



# How to Help Your Organization Gather Better Information

## Executive Summary

Today's executives need more strategic information to make effective decisions, evaluate strategies, and manage for best results. This information is typically gathered through surveys, questionnaires, or appraisals.

But using paper-based forms is not efficient. The best way to modernize these functions is with a real-time computerized system.

This white paper shows IT managers how a real-time information-gathering and analysis system can help support an enterprise's goals, and the criteria for selecting the right one.

An ideal real-time information-gathering and analysis system meets these four criteria:

- ◆ deep integration with existing infrastructure
- ◆ unlimited scalability

- ◆ iron-clad security for credentials and strategic data
- ◆ lowest possible total cost of ownership (TCO).

The information gathered through employee surveys, questionnaires, and appraisals is very strategic and must be kept secure at all times.

For most enterprises, this need for rock-solid security makes the traditional software licensing model a better choice than the new software-as-a-service model.

From basic system design through ease-of-use to pricing, the ideal system provides the most effective operations at the lowest TCO.

Selecting the proper system can help IT play a key role in the success of an organization, without the burden of making any hardware or software updates, doing any user training, or handling any additional mundane tasks.

To compete in the global economy, today's executives must continuously re-evaluate business strategies.

To do so, they need more complete, detailed information on many aspects of enterprise performance.

Executives need strategic information that helps them see patterns, make effective decisions, and manage for better results.

The stakes are high. Truly strategic information can lead to dramatic results, such as:

- ◆ immediate improvements in productivity
- ◆ improved customer retention
- ◆ streamlined procedures that save costs
- ◆ reduced employee turnover
- ◆ better bottom-line performance.

To achieve these benefits, IT needs to help provide executives with comprehensive, up-to-date information on any facets of the organization that can be researched or measured through surveys, questionnaires, or appraisals.

But using paper-based forms for these tasks is not efficient, and sometimes impossible.

The physical burden of printing, handling, analyzing, and storing paper creates a tremendous lag between when a question is posed and when strategic results are ready for management.

Real-time computerized systems can modernize these functions.

These systems streamline the gathering and analysis of highly strategic information such as customer satisfaction, customer service adequacy, employee performance and satisfaction, product quality, training needs assessment, and so on.

Typically, executives ask IT to find the best corporate-wide solution. Otherwise, individual departments will find their own band-aid solutions, including non-integrated systems that in the long run cost more and make more work, or hosted solutions that can never be as secure as keeping data behind your own firewall.

This white paper is intended to show IT managers how a real-time information-gathering and analysis system can help support the goals of an enterprise, and the criteria for selecting the right one.

### Three business drivers

Three factors drive the requirements for any real-time information-gathering system:

- ◆ today's constant pressure to improve performance
- ◆ the need for better metrics on every key aspect of the organization
- ◆ the need to streamline paper-based surveying, analysis, and reporting.

Most functions in the enterprise already rely on computerized systems. The business drivers listed above create a compelling case for automating an organization's feedback mechanisms as well.

With the proper system in place, surveys, questionnaires, or appraisals can all be performed in a more timely, cost-effective way, generating faster results that enhance IT's role in supporting the mission of the enterprise.

But how does an IT manager go about selecting the right system to achieve all this?

### Four criteria for an ideal solution

An ideal real-time information-gathering and analysis system must meet several key technical criteria.

An ideal system provides:

- ◆ deep integration with existing infrastructure
- ◆ unlimited scalability
- ◆ iron-clad security for credentials and strategic data
- ◆ lowest possible total cost of ownership (TCO).

### **System criteria #1: Deep integration with existing infrastructure**

An ideal system can access any information in Active Directory (or any other LDAP-compatible directory) and in any corporate databases, CRM, ERP or HRIS.

It can integrate with existing security policies. It can generate outgoing e-mails and notifications, and automatically send them through Microsoft Exchange/Outlook.

Most of all, this deep integration can be achieved quickly. This provides several benefits, including faster ROI, more successful surveys, and less burden on IT resources.

### **Faster ROI**

Return on today's system investments must be measured in months, not years.

An ideal system is architected for quick integration, with pre-built components designed to access and convert information from any existing source.

The underlying engine must not require any tweaking or recoding to encompass a different data source. Ideally, any data conversion is isolated to a separate module, which lessens the requirements for integration coding.

All these factors contribute to faster ROI.

### **More successful surveys**

This deep integration with existing systems eliminates the need to ask repetitive and irritating questions.

