HOW BUSINESS PROS USE MORE DATA WITH LESS WORK THROUGH SELF-SERVICE AUTOMATION



In recent blogs we detailed BMC's data democratization initiative to create a self-service enterprise data warehouse that would be easily usable by business users across the company, and took a deep dive into how our finance operations are benefiting from having new ways to access and work with data. In this installment, we provide an overview of how non-technical users in the customer support, marketing, and sales operations groups are doing their own job-specific analytics (with a big, behind-the-scenes assist from Control-M), and we'll show how improving enterprise access to data has helped our customers and employees.

-By Jeff Gheen, IT Director – Business Intelligence, BMC

BMC, like many other companies, is dealing with a growing number of data sources, and more people that want to use data from those sources in new and expanding ways. In the past, dealing with such growth was a painful process. Exploding data volumes, options, and new user requests can create a lot of work and backlogs for the IT and analytics teams that are responsible for providing data and tools. They can also frustrate business users that want to develop new insights. However, the rapidly expanding set of data sources and business users that want to work with them isn't causing headaches at BMC. That's because of the success of our data democratization program, which puts data in the hands of those who need it to create new business insights, while keeping access policies, security, and other controls with us in IT.

What is Control-M?
Control-M simplifies application and data workflow orchestration on premises or as a service. It

makes it easy to build, define, schedule, manage, and monitor production workflows, ensuring visibility and reliability, and improving SLAs.

We couldn't do it if we weren't able to automate many of the tasks, and to orchestrate the automated processes that need to coordinate across systems. Automation and orchestration enable self-service programs to be able to scale. To gain those abilities, we turned to BMC's own application workflow orchestration platform, Control-M.

Control-M plays a crucial role in orchestrating all the workflows, integrations, and other handoffs needed to deliver data and insights, while providing an easy-to-use front-end interface for our business professionals. In this post, I'll share a few examples of how it all comes together in customer service, marketing, and sales operations.

It's easy to see the value of putting data from multiple sources into the hands of business users. However, it wasn't easy to do because it involved multiple processes that are complex and interdependent. This complexity is what slows data democratization at many organizations. Automation is the bridge that gives non-technical users new analytics capabilities.

Our Customer Support organization uses data to drive key business decisions

In Customer Support, drawing insights from data is a critical component of the decision-making process. Given that, having accurate information available at all times from a single source of truth is vital. This ensures that everyone in the organization is working from the same set of information when making business decisions. The Support Analytics team has been working closely with the IT team to architect a process to drive high performance, high efficiency, and maximum automation throughout the reporting and analytics processes.

"It is imperative that the data be available and current at all times," says Tricia Blank, senior manager of the Support Analytics team. "The question you have to think about to fully realize how impactful this is, is: 'How much time is lost and what is the impact when data is not available or if the data is stale?' For example, if someone comes in and views their dashboard, they may not realize that the data is old and thus, might draw some incorrect conclusions."

To make sure the most up-to-date accurate data is available, Blank and her team took advantage of our self-service enterprise data warehouse architecture to create a single source for all the various types of data. All reporting and analytics tools, including MicroStrategy, Tableau, Alteryx, and Metrics Insights, utilize this single source of data. This ensures that regardless of which tool is being used to view the data, the resulting metrics and information will all be the same.

Before we created a modern, self-service enterprise data warehouse (EDW) and orchestrated it through Control-M, delays were common for collecting and integrating the data from different sources and producing the dashboards. It wasn't unusual for database updates to be delayed four to seven hours, which caused significant problems downstream.

"If the dominoes don't fall in the correct order, it all crashes down," says Blank. For deadline-critical reports, the team would have to manually monitor the data jobs to make sure everything was running on time and in sequence. This was a time-consuming task and was a high-stress one at the end of each quarter.

To automate processes, Blank and her team used Control-M to automate all the data transfers, workflows, notifications, and many other jobs needed to produce daily dashboards and reports.

"Our goal is to ensure that the Customer Support organization has the information it needs to make key business decisions, both now and as the needs of the business change," says Blank. "Utilizing the self-service enterprise data warehouse as well as Control-M has allowed us to do that in a very efficient way."

