

Sage ERP

Making Sense of Business Intelligence in the Mid-Market: Why Sage Intelligence Is the Right Fit for You



Table of Contents

Introduction	3
Why Your Organization Needs Business Intelligence	4
What Solution Is Best for Your Company?	5
What Is Sage Intelligence?	6
How Sage Intelligence Can Meet Your Needs	7
Sage Intelligence Delivers Bottom-Line Savings	8
Conclusion	9



Introduction

As the amount of social and organizational data continues to grow, businesses of all sizes are trying to figure out how to manage it all. For years, business applications have captured data to help give executives insight into business performance. However, these solutions have been largely disjointed and provided static views of performance.

Business intelligence (BI) solutions are becoming increasingly popular as they promise real-time views of data from across the business to enable better-informed decision making in less time. As described by one consulting group, “In its simplest form, BI is the ability to accumulate, organize, and analyze data from multiple sources.”¹ As data discovery needs intensify, BI is becoming more visual in order to provide executives and managers with faster access to information and a real-time overview of the company’s top Key Performance Indicators (KPIs).

Traditionally, BI solutions have catered to larger, more complex organizations with sophisticated cube-based OLAP tools and expensive implementations. Small and mid-sized businesses (SMBs) have relied on Excel® spreadsheets for data manipulation and analysis. However, a sea of change is upon us as approachable BI tools are making their way to the middle market.

Though Excel is a powerful tool, SMBs have struggled with its limited ability to roll up data from multiple sources and maintain control and accuracy of data. Spreadsheets can be time consuming to maintain and input new data. They are also error prone, especially as they are shared throughout the organization and multiple versions get created. As a result, Excel does not suffice as a BI solution when used as a stand-alone application. However, it can be a powerful decision support tool when integrated and utilized within a structured framework.

Analysts agree that the importance of BI and analytics is rising in corporations of all sizes. IDC predicts the business analytics market will reach \$50.7 billion by 2016, and some analysts believe it will reach as high as \$136 billion by 2020.² *The Essential CIO*, IBM’s study based on face-to-face conversations with more than 3,000 CIOs, found that three key business issues that will be top of mind for both the CEO and the CIO in the coming years:

- Data—business intelligence and analytics.
- People skills to manage growing organizational complexity.
- Client relationships.

This survey revealed that “92 percent [of CIOs] said they would lead or support efforts to drive better real-time decisions and take advantage of analytics.”³ [Gartner’s 2012 CIO survey](#) also showed that analytics and BI is the number-one technology priority for CIOs.⁴

1. “Business Intelligence: Turning Data into Wisdom,” Brown Smith Wallace Consulting Group, October 2010.

2. Chris Kanaracus, “[IDC: Analytics software market will remain strong](#),” InfoWorld, July 11, 2012.

3. “[The Essential CIO: Insights From the Global Chief Information Officer Study](#),” IBM, May 2011.

4. “[Gartner Says Worldwide Business Intelligence, Analytics and Performance Management Software Market Surpassed the \\$12 Billion Mark in 2011](#),” press release, Gartner, April 2, 2012.

Why Your Organization Needs Business Intelligence

Companies of all sizes are turning to Business Intelligence (BI) tools to help make sense of the information overload. [Forrester Research](#) analyst Boris Evelson reports, “Actually businesses have no choice but to act and react quickly in the face of financial volatility and rapidly changing business and regulatory conditions.”⁵

Business Intelligence pulls company data into an easily digestible format and gets the right information to the right people when they need it. BI paves the way for collaboration across a business as more people have access to information they need to make better decisions, faster. And as teams can collaborate more effectively, people will be more productive, and decision makers more proactive, which gives a company a competitive edge.

BI can help you work smarter. With access to real-time accurate information from across the business, CEOs can make better informed business decisions. Small and mid-sized companies pride themselves on being more agile than large enterprises and much quicker to make decisions. Not only the ability to make more effective decisions, but the time it takes to arrive at decisions is important.

