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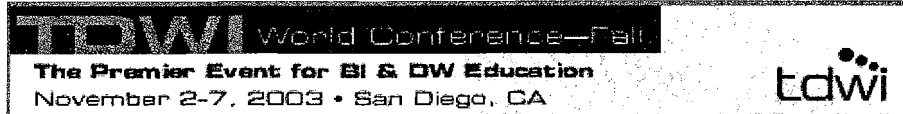
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BI This Week

Why So Many BI Initiatives Fail

Balanced scorecards may help align what BI projects deliver with the strategic and operational information business users really want.

8/20/2003

By Peter Walzer

A recent International Data Corporation (IDC) study, "The Financial Impact of Business Analytics," confirms what many business executives and managers already know: Business Intelligence (BI) initiatives can provide considerable value to all types of business organizations. The study, first conducted in 1996, found that "Business analytics implementations generated an average 5 year ROI [Return on Investment] of 431%." In addition, over half (63%) of the firms participating in the study "had a payback period of two years or less."

Why do so many BI projects fail? For years we've heard about the potential value of BI, so why are the results often so disappointing in the eyes of key BI project sponsors and stakeholders? A BI project can go quite smoothly -- from a technical perspective -- and still fail in the eyes of these sponsors and stakeholders.

The reason for this apparent confusion has to do with the way BI projects provide value. Specifically, the content delivered by many BI projects often does not need to be used by anyone. In fact, many BI projects have to constantly work to attract customers (or clients) who will hopefully be involved in the BI projects throughout their lifecycle. Typically, these clients must see the opportunity to leverage the information delivered by the BI project.

Contrast this to a mission-critical operational system that is inextricably tied into a key business process. As a result, what's required in a successful BI project is for key executives, managers, and other members of the organization to want to make use of what a BI project delivers. In other words, the successful BI project is aligned with the information that the organization desires.

A Strategic Approach to BI Project Alignment: Balanced Scorecard Provides the Connective Tissue

What's needed is an approach for resolving the alignment of what BI projects deliver and the strategic and operational information that the business really would like to have. Enter the Balanced Scorecard: an approach that provides a little structure and just so happens to be an ideal way to address the BI alignment problem.

In providing the rationale for utilizing the Balanced Scorecard within business organizations, Robert Kaplan and David Norton explain in "The Strategy-Focused Organization" that even organizations with "well formulated" strategies have trouble implementing them (as you might have guessed our alignment problem is often more than just a BI alignment problem). The authors explain that "strategies ... are changing but the tools for measuring strategies have not kept pace."

Balanced Scorecard: Building the map

To get a sense of how the Balanced Scorecard can help us, let's start with an example of some standard strategic objectives common to many business organizations:

1. Increase Customer Value
2. Build the Franchise
3. Achieve the Best Cost Structure in the Industry

How can the Balanced Scorecard help us? If we take these Strategic Objectives and move them into an initial Balanced Scorecard Strategy Map (Figure 1) right away we notice two significant improvements.

First, we have incorporated different organizational perspectives for the business into the mix. There is the financial perspective, customer perspective, internal - or business process - perspective, and the learning and growth perspective. These perspectives clarify the orientation of the strategic objectives, giving them a clear frame of reference within the overall business entity.
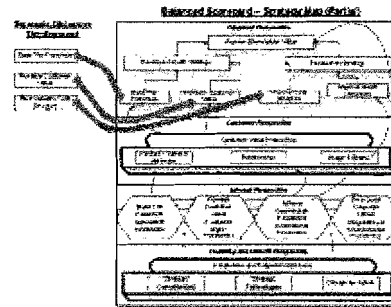

Figure 1: Click to enlarge

Secondly, the Strategy Map documents the links between individual strategic objectives and also between certain strategic objectives and key business processes. This creates an opportunity for the strategy participant to ensure that strategic objectives support each other and that key business processes adequately support the right strategic objectives. The strategy participant can also evaluate the degree to which strategic objectives address key business process issues and critical success factors.
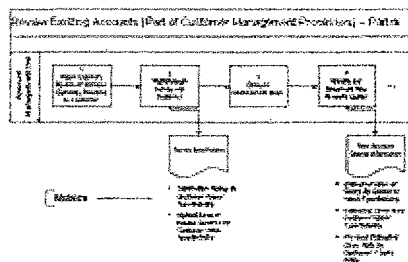
Balanced Scorecard: Adding the KPI's

Figure 2: Click to enlarge

The next step is to add the performance measures -- or KPI's in BI parlance -- to the Balanced Scorecard. In doing this, we look at specific information used to measure the effectiveness of each Strategic Objective. The links between various strategic objectives (and between certain strategic objectives and internal processes) can help support this high-value task.

