.com.

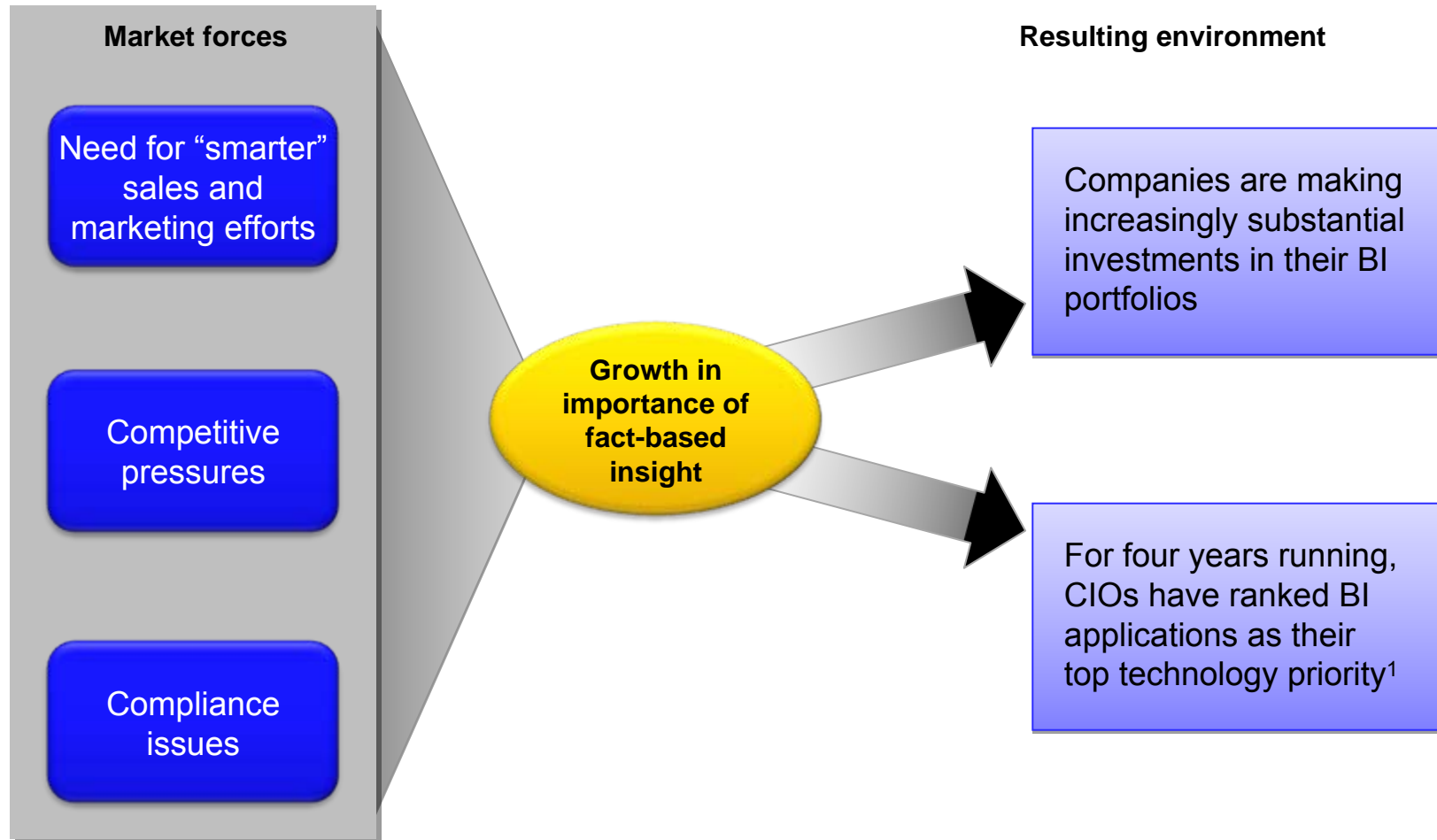


Aligning Marketing and Sales Making Your Business Intelligence (BI) Investment Pay Out

Webinar

December 2009

Market forces have deepened companies' reliance on fact-based insight, leading many organizations to invest substantial resources in BI



1 Gartner worldwide survey of CIOs (2006-2009)

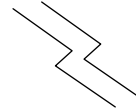
However, most executives are dissatisfied with the returns they receive from their BI investments, with several key factors driving the disconnect

Investment in BI

For four years running, CIOs have ranked BI applications as their top technology priority¹

Perceived return from BI

74% of executives are dissatisfied with their BI results²



Rapidly evolving BI tools

- Growth and complexity of enterprise data environments outpaces internal IT and decision-support capabilities

Overwhelming data volumes

- Enterprises have to deal with a cumbersome volume of data as a result of the increasing adoption of analytic tools and processes

Divergent agendas between marketing and sales

- Siloed needs, budgets, and expectations limit the value potential of the data at hand