When an employee signs in to take a survey, the system automatically matches their user name with their employee record, which includes data such as name, title, department, employee number, division, location, years with the company, salary level, and so on.

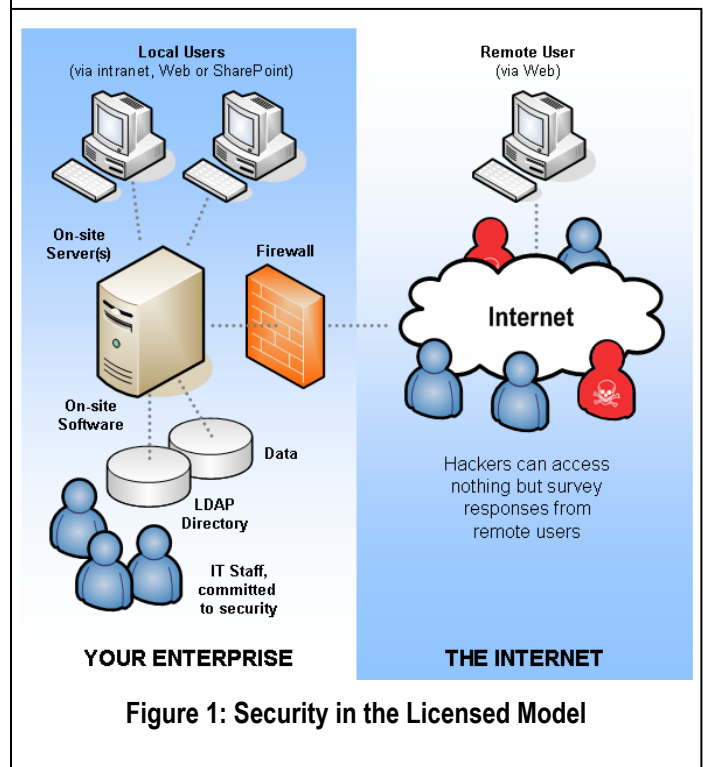
Since all these basic questions are no longer required, surveys can be shorter. This tends to improve response rates.

Therefore, deep integration promotes more successful surveys.

### **Less burden on IT resources**

Deep integration spares IT from the ongoing burden of generating lists of users and credentials, since all user records are already stored in existing systems.

As long as you maintain the normal user directories, an ideal information-gathering system is automatically maintained with up-to-date user lists.



**Figure 1: Security in the Licensed Model**

## **System criteria #2: Unlimited scalability**

An ideal system scales up to support an unlimited number of users who need to create or respond to surveys, questionnaires, or appraisals.

The ideal system can scale up to handle the entire enterprise, numbering hundreds of thousands—or even millions—of employees.

The consequences of limited scalability damage IT's credibility.

For instance, a 360 review process often starts as a pilot project in one department or at one site. If effective, the 360 program is often rolled out across the next division, the next site, or perhaps the entire enterprise.

What happens if the system can't support the next wave of the rollout? The whole project can be thrown into question.

## **System criteria #3: Iron-clad security for credentials and strategic data**

Information gathered through employee surveys, questionnaires, and appraisals is highly strategic. It must be kept secure and confidential at all times.

This critical requirement helps to determine the appropriate delivery model for an ideal system.

There are two delivery models for enterprise software: the traditional, perpetual license model, and the ASP/ hosted/ subscription model.

**In the perpetual license model**, as shown in Figure 1, an enterprise pays for the rights to install and use the software on their own server(s). The firm's IT staff is responsible for security and system maintenance.

And all the company's data and the vast majority of its user credentials reside on their

own machines behind their own firewalls, tended by their own IT people.

**The subscription model**—sometimes called “software-as-a-service”—is quite the opposite, as shown in Figure 2 on the next page. In this approach, an enterprise subscribes to software accessed via a Web portal provided by the vendor. The software is not installed on the customer's servers.

Staff at the software vendor (or staff at a third-party data center) are responsible for security and system maintenance. All the company's data resides at the data center, and every transaction takes place over the Internet, including frequent transmission of user credentials and responses, and every report prepared with the system.

While software-as-a-service is fine for some applications, it is questionable for a real-time information-gathering system.

