

# Understanding Business Intelligence

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# Thank you for joining us!



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# Moving away from...

Amounts . . . . .			Change . . . . .	
Current	Last Month End	Last Year End	This Month	This Year
1,020,527.89	346,925.04	120,652.31	673,602.85	899,875.58
579,329.02	1,076,817.72	621,974.34	497,488.70	42,645.32
116,652.06	116,652.06	116,652.06		
2,981,198.74	2,186,667.91	452,005.71	794,530.83	3,433,204.45
4,697,707.71	3,727,062.73	407,273.00	970,644.98	4,290,434.71
1,718,998.44	1,481,734.72	1,156,394.13	237,263.72	562,604.31
493,848.80	315,475.02	367,494.31	178,373.78	861,343.11
56,217.59	56,217.59	56,217.59		
2,269,064.83	1,853,427.33	845,117.41	415,637.50	1,423,947.42
6,966,772.54	5,580,490.06	1,252,390.41	1,386,282.48	5,714,382.13
3,501,612.77	3,716,829.23	880,233.21	215,216.46	2,621,379.56
67,273.41	61,111.73	46,984.38	6,161.68	20,289.03
125,388.95	125,388.95	125,388.95		
61,480.61	58,735.86	58,735.86	2,744.75	2,744.75
3,755,755.74	3,962,065.77	1,111,342.40	206,310.03	2,644,413.34
8,820.73	8,820.73	8,820.73		
18,755.76	18,755.76	18,755.76		
27,576.49	27,576.49	27,576.49		
267,500.00	267,500.00	267,500.00		
1,535,017.77	535,017.77	535,017.77	1,000,000.00	1,000,000.00
11,750,607.37	9,955,729.37	689,046.25	1,794,878.00	11,061,561.12
13,131,529.91	10,744,059.40		2,387,470.51	13,131,529.91
3,183,440.31	1,590,847.80	113,471.52	1,592,592.51	3,069,968.79
6,966,772.54	5,580,490.06	1,252,390.41	1,386,282.48	5,714,382.13

# Moving away from...

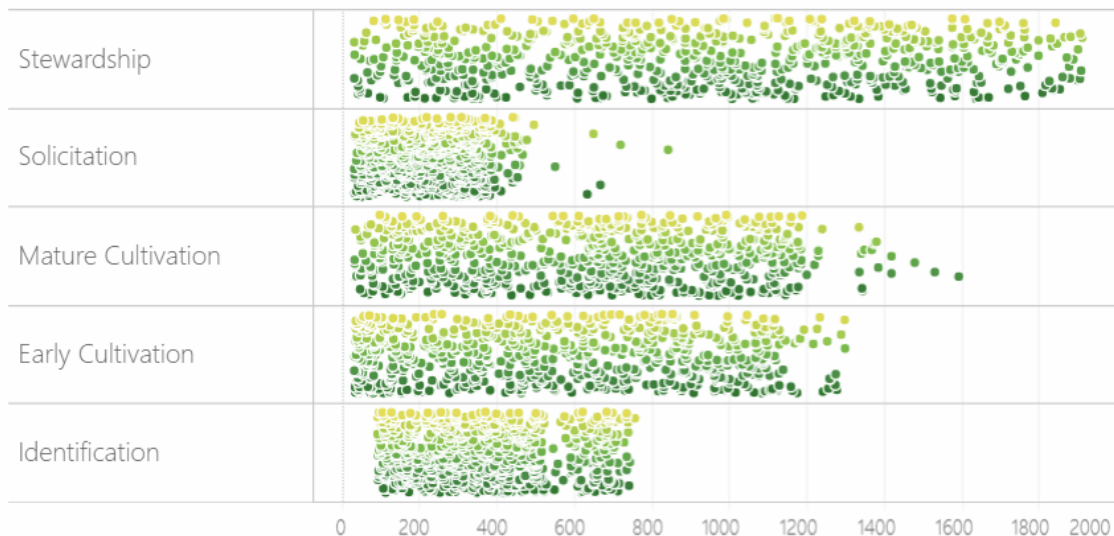
	A	B	C	D	E	F	G	H
1				Income				
2	Fund	Mon	Yr	Total Donors	Avg Gift	Total Donations	Change in Donors	Change in Income
3	General Fund	Jan	2014	6375	£ 6,375.00	£ 192,016.94		
4			2015	6131	£ 6,131.00	£ 186,357.28	-244	-£5,659.66
5		Jan Total		12506	£ 12,506.00	£ 378,374.22		
6		Feb	2014	253	£ 253.00	£ 3,860.89		
7			2015	268	£ 268.00	£ 8,538.20	15	€4,677.31
8		Feb Total		521	£ 521.00	£ 12,399.09		
9		Mar	2014	20	£ 20.00	£ 588.81		
10			2015	124	£ 124.00	£ 3,923.62	104	€3,334.81
11		Mar Total		144	£ 144.00	£ 4,512.43		
12		Apr	2014	7	£ 7.00	£ 340.00		
13			2015	40	£ 40.00	£ 1,260.00	33	€920.00