A step often overlooked in collecting the metrics involves spending some

time drilling into the detail of some of the key Internal Processes to establish operational metrics (Figure 2). Although strategic planning work doesn't generally call for business process analysis, certain business processes are so important to the strategic objectives of the business that this step can't be overlooked. Occasionally, business process documentation will already be available. In the event that there is no such documentation, business process experts should be asked to walk-through some of the key process flows at a high-level. This walk-through should uncover key informational metrics in the process. Since key information that supports the specified strategic objectives is all that is needed in the walkthrough, the common problem of KPI overkill can be avoided.

The result of this process analysis combined with our efforts to assign measures to Strategic Objectives will result in a Strategy Map seasoned with all the key metrics that the BI projects should be focused on implementing (Figure 3).

Benefits of a Balanced Scorecard Approach to BI Alignment

As Figure 3 illustrates, the Balanced Scorecard can be a unifying force in an environment where there is a real disconnect between the strategic and operational information needs of the business and the information consistently delivered by the BI project team. With an effectively implemented Balanced Scorecard, the BI project team and the rest of the business organization can begin to confidently refer to the Scorecard's elements knowing that they are talking about the same strategic objectives, key internal processes, and key performance metrics.
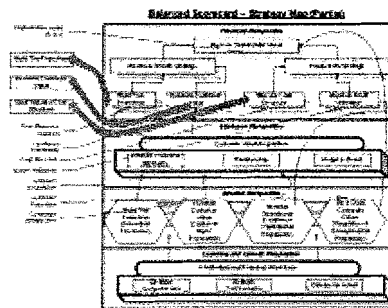

Figure 3: Click to enlarge

The Balanced Scorecard approach is now recognized internationally as an incredible transformational tool for businesses that endeavor to improve their strategic focus. For those organizations that have not yet considered this approach, an initial focus on the benefits in improved BI Alignment represents a tremendously synergistic opportunity: well-aligned BI projects can provide the performance measures that are critical to every Balanced Scorecard effort.

The Balanced Scorecard facilitates BI project alignment, prioritization, and focus and gets its performance measures as part of the package. What does the business get? It gets a focused, clearly articulated strategy and a road map for better-aligned BI projects.

References:

1. Press Release, IDC Study Finds Analytics Projects Yield 431% Average ROI, International Data Corporation, October 28, 2002.
2. Kaplan, Robert, Norton, David, The Strategy Focused Organization, Harvard Business School Publishing Corporation, 2001.

Peter Walzer is a strategic management and systems consultant with 17 years of experience delivering solutions to Fortune 1000 clients. His specialties include Business Intelligence, Project Management, and Strategic and Operational Planning. He can be reached through The Carrera Agency or at pwalzer@blueglobegroup.com.

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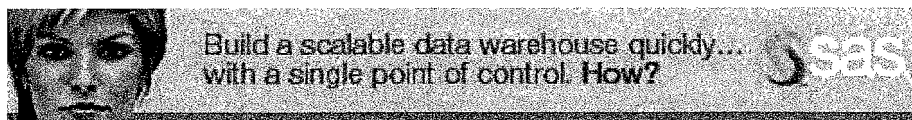
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FIGURE 1.

Balanced Scorecard -- Strategy Map (Partial)

Strategic Objective Development

Build The Franchise

Increase Customer Value

Best Industry Cost Structure

Financial Perspective

Improve Shareholder Value

Revenue Growth Strategy

Productivity Strategy

Build The Franchise

Increase Customer Value

Improve Cost Structure

Improve Asset Utilization

Customer Perspective

Customer Value Proposition

Product / Service Attributes

Relationship

Image & Brand

Internal Perspective

Build The Franchise (Innovation Processes)

Increase Customer Value (Customer Mgmt Processes)

Achieve Operational Excellence (Operational Processes)

Be a Good Corporate Citizen (Regulatory & Environmental Processes)

Learning and Growth Perspective

A Motivated and Prepared Workforce

Strategic Competencies

Strategic Technologies

Climate for Action

FIGURE 2.

Review Existing Accounts (Part of Customer Management Processes) -- Partial

Account Management Unit

| 1 Begin Quarterly Review of Services Currently Provided to Customer | → | 2 Walkthrough Survey with Customer | → | 3 Discuss Underserved areas | → | 4 Identify and Document New Account Opptys | ... |

Survey Information

New Account Opptys information

Metrics ——————

- *Satisfaction Rating By Customer Value/ Type/Industry*
- *Highest/Lowest Valued Services by Customer Value/ Type/Industry*

- *Estimated Value of Oppty By Customer Value/Type/Industry*
- *Estimated Close % by Customer Value/ Type/Industry*
- *Previous Estimated Close Rate by Customer / Sales Entity*

FIGURE 3.

Balanced Scorecard -- Strategy Map (Partial)

Blue Globe Management Consulting

Truth in Your Organization

Improving Business Focus and Measuring Results

If your business is like most you <u>have</u> business strategies...but they are divorced from your enterprise's day-to-day operations

➢ Strategic planning often gets reduced to an "exercise" to obtain bank or venture capital funding.

➢ Sometimes goals are set in a *pie-in-the-sky* manner without a clear relationship to needs, means, or feasibility.