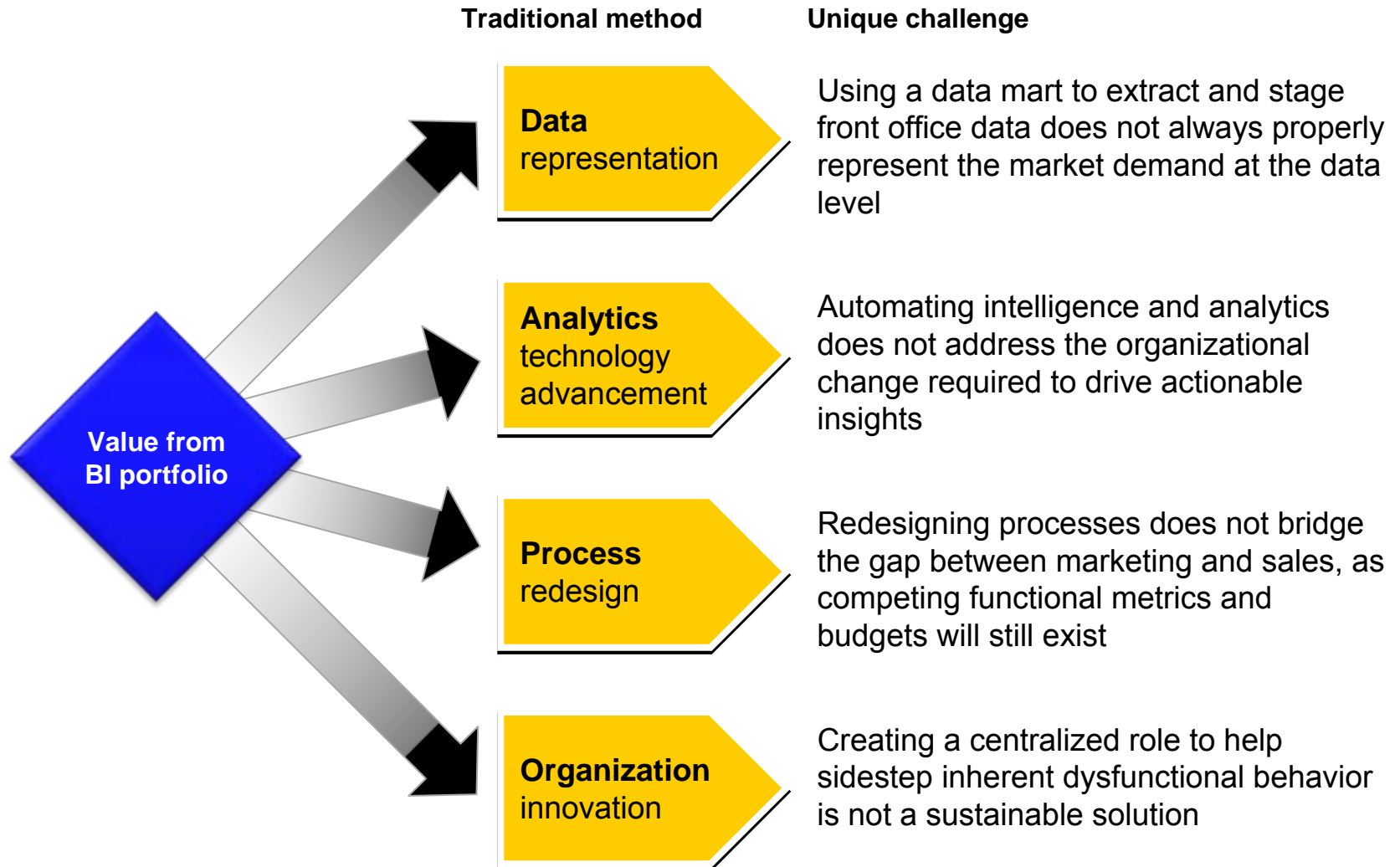
Missing organizational change

- Organizational change needed to gain value from data is often overlooked by executives

1 Gartner worldwide survey of CIOs (2006-2009)

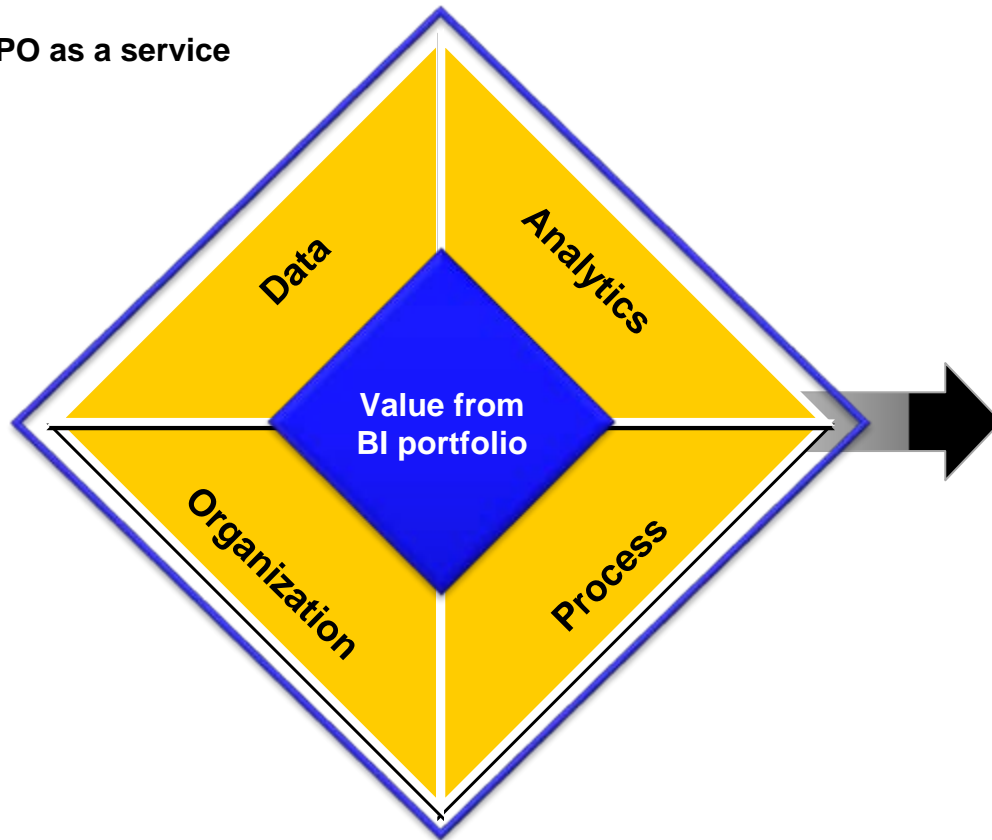
2 Bettermanagement.com

In attempt to resolve this issue, companies often turn to one of four traditional methods for capturing greater value from BI, but each entails unique challenges



An effective way to overcome these challenges is adopting an integrated approach – linking data, analytics, process, and organization through KPO as a service

KPO as a service



Business outcomes

Improved sales

Increased insight and innovation

Reduced opex

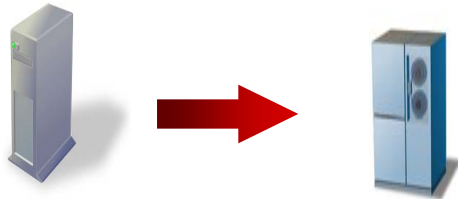
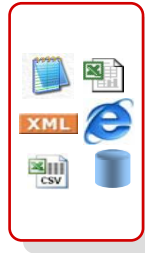