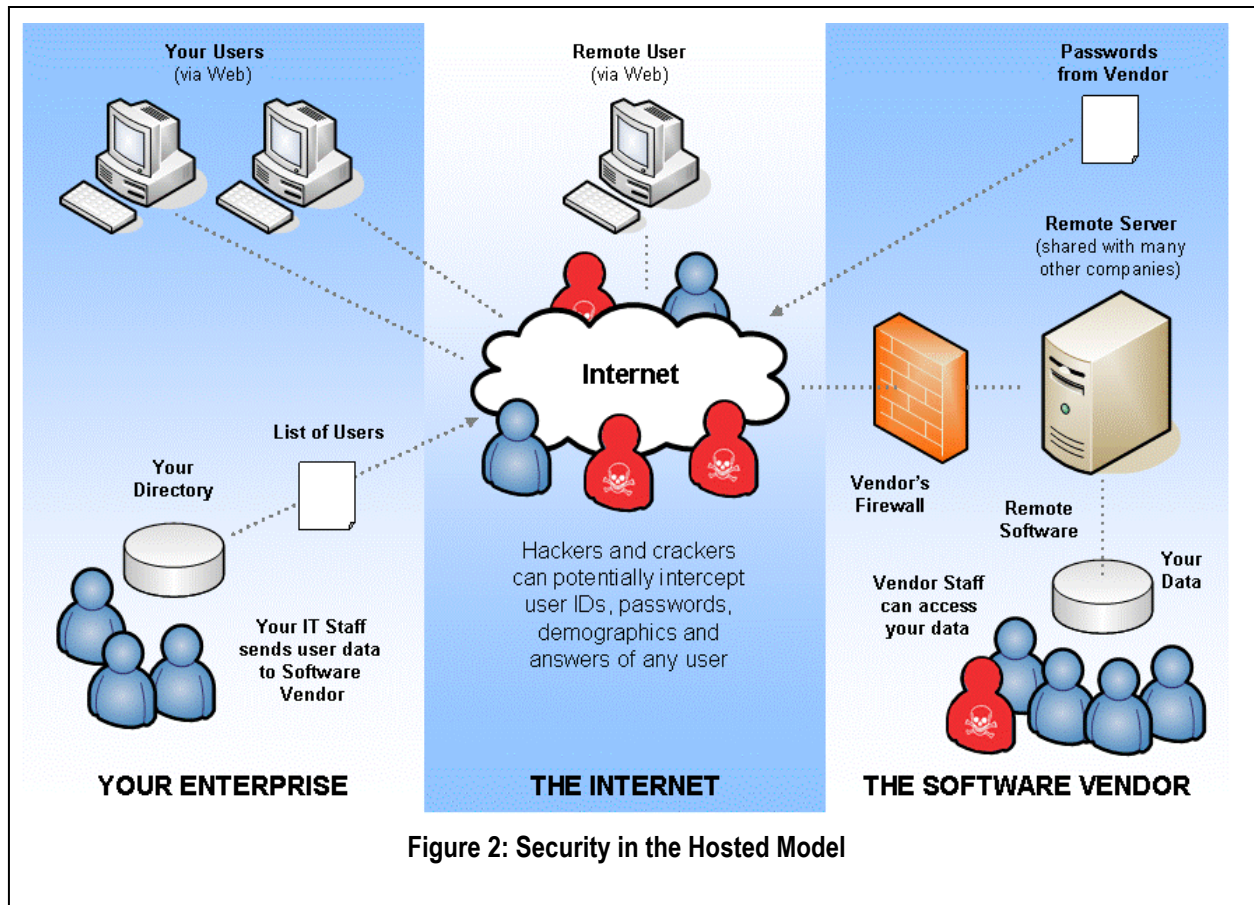
Would you be comfortable with every employee's performance and salary information transmitted over the Internet and stored off-premises by somebody else? What about customer satisfaction ratings? Product quality data? Do you have any competitor who might enjoy getting a sneak peak at such strategic information?

For this application, an ideal solution should probably be delivered as traditional, licensed software that gives you total control of your own data. What's more, this leaves your IT people in charge of your system security.

Who else is more motivated to safeguard your own data than your own people, at your own premises?

## **System criteria #4: Lowest possible total cost of ownership (TCO)**

From its basic architecture through ease-of-use to real-world pricing, the ideal system provides the lowest possible TCO.



**Figure 2: Security in the Hosted Model**

An ideal system enables each department to serve itself, without taxing IT resources for mundane tasks like survey design, data entry, spreadsheet analysis, or report formatting.

And it does not require a small army of outside consultants to perform these tasks.

An ideal solution does not require installing any software, browser plug-ins, or Active-X controls on each PC. It does not involve making a single service “touch” for hardware upgrades.

In fact, the ideal solution does not require any new hardware, software, security, policies, or anything beyond one or more industry-standard Windows servers, and client PCs with a corporate-standard Web browser such as Internet Explorer or Firefox.

