

# Accessible Analytics Improve Operational Performance

Give Call Centers, Human Resources and Sales a 360-Degree View

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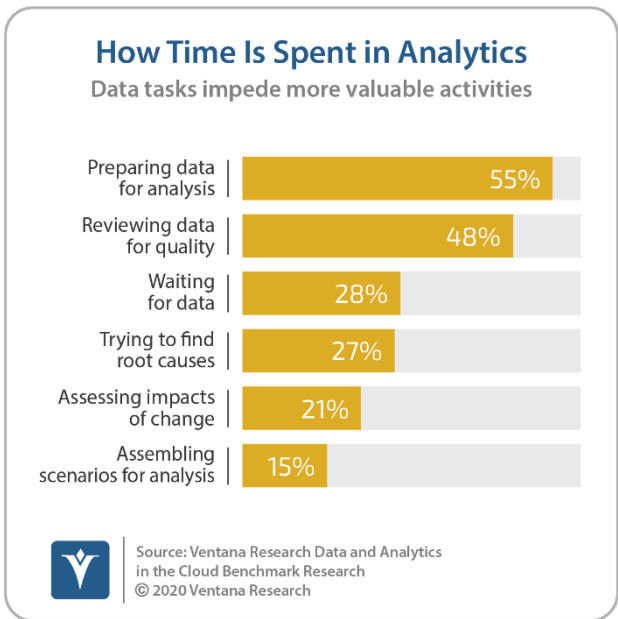


# Line-of-Business Personnel Need Information at Their Fingertips

For decades, organizations have been trying to make information and analysis available to the lines of business to improve their operations. Our research shows that analytics generate value for organizations in multiple ways, including by helping them gain a competitive advantage, increasing sales, lowering costs and improving customer experience. But analytics and business intelligence (BI) tools have traditionally been separated from operational applications making it difficult for organizations to take full advantage of the data they collect. Analytical systems were initially designed to be separate because of concerns that analytical workloads would interfere with core business applications. And while these limitations no longer exist or have changed significantly, the legacy of separate systems for analytics and operations persists.

Analytics tools that reside separately from operational applications are challenging for line-of-business personnel. When employees need to switch contexts from operational systems to analytical systems, they lose productivity and are less effective. Switching contexts takes time which may not be available, and it interrupts an employee's train of thought. Separate systems also typically require significant effort to prepare data for analysis, making it the most reported time-consuming task in the analytic process according to our research. Operational application vendors sometimes incorporate analytics, but often the analyses line-of-business personnel need to perform require more data than is available in any single application.

A more effective solution is to deliver robust cross domain analytics in the context of line-of-business functions. Today, most job functions are supported by software applications, either off the shelf or custom-built. For example, most organizations use specific applications for sales, HR, call centers and several other functions. These applications have been made more accessible, with many offering mobile versions of the applications. This is where analytics capabilities belong: in the hands of the line-of-business users, and accessible while doing their jobs. Organizations that make these tools available at the point where they can be used most effectively effect can improve outcomes across a range of business functions.





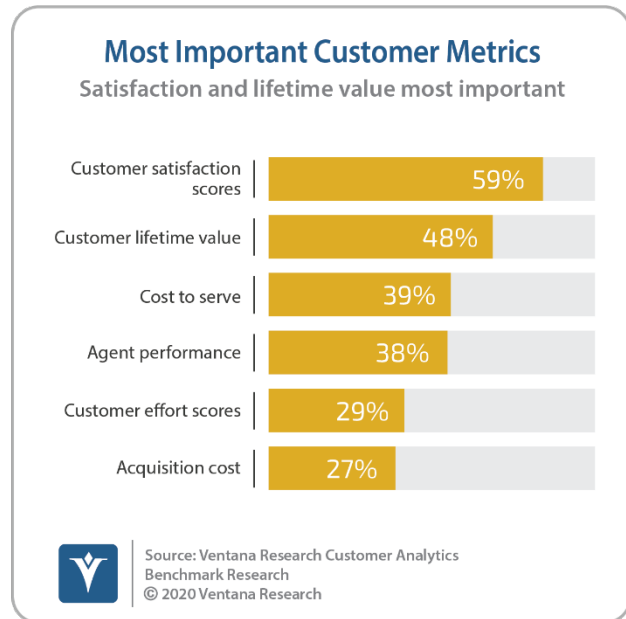
## Enabling Call Center Effectiveness

Call center directors must manage not just operations, but results. Call center metrics often focus on minimizing hold times and increasing resolution rates and managing utilization of call center personnel to ensure adequate staffing without overstaffing. But these metrics must also be balanced with customer satisfaction level, which is the most important customer metric reported by participants in our research. And the call center is no longer just a “call” center. Multiple means of communication are now used, including phone, email, chat and social media.

