## Precision configuration Information Technologies' orphan child



## **I.T. versus bridges**





# **Engineers do NOT design bridges to stand up**





# **Engineers design bridges NOT to fall down**





## Vision





Angus Struan Robertson

## **Experiencing failure**





## **Some historical context**



- 1. Insects and butterflies
- 2. Cataloguing -- punch cards
- 3. Defence Force filing system
- 4. Strategy development



- 5. ERP and other IT projects which produced exceptional outcomes
- 6. Pulse measurements on many highly sub-optimal ERP and other implementations
- 7. Some heavy opposition
- 8. and some in-depth analysis

## What is strategy?



## Strategy



• Doing the right things



Professor Malcolm McDonald

## **Tactics**



• Doing things right



Professor Malcolm McDonald

# Tactics – Doing things right

Strategy – Doing the right things  $\rightarrow$ 

Professor Malcolm McDonald

**Strategy versus tactics** 















Tactics – Doing things right →









## What is strategy?



• The essence of why an organization exists and how it thrives



## **Information technology**



## An industry in crisis





Can these men turn the tide?

Inff. Darkada ala Inna ka

## Failures are increasing The opportunity is huge







## **Extreme failures**



- 1. Seven years and half a billion dollars -- international chemicals company
- 2. \$400 million -- multinational shoe corporation
- 3. Multinational entertainment giant -- \$878 million
- 4. Major supermarket chain -- \$195 million



## **Deleting a building**





## An industry characterized by failure



"Attendees of Gartner's Business Intelligence Summit in London last month were not surprised to hear that most enterprises are still failing to use business intelligence (BI) strategically. Gartner's survey of over 1300 CIOs returned some unimpressive findings about the state of BI implementations: Gartner's vice: president of research summed up the situation nicely by saying:

"<u>Most organisations are not making better decisions than they</u> <u>did five years ago</u>"

## There is a need for a new approach





# What is NOT an engineering approach?





## There IS great opportunity IT can and should add value





## **Different view of ERP** (Integrated business information systems)





## What is a database?



## 



## What is an ERP?

*"Enterprise Resource Planning"* = ERP Systems ? or ? *"Integrated Business Information Systems"* = IBIS

all the information "repositories"
= databases
= tables
= lists

= filing drawers / folders

real world items that require description and management

+ the numerical computations, workflow and other activities that are executed with the numbers (and text) stored in these repositories

ALL of which can be done by human beings -- including making a mess!





## Why invest in a new ERP / IBIS? Or any IBIS?



## How do you unlock IBIS value? le business decisions 1. Value is unlocked through effective delivery of informative intuitively fundamentally meaningful 2. Packaged in a way that the computer system intelligent 3. Presented through: 1. reports 2. graphs 3. dashboards 4. advance mic analysis 5. adv aced techniques of information presentation, s and interpretation

esulting in MUCH BETTER strategic, tactical and operational decisions that manifest in improved organizational profitability, growth, impact, etc

## What is the core requirement for any IBIS?



## How is value created





Value manifests through increased profitability, gr job satisfaction, fulfilment of the strategic

The consequence of intuitive, intellige business decisions – thrive de

crated and enhanced through Such decisions are facili eaningful and relevant information access to more

Answers tr

10

ins I have not yet thought to ask

Int information" is assembled as a consequence of high crategic and executive level input into the design of the CONTENT – taxonomies designed to catalogue every conceivably relevant classification ahead of time

## Precision strategic content engineering



The definition of information content

- in a way that is structurally (taxonomically) fundamentally meaningful to human beings who understand the business
- and the translation of this content into structured codes which faithfully and accurately reflect human understanding of the REAL WORLD in a way that the computer can manipulate
- with minimal human intervention
- > so that the computer system **appears to be intelligent**

## **Taxonomy defined**

- 1. Logical word (semantic structure)
- 2. Precision vocabulary of preferred terms
- 3. Conveys understanding between humans with relevant knowledge and experience
- 4. Once linked to a precision code scheme the most important communication mechanism between computers and people
- 5. An art and a science

6. Once it is right it is OBVIOUS 😊

### FIXED MACHINES AND EQUIPMENT-AssOwn TOOLS AND PORTABLE MACHINES-AssOwn VEHICLES MOBILE PLANT LOCOMOTIVES ETC Engine Transmission Chassis Wheels, Tyres And Brakes