Key Benefits of Knowledge Process Outsourcing (KPO)

- **Consolidates** dispersed analytic and data management functions to a central team without disruption to current organizations
- Relieves business owners of **repetitive** data and reporting tasks
- Establishes **clear accountability** for analytic processes between IT, business units and the analytic shared services team
- Provides access to a **larger talent pool** of skilled analytic and data management resources
- Enables an enterprise to **economically scale** with offshore analytic and data management resources at dramatically **lower cost**
- Enables cross-purposing of data for better **integrated analytics** across sales, marketing and customer operations

Data Management & BI input data requires advanced data modeling and architecture

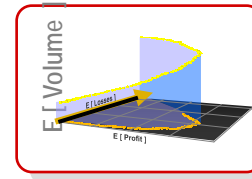
3rd party & unstructured



Data Visualization



Data Mining & Reporting



Analytics

ERP/CRM

Data Warehouse

BI Platform

BI Platform Outputs



Minimal

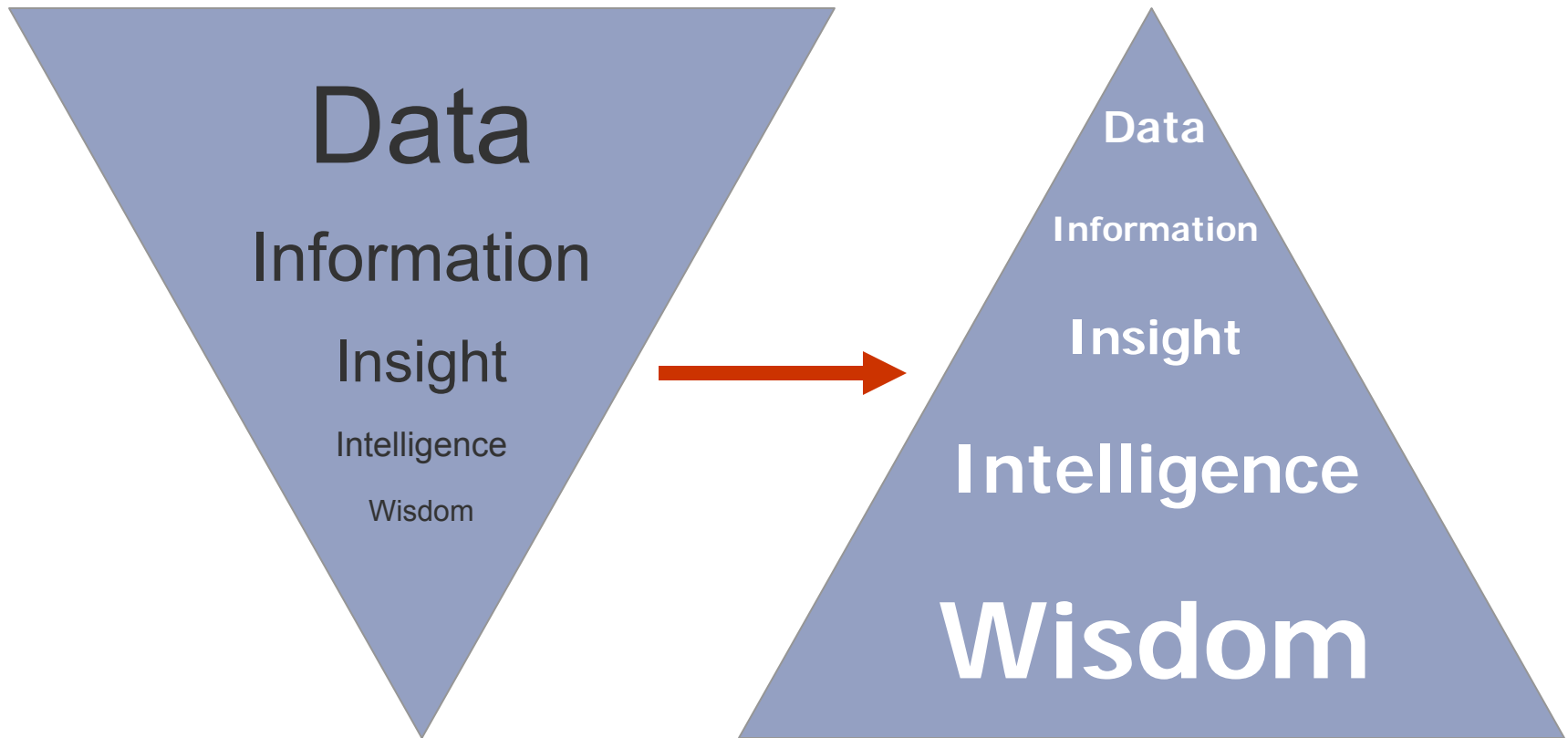


Moderate



Moderate

Erroneous Estimates for Data Management Man Hours



**Data Rich...
...Actionability Poor**

**Modeling adds value only if it
provides client-actionable
recommendations**

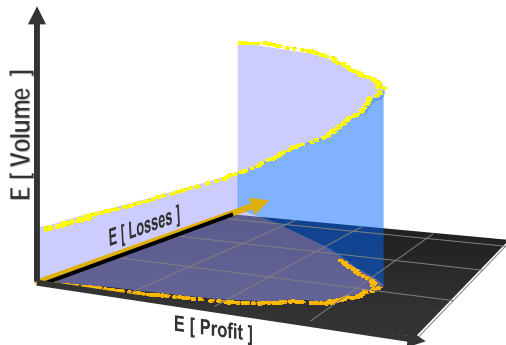
The ability to manage, integrate and analyze both customer and market data leads directly to deeper insights and more effective decision making.

