

Using Business Intelligence to Drive Business Productivity and Performance



Smetric Insights Uses Business Intelligence Solutions to Drive Business Productivity and Performance.

Software providers and implementers are ideally positioned to have conversations with business owners and recognise the signs that they need help. For software providers and implementers, and businesses, lifting productivity is a win-win situation. It creates a combination building more loyalty for business advisors, higher profits for business owners, higher wages for management and workers and lower prices for consumers

It is recognised that the biggest gains in productivity are being driven by digital transformation and that includes Business Intelligence.

Implementing Business Intelligence leads to better insights and better, faster decisions that are based on facts, not gut feelings.

Businesses Intelligence helps businesses to more easily spot opportunities to:

- Grow sales
- Improve customer experience
- Optimise operations
- Reduce costs and release cash
- Engage staff

Clients that we can add the most value to are typically:

- Medium sized businesses - \$2m to \$50 million
- See value in data
- Are currently pushing the "Export to Excel" button to do regular reporting

The verticals we are targeting are:

- Sales & marketing (common to all)
- Service and contracting business
- Wholesale distribution
- Supply chain
- Manufacturing
- Multi branch

These businesses are using a range of these software platforms:

- Xero and add-ons, especially Cin7, WorkflowMax, Unleashed
- MYOB AccountRight, MYOB Exo, MYOB Advanced
- Accredo
- M1
- Google Analytics
- CRM systems e.g. Capsule, Hubspot
- Others on request

The Benefits of Smetric Insights BI Solutions

- **Stop the Spreadsheet Madness.** These businesses typically have loads of data, but it is all in their different systems. They will currently be going into each system to export it to Excel to try to put it together into meaningful information to drive decisions.
- **It's an ongoing end-to-end service, not just software.** Our team provide the experience and expertise in business and data science necessary for a successful BI solution, ongoing support and maintenance, and further tailoring as the potential is seen for integrating other data.

Smetric Insights Quick Start EBook

To find out more about the benefits of Business Intelligence and how to get started, [Click on this link](#) to read our EBook

Case Studies

- Find out how Smetric Insights helped a Taranaki Transport operator save time and reduce stress by automating pulling their data into one place. [Click here](#) for the Walker Brothers Transport Case Study.
- See how we created dashboards to give Quality Education Services more timely, reliable information on student performance. [Click here](#) for the case study.
- See how we provided Taratahi Agricultural College with better visibility on data from Xero over 50 cost centres and provided forecast balance sheet and cashflow on Power BI. [Click here](#) for the case study.

What is the process to get started?

Business Intelligence Quick Start



Step 1 - Discovery

- What are the key decisions in your business?
- What data is critical for making these decisions?
- Review operational metrics, critical performance indicators, benchmarking
- Review your current use of Excel for reporting
- Review of other current reporting and systems used and their limitations



Step 2 – Prototype a Quick Win

- Grab some of your data
- Learn how to assemble a dashboard
- Create your prototype with 3- 5 dashboards for quick wins
- Review and test your dashboards



Step 3 – Technology Choices

- Review your BI technology options
- Extraction and storage of your data
- Data Access / Data Security / Dashboard Sharing
- Resources/skills/ timescale required for different options



Step 4 – Create a Road Map

- Which staff/suppliers/customers/IT providers need to be involved?
- What are the critical business decisions they make?
- What are the systems you want to connect to?
- What frequency of data refreshing is required?



Step 5 – Just Do It!

- You are on the journey to becoming a data driven business
- Keep reviewing and modifying as you see more potential

How Much Does It Cost?

Effective 15 October 2018

Subscription Service

Monthly Subscription Rate (Microsoft Power BI Embedded)

- Minimum - \$200
- Up to 10 users - \$50 per user
- 11 to 20 users - \$40 per user
- Over 20 users - price on application

Monthly subscription includes:

- Automated data extracts
- Data storage
- Online sharing of dashboards
- Differentiated levels of access
- Security
- Standard dashboard Set
- Online Web interface

Set Up and Configuration

- Discovery from \$1,500
- Onboarding and configuration from \$3,500
- Subject to systems to connect to and dashboards required
- Plus, travel outside of Auckland, if required
- Ongoing tailoring as required on agreed budgets

Note that excludes data cleaning and API call costs above the free level

Note all pricing is exclusive of GST

NZTE Funding Available

Eligible businesses may receive a subsidy of up to 50%. This service is designed as a quick start to understand what is possible with Business Intelligence, how it could improve their productivity and business performance and give them a road map to get started. We can then help them implement Business Intelligence, if they choose to.

Service Name

Using Business Intelligence to Drive Business Performance

Description

In a series of development and training sessions, we will take you and your relevant managers through the application of using your data to create business Intelligence (BI) to drive performance in your business by identifying opportunities to:

- Grow sales
- Improve customer experience
- Optimise operations
- Reduce costs and release cash
- Engage staff

The following topics will be covered:

- What are the key decisions in your business and what data is critical to effectively making these?
- A review of current reporting and systems used. Limitations these may present to making key operational and business decisions
- What's possible with technology to automate data extraction, reporting and the visualisation of data
- Consideration of what technology to choose
- Who needs to be on the business intelligence journey: staff, customers and suppliers?
- What capability and approach are needed to take advantage of fast-moving technology?
- Creation of sample dashboards with your data

By the end of the programme we will have helped you identify:

- The key drivers of performance for your business
- What data really matters and needs to be your prime focus for your business
- How live data can be effectively presented on dashboards allowing your business to make faster decisions and achieve better results
- A practical roadmap for your business to jump on the business intelligence journey.

Cost

From \$2,500 + GST depending on company size and complexity.

This includes a series of 3 tailored sessions, creating a business intelligence road map tailored to your organisation. The introductory session will be 2 hours and the 2nd and 3rd sessions will be 4 hours.

Follow up coaching sessions are available at \$250 per hour