This means little-to-no cost for user training or support.

As for pricing, many enterprise systems have one fixed price, take it or leave it. This means you must pay the full bill, even to start with a pilot project.

Other systems charge by usage, so that every time one of your managers wants to run the smallest follow-up questionnaire, their department must pay all over again.

This is a powerful disincentive to doing follow-ups that could yield valuable information.

An ideal system is priced in a way that makes sense: priced by employee (for review-based activities) or priced by administrator (for survey-based activities).

That means you pay once for every employee surveyed with the system, or once for every administrator who creates or manages surveys with the system.

From then on, any authorized employees or administrators can use the system as they wish with no further fees.

## What “Powered by Blue” means for you

With these criteria for selecting an ideal real-time information-gathering and analysis system in mind, how do the current offerings on the market stack up?

One in particular stands out: Blue from eXplorance.

Blue is an enterprise-class suite of four Web-based applications designed to support IT in gathering the information and feedback your enterprise needs.

Using Blue, any department can gather information, analyze it in powerful ways, and deliver strategic highlights to decision-makers, faster and easier than ever before... without taxing IT resources, or relying on costly outside consultants.

Blue was designed to meet all four criteria for an ideal solution, as described below.

### 1. Blue offers deep integration with existing infrastructure.

Blue achieves deep integration quickly and easily. Blue links to all mainstream enterprise systems, such as:

- ◆ user directories (Microsoft Active Directory or any LDAP-compliant directory)
- ◆ corporate databases (SQL Server)
- ◆ Web portals (Microsoft SharePoint)
- ◆ e-mail systems (Microsoft Exchange/Outlook).

And Blue can support any CRM, ERP, or HRIS system such as Oracle, PeopleSoft, SAP, or Siebel. What’s more, Blue’s creator, eXplorance, has been a Microsoft Partner

since 2003, and the company understands the Microsoft universe very well.

A typical Blue project involves one day of consulting, one day of installation, and two days of training. So you won’t have to worry about a never-ending integration project that erodes IT’s credibility in the eyes of top executives.

### 2: Blue supports unlimited scalability.

As shown in Figure 3, Blue has a modular design, with four system components that can be installed on different servers for load-balancing and optimum throughput:

The **Blue Integration Platform** links to any existing data sources and security policies to handle data management and authentication. Isolating all integration to this one module dramatically shortens installations, since no other components must be changed to handle various data sources.

The Blue Integration Platform can be installed on its own server for better throughput.

The **Blue application** provides the Web portal where users can send in responses to surveys, questionnaires, and appraisals, and where administrators can create forms, analyze responses, and prepare reports.

The Blue application can be installed on its own server for better throughput.

The **SQL Server** stores all the data gathered by the system, along with templates for forms and reports, and up-to-date user credentials. The Blue SQL Server can be installed on its own server for better throughput.

The **Blue Windows Service** syncs with any SMTP server such as Microsoft Exchange to deliver e-mail to users. E-mail is rule-based, so that you can control the flow of messages sent out to regulate the incoming hits on the Blue application server and database.

For example, even though a department may need to take 50,000 surveys, you can send out the notices in a continuous regulated flow, instead of 50,000 all at once.

The Blue Windows Service can be installed on its own server for better throughput.

Because of this modular design, Blue is as scalable as the hardware it runs on. One stated goal of its design philosophy was to be scalable from 100 to 500,000+ respondents. At the largest site installed to date, Blue supports 3.8 million users with no issues.

