

EPM and BI Task Force Details, Survey Results and COLLABORATE 18 News!

BY KIRBY LUNGER, PERFORMANCE ARCHITECTS

In May 2017, the OAUG formed an EPM and BI Task Force to increase the organization's focus on members interested in these areas. As a task force member, and as the board co-chair for the Analytics, BI and Big Data Special Interest Group (SIG), I was asked to share the team's progress in two areas:

1. Our EPM and BI membership survey outcomes.
2. How we're using this survey data to create educational and networking opportunities at COLLABORATE 18 and to provide related SIG activities.

EPM and BI Definitions

"EPM" stands for "Enterprise Performance Management," which research organization Gartner defines as "an umbrella term that describes the methodologies, metrics, processes and systems used to monitor and manage the business performance of an enterprise...(and to) translate strategically focused information to operational plans and to send aggregated results. These applications are also integrated into many elements of the planning and control cycle." This solutions category is also sometimes called "Corporate Performance Management" or "Business Performance Management." The category may also be called "Hyperion" when specifically referring to Oracle EPM solutions because Hyperion was the name of the company Oracle acquired in the EPM arena to build this capability.

"BI" is defined by Gartner as "business intelligence...an umbrella term that includes the applications, infrastructure and tools, and best practices that enable access to, and analysis of, information to improve and optimize decisions and performance." This term is often co-mingled with other related terms such as "Analytics" and "Big Data."

These areas are usually grouped together in the same functional and IT groups at many organizations (even though they're usually perceived – and sometimes built – as separate solution areas), which is why we established one task force to address interests in both areas.

EPM and BI Task Force History

The EPM and BI Task Force met once a month for the past several months to help address member needs in this area.

Active volunteer task force members included: Beth McLaughlin, Dunkin' Brands, Inc.; Deanna Sunde, Key Performance Ideas, Inc.; Eric Helmer, Velocity Technology Solutions (formerly Mercury Technology Group, Inc.); Jay Canupp, AXIA Consulting; Julio Lois, Southern Company Services, Inc.; Kirby Lunger and Melanie Mathews, Performance Architects, Inc.; and Sandeep Reddy, Equinix.

One of our first tasks was to make sure that the educational tracks and smart tracks for COLLABORATE 18 matched the current on-premises and cloud EPM and Analytics Oracle solution offerings. We worked with Oracle team members Toby Hatch, Senior Product Marketing Director, EPM Applications, and Emily Cikovsky, Principal Product Manager, Analytics, to create new taxonomies that were built into the conference track and smart track selections.

We then reviewed all existing OAUG membership survey content to make sure we understood what the organization already knew about our members' EPM and analytics interests. The OAUG conducted a membership survey last fiscal year that provided a great starting point, but because of significant changes in the EPM and BI markets over the past few years, we decided that we needed more details in this arena. As a result, we worked to develop a membership survey specific to this area.

Most recently, we have been working to translate the findings from this survey into offerings for our membership that meet your interests in these areas.

EPM and BI Member Survey Themes

The EPM and BI survey themes included the respondent's:

- Profile information, such as industry, title and level.
- EPM/analytics products/solution(s) ownership history (both on-premises and cloud).
- Organization's cloud timeline and personal interest in cloud education.
- Challenges as an Oracle user.
- Interest in various ways the OAUG can provide information to address these challenges.
- Interest in volunteering for related SIGs.

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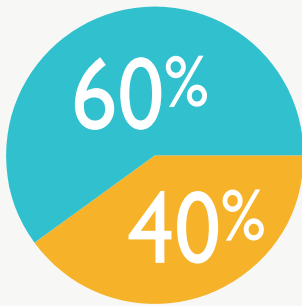
EPM & BI Member