➢ Forecasts are frequently unrealistic.

➢ Processes for identifying gaps between plans (i.e., budgets), forecasts, and reality are poorly developed.
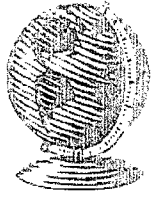
*But realistic, usable, up-to-date business strategies represent "the unique and sustainable way by which organizations create value" ***

> ➤ Effective business strategies focus resources and define what an enterprise does and what it does *not* do.

> ➤ Business strategies are the first step in explicitly defining and refining how a firm differentiates itself with the products and services it offers.

> ➤ A well-developed Sales & Marketing strategy is the single most effective way to avoid the shot-gun or scatter-plot syndrome.

> ➤ The best business strategies define measurable results for every significant endeavor of the enterprise.

Strategy is focus

** = Kaplan, Norton, The Strategy-Focused Organization, Harvard Business School Press, 2001
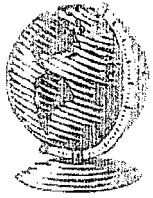
In order to make business strategies usable they must be fused with business operational activities

Business Strategy 1	Process A
Business Strategy 2	Process B
Business Strategy 3	Process C
	Program/Project i
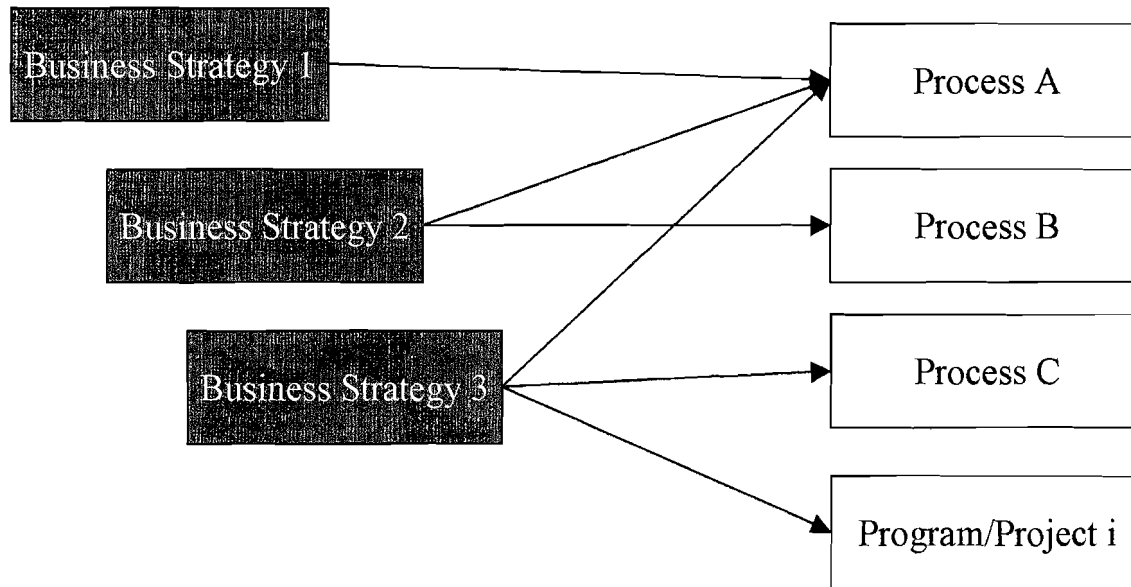
Linking selected elements of traditional strategic planning with the Balanced Scorecard approach is an effective way to begin connecting business strategy and business operational activities
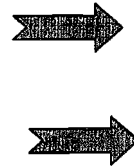
Traditional Strategic Planning
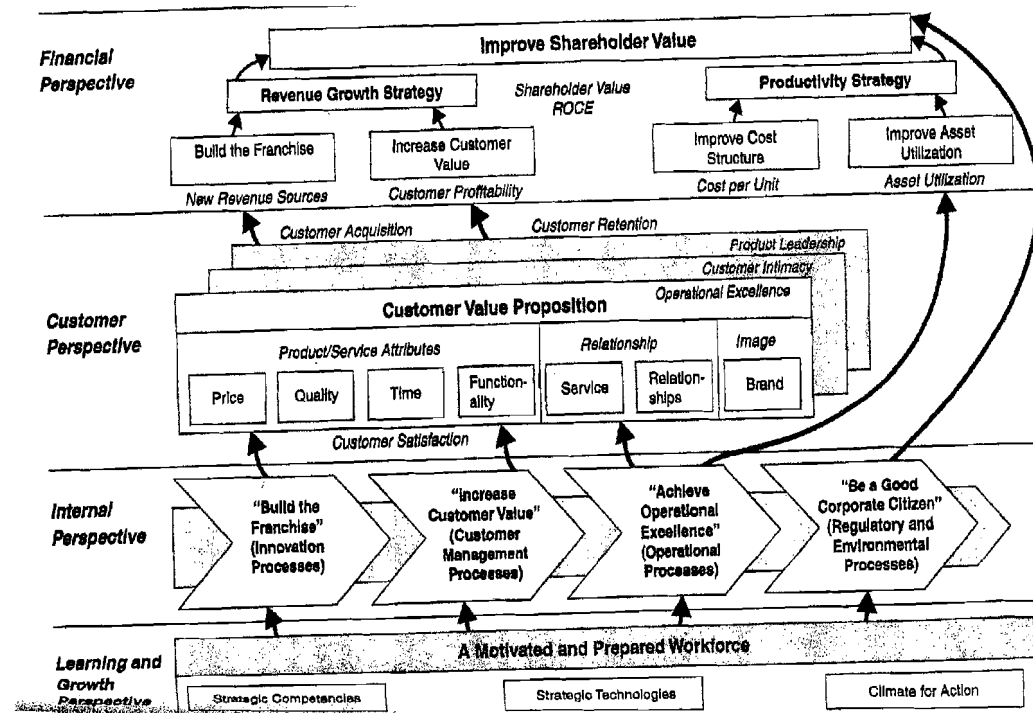
(Develop Strategic Goals)