Customer Insight Solutions

- Customer Behavioral Analysis & Profiling
- Loyalty & Churn Modeling
- Cross-sell/up-sell & Propensity Modeling
- Campaign Design & Optimization
- Response Modeling
- Profitability & Lifetime Value Modeling
- Customer Risk Modeling
- Customer Segmentation

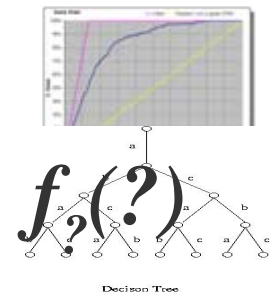
Market Insight Solutions

- Pricing & Revenue Optimization
- Marketing Mix Modeling
- Market Structure
- Portfolio Analysis
- Price Promo Effectiveness
- Space Management
- Market Structure Analysis
- Demand & Sales Forecasting



Macro-Economic Solutions

- Econometric Causality Testing & Modeling
- Time Series & Structural Forecasting
- Macro-Economic Policy Modeling



Decision Tree

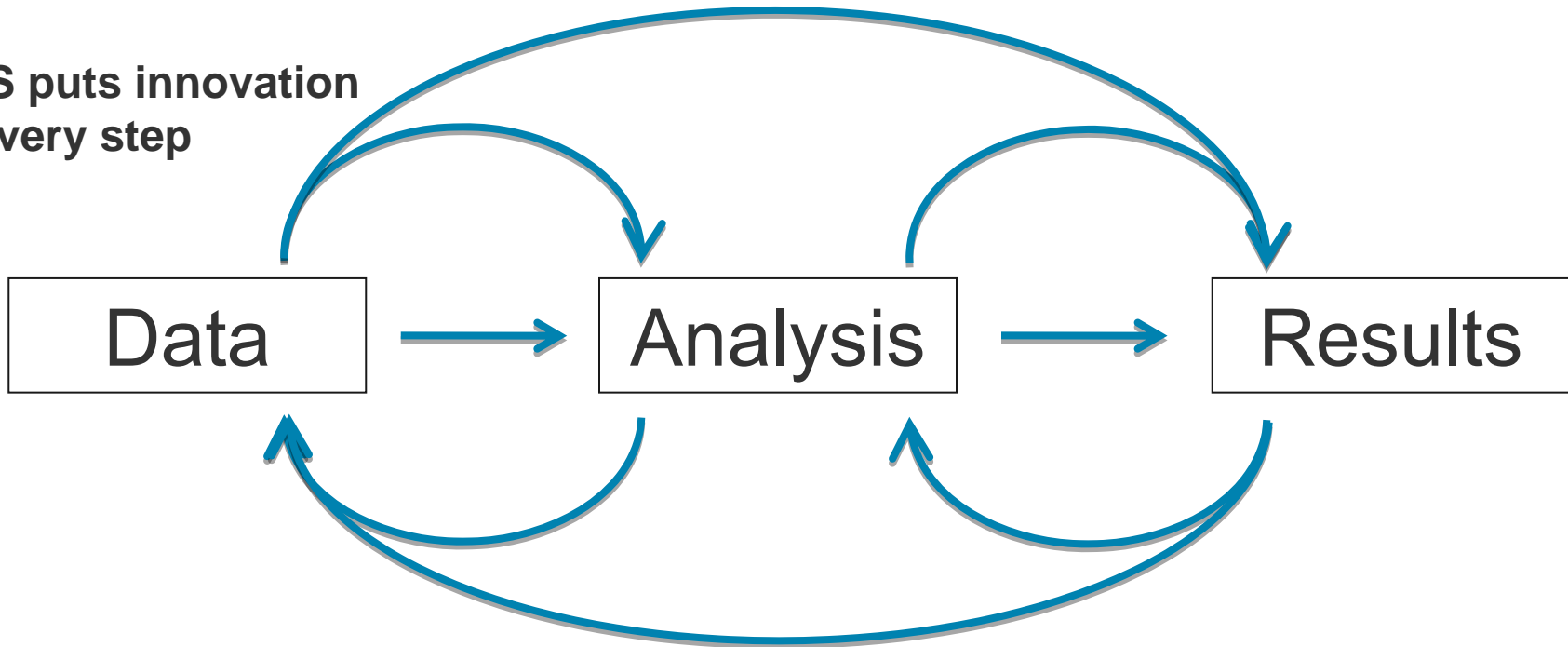
- **Build & Decay Functions**
 - MOST models use **AdStock** (decay only function), partial lags, or no lags
- **Simultaneous Threshold & Diminishing Returns Functions**
 - MOST models use **Natural Log** (diminishing returns functions) only
- **Time Varying Coefficients**
 - MOST models use **time-constant** parameters
- **Strategic Aggregation**
 - MOST models **aggregate** by outlet, quintile, marketing strategy, or not at all
- **Omitted Variable Functions**
 - MOST models use **Trends, Seasonality, and Intercepts** to reflect excluded variables
- **Significant Digits Discrepancy Treatment**
 - MOST models **do nothing** about it.

