Put Out The Pain!!

“How to get at the internal company information
you *need* to succeed at your business.”

Following is a point of view paper demonstrating how difficult it is for the average manager or executive to get the right reporting information (delivered in a timely manner) needed to successfully get his or her job done—and how to ***put out the pain****. It is non-technical and is based on personal experience. Most of us should be able to relate. Also included is a* ***valuable engagement process*** *that can be used for either internal IT or external outsourced execution.*

The Story

In 1984, having successfully worked my way up the ladder from field sales and management, I was promoted to my first inside position as the company’s Director of Sales and Marketing. On my first Monday the head of IT came into my office rolling a huge cart stacked high with pounds of 11 x 17” green and white-lined computer paper.

I joked and asked, “So, is that my weekly sales report.” He looked at me with a clever smile and said, “No. Not all of it.” He then took one of the smaller stacks—it was still almost ten inches high, with hundreds of pages--and dropped it onto my desk. The “thump factor” was impressive. After glancing into my face to see my stunned response, he turned quickly and wheeled his heavy cart out of my office—off to his next target.

I stopped what I was doing--I had to since the pounds of paper covered most of my work, and tugged the stack of paper over for a closer glance. Yes, it was my weekly sales report. In fact, it contained the names of every sales person, every manager, current and former that was still making residual overrides and commissions, and every new sale sorted alphabetically by customer. It also contained the field stats compiled from weekly reports, cancellations, and a truckload of additional information.

The Pain

After spending just a few minutes with the report, noticing that it only had a few summary pages, I tore off the last sheet, turned it over and began to list the information that was important to me. I wanted to know the top five sales people for the week, the month, year-to-date, the key regions, the sales ratios (close ratios, cancellation ratio), who was on target for the Hawaii trip, which products were selling best and which were not selling at all, the most effective promotions, and several other important statistics. I then painstakingly went through the huge paper stack and started compiling the information. A little over two hours later I had summarized almost everything I needed. I was excited that the company was recording so much information. However, I realized it was going to kill me to spend hours each week trying to get to it.

I knew that I wanted to have this data, but *I needed it to be compiled in a way that was useful to me*. I called in my administrative assistant and asked her how my predecessor managed to make sense of it all. She said, “He didn’t. He would stack it in a corner and maybe once a month he would look at it, and whenever the stack became taller than he was… he would dump it. He usually just guessed or shot from the hip.”

The Solution

I then asked her if she could setup lunch with the IT manager so I could discuss my reporting ideas with him. In our meeting our IT manager was very amiable, and asked what I wanted. On a single piece of 8 ½ x 11” paper I had sketched out the exact information and format that I wanted. He said, “No problem. Give me a week.” The following week he returned with exactly what I requested. I later made a few minor changes, extending the report to 1 ½ pages. I didn’t know the rarity of this kind of reporting information at the time, but I do now.

The Payback

The new report provided all of the summary information I needed to effectively manage the entire 300 person sales force and achieve record sales. It also helped me to be much smarter with promotions, gain better insight into our product life cycles, determine product sales seasonality, gather competitive intelligence, etc.

The key to having the information I needed was two-fold. First, *the company was capturing the right information*. Second, *I was receiving the information, timely, concisely, and in a manner that was the most useful to me*. This same report has survived several different iterations of internal systems (from mainframes with dumb terminals to PC-based networks), but it is effectively the same report and is still used today by the same company almost 20 years later!

How Prevalent?

Seven years later, when I moved on, I formed a startup and, having already seen the value of concise relevant data, helped setup the internal reporting functions correctly from the start. I got all the information I needed and we grew the company from a handful to over 4,000 people—scaling our reporting as needed. It wasn’t until I got recruited away into the nation’s 5th largest software company that I began to feel the same pain I felt briefly, years prior. This company had weekly reporting, it was relatively concise, with graphs and charts, but it didn’t contain all of the information I needed to get my job done. I met with IT to get a modified version, but this time I was met with major resistance. First, they specialized in PC and network service, not custom report generation. Second, they were stretched too thin and even admitted they were too busy to help me. They explained that the CEO specified the current reports, that IT had to hire an outside person to put together the information, and that I would have to get used to them.

Since I didn’t have my own line-item budget to create the desired report, and since IT didn’t report to me, and my multiple attempts to enlist their help didn’t work—I decided to live without the company-supplied data. I ended up creating and managing a separate, duplicate set of records and reports (managed by an admin), just to run my part of the business. It was MUCH more expensive, and the data wasn’t integrated, as it could have been, but I could at least have enough information to do my job—even though the process wasn’t efficient.

As I later moved into even bigger companies, one was $33 billion, and another was over $130 billion, with over 300,000 employees, the problem of not having timely and concise information to run the business became more obvious. I was running marketing for a $2 billion group, and was entirely blind. I didn't know my budget-to-actuals, since my chart of account didn't match the sectors', I knew the total category sales, but I didn't know exactly which product was selling, since the part numbers weren't setup properly by options, nor did the legacy system have enough fields left to even input the desired data. I also didn't have sales information by product, by sales rep, region, or division, since the sales force used a different, disconnected system to record their wins, nor could I get IT to integrate any of this information, without politicking through upper management and then waiting months for the simplest reprieve. Gone was the hope of getting everything I needed to track, measure and refine my efforts—let alone having it all on a *single* page.