BI reports and dashboards provide information when needed, eliminating the costly wait times for data pulls and number cruncher analysis. Instead, you have a customized management dashboard that provides a real-time overview of your company’s top KPIs and the ability to drill down to detailed transactions.

A 2011 study found that data mining (60%), collaboration (48%), and operationalizing business intelligence (75%) are very important to organizations.⁶ These businesses understand that without insights into historical data and the ability to generate what-if scenarios, data is just data. BI reports and dashboards can provide users with insight and perspective, making it quicker and easier to focus on running the business.

Mobile BI is also proving to give companies an added competitive advantage. A recent Aberdeen Group report shows that organizations using mobile BI can make decisions 2.5 times faster than those who do not.⁷



5. Boris Evelson, “[Top 10 Business Intelligence Predictions for 2012](#),” Forrester blog, November 15, 2011.

6. Howard Dresner, “[Six Recommendations for Implementing Business Intelligence Solutions](#),” Sandhill.com, December 5, 2011.

7. “Mobile BI 2012: Accelerating Business on the Move,” The Aberdeen Group, March 2012

What Solution Is Best for Your Company?

There are many business intelligence tools available for SMBs. When evaluating BI solutions for your company, you should consider your needs and look for the following features:

- 1. Addresses your financial reporting needs.** What are your business requirements? Your BI solution should meet your organizational needs and goals. The right solution will provide insights into historical data and help increase transparency of your company's financial events and overall health. And with better insight, you have the ability to make better decisions.
- 2. Consolidates reporting from multiple sources.** To stay competitive, you need more than simple general ledger reporting. A good BI solution should go beyond financials and allow you to combine information from multiple sources, including your ERP, CRM, and payroll databases, to deliver a 360-degree view of your company. Your BI solution pulls all of your existing information together from multiple companies, divisions, and data sources and provides an easily digestible format for in-depth analysis.
- 3. Easy to use yet offers advanced tools.** There is a reason why Excel is so dominant—it is easy to use, global, and can handle data manipulation, analysis, as well as deliver the graphical representations required for most reporting. It can be a powerful tool when used within a structured BI solution, and your end users already know how to use it. The ability to pull and manipulate data from multiple sources, obtain insight into trends, and perform multidimensional analysis on demand is what SMBs need to improve visibility and decision making.
- 4. Provides visual elements to support agility.** Executives and managers want information quickly. Graphical dashboards provide a time-sensitive, real-time overview of the company's top KPIs so they can track performance from anywhere and make timely decisions when they're needed most.
- 5. Includes additional tools to support business insight.** Writing for [ChannelPro SMB](#), the [Sage ERP senior director of product marketing](#), Jean Huy, lists some other functionality your company should consider when selecting a BI solution:⁸
 - **Alerts**—With automated monitoring and notifications, your company will always know when numbers fall outside of acceptable benchmarks.
 - **Drill-down or inquiry tools**—Learn more about the numbers behind your data points and drill down to detailed transactions.
 - **Remote access**—Delivering immediate access to information accelerates the decision-making process.
 - **Flexible reporting**—Empowers you to quickly and easily obtain information from multiple sources to improve operations and reporting across your entire business in a user-friendly Excel format.

8. Jean Huy, "[4 Myths About SMB Business Intelligence: Cutting Through the Hype](#)," ChannelPro SMB, July 26, 2012.

What Is Sage Intelligence?

Sage Intelligence sets itself apart as a flexible, Excel-based reporting tool that is a module of your Sage ERP solution. Sage Intelligence empowers you to quickly and easily obtain the information required for improved operations and reporting across your entire business. Based on the familiar Microsoft Excel application, Sage Intelligence lets you effortlessly create reports and analyze data, improving visibility into your organization.