# Moving away from...

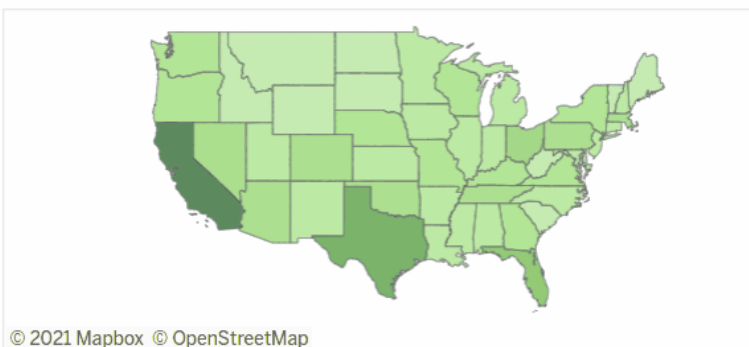


# To...

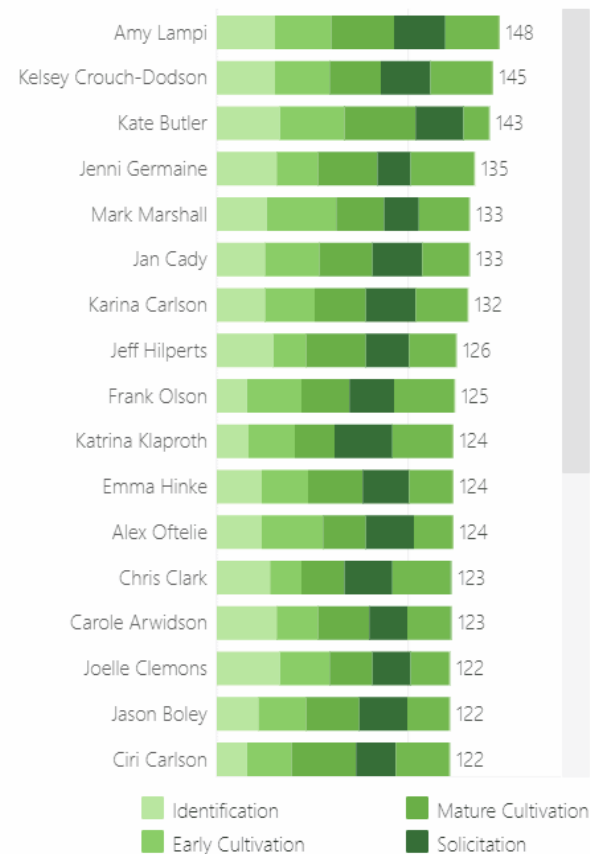
## Days in Prospect Status



Stewardship	715
Solicitation	669
Mature Cultivation	717
Early Cultivation	682
Identification	691