Marketing gets more creative with data

Marketing produces and consumes a lot of data, for performance monitoring, email campaigns, lead and pipeline tracking, and more. Its essential data sources include Eloqua, Salesforce, and Adobe files. Marketing produces a lot of dashboards, and also outputs data and reports using MicroStrategy, Alteryx, and Tableau. It is another department that makes extensive use of Control-M without necessarily knowing it because of all that goes on behind the scenes.

Historically it was difficult for marketing to integrate its various data sources to produce the insights and reports it wanted. Getting a complete view of a customer or a campaign involved going to multiple sources and bringing the various data points together in an ad hoc way. A frequent problem was that a needed component, such as an Adobe file with web analytics data, wasn't ready when it was needed to produce a dashboard. That can quickly lead to a lot of processes being delayed. The situation illustrates the value of process orchestration.

We were able to prevent such problems for our marketing operations. Now, all the back-end data loads, integrations, and jobs run in the background through automation built with Control-M.

When you integrate data for a dashboard or other use cases, you need to make sure the data sources you're integrating are available. Strategically, we don't want business units involved in ingestion. They shouldn't be up at night wondering "Did the data load?" We've set it up for them so Control-M does the data loads automatically, in addition to running the jobs in sequence to produce the needed output. Our marketing staff doesn't have to do any heavy lifting with the data, so they've been able to concentrate on using it in new ways. For example, we've gained visibility into the customer journey so we can better see connections between sales and marketing activities. In turn, that helps our salespeople know what questions to ask customers.

"The automation and self-service have really shortened our data-to-impact time. Now we focus on the right things sooner," says Carlos Umana, a BMC senior manager of marketing business operations.

So far, we've been able to meet all the new dashboard and visualization requests because Control-M can orchestrate multiple processes—marketing professionals now create their own custom reports and dashboards.

"While access to data is powerful, the ability to leverage that data in a self-service manner and provide insights to our stakeholders is what defines success for our team and for BMC," says Doug Piper, senior manager of marketing programs. "The ease of use and immediate access drives increased productivity, allowing our team to spend more time thinking strategically and less time working through extensive, manual data manipulation. Currently, we're using the data in our dashboards to focus on ensuring quality and progression of marketing-sourced leads, working closely with Sales to ensure we're aligned on maximizing results."

Automation & alerts take Sunday out of the work week

Sales Operations is another department that was freed from the effort of loading data and monitoring the progress, which is something Richard Gilbert did every Sunday. His team produces a closely watched dashboard that must be ready as soon as BMC's top executives begin work each Monday morning.

"We're providing insights into sales operations to the sales leaders," says Gilbert. "Our output is used as an executive management tool and as a sales productivity tool."

Producing the data for the dashboard requires 24 to 32 workflows to process between 5 and 6 terabytes of data, which is housed in siloed systems. That volume and sophistication are why Gilbert used to have a lot of stressful Sundays. Control-M is why he doesn't anymore. He and his international team used Control-M's self-service tools to automate extract, transform, and load (ETL) functions and job runs, and to create alerts that send automatically if any delays or other problems develop.

"Control-M stripped the middleman out of the process and eliminated having to wait for results," says Gilbert. "Automation has had a huge impact on our work. I went from having a 12-hour workday on Sundays to working maybe 10 minutes to have the databases up and ready by Monday morning."

Success breeds success

BMC's Sales Operations, Marketing, and Customer Support organizations have very different functions, but each has benefited from automation that gives them controlled access to enterprise data and analytics capabilities. Another common bond among these groups is the significant time savings each has realized since adopting Control-M.

Their success has led other teams across the company to look for ways Control-M's automation capabilities can help them streamline their analytics activities. New ideas and use cases are launching all the time. More and more of the company's day-to-day work is better informed by data, which is helping us be more responsive and effective. Our business users, our company, and our customers are all better for it.

Tricia Blank sums it up best: "Control-M was a huge win for our customers, for the BMC executives that use our dashboards, and for my team. With the time we are saving, we can focus on more strategic projects."