We put innovation in every step for every client and every prospect

Cookie cutter throughout the process



SMS puts innovation in every step



Definition of Insanity: Doing the same thing and expecting different results

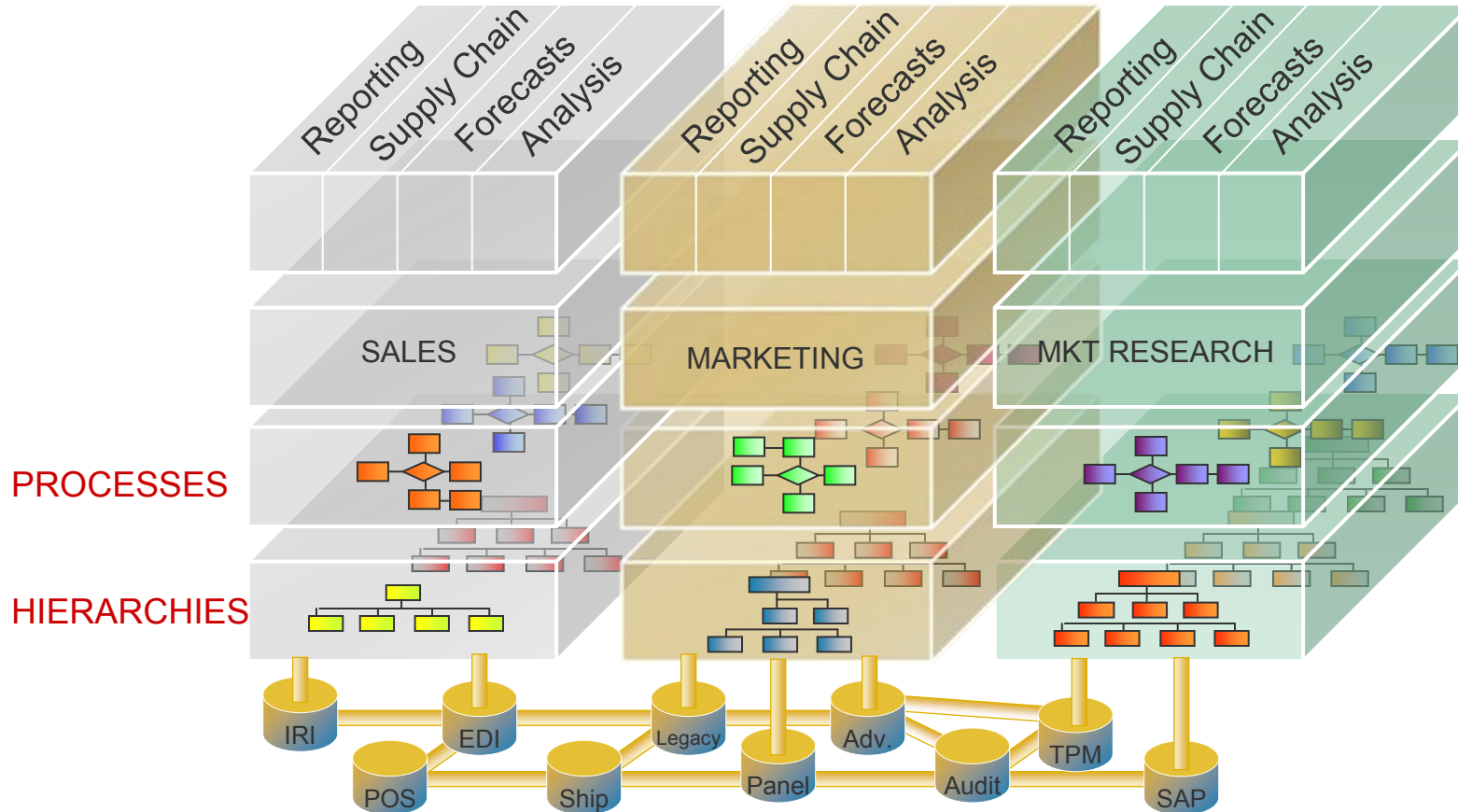
Create a culture for Innovation leveraging Automation initiatives

- Drive efficiency, accuracy and timeliness through Automation
- Be recognized as the pioneers in innovation and Automated solutions
- Leverage technology to find innovative solutions
- Enhance value for all stakeholders



Enhance Value through Accuracy, Efficiency, Productivity and Timeliness

Organizational barriers are preventing an integrated approach



- The Problem:**
- Every group accesses the same data in a different manner
 - Each group combines the data in a unique fashion
 - Each group tries to represent the data in unique hierarchies
 - Results in a slow, painful, and inaccurate processes



Proven and tested migration process: speed with minimum risk

- **Rapid Ramp Protocol (RRP)** - Best practice approach developed specifically for the marketing and information services market .The RRP methodology helped to single Symphony from the herd and contributed to our leadership ranking in the Black Book of Outsourcing 2007
- **Six sigma enabled** – Drive efficiency, and minimize risk through the application of standardized tools and templates, tollgates, monitoring and measuring, continuous improvement discipline
- **Customizable** – Comprehensive framework allows for easy adaptation to varied business domains, geographies, and unique processes requirements
- **Modular** – Component driven model enables subject matter application, and speed of migration
- **Proven** – Methodology is proven in the establishment of the 1,150 resource Symphony global offshore centre, as well as with other information intermediaries



Organizations want a complete view of their customer & business so that investment decision can be fact based

“We need to find the solution that would allow us faster and full access to all the data that we have in the globe that...

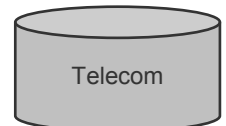
- Harmonizes across categories, hierarchies, financial reporting structure and geography,
- That has the flexibility to handle disparate data sources and formats,
- Can scale across multiple dimensions,
- Delivers visual solutions integrated at the highest levels and lowest levels,
- And the capability to overcome the typical challenges of international data mapping”

Source, Reckitt & Benckiser

SMS KPO Platform – Evolved through multiple successful KPO programs



Ad Hoc Front Office Decision Making and Tribal Processes



Process and Organizational Innovation



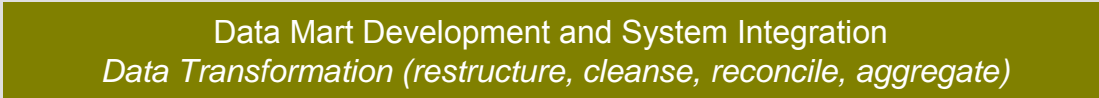
Analytical Competitor →



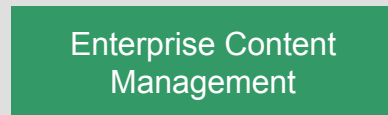
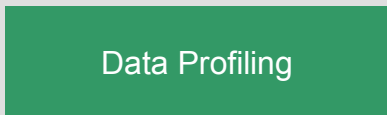
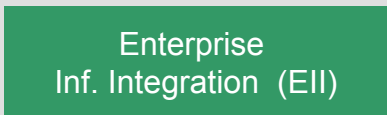
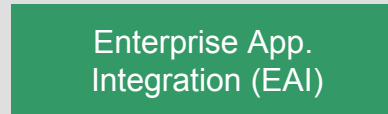
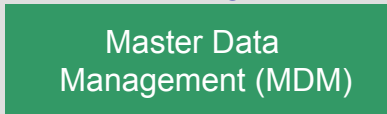
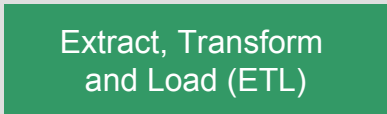
Business Intelligence Analytics, Tools, and Applications