## Portfolio Size and Prospect Status

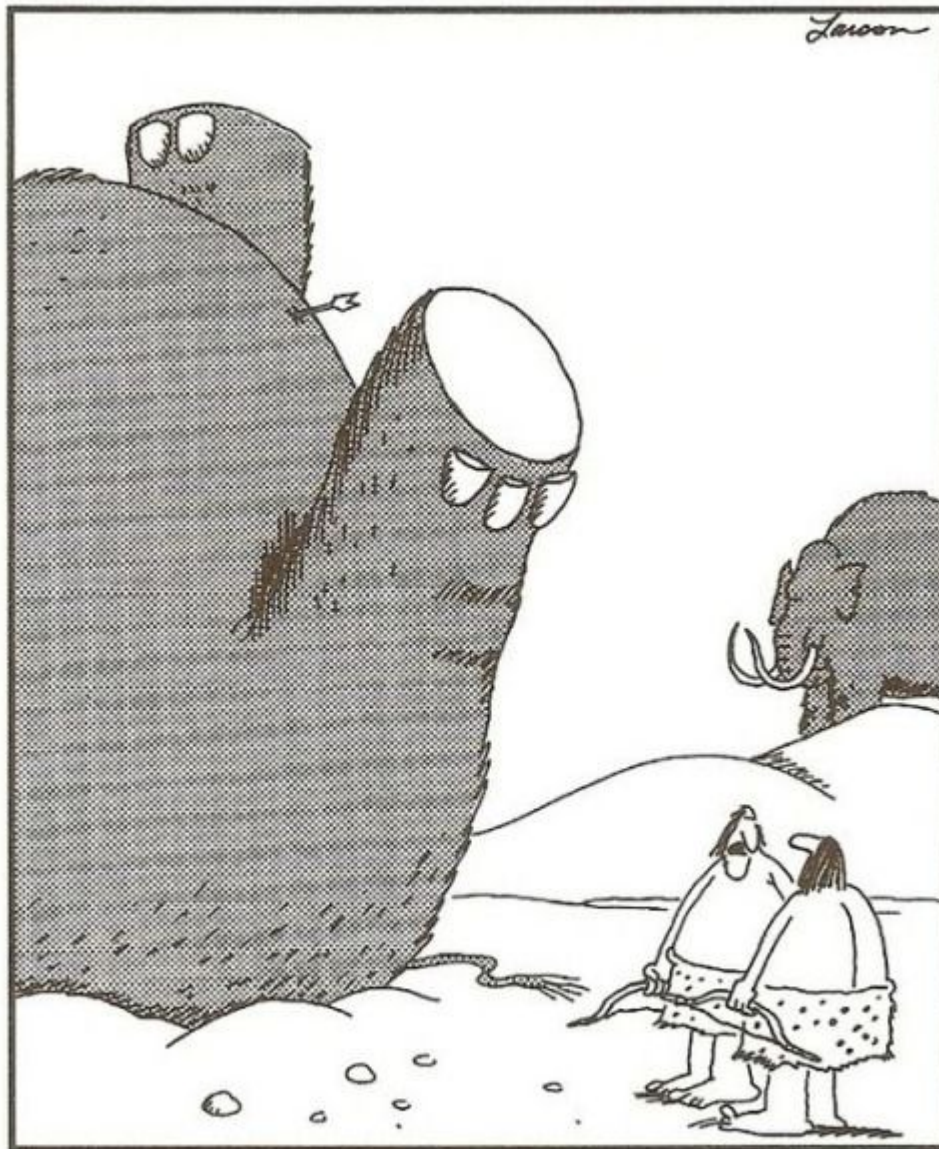


■ Identification
 ■ Early Cultivation
 ■ Mature Cultivation
 ■ Solicitation

## Agenda

- What does Business Intelligence accomplish?
- Where are we now?
- A Brief History.
- Establishing Access and Refresh Methods.
- Up and Running with Business Intelligence.





“We should write that spot down.”



# What are we trying to accomplish?



Save Time



Quickly Identify Anomalies & Opportunities



Effectively Communicate Insights

# Where are we now?

## How are you viewing your data?

- Printed reports or PDFs
- Excel Workbooks or Dashboards
- CRM Canned Reports
- Tableau
- Microsoft Power BI
- Other BI Product
- None of the above

# Where are we now?

**How is your President, Vice President, Executive, CEO, Board, or other Executive Leadership viewing your data?**

- Printed reports or PDFs
- Excel Workbooks or Dashboards
- CRM Canned Reports
- Tableau
- Microsoft Power BI
- Other BI Product
- None of the above

# A brief history.

*"In 1865, Richard Millar Devens presented the phrase "Business Intelligence" (BI) in the Cyclopædia of Commercial and Business Anecdotes. He was using it to describe how Sir Henry Furnese, a banker, profited from information by gathering and acting on it before his competition."*<sup>1</sup>

1. Foote, K., 2017 *A Brief History of Business Intelligence*

# A brief history.

*"More recently, in 1958, an article was written by an IBM computer scientist named Hans Peter Luhn, describing the potential of gathering Business Intelligence (BI) through the use of technology."*