SURVEY SNAPSHOT

Advanced Cloud Solutions Users

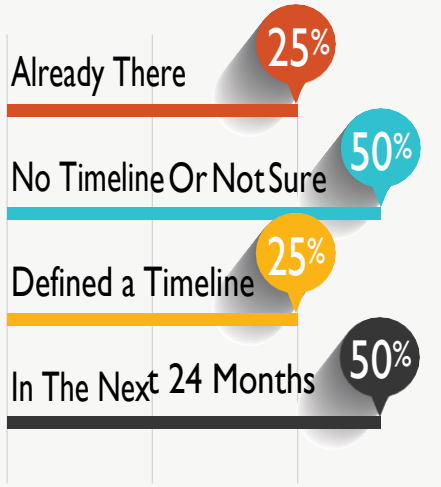
EPM AND ANALYTICS

Very interested in learning more about these cloud solutions

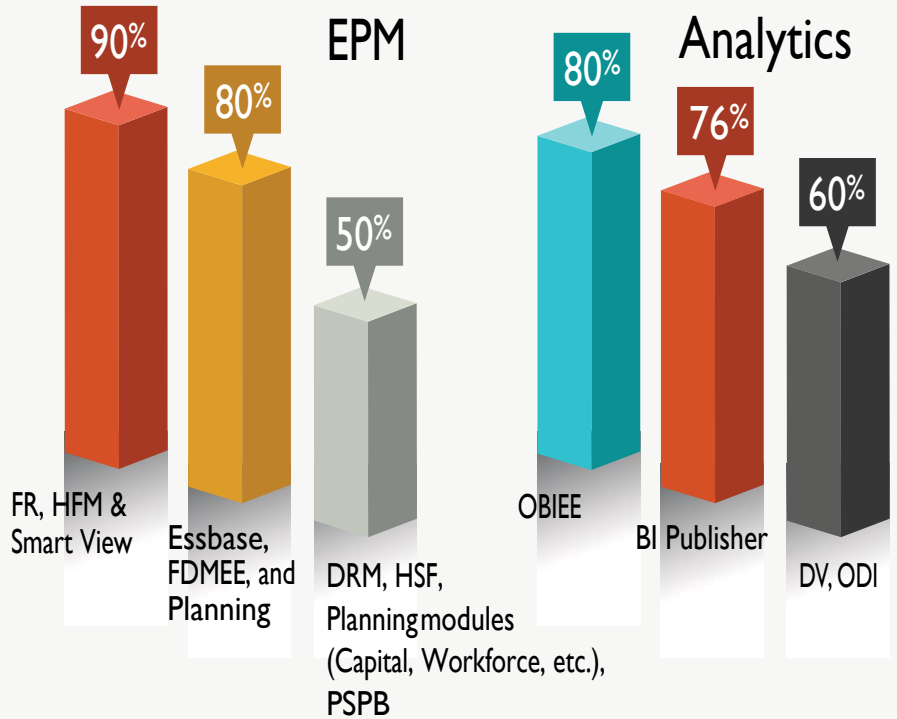


Working with some of the newest cloud solutions for both categories (EPM=EPBCS, FCCCS, etc.; Analytics=OAC)

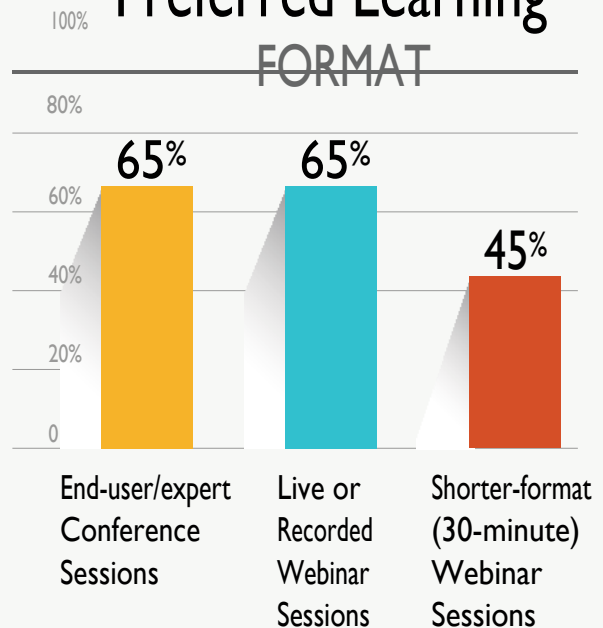
Timeline To Move TO THE CLOUD



Seasoned On-Premises AUDIENCE



Preferred Learning FORMAT



EPM and BI Member Survey Findings and Outcomes

The survey findings are not statistically significant, and obviously reflect feedback at a point in time. As a result, we consider this feedback to be “directionally correct.”