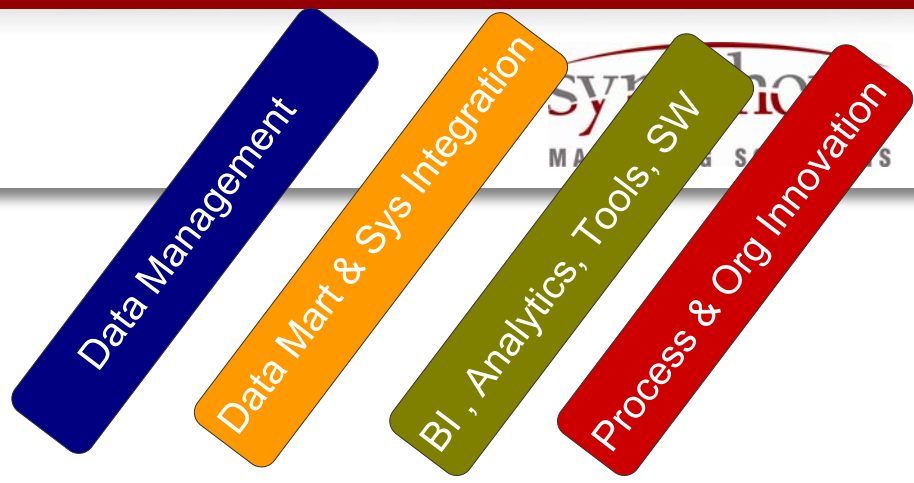


Data Mart and Systems Integration



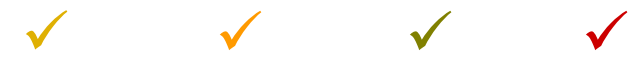
Data Management





SMS Solutions Experience

Case #1: CPG/Retail Information Services Company:
Global Research and Business Intelligence Delivery
Across Multiple Countries and Multiple Data Sources



Case #2: Healthcare Information Services Company:
Business Intelligence & Reporting Across Multiple
Categories in Multiple Countries



Case #3: Consumer Packaged Goods Company:
Continuous Market & Sales Forecasting Providing a
Real Time BI Capability Across Multiple Brands



Case #4: Pharmaceutical Company: Market Share
Analytics and Insights Across All Brands Enabled
Though a Continuous Marketing Database



Case #5: Consumer Retail Company: Shopper
Attitudinal Analytics and Behavior Profiles



Case #6: Insurance Company: Multidimensional
Targeting Model Driving Insights Across Marketplace
Characteristics and Preferences



Case Study #1 - CPG/Retail Information Services Company: Global Research and Business Intelligence Delivery Across Multiple Countries and Multiple Data Sources

- Accurate Data
- Timely Data
- Client-specific Data Views
- Client Ready Presentations
- Business Insights



Process and Organizational Innovation

Six Sigma training for all resources

Established metrics / dashboards for all areas

Established Business Quality Council

Six Sigma rigor for all processes

Business Intelligence Analytics, Tools, and Applications

Business Analysis, Reporting & Data Visualization



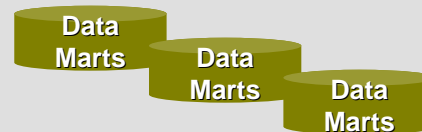
Analytic Applications



Automated and Custom Reports & Dashboards; Advanced Behavioral Insights

Data Mart and Systems Integration

Geographic and Customer-specific Data Marts



Standard and Custom Data Marts

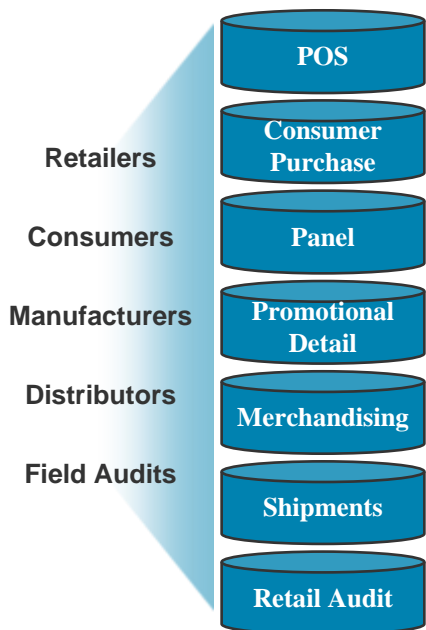
Data Management

Data Acquisition
Data Loading, Investigation, Movement

Data Transformation
Item Categorization & Placement



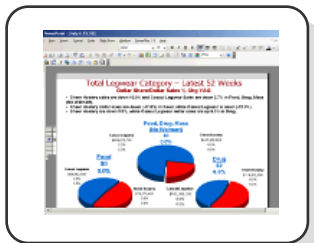
Fully Coded Products



Case Study #1: Results: 25% increase in revenues, 45% reduction in cost



Over 140 Six Sigma Initiated Quality Programs



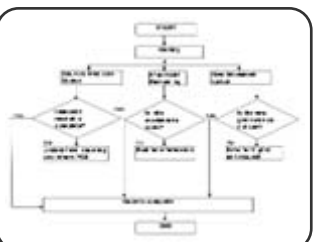
5,000 standard and 7,000 custom client reports delivered monthly

