

a comprehensive introduction to BPM. As you will see and appreciate, BPM and visual analytics have a symbiotic relationship (over scorecards and dashboards) where they benefit from each other's strengths.

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3.1 OPENING VIGNETTE: Self-Service Reporting Environment Saves Millions For Corporate Customers

Headquartered in Omaha, Nebraska, Travel and Transport, Inc., is the sixth largest travel management company in the United States, with more than 700 employee-owners located nationwide. The company has extensive experience in multiple verticals, including travel management, loyalty solutions programs, meeting and incentive planning, and leisure travel services.

CHALLENGE

In the field of employee travel services, the ability to effectively communicate a value proposition to existing and potential customers is critical to winning and retaining business. With travel arrangements often made on an ad hoc basis, customers find it difficult to analyze costs or instate optimal purchase agreements. Travel and Transport wanted to overcome these challenges by implementing an integrated reporting and analysis system to enhance relationships with existing clients, while providing the kinds of value-added services that would attract new prospects.

SOLUTION

Travel and Transport implemented Information Builders' WebFOCUS business intelligence (BI) platform (called eTTEK Review) as the foundation of a dynamic customer self-service BI environment. This dashboard-driven expense-management application helps more than 800 external clients like Robert W. Baird & Co., MetLife, and American Family Insurance to plan, track, analyze, and budget their travel expenses more efficiently and to benchmark them against similar companies, saving them millions of dollars. More than 200 internal employees, including customer service specialists, also have access to the system, using it to generate more precise forecasts for clients and to streamline and accelerate other key support processes such as quarterly reviews.

Thanks to WebFOCUS, Travel and Transport doesn't just tell its clients how much they are saving by using its services—it shows them. This has helped the company to

differentiate itself in a market defined by aggressive competition. Additionally, WebFOCUS eliminates manual report compilation for client service specialists, saving the company close to \$200,000 in lost time each year.

AN INTUITIVE, GRAPHICAL WAY TO MANAGE TRAVEL DATA

Using stunning graphics created with WebFOCUS and Adobe Flex, the business intelligence system provides access to thousands of reports that show individual client metrics, benchmarked information against aggregated market data, and even ad hoc reports that users can specify as needed. "For most of our corporate customers, we thoroughly manage their travel from planning and reservations to billing, fulfillment, and ongoing analysis," says Mike Kubasik, senior vice president and CIO at Travel and Transport. "WebFOCUS is important to our business. It helps our customers monitor employee spending, book travel with preferred vendors, and negotiate corporate purchasing agreements that can save them millions of dollars per year."

Clients love it, and it's giving Travel and Transport a competitive edge in a crowded marketplace. "I use Travel and Transport's eTTek Review to automatically e-mail reports throughout the company for a variety of reasons, such as monitoring travel trends and company expenditures and assisting with airline expense reconciliation and allocations," says Cathy Moulton, vice president and travel manager at Robert W. Baird & Co., a prominent financial services company. What she loves about the WebFOCUS-enabled Web portal is that it makes all of the company's travel information available in just a few clicks. "I have the data at my fingertips," she adds. "I don't have to wait for someone to go in and do it for me. I can set up the reports on my own. Then we can go to the hotels and preferred vendors armed with detailed information that gives us leverage to negotiate our rates."

Robert W. Baird & Co. isn't the only firm benefiting from this advanced access to reporting. Many of Travel and Transport's other clients are also happy with the technology. "With Travel and Transport's state-of-the-art reporting technology, MetLife is able to measure its travel program through data analysis, standard reporting, and the ability to create ad hoc reports dynamically," says Tom Molesky, director of travel services at MetLife. "Metrics derived from actionable data provide direction and drive us toward our goals. This is key to helping us negotiate with our suppliers, enforce our travel policy, and save our company money. Travel and Transport's leading-edge product has helped us to meet and, in some cases, exceed our travel goals."

READY FOR TAKEOFF

Travel and Transport used WebFOCUS to create an online system that allows clients to access information directly, so they won't have to rely on the IT department to run reports for them. Its objective was to give customers online tools to monitor corporate travel expenditures throughout their companies. By giving clients access to the right data, Travel and Transport can help make sure its customers are getting the best pricing from airlines, hotels, car rental companies, and other vendors. "We needed more than just pretty reports," Kubasik recalls, looking back on the early phases of the BI project. "We wanted to build a reporting environment that was powerful enough to handle transaction-intensive operations, yet simple enough to deploy over the Web." It was a winning formula. Clients and customer service specialists continue to use eTTek Review to create forecasts for the coming year and to target specific areas of business travel expenditures. These users can choose from dozens of management reports. Popular reports include travel summary, airline compliance, hotel analysis, and car analysis.

Travel managers at about 700 corporations use these reports to analyze corporate travel spending on a daily, weekly, monthly, quarterly, and annual basis. About 160 standard

reports and more than 3,000 custom reports are currently set up in eTTEK Review, including everything from noncompliance reports that reveal why an employee did not obtain the lowest airfare for a particular flight to executive overviews that summarize spending patterns. Most reports are parameter driven with Information Builders' unique guided ad hoc reporting technology.