# A brief history.

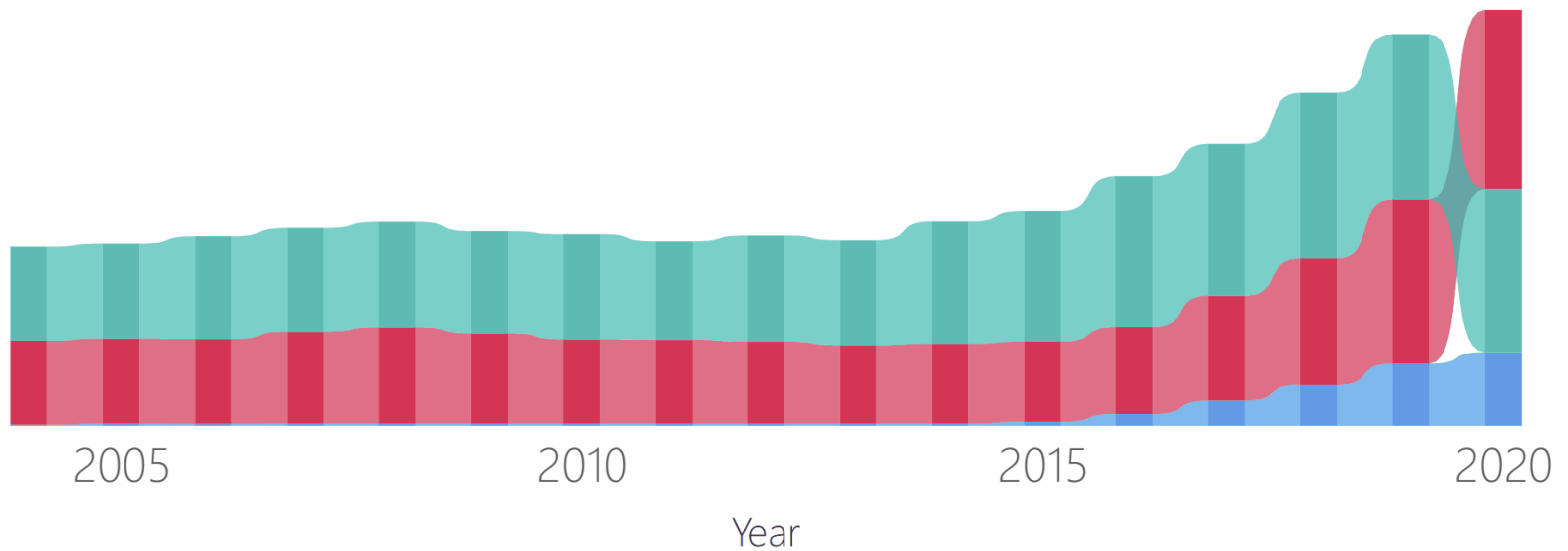
*"Business intelligence, as it is understood today, uses technology to gather and analyze data, translate it into useful information, and act on it 'before the competition.' Essentially, the modern version of BI focuses on technology – a way to make decisions quickly and efficiently – based on the right information at the right time."*



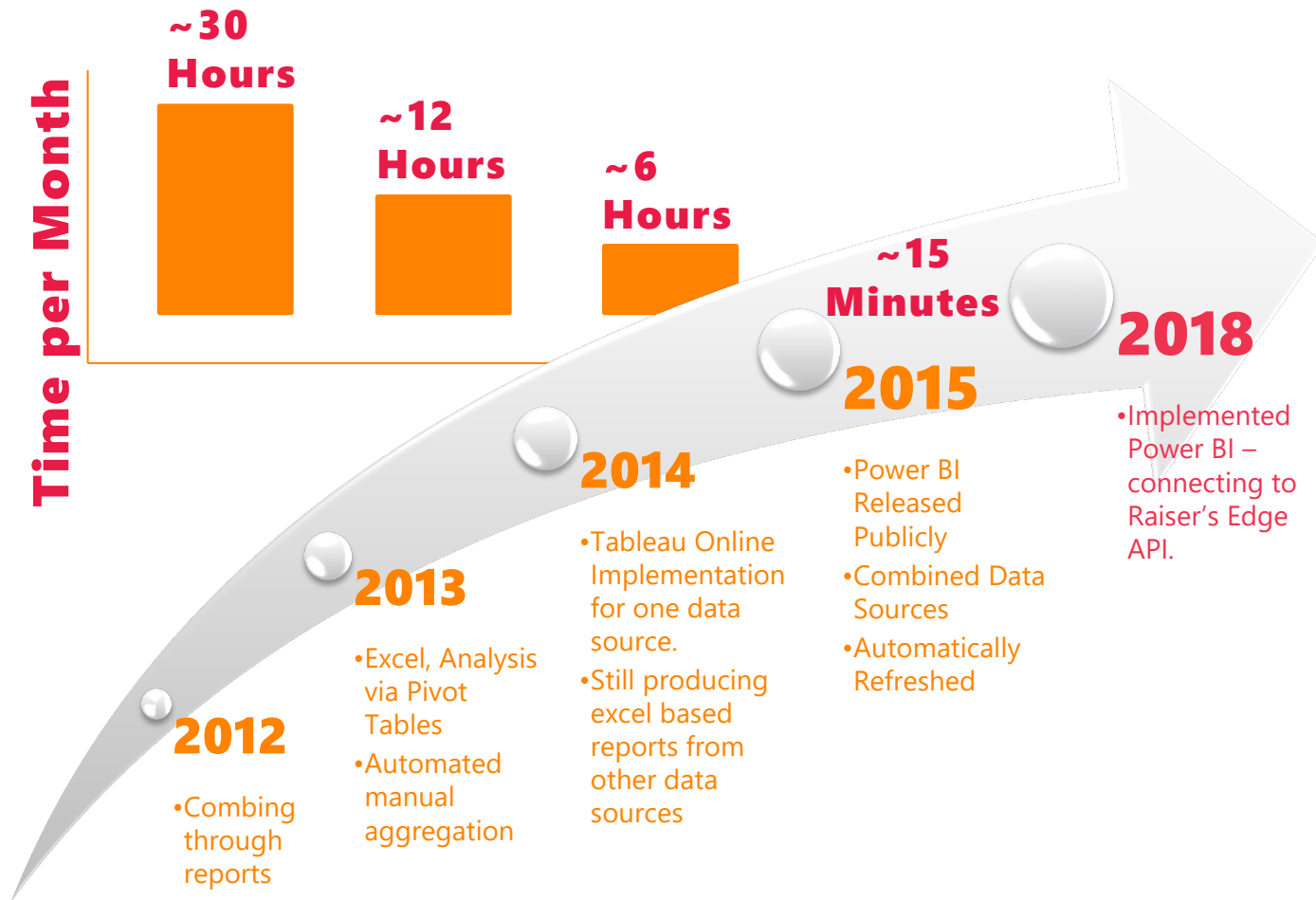
# A brief history.