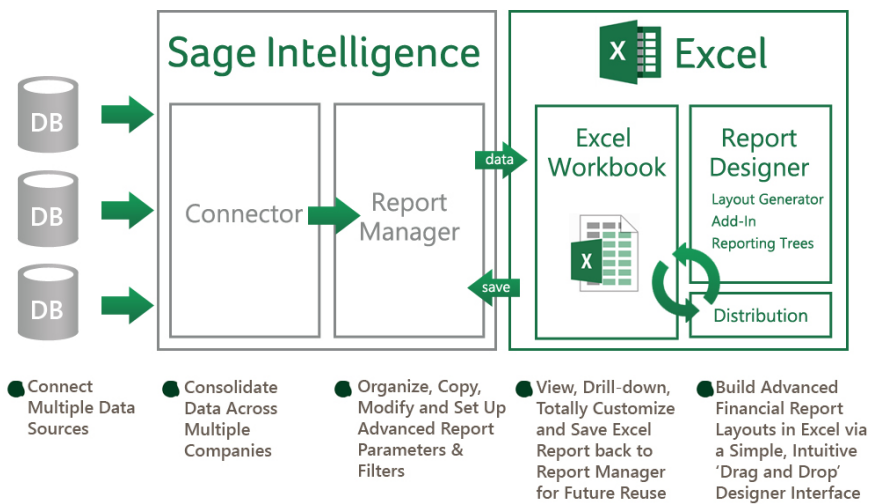
Sage Intelligence is a new-generation BI product, designed from the ground up with your needs in mind:

- It specifically addresses serious challenges around financial reporting including departmental reporting, GL segmentation, and project reporting.
- It offers consolidated reporting from multiple sources.
- The product components are structured to cater to both basic and advanced users.
- It includes access to numerous free resources on the [BI Community](#), [free webcasts](#), and training on [Sage University](#).

This powerful reporting tool is gaining traction in the mid-market, as it saves customers time and money through the provision of reports in a user-friendly Excel format. Sage Intelligence addresses a number of pain points endured by senior level executives in terms of business reporting capabilities, including flexibility, accuracy, and timeliness. Sage Intelligence draws up-to-date, trusted data directly from your Sage ERP database and other unrelated data sources and delivers a single version of the truth that can be easily analyzed, customized, and distributed in the familiar environment of Excel.

“We use Sage Intelligence extensively in our business. I believe that being able to obtain a ‘snapshot view’ of your business is critical in today’s business environment when there is just too much information floating about. Managers need to dedicate their skills to managing—not sifting through endless reports trying to make sense of heaps of information. Sage Intelligence does this neatly and efficiently—with no fuss at all and delivers this information ‘on demand’ and through Excel. What more could you ask for?”

Steven Cohen
 Managing Director
 Softline (Pty) Ltd



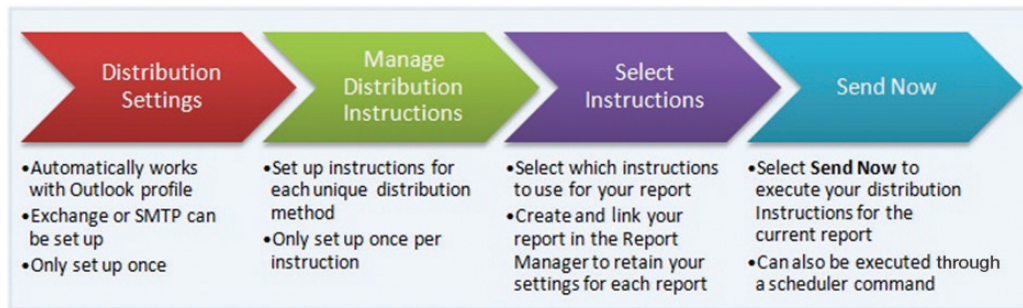
Sage Intelligence is the integrated business intelligence solution for the following Sage ERP and accounting products:

- Sage 50—U.S. Edition
- Sage 50—Canadian Edition
- Sage 100 ERP
- Sage 300 ERP
- Sage 500 ERP
- Sage PFW ERP
- Sage ERP X3*
- Sage Pastel Accounting
- Sage Pastel Payroll
- Sage VIP Payroll

Part of your Sage ERP package, Sage Intelligence can be rapidly deployed without new or extensive IT investments. It automatically pulls data from your accounting system into Microsoft Excel—the tool many end users are already using today for static reports. Sage Intelligence empowers users to work within Excel to make and save changes to their reports so that they can be delivered in the required format in the future.