DIRECT OPERATIONAL EXPENDITURE

RENTAL OF ASSETS-OpCost

LEASEHOLD IMPROVEMENTS

OFFICE BUILDINGS PRODUCTION LINES

DEPRECIATION ASSET OWNED-OpCost

LEASE FINANCE CHARGES-OpCost

DEPRECIATION ASSETS LEASED-OpCost

OPERATING LEASE COSTS ASSETS-OpCost REPAIR AND MAINTENANCE ASSETS-OpCost

PROPERTY (NON-PLANT, NON-OFFICE)

INDUSTRIAL BUILDINGS AND WAREHOUSES

ASSET OPERATING COSTS

- Cab / Manufacturers Body
- Electrical
- Electronic
- Freezer And Cooling Units
- Hydraulics And Pneumatics
- Load Carrying Body
- Specialized Mechanical Components



EXPENDITURE



## **Taxonomy relevance**

- 1. Essential to effective operational and strategic use of business software
- 2. Nearly ALL validation lists (drop down lists), chart of accounts, etc
- Large body of expertise Botany, Zoology, military filing, Library Science, Information Management, etc
- 4. Unknown to many (most?) IT professionals and business people

Selections in the line of the						
C.	ORDER CANCELLED					
CC	Order Cancelled Credit Control					
CS	Order Cancelled by Consumer					
CT	Order Cancelled by Customer					
D.	DAMAGED OR DEFECTIVE					
DF	Defective Product					
DM	Damaged Product					
DP	Damaged Packaging					
DT	Consumer Complaint					
P.	PRICE ERRORS OR DISCONTINUED					
PD	Discontinued					
PI	Incorrect Price					
S.	SUPPLY ISSUES					
SD	Order Duplication					
SF	Customer Non-Franchise Holder					
SI	Incorrectly Supplied					
SK	Overstock					
SL	Late Delivery					
SO	Oversupplied					
SV	Not in Customer Inventory Master					
Τ.	USED AS TESTER					
Π	Used as Tester					
Ζ.	OTHER					
ZN	Not Known					
ZO	Other					



## A computer is An adding machine / calculator





0 1 1 + 1 = 101 + 1 + 1 = 111+1+1+1=100

Called a "bit"





8 bits make a byte

2 bytes make an ASCII character

A= "41" hex



## **Coding taxonomies**





- 1. Computers only understand binary
- 2. The code is a unique binary pattern that corresponds to the structured English taxonomy
- 3. The only way the computer will appear to be intelligent
- 4. Results in "intelligent data"
- 5. Standard conventions
  - 1. Indents and trailing periods
  - 2. Capitalization
  - 3. Other standards and conventions

XPE	NL	ITURE						
DIH	RE	CT OPERATIONAL EXPENDITURE						
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	0	PERATING LEASE COSTS ASSETS-OpCost						
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		LEASEHOLD IMPROVEMENTS						
		INDUSTRIAL BUILDINGS AND WAREHOUSES						
		OFFICE BUILDINGS						
		PRODUCTION LINES						
		FIXED MACHINES AND EQUIPMENT-AssOwn						
		TOOLS AND PORTABLE MACHINES-AssOwn						
		VEHICLES MOBILE PLANT LOCOMOTIVES ET						
		Engine						
		Transmission						
	Chassis							
	Wheels, Tyres And Brakes							
	Cab / Manufacturers Body							
		Electrical						
100		Electronic						
133	Hydraulics And Pneumatics							
13		Load Carrying Body						

## Software and data text -> hexadecimal -> binary All for US ©



10001011010 00110001101

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## What is a general ledger?





## **Integrated system** (look-up and posting)



## **Example of custom data entry screen** With custom taxonomies



Inventory and A&P Maintainance System						
	Edit Stock Code					
Inventory Take-On	Barcode:	3365440003811	Load Stock Item			
New Stock Item	22.22					
Barcode	SKU Description:	Kouros EDT 100ml				
Temporary Barcode	Brand Hierarchy (Product Class):	YFMK YSL - Kouros	~			
Edit Stock Item	(Product Class):	Dept All				
Replace Temp. Code		Post Ali				
New Reference No						
Generate EAN	Item Masters					
Reports	Descriptive Custom For	ms Genera Replenishment Production Sal	es			
Logout	Product Status:	P - Padundant				
A&P Applications	Froduct Status.	K - Keundant				
Bonding Job Receipt	Target Gender:	M - Masculine 💌				
Bonding Job Posting	Product Category:	1T - Eau de Toilette	~			
A&P Budget						
Job Closure	Sales Category:	AS - ASCO Select	×			
Budget Roll-up	Qualifier Stockcode:					
EDI Applications						
s Prod. Info.						
Admin Menu	Prev Next					
Brand Hierarchy						