750 advanced analytic modeling projects completed over last 12 months



5,500 customer databases updated weekly, delivered monthly

160 client portals developed & maintained over last 12 months



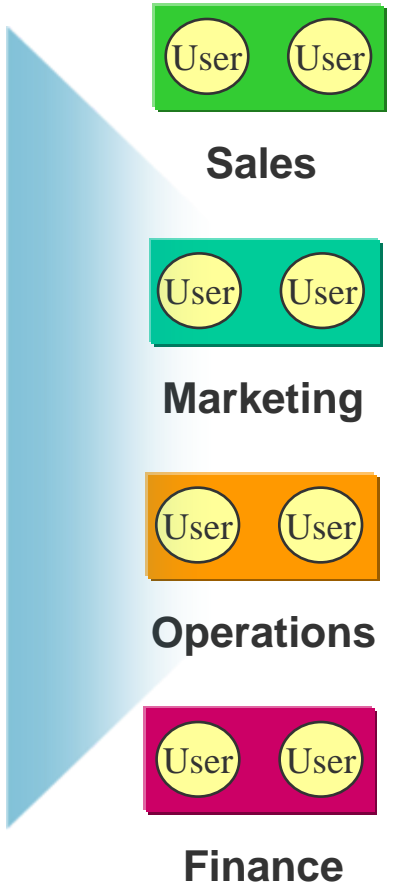
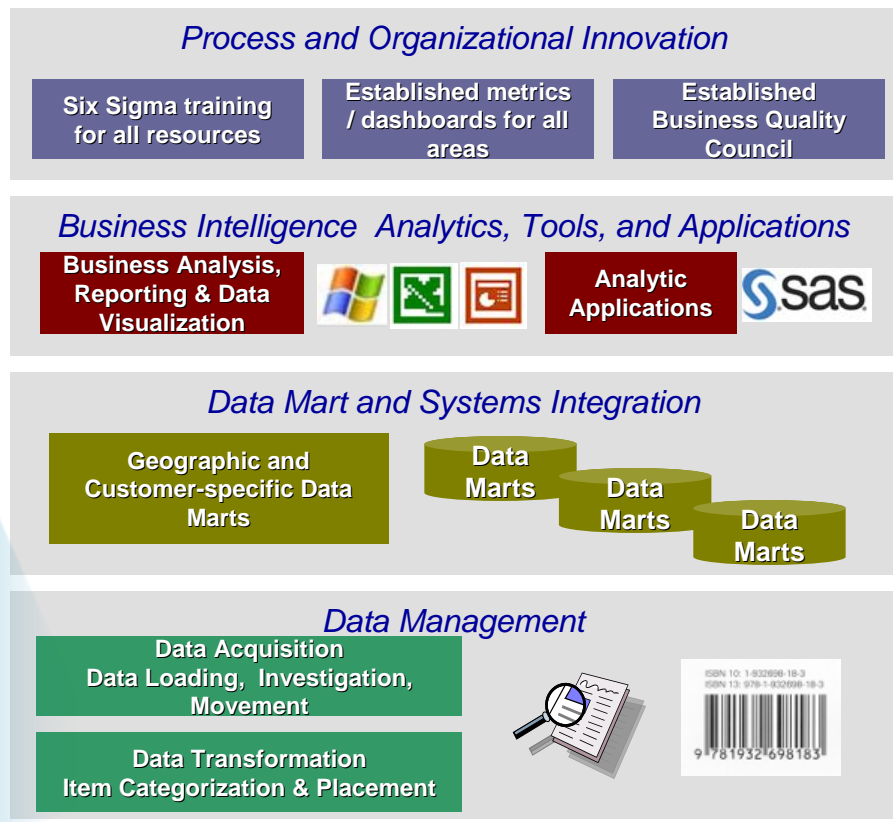
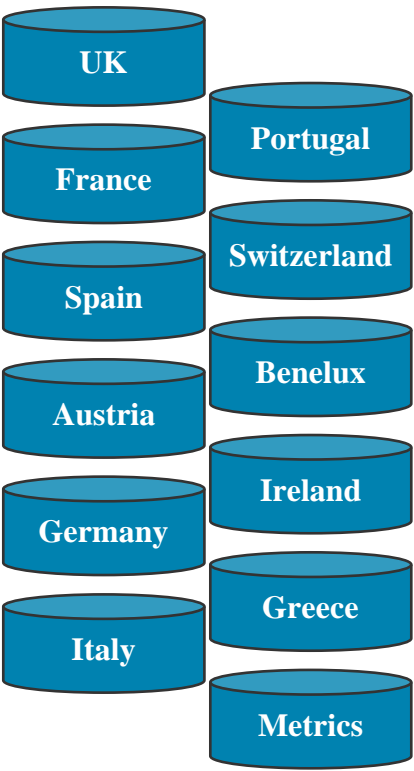
1.2 billion retail transactions (UPC-Store) integrated weekly

3,000 product categories updated and 16,000 items coded weekly

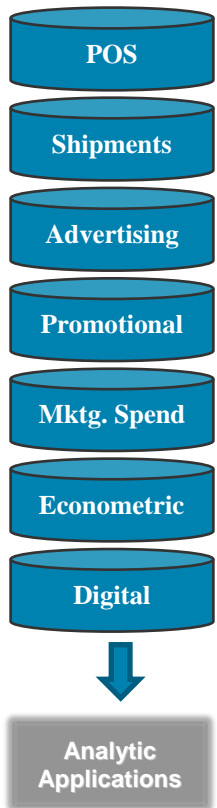
- **Global Production Costs cut by more than 45%**
- **Cycle times reduced from 4 weeks to 3 days**
- **~25% top line increase from new analytic products**

Case Study #2 - Healthcare Information Services Company: Business Intelligence & Reporting Across Multiple Categories in Multiple Countries

...Leveraged across 7 product groups and multiple departments



Case Study #3: Consumer Packaged Goods Company: Continuous Market & Sales Forecasting Providing a Real Time BI Capability Across Multiple Brands



Process and Organizational Innovation

Forecast Measurement Alignment – “One” vs. multiple estimates
Complementary On and Off-Shore teams – Continuous Analytic process

Just in Time analytics
Fact based decisions

Business Intelligence Analytics, Tools, and Applications

Analytic application alignment
Consumption based analytics
Real –time decomposition of prior period findings