## Google Search Trends Over Time:

● Business intelligence ● Microsoft Power BI ● Tableau

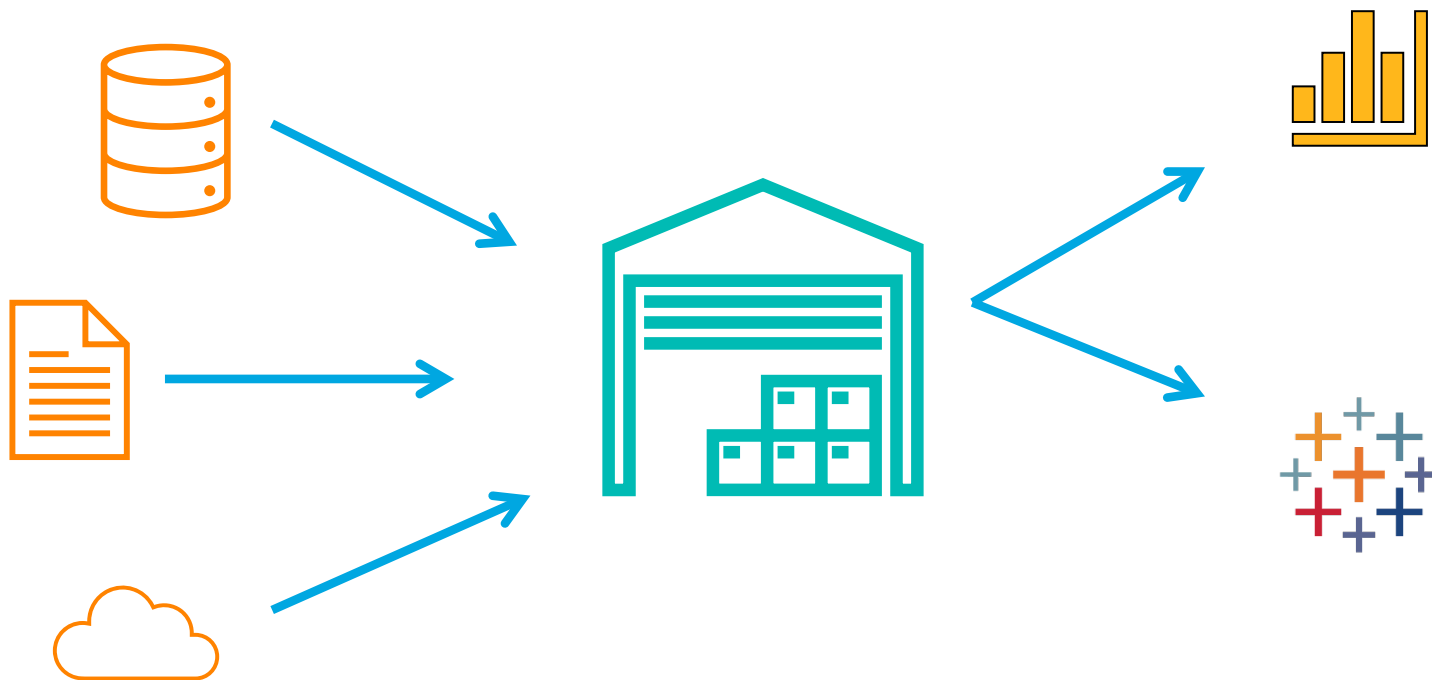


# My journey with BI.



# Establishing access and refresh methods.

## Enterprise Data Warehouse



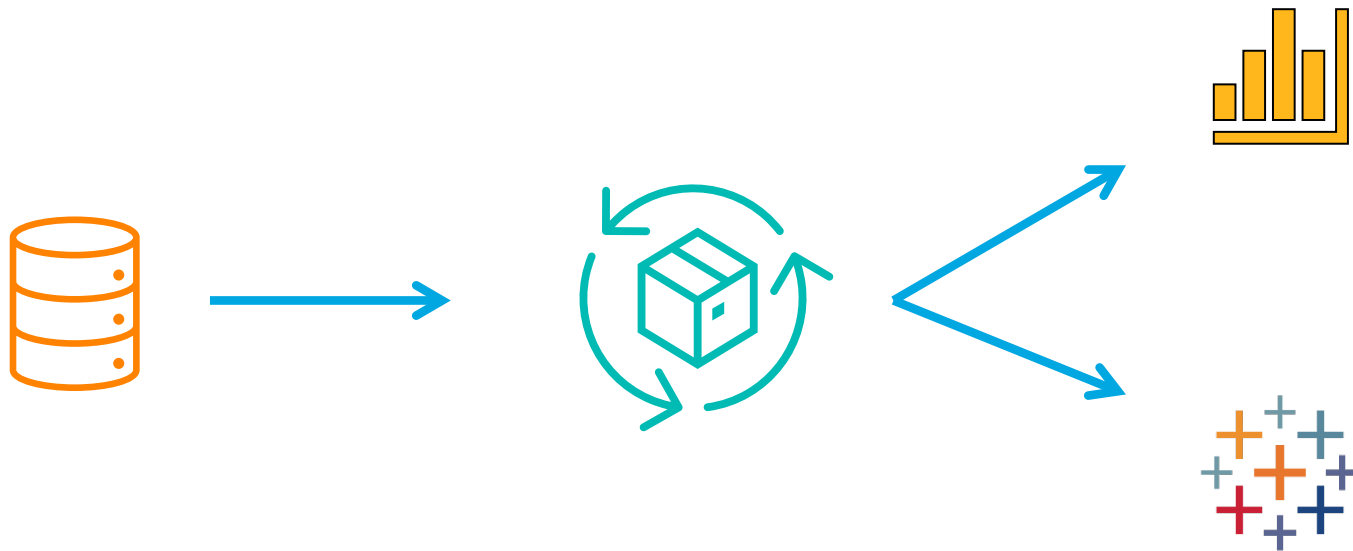
# Establishing access and refresh methods.

## Enterprise Data Warehouse

PROS	CONS
<ul style="list-style-type: none"><li>• Access to Multiple Data Sources</li><li>• Close to Real-Time Access</li><li>• Standardized Data</li><li>• Autonomous</li><li>• Improves performance