## Example of custom code maintenance development for client specific<sub>ystem</sub>

taxonomy

Brand Hierarchy (Product Class)



# Matching codes in unrelated module provide logical integration



Hierarchies for Job: CY002009						
File Edit Options Job Query						
Hierarchy						
□ <b>44</b> CY002009						
🖻 🖉 Y - YSL						
🖻 🖉 B - YSL BEAUTE						
🖨 🏸 F - YSL FRAGRANCE						
🕞 🥬 F 🕘 FEMININE - YSL FRAGRANCE						
🖃 💯 M MASCULINE - YSL FRAGRANCE						
🕀 🎾 7 - YSL-M7						
🗄 🎾 B - YSL - Body Kouros						
H - VSL - L'Homme						
J J - YSL - Jazz						
K - YSL - Kouros						
P 2E MEDIA						
2CI - Advertising Space						
222 - Mailers						
Direction						
2E5 - Television						
2E6 - Promotional						
🖉 zE8 - Other Media						
🦉 zE9 - Rec Consult Fee -Distribn						
ZH LAUNCH COSTS						
2H1 - Travel & Accomodation						
zH3 - Venue Hire						
zH5 - Catering						
zH6 - Joint Launch Cost						
zH7 - Materials						
2H9 - Other Launch Costs						
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Getting the software to do what it supposedly cannot do

## Example of faulty integration "The &\$%^#@% system lost my data"

-				
Heads/Section	ons			
ouble-click to select	Desentations		Taraking Card Oak	WID Contraction Index
Hierarchy	Description	WIP Control ledger	Fracking Lost Unly	WIP Lost tracking ledge
/ /F /M /K /zE.	MEDIA		No	and the second
/F /M /K /zE1	Advertising Space		Yes	10-33/E1-11
/F /M /K /zE2	Mailers		Yes	10-337E2-11
/F /M /K /zE3	Billboards / Uutdoor		No	10.0075111
/F /M /K /zE4	Production		Yes	10-337E4-11
/ /F /M /K /zE5	Lelevision		No	10.00750.11
/ /F /M /K /zE6	Promotional		Yes	10-337E6-11
Y /F /M /K /zE8	Other Media		Yes	10-337E8-11
Y /F /M /K /zE9	Rec Consult Fee -Distribn		Yes	10-337E9-11
/ /F /M /K /zH.	LAUNCH COSTS		No	
Y /F /M /K /zH1	Travel & Accomodation		Yes	10-337H1-11
Y /F /M /K /zH3	Venue Hire		Yes	10-337H3-11
Y /F /M /K /zH5	Catering		Yes	10-337H5-11
Y /F /M /K /zH6	Joint Launch Cost		No	
Y /F /M /K /zH7	Materials		Yes	10-337H7-11
Y /F /M /K /zH9	Other Launch Costs		Yes	10-337H9-11
Y /F /M /K /zl.	TRAINING		No	
Y /F /M /K /zl1	Travel & Accomodation		Yes	10-33711-11
Y /F /M /K /zl3	Venue Hire		Yes	10-33713-11
Y /F /M /K /zl5	Catering		Yes	10-33715-11
Y /F /M /K /zl7	Materials		Yes	10-33717-11
Y /F /M /K /zl8	Training Team		No	
7 /F /M /K /zl9	Other General Train Costs		Yes	10-33719-11
Y /F /M /K /zL.	LOCAL POINT OF SALE MATERIAL		No	
7 /F /M /K /zL1	Local Transparences /Logos		Yes	10-337L1-11
Y /F /M /K /zL3	Local Materials		Yes	10-337L3-11
Y /F /M /K /zL5	Personalized Fixures / Counter		No	
Y /F /M /K /zL6	Product Sleeve (Instore)		No	
Y /F /M /K /zL7	Shelf Tools		No	
Y /F /M /K /zL9	Shelf Price Stickers		No	



# The value of technology is determined by the person using the technology





## The Business Intelligence and ERP challenge



>Most businesses are NOT making better decisions than they did five years ago despite substantial BI investments -- Gartner 2006

≻19 out of 20 ERP implementations do not deliver what was promised" – Financial Mail 2003