**Scalable across the
business**
Continuous diagnostics

Data Mart and Systems Integration

Dynamic, Integrated Database, multiple external
and internal sources

**Directly linked
to SAP and
customer data**

Data Management

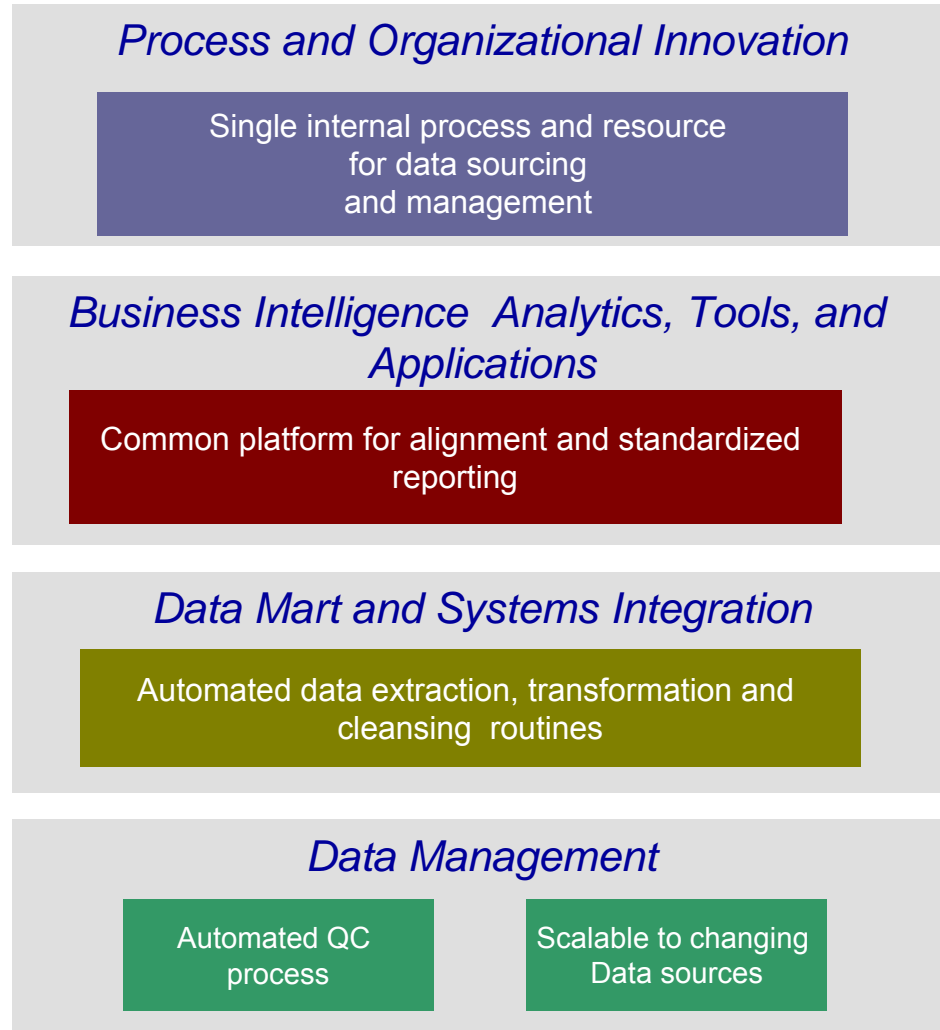
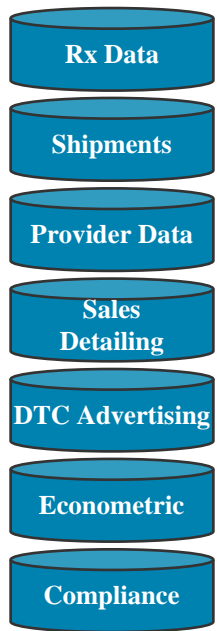
Alignment of disparate
Data sources

Dynamic Data
Mapping

Data Refreshed based
on Business needs

Expanded Coverage
**Single Source of
“Truth”**

Case Study #4 - Pharmaceutical Company: Market Share Analytics and Insights Across All Brands Enabled Through a Continuous Marketing Database



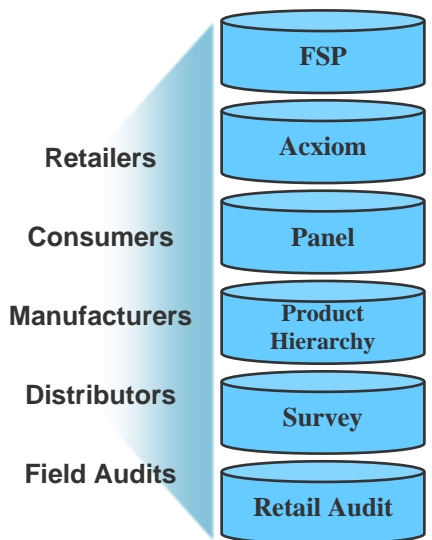
Eliminated Multiple Constituencies

Single Source for advanced analytic insight

Automated vs manual process

Combined on and off shore team

Case Study #5 - Consumer Retail Company: Shopper Attitudinal Analytics and Behavior Profiles



Trip Type and Trip Mission

| | | |
|---------------------------------------|---|---|
| Define relevant TT / TM for retailers | Established profile reports for retailers | Build strategies to drive more value from consumers |
|---------------------------------------|---|---|

Who, Why and Where do consumers shop

Business Intelligence Analytics, Tools, and Applications

| | | | |
|---|--|-----------------------|--|
| Panel reports, Reporting & Data Visualization | | Analytic Applications | |
|---|--|-----------------------|--|

Automated and Custom Reports & Dashboards

Survey data analysis

| | | | |
|---|--------|---------|-------------|
| Geographic and Customer-specific Data Marts | Survey | Reviews | Third-Party |
|---|--------|---------|-------------|

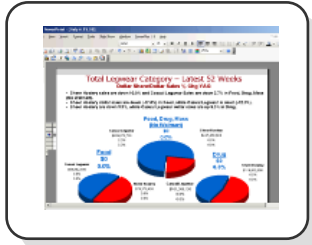
Profile Reporting

Attitudinal Analysis

| | |
|--|---|
| Factor analysis on survey questions | Correspondence Analysis of Shopper Occasion and Attitudes |
| Contingency Table of Shopper Occasion and # Responders | Provide strategic recommendations for boosting growth |

Better Targeting strategy based on consumer attitude

Case Study #5: Results: \$500MM in new revenues



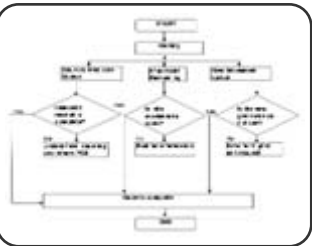
**Profile reports on
8,000 responders
delivered**

**5-8 major shopper
occasions defined for
major retailers**



**5,000 new responders
to be scored on
quarterly basis**

**7-9 major consumer
attitudes defined for
shoppers**



**11.2 billion retail
transactions (UPC-
Store) scored**

**300-500 product
categories updated
and 16,000 items used
from the FSP**

- Helped retailers serve their customers better
- Cycle times for quarterly analysis reduced from 8 weeks to 3 weeks
- Helped drive \$500MM in new revenue

Case Study #6 - Insurance Company: Multidimensional Targeting Model Driving Insights by Analyzing Marketplace Characteristics and Preferences