PEER REVIEW SYSTEM KEEPS EXPENSES ON TRACK

Users can also run reports that compare their own travel metrics with aggregated travel data from other Travel and Transport clients. This benchmarking service lets them gauge whether their expenditures, preferred rates, and other metrics are in line with those of other companies of a similar size or within the same industry. By pooling the data, Travel and Transport helps protect individual clients' information while also enabling its entire customer base to achieve lower rates by giving them leverage for their negotiations.

Reports can be run interactively or in batch mode, with results displayed on the screen, stored in a library, saved to a PDF file, loaded into an Excel spreadsheet, or sent as an Active Report that permits additional analysis. "Our clients love the visual metaphors provided by Information Builders' graphical displays, including Adobe Flex and WebFOCUS Active PDF files," explains Steve Cords, IT manager at Travel and Transport and team leader for the eTTEK Review project. "Most summary reports have drill-down capability to a detailed report. All reports can be run for a particular hierarchy structure, and more than one hierarchy can be selected."

Of course, users never see the code that makes all of this possible. They operate in an intuitive dashboard environment with drop-down menus and drillable graphs, all accessible through a browser-based interface that requires no client-side software. This architecture makes it easy and cost-effective for users to tap into eTTEK Review from any location. Collectively, customers run an estimated 50,000 reports per month. About 20,000 of those reports are automatically generated and distributed via WebFOCUS ReportCaster.

AN EFFICIENT ARCHITECTURE THAT YIELDS SOARING RESULTS

Travel and Transport captures travel information from reservation systems known as Global Distribution Systems (GDS) via a proprietary back-office system that resides in a DB2 database on an IBM iSeries computer. They use SQL tables to store user IDs and passwords, and use other databases to store the information. "The database can be sorted according to a specific hierarchy to match the breakdown of reports required by each company," continues Cords. "If they want to see just marketing and accounting information, we can deliver it. If they want to see the particular level of detail reflecting a given cost center, we can deliver that, too."

Because all data is securely stored for three years, clients can generate trend reports to compare current travel to previous years. They can also use the BI system to monitor where employees are traveling at any point in time. The reports are so easy to use that Cords and his team have started replacing outdated processes with new automated ones using the same WebFOCUS technology. The company also uses WebFOCUS to streamline their quarterly review process. In the past, client service managers had to manually create these quarterly reports by aggregating data from a variety of clients. The 80-page report took one week to create at the end of every quarter.

Travel and Transport has completely automated the quarterly review system using WebFOCUS so the managers can select the pages, percentages, and specific data they want to include. This gives them more time to do further analysis and make better use of the information. Cords estimates that the time savings add up to about \$200,000 every

year for this project alone. “Metrics derived from actionable data are key to helping us negotiate with our suppliers, enforce our travel policy, and save our company money,” continues Cords. “During the recession, the travel industry was hit particularly hard, but Travel and Transport managed to add new multimillion dollar accounts even in the worst of times. We attribute a lot of this growth to the cutting-edge reporting technology we offer to clients.”

QUESTIONS FOR THE OPENING VIGNETTE

1. What does Travel and Transport, Inc., do?
2. Describe the complexity and the competitive nature of the business environment in which Travel and Transport, Inc., functions.
3. What were the main business challenges?
4. What was the solution? How was it implemented?
5. Why do you think a multi-vendor, multi-tool solution was implemented?
6. List and comment on at least three main benefits of the implemented system.
Can you think of other potential benefits that are not mentioned in the case?

WHAT WE CAN LEARN FROM THIS VIGNETTE

Trying to survive (and thrive) in a highly competitive industry, Travel and Transport, Inc., was aware of the need to create and effectively communicate a value proposition to its existing and potential customers. As is the case in many industries, in the travel business, success or mere survival depends on continuously winning new customers while retaining the existing ones. The key was to provide value-added services to the clients so that they can efficiently analyze costs and other options to quickly instate optimal purchase agreements. Using WebFOCUS (an integrated reporting and information visualization environment by Information Builders), Travel and Transport empowered their clients to access information whenever and wherever they need it. Information is the power that decision makers need the most to make better and faster decisions. When economic conditions are tight, every managerial decision—every business transaction—counts. Travel and Transport used a variety of reputable vendors/products (hardware and software) to create a cutting-edge reporting technology so that their clients can make better, faster decisions to improve their financial well-being.

Source: Information Builders, Customer Success Story, informationbuilders.com/applications/travel-and-transport (accessed July 2013); and www.travelandtransport.com.

3.2 BUSINESS REPORTING DEFINITIONS AND CONCEPTS

Decision makers are in need of information to make accurate and timely decisions. Information is essentially the contextualization of data. Information is often provided in the form of a written report (digital or on paper), although it can also be provided orally. Simply put, a **report** is any communication artifact prepared with the specific intention of conveying information in a presentable form to whoever needs it, whenever and wherever they may need it. It is usually a document that contains information (usually driven from data and personal experiences) organized in a narrative, graphic, and/or tabular form, prepared periodically (recurring) or on an as-required (ad hoc) basis, referring to specific time periods, events, occurrences, or subjects.