I felt frustrated. I had all the responsibility, but not enough clout with our global IT systems group to get their help—and I was a Vice President. The only consolation was that most of my peers were running just as blind, and there wasn't enough information for the GM's to know the difference, since they had the same problem I had. I also knew that if *I* had this kind of problem, it was probably only a fraction of the frustration the directors and managers were having.

You May Need Help

Based on my own experience as a Manager, Director and Senior VP within startups, mid-sized and multi-billion dollar companies, and the discussions with peers, I believe that concise, timely, managerial information delivered in the format desired is extremely rare. In some cases, it is almost impossible, *with existing resources and systems*, to get what is needed to run a business.

If you have this kind of concise information, delivered timely, containing exactly, or even close to what you want, then count yourself fortunate. If not, then you may need help.

Options

Ok, so we want to fix this problem. As identified earlier, there are two issues. First, we have to *capture the needed information*. Second, we have to *have it delivered timely, concisely, and in a format that helps **you***.

Capturing The Information

Unless you're the President, or CEO (not just a division GM who may have to rely on global systems for his division's needs), getting the right information captured may be beyond your capabilities, since the global sales organization, accounting department, shipping and receiving, or marketing may not report or pay attention to you. Hence, you may have a hard time dictating what information is captured. However, sometimes an outside consultant can help bring attention to the problem, and can also bring credibility to the solution. I have used consultants in the past for exactly this reason. Regardless, you may still be able to control some of the information that is within your control, and hence provide managerial information that is still vital.

Generating The Reports

Second, assuming you first have the right information being captured within existing systems, you need to have this information pulled out in the form of a report. This report can be delivered on paper, or nowadays, you can also have a customized Web portal. You could first try going directly to IT to see what they can do—since they are usually very eager to please. If they have the bandwidth, freedom, motivation and technical capability, then you should be able to get the desired reports. The included "Engagement Process" (below) will help guide you through this initiative.

However, your existing team may be like most IT groups, willing to help, but stretched to the gills with network and PC troubleshooting issues. Or else they may have a different skill set and don't have the database, programming or system integration skills to compile and automate the required information from multiple systems. This is especially daunting when we realize that 29% of the time, the information we may want is within 4-6 different systems, and 41% of the time it is in seven or more separate systems (Forrester Research).

So how can you get this information when it may not be in the system, or your internal team does not have the bandwidth or skill set to integrate it into a useful report?

Titan Solutions Group

I invite you to consider our team to help you create the systems and processes to provide you the managerial information you need to optimize your business!

Titan Solutions Group specializes in integrating backend systems, creating flexible reports and user-defined front-end interfaces. *This is our expertise and passion*. In fact, we have not found a system yet that we could not successfully integrate. Satisfied customers over the last half decade include AMD, Harcourt, Tivoli Systems, Compaq, World Savings, Frost Bank, D.R. Horton, Progressive Insurance, American Cancer society, Seton Hospital, IBM, Texas Monthly Magazine, Fed Ex, Motorola, and many more. Most of these have become long-time repeat customers. We would love to help you to have similar success.

The Engagement Process

Our team uses the following consultive approach that divides this initiative into stages. You are welcome to use a similar approach if you can get this work done internally, or you can allow Titan Solutions Group to guide you through this process.

1) **Initial review**. We first meet with you to present any additional information, answer any questions, review your overall needs, the scope of the project and determine if we wish to move forward. This is a no-obligation, no cost opportunity to understand capabilities and needs. All we ask is the opportunity to be considered if you choose to outsource all or any of the integration.

2) **Interview stage**. If you wish to proceed, we then move into the interview stage. During this stage we do the following:

   a. Thoroughly interview each individual that will use the information (representing personal or departmental needs)—for example, most product managers, or regional sales managers can pick a representative since they typically want similar information.
   b. During the interview we determine exactly what type of information is desired (we have pick lists by department with samples showing numbers, percentages, charts and graphs, hi/low, weekly, monthly, running year-to-date, five year average, competitive information, summary information, etc.). You tell us exactly what you want—we deliver it… if existing systems contain the information. If all of the information isn't available, we'll deliver what is.
   c. We also help you prioritize the information so we can later tell you what can, or may not be available during the first phase, with just your current systems in place. For example, if you're in marketing you may want a weekly report, or live portal, that shows the stage and % completed of all products in development, along with current promotions by campaign with the # of leads by class (hot/warm/cool), % contacted, and % closed, etc. You may be capturing the leads, but may not have the systems in place to determine which are closed. We provide the available information in phase I, and an integration roadmap to provide the remaining information later, assuming you still want it.
   d. We then review samples to help the individual solidify how they want the data delivered and presented (black and white/color, numerical/graphs, paper and/or Web). *This is the exciting stage, when you realize you will soon have exactly what you want, delivered in a format that works best for you!*

3) **Systems analysis stage**. The next stage analyzes existing systems, processes and internal capabilities as follows:

   a. Meet with IT to review existing accounting, database, network, SFA, CRM, ERP and other systems that currently exist (by vendor and version, so we know your exact current capabilities).
   b. Determine IT's current capability, interest level and bandwidth to participate in all aspects of the project (programming, data migration/data pumps, installations, web development, reporting capabilities, etc.).