Call center representatives often need to switch between multiple applications to respond to callers’ requests. For instance, ticketing systems log callers’ requests and the status of those requests but do not necessarily include order information.

Inquiries from phone, chat and email may be logged in different systems that are not necessarily connected. The representative may need to know the status of a current or prior online shopping cart to properly address an issue. And the status of inventory on hand may impact a representative’s ability to resolve a request.

Given the wide variety of use cases relying on cross-application information and analysis, delivering easily accessible, 360-degree views and analytics of customers and prospects can make call centers more effective. Instantaneous access to inventory levels at remote locations can help a representative close a sale that might otherwise have been lost. Prioritizing resolutions based on customer lifetime value (CLV) requires information from a variety of systems in addition to analytics, but it can help focus resources where they will have the biggest impact. For call center directors, information on call resolution, post call surveys, utilization rates and even weather information can be helpful when planning staffing. This information should be available at the fingertips of call center representatives and managers while they are engaging with customers or employees without requiring them to switch from application to application.



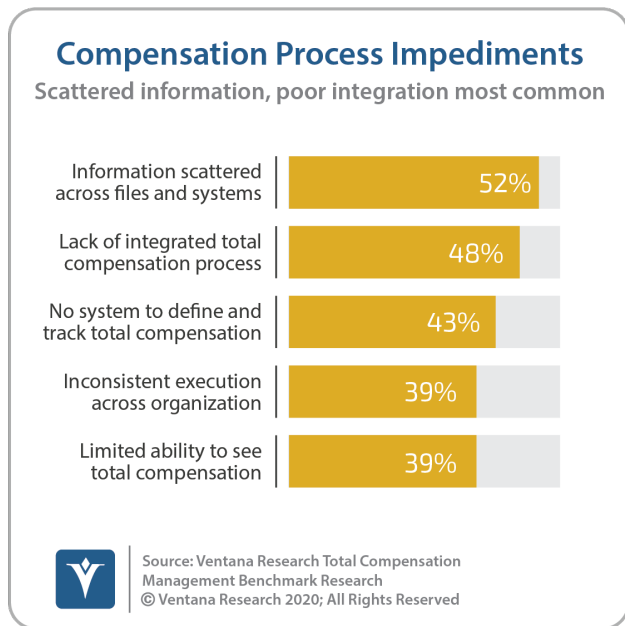
## Supporting Human Capital Management

HR directors and their teams need to manage talent acquisition, retention, compensation and learning while supporting overall organizational objectives. Our research shows hiring metrics related to cost, quality, time and satisfaction are still the most widely used, but talent



acquisition has become much less transactional and much more about meaningfully engaging candidates. While “time-to-fill” metrics are important, the hiring process must also consider skill and salary, and employee retention is influenced by compensation, satisfaction and other factors.

HCM applications are the primary tools used to analyze and balance these factors, but they typically only address specific niches within the larger HCM picture. This creates issues when analysis calls for data from different applications. Indeed, our research shows that the most



common impediments to compensation management, for instance, are that information is scattered across files and systems and a lack of integration, each reported by approximately half the participants. Talent acquisition systems provide status of the recruiting pipeline and where a candidate sits in that process, but they do not necessarily provide a complete picture of the overall hiring environment. Compensation systems provide the status of internal compensation measures and perhaps some external compensation benchmarks, but not necessarily measures of the employee’s contribution to the organization. Time management systems provide measures of employee attendance,

but not necessarily employee engagement and well-being. Learning management systems provide some measure of internal training, but not necessarily job satisfaction.

360-degree views and analytics made easily accessible can improve the effectiveness of HR teams. For example, talent acquisition teams often consider information drawn from a variety of internal and external sources such as LinkedIn profiles, public job boards or news about a candidate’s current employer. Compensation managers need to consider internal and external compensation benchmarks, combined with employees’ effectiveness which may be measured by utilization and customer satisfaction rates coming from other systems. Hiring plans and compensation adjustments are also influenced by the organization’s actual versus budgeted performance as measured in the financial planning and analysis systems. This 360-degree view should be available at the fingertips of the HR directors while they are engaging with candidates and employees without requiring them to switch from application to application.