How Sage Intelligence Can Meet Your Needs

- 1. Saves time and money.** Sage Intelligence automates report preparation by pulling trusted information from your ERP system and other sources into Excel report templates when you need it, so you can spend your time analyzing the data, rather than pulling it together.
- 2. Out-of-the-box value.** The solution comes with predefined financial, sales, dashboard, and other reports.
- 3. Eliminates “spreadsheet chaos.”** Sage Intelligence provides a controlled and secure environment to store and run your Excel reports.
- 4. Easy to use.** Employees can view, analyze and customize reports in the familiar interface of Excel. This leverages existing Excel skills in your business, maximizes flexibility, and lowers your total cost of ownership.
- 5. Improves collaboration.** Automated report distribution can be set up which allows for improved access to information and collaboration amongst teams.



“I’m completely blown away by this product. I managed to install it and link it to my data in about 30 minutes tops.”

Keith Castle (MD)
Antimony

* For financial reporting only.

6. Consolidates data. Data from multiple companies, divisions, and departments can be consolidated into one report using information from any ODBC compliant database.

7. Flexible reporting. You can take full control of financial reporting with the Report Designer module, which fast tracks the building of financial reports through an easy-to-use, drag-and-drop interface. Reporting Trees functionality allows you to model a reporting structure and view your organization in many different ways. The Report Designer Add-in provides an alternative to the Report Designer Layout Generator by providing an easy way to drag and drop pieces of a financial report, including prebuilt financial formulas, into Excel and then arrange them as desired.

Sage Intelligence Delivers Bottom-Line Savings

With Sage Intelligence, you will reduce manual report preparation, repetitive data pulls, and complex back-end data joins. Instead, you'll spend more time focusing on strategic analysis and interpretation with up-to-date, accurate, and presentation-quality reports.

When you boost productivity, your company saves time and money. Here is an example return on investment calculation:

- Number of people manually preparing data from Excel: **6**
- Average number of hours spent per day on data entry: **2**
- Hourly rate per person: **\$50 USD**
- An efficiency improvement of **25%** could save this company **\$3,000** per month!

To calculate your company's potential ROI, visit:

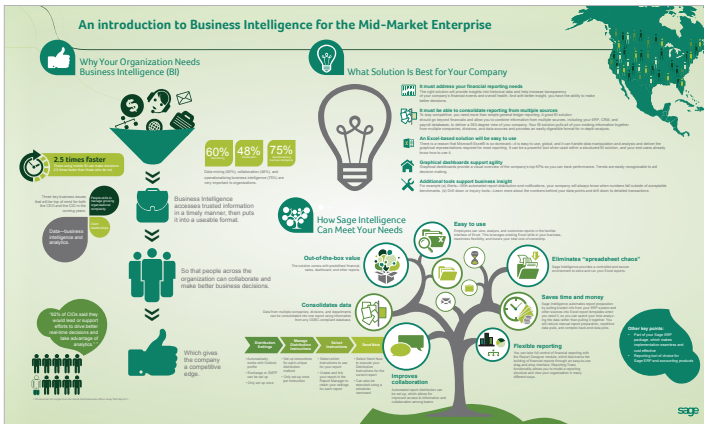
<http://go.sageerpsolutions.com/forms/100Intelligence>

"Our expectations have been exceeded in the way Sage Intelligence delivers critical business information from our system. We have converted weeks of repetitive work every month into a few hours. Now that's what I call a measurable return on investment."

Ravind Sukdeo
(Financial Director)—
Bidfreight Port Operations
(Pty) Ltd (member of the
BIDvest Group Limited)

Conclusion

The right business intelligence solution can provide many benefits to your business. From access to real-time data across the organization and graphical reporting tools to better insight and collaboration, BI can give your company a competitive advantage. Using a solution like Sage Intelligence, you can empower employees to analyze and report on data in a familiar Excel-based environment so that everyone in the organization can visualize current performance—and plan how to best achieve company objectives.



To learn more about Sage Intelligence, visit our microsite, click: [Sage ERP Solutions](#)

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