4) **Proposal stage**. At this point we will provide a person-by-person summary of requested data, format and preferred layout, along with a summary of what systems already exist, plus a proposal for any missing systems are needed (if applicable) to provide the requested managerial information.

   a. If everything is already in place, both the systems and the required information, then the team can present a time and materials proposal for how long it will take to complete the integration process. Depending on existing systems, this could take from one day to several weeks—longer if there is very little in place.
   b. If there are either missing systems or missing data, then a proposal for the required systems (database, accounting, SFA, CRM, Web server, etc.) will be presented.

c. In addition, any presentation/training or process creation will be proposed to help change internal company behavior so the organization sees the practical and personal advantage of populating either existing or new systems to ensure reliable managerial information. Either Titan Solutions Group or an internal person can present and/or be cross-trained to champion this effort.
d. Titan Solutions Group proposals will be pragmatic, and contain 2-3 options designed to help management understand what information they can possess now, with minimal work, versus the kind of information (based on the prioritized report requests) that can be provided over time—along with an all at once, or phases integration approach.
e. The proposal itself will be part of the deliverables and will be detailed enough to construct an RFP for possible bidding of any component parts.

5) **Integration stage**. If you are happy with our efforts so far, then we will be pleased to provide a competitive bid for any of the proposed integration work or system installation to complete the process and provide the information in exactly the format you want.

   a. Integration usually involves one or two people working remotely and/or on-site to connect the different systems, generate the custom reports/or on-line portal (managerial dashboard).
   b. All work uses industry standards whenever possible with repeatable processes so the project can be easily modified if enhanced features are requested later.
   c. The complete project, and any future maintenance (i.e., if you switch database versions we can re-hook the links) can be performed by Titan Solutions Group, or we can train existing staff on how to maintain.
   d. Our efforts are done to your complete satisfaction. Over 90% of our total integration work is for new projects from existing customers. We hope you will be pleased enough to similarly consider us again if there ever arises a need.

What's Holding You Back?

There are several reasons why a lack of managerial information may exist within your organization today.

1. *First, the pain may not be evident throughout the organization*. For example, the President or GM (who has multiple departments reporting into them) may get everything they need, in the exact format that they request, exactly when they need it, so they are not aware of any pain—since they aren't experiencing it! Of course, they may be getting their information from you, and it is your team that is pulled off task for a week preparing for a single one-hour meeting. Someone needs to let the management know of the pain and inefficiency that exists—provide real examples and provide a solution. Titan Solutions Group can help. We have given many CEO presentations explaining the issues, inefficiencies and resolution, and were able to solve these problems and *put out the pain*!

2. *Second, your corporation may already have systems in place*—LOTS of them. Unfortunately, some large corporations get "systemitis," with massive global systems providing too much information, and an equally huge and unyielding IT team screaming

"conformity." Fortunately, in this case, the company may be capturing everything you need—you just need a way to get the valuable information out. What you need is customized reporting, or a customized portal. Titan Solutions Group has worked with multiple divisions within large multi-billion dollar corporations to automate and extract the exact information you need. We are often considered the heroes by IT, since we work hand-in-hand with them to help get these projects completed and relieve their stress. We also show them how to maintain the information when the project is completed.

3. *I don't have the budget right now*. Fortunately, the initial meeting, although very informational, costs nothing, since it is investigative. If the budget doesn't exist, you can scope the project and know how much to add for next years budget. Also, the project may or may not cost very much—depending on what systems already exists, and the level of integration required in the initial phase. Often, during the first phase, the low hanging fruit is easy to encapsulate. The resulting ROI (in dollars and saved time) can then be used to justify additional integration during a later phase. Titan Solutions Group stands ready to assist at any stage.

Visualize This

Imagine the first Monday after the integration process is complete. A single page shows up on your desktop, or an e-mail notification with a link to your own personal portal page. This data now contains **exactly** the information you need, in the exact format you prefer to better get your job done right! You are no longer flying blind and know what is working and what needs fixing. You now know which product is selling best, which product is out of stock for the next 14 days, which will be developed on time, how many customers are repeat buyers, which sales person will win the Hawaii trip, which item just went over budget, the exact promotion that is generating the most leads, how the company/division is doing year-to-date on revenue/per product, the top 5 customers to-date, and anything else that will *help you to better understand your business and make wise, quick managerial decisions*.

We Invite You…

We invite you to rise out of the ashes of frustration that comes from not having convenient, concise and timely accurate managerial information to help you succeed in your job. ***Call Titan Solutions Group*** and give us the opportunity to meet with you, provide an assessment, and get you started in the right direction. There is no obligation, nothing to loose, plus we'll leave behind some great information that will help you better understand the pro-active process for gaining better control of your business.

We look forward to hearing from you soon.

Best regards,

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