for large data sets</li></ul>	<ul style="list-style-type: none"><li>• Expensive</li><li>• Requires specialized employees</li></ul>

# Establishing access and refresh methods.

## Third-Party Data Layer



# Establishing access and refresh methods.

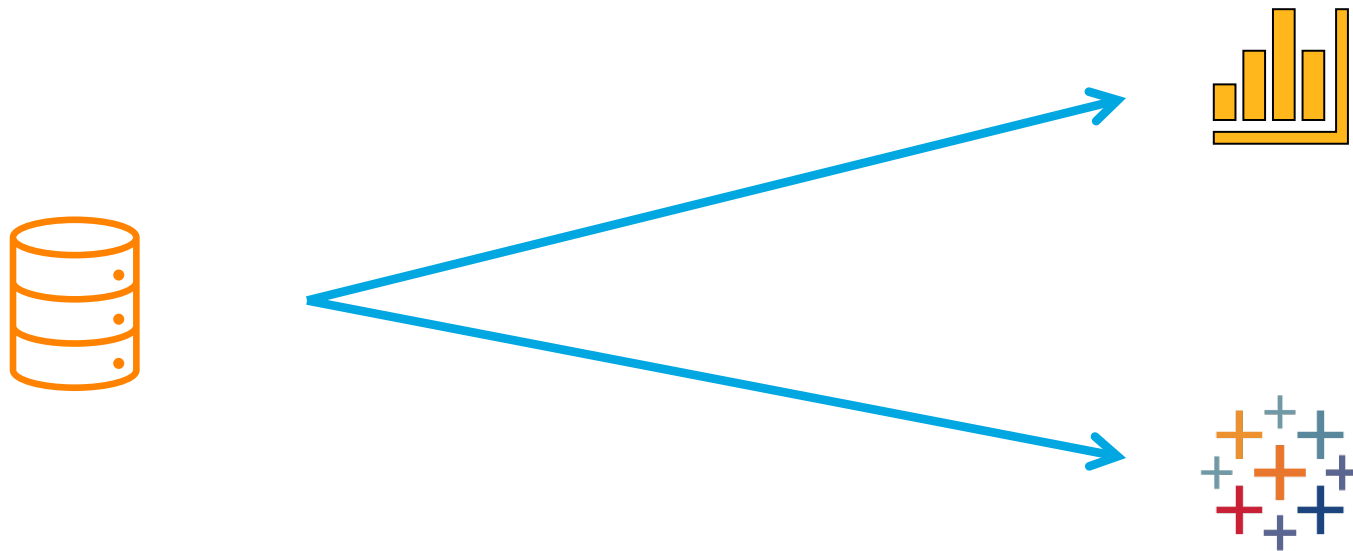
## Third-Party Data Layer

PROS	CONS
<ul style="list-style-type: none"><li>• Close to Real-Time Access</li><li>• Standardized Data</li><li>• Autonomous</li></ul>	<ul style="list-style-type: none"><li>• Expensive</li><li>• Access to CRM only</li></ul>