Build the Franchise

Increase Customer Value

Best Industry Cost Structure

Balanced Scorecard (Strategy Map)

Leveraging information about key business processes to reconcile and validate strategy measures further solidifies the link between business strategy and business operational activities
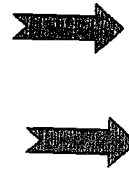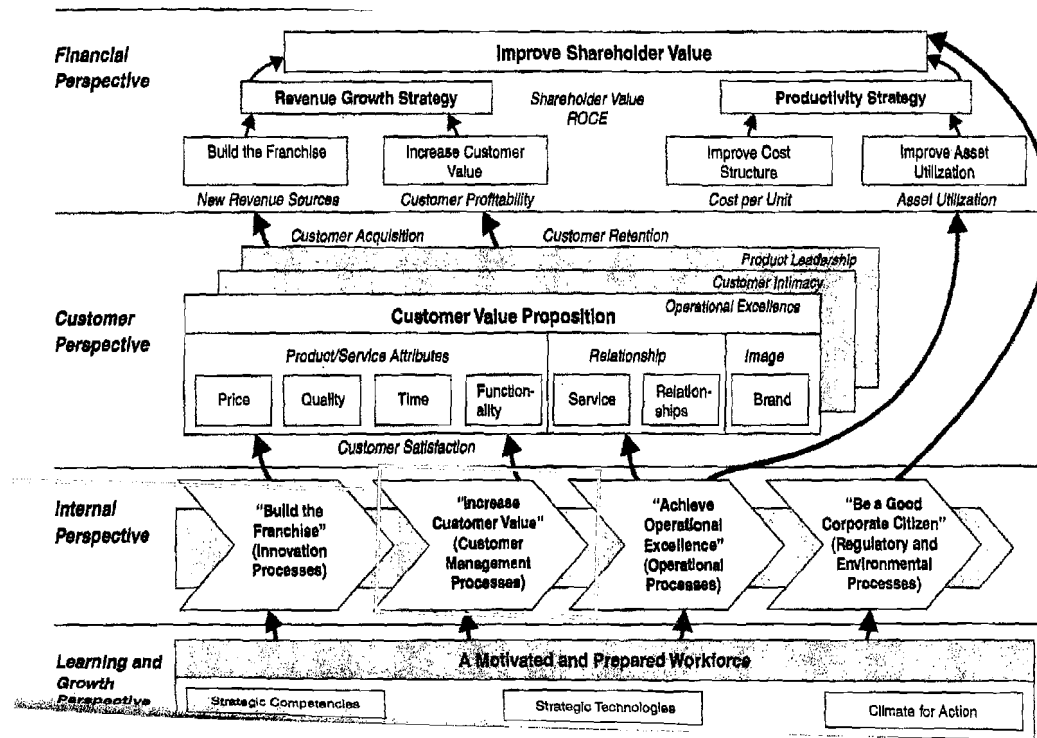
Traditional Strategic Planning

Balanced Scorecard (Strategy Map)

(Develop Strategic Goals)

Build the Franchise

Increase Customer Value

Best Industry Cost Structure

Financial Perspective

Improve Shareholder Value

Revenue Growth Strategy — Shareholder Value *ROCE* — Productivity Strategy

Build the Franchise	Increase Customer Value		Improve Cost Structure	Improve Asset Utilization
New Revenue Sources	Customer Profitability		Cost per Unit	Asset Utilization

Customer Acquisition   Customer Retention

Product Leadership
Customer Intimacy
Operational Excellence

Customer Perspective

Customer Value Proposition

Product/Service Attributes				Relationship		Image
Price	Quality	Time	Function-ality	Service	Relation-ships	Brand

Customer Satisfaction

Internal Perspective

"Build the Franchise" (Innovation Processes)	"Increase Customer Value" (Customer Management Processes)	"Achieve Operational Excellence" (Operational Processes)	"Be a Good Corporate Citizen" (Regulatory and Environmental Processes)

Learning and Growth Perspective

A Motivated and Prepared Workforce

Strategic Competencies	Strategic Technologies	Climate for Action

Ensuring that an enterprise's business strategies are linked to its day-to-day operations does not ensure that the strategies will be successful, unless business results can be measured and tied back to these strategies. Decision Support Systems provide the basis of a systematic measurement system.