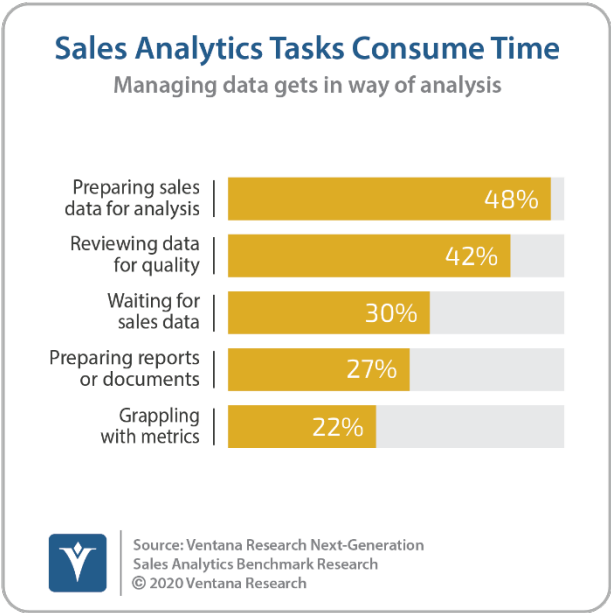
## Boosting Sales Effectiveness

Sales directors need to maximize quota attainment while managing the cost of sales. They use pipeline metrics to help ensure adequate sales opportunities across their organization, and



lead quality metrics to help prioritize where sales organizations should focus their time. Internal performance metrics foster gamification and competition to spur teams to greater achievement. Yet sales forecasting is still a challenge for most organizations, with fewer than half reporting that they do it well (30%) or very well (13%). However, sales margins are also a critical measure of success and can't be sacrificed in order to achieve sales targets.

Sales-related applications only solve pieces of the problem. Applications such as sales force automation (SFA) and customer relationship management (CRM) that are designed to capture data about accounts, contacts and opportunities cannot deliver optimal visibility and guidance for managing sales performance. Sales compensation and incentive systems help influence sales, but often do not consider margins on the products and services being sold. Internal priorities and metrics such as lead quality may not consider external influences impacting sales opportunities such as mergers and acquisitions or litigation. Territory and quota plans should not be static and should be continually optimized based on changes in product availability as well as hiring and turnover in the sales organization. Our research shows existing systems do not make sales analytics information related to these use cases quickly accessible, with nearly half (48%) reporting that preparing data for analysis and nearly one-third (30%) reporting that waiting for data are the most time-consuming tasks.



Again, as with other business functions, delivering easily accessible 360-degree views and analytics can improve sales performance. For example, sales personnel should be able to see a scorecard of all customer and prospect interactions quickly and easily, including information requests, quotes, orders, support tickets and service calls. While planning calls and visits, sales personnel should also be able to quickly see news and information about prospects and competitors. When managing territories or regions, sales directors should be able to access information about employees and the organizations in their pipelines. Our research shows the top-ranked benefits of having sales-related analytics capabilities are being able to align the sales force to business strategy and goals (38%) and better managing and tracking progress of product and sales initiatives (24%), both essential for effective sales performance management.



## Embedded Analytics Make 360-Degree Views Accessible

To provide these benefits to front-line workers, organizations must embed analytics into the applications that people use on a day-to-day basis. These include line-of-business applications, web browsers, email, productivity tools and mobile applications. One way to embed analytics is via automatically generated hyperlinks. Hyperlinks are a well-known and understood mechanism for accessing information, and they can be used in a variety of applications without the need for additional training. Our research shows that nearly three-quarters (72%) of organizations consider embedded analytics important, and hyperlinks can be the mechanism used to embed access to analytics within existing applications. This method brings the capabilities of separate analytics systems directly into the contexts used by the workforce.

Making analysis available via embedded analytics eliminates the need to extract and prepare data for any given analysis task. As noted above, data preparation is one of the most time-consuming tasks in the analytics process, and employees can be spared this task if they have access to embedded analytics. These embedded analytics should provide information that has been prepared and formatted for the context in which it will be used. This will make it easy for line-of-business personnel to access and consume the information.

## Uncover Meaningful Value Within Your Data

Organizations have access to much information that can enhance their call center, HR and sales operations, but it is not always easy for line-of-business personnel to access this information. Find ways to bring information together and make it readily accessible to individuals in these roles. Consolidating and preparing the information and analytics will make it easier for these functions to improve their performance. Embedding analytics into applications will make the information more accessible, and because the use of hyperlinks is a common technique, it can be used across many different types of applications so employees can access information anywhere. When equipped with easy access to information and analytics, call center, HR and sales operations personnel will be able to perform at a higher level and improve the organization's bottom line.



## About Ventana Research

Ventana Research is the most authoritative and respected benchmark business technology research and advisory services firm. We provide insight and expert guidance on mainstream and disruptive technologies through a unique set of research-based offerings including benchmark research and technology evaluation assessments, education workshops and our research and advisory services, Ventana On-Demand. Our unparalleled understanding of the role of technology in optimizing business processes and performance and our best practices guidance are rooted in our rigorous research-based benchmarking of people, processes, information and technology across business and IT functions in every industry. This benchmark research plus our market coverage and in-depth knowledge of hundreds of technology providers means we can deliver education and expertise to our clients to increase the value they derive from technology investments while reducing time, cost and risk.

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