### **3. Blue provides iron-clad security for credentials and strategic data.**

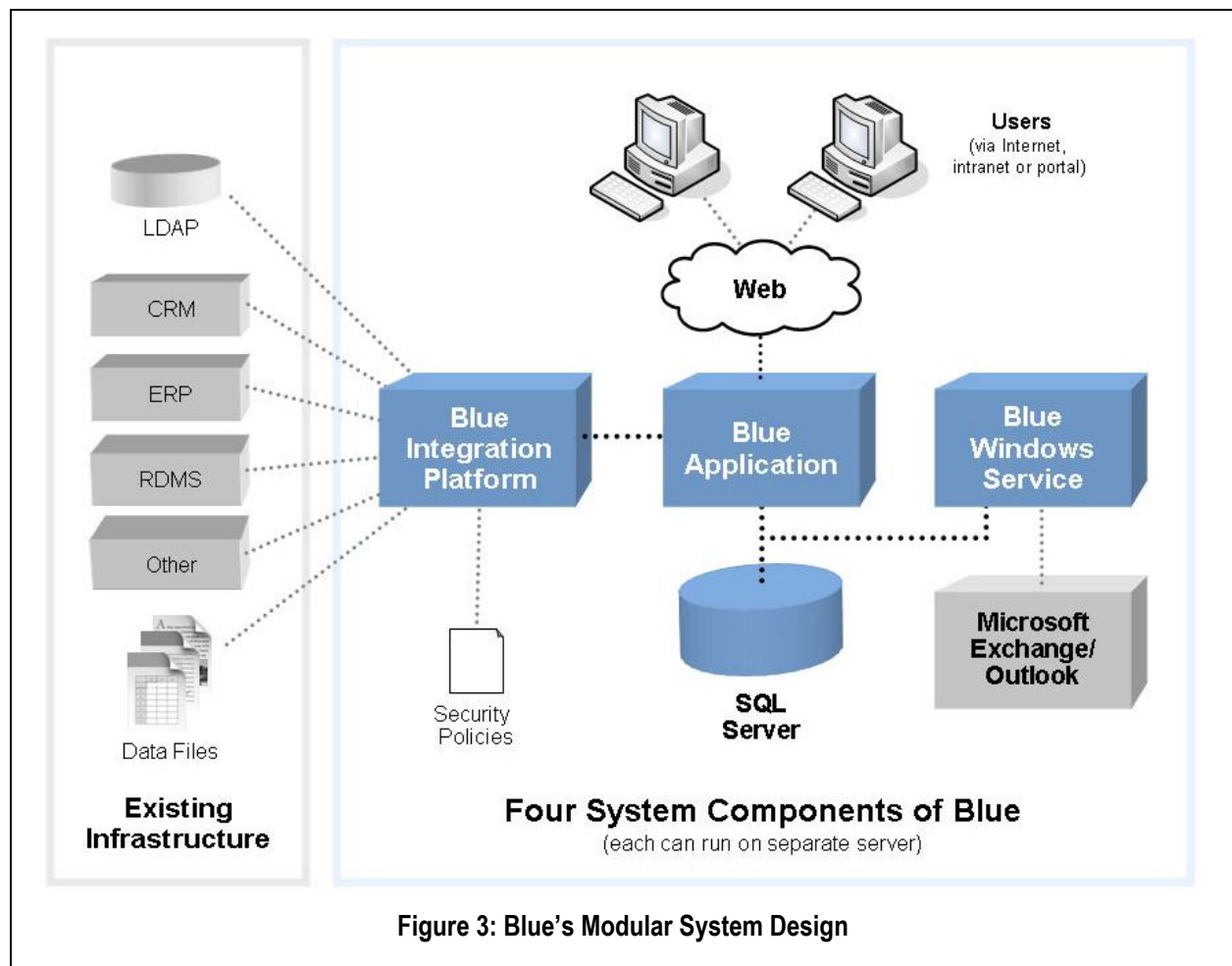
Although Blue is available as a hosted solution, it is most often installed on the customer's premises with a perpetual license.

This makes it as secure as any other system in your enterprise, with all credentials and data residing on-site behind your firewalls, protected by your IT staff.

You set the access policies for any remote or traveling employees, and you limit their access in a granular way to match your security policies.

### **4. Blue delivers the lowest possible TCO.**

Blue runs on existing PCs, with no need for upgrades or downloads. Department managers can create surveys, forms, and reports, with no support from IT and no need for expensive outside consultants. As long as you maintain your regular user directories, Blue is automatically updated to match.



Blue is a one-time investment, rather than an ongoing cost. An enterprise pays either by employee (for review-based activities) or by administrator (for survey-based activities); from then on, all authorized users can access the system as often as required.

With these sensible licensing terms, Blue provides an easy way to add more users.

Since Blue is a complete suite of products, it provides a smooth migration path for any enterprise wanting to add more information-gathering and analysis features.

Each product in the suite provides the same look and feel, for a unified experience with minimal learning curve. And each product module requires only a modest added install, reducing the system's server footprint.

All this makes Blue an ideal solution for any IT manager seeking a real-time information-gathering and analysis system that will help support an enterprise's goals.

Selecting the proper system can help IT play a key role in the success of an organization, without the burden of any hardware or software updates, user training, or additional mundane tasks.

### **To find out more...**

To find out more about how Blue can help IT play a key role in the success of your organization, visit [www.eXplorance.com](http://www.eXplorance.com) and register for a short online demo, to be delivered through the Web at your convenience.