<u>**Traditional Strategic Planning**</u>   <u>**Balanced Scorecard (Strategy Map)**</u>

(Develop Strategic Goals)

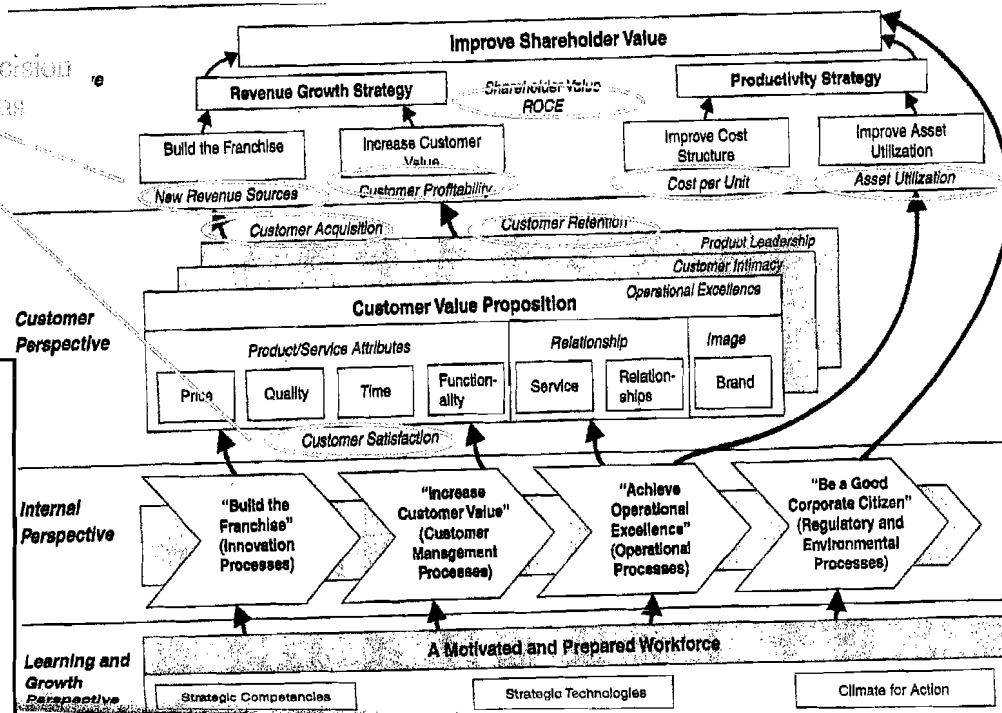Build the Franchise

Increase Customer Value

☐ **Decision Support Systems (sometimes called Data Warehouses, Business Intelligence Systems, etc.) allow an enterprise to measure its results**

   ✓ **Possibility of pinpointing positive or negative trends and changing direction**

   ✓ **New types of information can be synthesized**

Strategic Business Planning

by Peter Walzer

The Strategic Business Plan

A lot of very experienced business people have never found business planning to be a particularly fruitful exercise. In fact, why should any business develop a business plan at all? Isn't the whole process just an exercise for young, inexperienced MBA's? Shouldn't we all take the advise of a well known shoe manufacturer and "just do it"?

Why Develop a Business Plan?

Well, there are some very good reasons to develop a business plan:

- A business plan is often required to obtain any sort of business funding, whether the funding is in the form of venture capitalists, "angel" investors, or financial institutions
- The process of developing a business plan will invariably help clarify the focus of a business. In particular it will usually help to realistically clarify:
    o The structure and characteristics of the market the business is targeting
    o The structure and characteristics of the business' competitive landscape
    o The general strategic focus of the business
    o The business' unique value proposition
- A good business plan will clarify the ongoing financial prospects and challenges of the business.

What's a Strategic Business Plan?

But scores of business organizations do have business plans. Many businesses even develop an "annual plan" and require executives and middle managers to spend hundreds of hours a year to support its development. Many of these same organizations have also developed "business strategies, often developed in a stand-alone manner. Here are some of the observations you will hear from many executives and managers who work for these business organizations:

On Business Plans:

- This is just an exercise we are going through to negotiate our budgets.
- I don't know how we came up with those numbers. Somebody in Finance has a huge spreadsheet with assumptions that few have us agree with 100%, but nobody wants to rock the boat and prolong this process.
- We don't really know if our strategies even work, but they are supported by the published Mission Statement that is pasted to the wall in every conference room. There has to be a way to better link our strategic objectives to our business plan.