# Establishing access and refresh methods.

## Direct Access to Tables via API



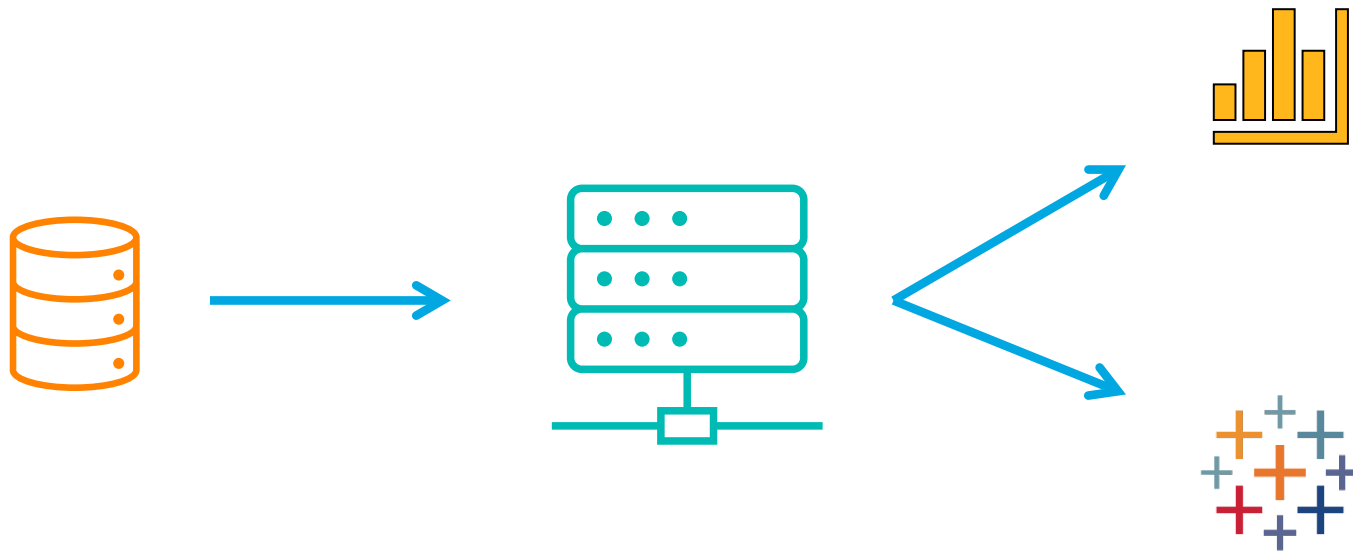
# Establishing access and refresh methods.

## Direct Access to Tables via API

PROS	CONS
<ul style="list-style-type: none"><li>• Close to Real-Time Access</li><li>• Autonomous</li></ul>	<ul style="list-style-type: none"><li>• Not standard among CRM Vendors</li><li>• Not preferred for organizations with large record counts</li><li>• Limitations in data availability</li></ul>

