

# PRODUCT PROFILE

## SalesAdvizor for Salesforce.com Aims to Simplify BI

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Part of the ECT News Network

03/07/07 5:00 AM PT

*Business intelligence has evolved; what were once large, unwieldy applications have gradually become easier to use. For example, SalesAdvizor™ for Salesforce.com, a so-called "one-click" BI tool, brings data mining and statistical and numerical analysis features to any user of Salesforce.com's on-demand CRM system.*

Business intelligence is a fast-growing segment area in the on-demand market. BI solutions help enterprises track performance, understand business drivers, and manage an organization's overall operations.

A complete set of BI capabilities includes information management, query and analysis functions, and presentation of results.

"BI is a large, complex set of technologies, processes and methodologies that address all of the steps necessary to transform raw data into useful, usable, actionable information," Forrester principal analyst for business intelligence Boris Evelson told CRM Buyer.

### The BI Ecosystem

In the BI universe, the presentation layer -- that is, the reporting functionality -- is important, but "typically, 80 percent of the work and effort goes into the other layers of the stack, such as data discovery, transformation, cleansing, integration, aggregation, modeling, building analytics -- KPIs, or key performance indicators -- and finally, presentation via traditional reports or newer technologies such as OLAP (online analytical processing)," Evelson said.

When it comes to evaluating BI systems, Evelson noted that "any mid-sized to large enterprise with the least level of sophistication does not want to look at sales metrics and analyze sales in a vacuum. One needs to integrate sales, marketing, financial, operational, risk, IT, supply chain and other metrics into the overall picture.

"This is the realm of industrial strength BI vendors: IBM, Microsoft, Business Objects, Cognos, SAS, Information Builders, Hyperion, Oracle, Microstrategy and SAP," Evelson added, "[but] I have yet to see a full, on-demand BI offering that addresses all of the issues and challenges I outlined above."

### SalesAdvizor for Salesforce.com

[Advizor Solutions'](#) recently released SalesAdvizor for Salesforce.com is a graphically driven data mining and analysis tool that is available on a per-seat perpetual license via [Salesforce.com's](#) (NYSE: CRM) AppExchange and on-demand CRM system.

SalesAdvizor is the first of several packages that Advizor Solutions plans to release in the coming months, and is the forerunner for the upcoming release of Version 5.2 of the company's flagship BI application system, which is scheduled for the end of this quarter, according to CEO Doug Cogswell.

"Most business intelligence software is cluttered with complex reports, flashy charts, and complicated analytics," Cogswell claimed. "These products were not designed for serious analysis or are way to difficult to use -- they require an IT department to support them."

SalesAdvizor is easy to set up and allows the easy sharing of results via PowerPoint, Word, Excel and PDF output, he said.

As a new addition to Salesforce.com's Apex on-demand application platform, SalesAdvizor joins an online software library that contains more than 500 applications.

## **A Possible First**

SalesAdvizor for Salesforce.com brings data mining and statistical and numerical analysis features to any user of Salesforce.com's on-demand CRM system.

It includes Advizor's Analyst Office product, which means that it can be expanded to other dashboards and CRM data sets that make use of Microsoft Excel, Access and Salesforce.com data, such as marketing and customer support.

Key to accomplishing this is SalesAdvizor's "architecture of in-memory data management, data visualization and predictive analytics in a completely point-and-click interface," Cogswell noted.

## **Lakeview Technologies' Deployment**

SalesAdvizor for Salesforce.com is deployed at [Lakeview Technology](#), a provider of protection and recovery solutions. Its MIMIX products provide protection and continuity of operations for critical applications and data on a switch-ready backup server.

MIMIX supports applications on a variety of operating systems and is in use at several financial institutions, including Alfa Bank, one of Russia's largest integrated banking and brokerage firms.

"SalesAdvizor enables us to analyze trends, identify anomalies, and answer questions in a few short minutes when it would normally take hours or more," Edward Vesely, Lakeview Technology's vice president for worldwide marketing, told CRM Buyer.

"Prior to SalesAdvizor, we'd utilize Salesforce.com dashboards and reports, and then wait for IT to produce additional detail to answer our most pressing questions. And of course we'd often end up with more new questions than answers," Vesely said.

"SalesAdvizor presents information in ways that are intuitive -- in a manner that aligns with the way we think. It helps us make informed, fact-based decisions in record time," he added.

The resulting productivity gains are "extensive," noted Vesely. "We're now able to quickly determine which campaigns are generating the highest returns across product, geography, people, industry, channel and time dimensions."

## It's ShowingTime

[ShowingTime](#) provides a line of CRM products specifically designed for the real estate industry, including property-showing management tools for scheduling appointments and distributing listing activity reports to sellers. It is another SalesAdvizor for Salesforce.com early adopter.

"The productivity gains will probably mostly occur from the sales manager being better able to guide the salespeople in developing their pipeline. With its simple operation and clear visual presentation, it is easy to see where strengths and weaknesses in the pipeline are," CEO Scott Woodward told CRM Buyer.

"We have historically exported the information from Salesforce to Excel, and then worked with tables of numbers and sometimes generated graphs. It is a time-consuming process and, hence, not done frequently," Woodward explained.

"The beauty of SalesAdvizor is that one can quickly get this information and graphically manipulate it to drill down to the issues that need to be addressed," he added. "I haven't analyzed other alternatives in detail, but in general there seems to be a lot more work required to initiate use, and more complexity in graphically moving about the data." 