- If you take a serious look at our business plan, you would say we are trying to be "all things to all people." Nothing in the plan seriously attempts to define what makes us unique.

On Business Strategies:

- This is just an exercise we are going through so we can claim we have Strategy. This should keep the board from bringing in McKinsey for a while.
- We set our goals in a pie-in-the-sky manner without a clear relationship to needs, means, or feasibility.
- We don't really know if these strategies even work. No one is going to try to tie our strategies to our forecasts or budgets. There has to be a way to better link our strategic objectives to our business.

Here is an idea. What if we developed a Strategic Business Plan? This would require combining our business planning and strategy efforts, ensuring the two support each other. This would require strategic planning to seriously consider and evaluate the tactical feasibility of its assertions. In addition, the business planning efforts would have to scrutinize all of the high-level strategic focus issues.

A Structured Approach to Strategic Business Planning

Successful Strategic Business Planning efforts require a structured approach. Strategic Planning is often is associated with an open-ended, brainstorming process. To be sure, lots of outside-the-box thinking is required, but the process needs to be managed to be effective. The Strategic Business Planning effort needs to be managed as a project.

Here's an outline of the tasks required for a typical Strategic Business Planning project:

- Determine required Business Plan elements (for example Palo Alto Software's *Business Plan Pro* provides an excellent outline of what is required in a typical business plan)
- Begin by assessing the state of the general market climate for your business. This may require external market research.
- Develop a Strategic Planning approach. The approach should fit your organization's management culture. Consider utilizing a combination of methods / tools. For example, Balanced Scorecard is a very effective approach, but it must often be combined with other methods or custom tailored to the business organization.
- Begin Strategic Planning efforts using the above approach defined for the business, ensuring that all strategic assertions are backed up by tactics and programs that are defined in the business plan.
- Create or refine the Value Proposition for the business. Test it: It is focused? It is

truly unique? Try "we are different because...."

- Ensure that the competitive landscape has been addressed. How does this map to the strategic objectives?
- Ensure that the Management and Personnel plans are consistent with the strategic objectives and the overall business plan
- Ensure that everything "pencils out." How do the strategic objectives, and their supporting tactics and programs, align with the Sales Forecasts, Cash Flow, P&L, and Balance Sheet? Are the assumptions valid?

Successful Business Intelligence Project Management

by Peter Walzer

So you are looking for an experienced project manager to ensure that your Data Warehouse or Business Intelligence (BI) Project is a success. Perhaps your company has tried to "do Data Warehousing" a number of times but each effort has resulted in project failure. You are determined that your project will be different.

What will you do – from a project management perspective – differently on this "new and improved" BI project?

Project Management - The Basics

To clarify some of the project management issues that surface on BI projects, it makes sense to first review some of the common characteristics of a project.

The Project Management Institute (PMI) defines a project as "a temporary endeavor undertaken to create a unique product or service." Another words a project :

- Is not part of a day-to-day, ongoing business process or activity.
- Generally has a unique scope and requires a unique application of resources.
- Has a measurable final deliverable.
- Should be managed in a systematic way; i.e., successful projects usually require project management.

A project generally has three significant structural components:

- Scope
    - Why are we doing this project? What specifically are we not trying to do ?
    - How do we define success?
    - How do we know when we're done?
    - How do we transition to "production" or to the next project?
- Resources
    - The people, equipment, and materials required for a project, including the limitations and financial factors associated with these resources.
    - People: who/when can we assign from internal/external organizations.
    - Equipment: computers, heavy machinery, etc.
    - Material: material "burn-rate," renewal rate, new material acquisition seasonality, lead-time, etc.
- Time

      o Either a self-imposed (internal constraint), such as the project must be done by :_____
      o or due to other external factors – seasons, etc. (external constraint)

A project manager must manage Scope, Resources, Time for a particular project like a *three-legged stool* in the sense that any two of the project's "legs" (Scope, Resources, Time) may be fixed (specified in some way external to the project) but the third "leg" will be determined by the outcome of the project and the project manager. Here are some classic "stool-balancing" scenarios that project managers must grapple with:

- Fixed Scope, Fixed Time, Variable Resources
- Fixed Scope, Fixed Resources, Variable Time
- Fixed Resources, Fixed Time, Variable Scope

There is also the classic scenario that is a No-win for any project manager: Fixed Scope, Fixed Time, Fixed Resources.

What makes Business Intelligence Project Management Unique?

Doesn't it seem like any good project manager who has some experience and understands how to apply the above Project Management Basics, can successfully manage a BI project? Why must BI projects be managed differently?

The answer has to do with the way BI projects "define success." The main goal of BI project is generally to provide access to useful information that can be used to improve business decisions. This brings up all kinds of questions that are key to defining the basic objectives of the project:

- Information for whom?
- How will this information be used in business decisions? (This is essential if the Return On Investment of the project is to be calculated.)
- What are the key metrics for each of the key business processes, and how many different ways are they defined?
- How do we know when we're done???