# Establishing access and refresh methods.

## Autonomous or Semi-Autonomous Raw Data Extracts



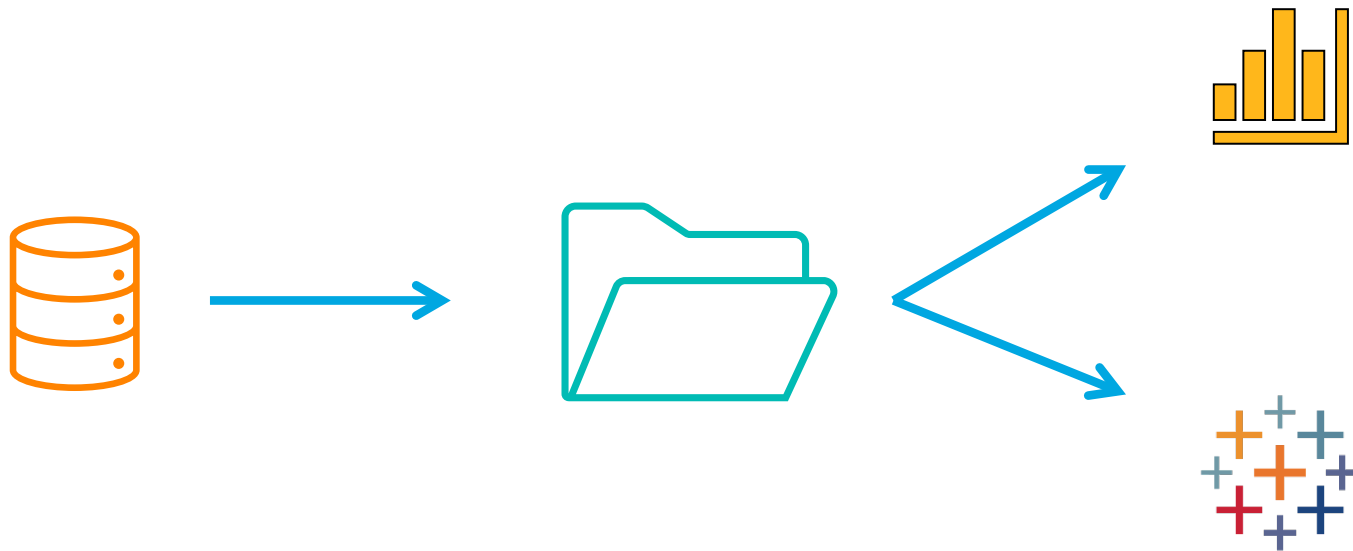
# Establishing access and refresh methods.

## Autonomous or Semi-Autonomous Raw Data Extracts

PROS	CONS
<ul style="list-style-type: none"><li>• Inexpensive</li><li>• Autonomous or Semi-Autonomous</li></ul>	<ul style="list-style-type: none"><li>• May require manual staff intervention</li><li>• Extracts may take a long time to run</li></ul>

# Establishing access and refresh methods.

## Manual Raw Data Extracts



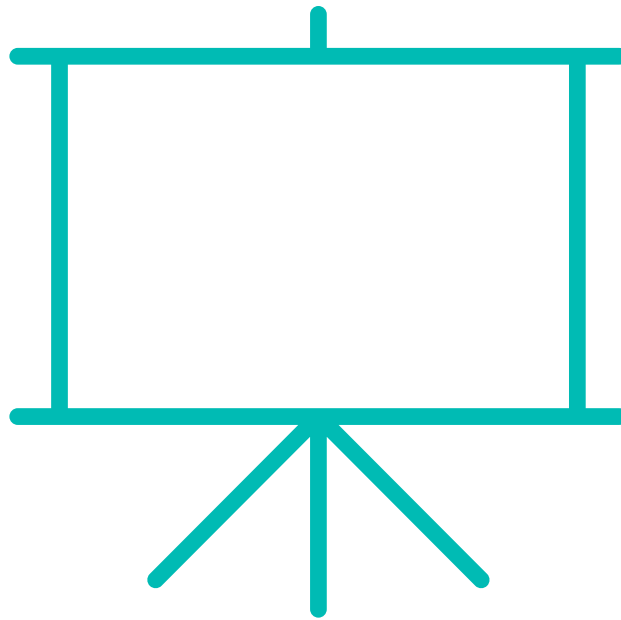
# Establishing access and refresh methods.

## Manual Raw Data Extracts

PROS	CONS
<ul style="list-style-type: none"><li>• Inexpensive</li><li>• Does not require IT expertise</li></ul>	<ul style="list-style-type: none"><li>• Manual export process</li><li>• Not real-time</li><li>• Not autonomous</li></ul>



# Up and running with Business Intelligence.



# Best Practices.

- Have an effective data governance strategy.
- THINK BIG – start small.
- Define a roadmap.
- Limit the data to only what you need.
- Isolate and emphasize.<sup>1</sup>
- Get leadership and community buy-in.
- Validate. Validate. Validate.

1. Berinato, S. (2016). *Good Charts: The HBR Guide to Making Smarter, More Persuasive Data Visualizations*. Harvard Business Review Press.

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# How can we help?

*For nearly 40 years, BWF has provided innovative, collaborative advice and specialized expert fundraising counsel and services to colleges, universities, arts and culture organizations, hospitals, environmental groups, and academic medical centers. The firm offers counsel and assistance for every step of the development process.*

- Build and deploy dashboard suites built upon years of fundraising expertise.
- BWF can host your solution in the cloud, allowing you to access dashboards on any device, from anywhere.
- Provide training for those who wish to build on their existing knowledge and maintain business intelligence locally.
- We don't stop at dashboards. Our consulting team is here to help create strategy and act on the insights you gain.



# Platforms and Partnerships.

mission**bi**

 **RealZips**  
GEODATA PLATFORM

 **tableau®**

 Power BI

# Thank you for attending!



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