From a respondent profile perspective, we learned that we need to address a diverse set of interests by function, industry and level, and that our membership is more sophisticated from a solution perspective than we may have given them credit for. For example, the majority of respondents own and use on-premises solutions in this area across multiple product categories, and approximately 40 percent are already working with the newest cloud solutions in these areas!

Biggest Challenges

50% Keeping Up With Pace Of Change (Both Oracle Technology Change And Cloud Options)

40% Staying Current On Patches, Upgrades, New Functionalities

40% Budget Constraints

That said, there is still a large group of respondents considering a move to the cloud or who haven't decided on a timeframe for a move, so we discovered we cannot neglect on-premises users and interests. People also mentioned repeatedly that they are struggling to keep up with the pace of change (both on-premises and in the cloud) and that they want education on how to address this change within a constrained budget.

The survey results demonstrate that OAUG EPM and analytics professionals want to learn through end-user and consultant conference sessions and webinars, which they prefer to be able to access on their own time (pre-recorded) and in shorter formats (30 minutes). Survey respondents also indicated a high level of interest in volunteering and sharing expertise!

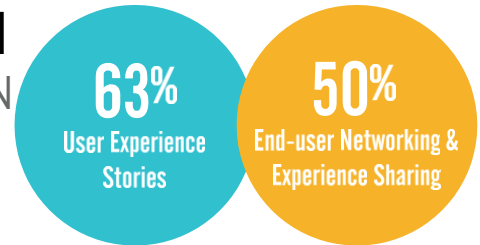
We used survey data to shape upcoming educational and networking opportunities at COLLABORATE 18 and to modify or expand related SIG activities.

Special Interest Group (SIG) Updates and Special Invites

The two OAUG SIGs in this area recently changed their names to reflect the product evolution in these categories. The Hyperion SIG is now named “EPM/Hyperion SIG,” and the BI-Big Data and Endeca SIGs merged and were renamed “Oracle Analytics, BI and Big Data SIG.”

Both SIGs are hosting regular customer case studies and product roadmap update webinars to meet participants' education interests and are also presenting at COLLABORATE 18.

Most Requested, Most Useful INFORMATION



If you're interested in presenting a webinar or participating and/or volunteering with one or both SIGs, please contact:

- EPM/Hyperion SIG: Chuck Persky, Chair, hyperion.communities.oaug.org.
- Analytics, BI and Big Data SIG: Kirby Lunger and Jay Canupp, Co-Chairs, analytics.communities.oaug.org.

EPM and Analytics COLLABORATE 18 Special Invites

Mark your calendars! We're very excited to announce a significant program of special events for COLLABORATE 18 attendees interested in EPM and analytics.

- Special Interest Group (SIG) meetings
 - EPM (Hyperion) SIG meeting, 3-4 p.m., Sunday, April 22, in South Seas B.
 - Analytics, BI and Big Data SIG meeting, 1:15–2:15 p.m., Tuesday, April 24, in Banyan D.
- EPM Welcome Reception:
 - 7-9 p.m., Tuesday, April 24, in the Seascaple Ballroom located in Mandalay Bay's famed “Shark Reef” attraction. Come mix and mingle with other EPM professionals in a unique and fun setting (yes, you'll get to see the sharks)!
- Conference sessions:
 - There are simply too many to list here, however, a full list of EPM sessions is available at:
 - On-Prem EPM/Hyperion: bit.ly/2DrqJSx.
 - Cloud EPM/Hyperion: bit.ly/2rr7OBN.
 - A full list of Big Data, BI and Analytics sessions is available at bit.ly/2DTwjdE.



Kirby Lunger is a Partner at Performance Architects. She focuses on the Oracle enterprise performance management (EPM) and analytics arenas and co-chairs the OAUG's Analytics, BI and Big Data Special Interest Group (SIG).