≻50% of ERP projects fail – Gartner

Precision strategic content engineering

→ THE MISSING LINK

➤A HUGE OPPORTUNITY

# Example of exceptionally BAD practice



## Huge impact on integration, reporting, etc



500528 Waste Material Consumed 500530 Loss from valuation of external materials 500540 Loss from valuation of own materials 500550 Losses - inventory variance -consignment sale 500560 Safety Clothing 500565 Safety Equipment 500570 Sand & Stone 500575 Scraper Rope 500580 Scrapers 500585 Services 500590 Signs 500595 Skips & Cages 500600 Finished Goods Inventory Offset 500605 Smelting & Refining 500610 Production Order Settlement - Variance 500615 Steel Other 500620 Steel Sections 500625 Steel Sheets & Plates

## **Precision ordered data Versus ...**





## From chaos to order



Example of simple hierarchically structured data table
C. ORDER CANCELLED CC Order Cancelled Credit Control CS Order Cancelled by Consumer CT Order Cancelled by Customer
D. DAMAGED OR DEFECTIVE DF Defective Product DM Damaged Product DP Damaged Packaging DT Consumer Complaint
P. PRICE ERRORS OR DISCONTINUED PD Discontinued PI Incorrect Price S. SUPPLY ISSUES
SD Order Duplication SF Customer Non-Franchise Holder SI Incorrectly Supplied SK Overstock
SO Oversupplied SV Not in Customer Inventory Master T. USED AS TESTER
Z. OTHER ZN Not Known ZO Other

# What is the best way to unscramble spaghetti?





## Structure of strategically aligned Chart of Accounts $\rightarrow$ plant maintenance $\rightarrow$ inventory $\rightarrow$ etc





## Mapping between modules Well structured



GL	R&M spares expo	ant spares		
	MOBILE PLANT		MOBILE PLANT	
	Loaders		Loaders	
	Dump trucks		Dump trucks	
	Drill rigs		Drill rigs	
	Other off read	8-12000000	Other off read	
	Other off road	N.M.N.M.M.S.	Other off road	
	etc	<	etc	

## Mapping between modules Badly structured



500528 Waste Material Consumed 500530 Loss from valuation of external materials 500540 Loss from valuation of own materials 500550 Losses - inventory variance -consignment sale 500560 Safety Clothing 500565 Safety Equipment 500570 Sand & Stone 500575 Scraper Rope 500580 Scrapers 500585 Services 500590 Signs 500595 Skips & Cages 500600 Finished Goods Inventory Offset 500605 Smelting & Refining 500610 Production Order Settlement - Variance 500615 Steel Other 500620 Steel Sections 500625 Steel Sheets & Plates



## **Precision strategic content engineering IS the missing link**

Lack of coding structure and standards

versus

fundamental first principles precision strategic content engineering



Instead of ->



Current

Objective

## Business Intelligence the ideal Better DECISIONS







## Business Intelligence current reality Throwing Money away





**Business intelligence solutions** 







## Business Intelligence the opportunity high value highly successful outcomes





## Solution



Fundamental first principles precision strategic content engineering including configuration and integration – intelligent data



## Value versus precision A critical consideration





>Driven by executive (strategic) decision support requirements

- >Fundamental first principles  $\rightarrow$  Strategic
- $\succ$ Highly structured  $\rightarrow$  Hierarchical
- >Very specific coding and layout conventions for ease of use
- Disciplined code design and maintenance

Massive improvement in management information and decision support

>Deliver the often promised but seldom delivered benefits of business ERP, CRM, ECM, BI, IT  $\rightarrow$  business system investments

>An opportunity to gear your current investment

## Characteristics of precision strategic content engineering Methods and standards







## Summing up



- 1. Excellent high value decisions rely on logical strategically aligned information  $\rightarrow$  the information to thrive
- To get executive intelligence OUT you must put executive intelligence IN "intelligent content"
- 3. Precision strategic content engineering IS THE missing link in ERP and IBIS
- 4. Requires a significant investment
- 5. An ART and a science



- 6. Do NOT scrap your current system until you have thoroughly evaluated this
- 7. An opportunity for dramatic gearing of your current investment

# If you do not act within 48 hours you probably never will – act TODAY! ©



What is your single most important insight from this presentation?

What is the single most practical action that you can take tomorrow to apply I.T. more effectively?



## **Design IT solutions like bridges ... Not to fall down – intelligent content**





## Acknowledgements



Clients, associates, staff

Father and mother, Angus and Thelma

Children Alexandra and Struan

Other significant people in my life



Psalm 136:5 "To Him who by wisdom made the heavens, for His mercy endures forever;"

## **Questions?**





Finding the missing pieces of your I.T. and strategy puzzles

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