As any experienced BI project manager will tell you, what these questions uncover is the lack of *Achievable Objectives* a typical BI project has when it is initially defined. The most important job of the BI Project Manager is chart an ***achievable course*** for the BI Project and to then manage the project according to this course.

BI Project Management: Things That Haven't

BI Project Management: Things That Haven't Worked

In order to provide this achievable course for their BI projects, BI project managers have tried many different approaches. Here are some common approaches that haven't worked:

- *Conducting a large numbers of interviews set-up with Executives and Middle Managers of the company.* An extremely detailed Interview Guide will be created. The project team will diligently summarize the findings of their interviews and invariably they will create a list of dozens (possibly even hundreds) of metrics or Key Performance Indicators (KPI's) listed in a matrix format. But how are these KPI's supposed to be prioritized? Which pieces of information are the key pieces of information?
- *Spending one year or more building an enormous "enterprise" data warehouse without delivering any usable information along the way.* The idea behind this is simple: "if we build it they will come." It is an attempt to address every possible information need to avoid the problem of a potentially misaligned project. This will never work. Most of these projects are cancelled before they make it to one-year mark.
- *Delivering "standalone data marts" for each key user area.* Often this will initially appear to be a great idea. But it is very expensive and all sorts of problems arise when the same information from different data marts doesn't match or when there is a desire for "integrated" information. Isn't this what the BI project was trying to address from the outset?
- *Waving the White-flag on the project by stating: BI is a process not a project.* Essentially, the BI Project Manager is communicating that they have given up on project management. This is a sure-fire way to ensure cancellation of the BI project. It is true that BI is in many ways more process-like than many projects, but most BI efforts must be managed like projects.

BI Project Management: Things that Work

So, what does work on BI projects?

- *Make the Business Alignment of your BI project – or program of projects – your number one priority.* This is a serious and time-consuming effort, but well worth all the time and energy that must be invested. It requires the alignment of the BI information deliverables with the strategies and tactics of the business organization. If there is a Balanced Scorecard or similar strategic initiative in place within the business organization, the BI Project Manager should strive to align the project with these initiatives. It is unlikely this will be easy, but it is essential for the continued success of BI within the business organization.
- *Break your BI project into multiple BI sub-projects, each delivering clear, usable information benefits to the right stakeholders.* This is often referred to as the "subject area" focused

approach. It delivers focused information for one particular process or reporting area at a time.

- *Build your "base" with each project.* As each focused "sub-project" is rolled out, try to leverage as much existing information and BI functional capability as possible. For example, if the first sub-project delivered Sales information and the second delivered Expenses, the third sub-project might be able to deliver Sales Profitability.

- *Always meet your dates.* There is an old project management saying: "If you can't make the deliverable, change the date or change the deliverable." On BI projects, the majority of the time it usually makes sense to change the deliverable. This should always negotiated openly with key stakeholders, but it usually better to deliverable something than to follow into the classic BI trap of not delivering any new information for many months.

CONTACT | PRIVACY STATEMENT | FEEDBACK

Wavelength

WAVELENGTH   *a pacific life publication*   FEBRUARY 2000
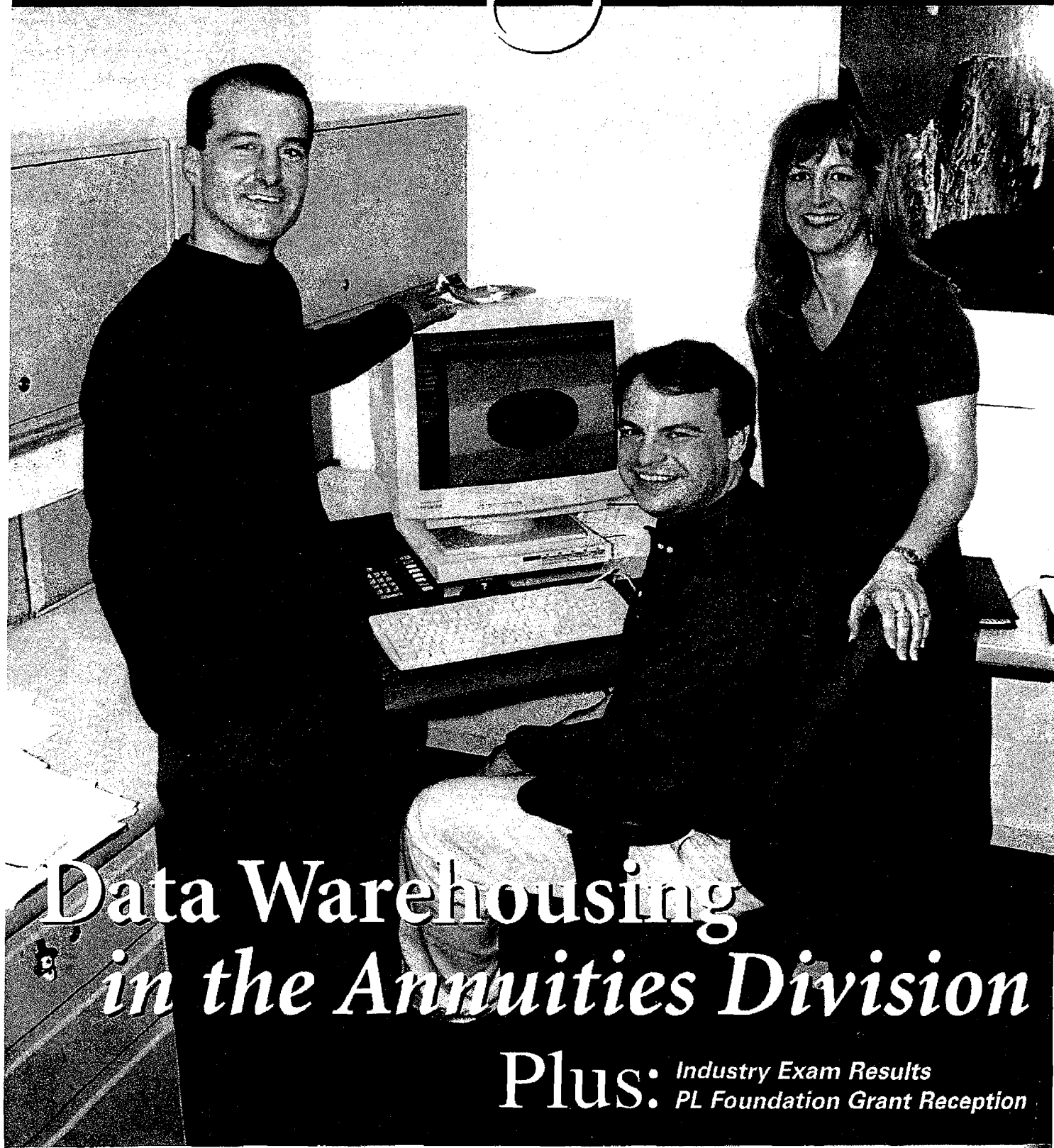
Data Warehousing
in the Annuities Division

Plus: *Industry Exam Results*
PL Foundation Grant Reception

ANNUITIES
Data
Warehousing

To help pinpoint the source of a person's medical condition, radiologists rely heavily upon Magnetic Resonance Imaging (MRI) machines to unveil what's otherwise blind to the naked eye. While physicians depend more and more on technology to help treat their patients, financial services companies are being defined by how well they integrate technology in their businesses.

At Pacific Life, the Annuities Division has developed its own slice-and-dice tool for analyzing business data.

Anew data warehousing and mining system is quickly becoming an invaluable tool for the Division because of its ability to convert statistical data into business intelligence.

With business intelligence, the systems encompass the streamlined use of information and knowledge to enable strategic and tactical business analysis and decision-making across the Division.

KEEPING UP WITH GROWTH

When the Annuities Division was formed as a separate entity back in 1993, annual sales were $86.7 million. The following year sales began to soar and have continued to grow at an astounding rate from $134.1 million in 1994 to $4.6 billion in 1999, 207% of goal.

With such tremendous growth, the Division's technical information needs have swelled as well. Starting in 1998, a team of employees in Annuities created a technical infrastructure for supplying information to the Division.

Supplying data is one thing, but it's another to make sure there is a business focus. With Annuities' thirst for information, a complete solution was needed.

Don Mockler, Director of Management Reporting, Financial, and Peter Walzer, Manager, Data Warehouse Program, Strategic Information Systems, have been at the helm of this project. Don is the business facilitator. As such, he works as a liaison for the Data Warehouse. Peter's team in Strategic Information Systems is responsible for the technology implementation.

According to Bill Robinson, Executive VP, Annuities Division, "The information provided by our new system will enable us to fine tune our sales, marketing, technology and customer service strategies to take us to the next level in the marketplace. The effort our team has put into developing the underlying technology will reap tremendous benefits for Annuities in the future."

Data Warehousing
continued from page 1

A WEALTH OF INFORMATION

Each annuity sale provides a wealth of information—who sold it, who bought it, demographics, size, etc. It can identify connections, links between variables, relationships and trends. When an application is filed, each "cell" of information is connected to programs that give a complete picture.

Previously, the Annuities Division used a mix of programs and desktop tools to conduct market research and analysis. This often involved manual assembly of multiple data sources and manual calculations.

With the new system, information is stored in a data warehouse—a storehouse of connected information. Selected users within Annuities use the data warehouse to pull out data patterns and relationships specific to their business needs, accessing critical decision-making information using a Web-based browser.

■ *Above: Business analysts who utilize the data warehouse (left to right) include: Michael Beck, Anthony Dufault, John Cubbon, Kim Collins, and Katie Zeich.*

Data warehousing consists of components that transform and load data from the Division's mainframe into an Operational Data Store (ODS) and into a "subject-area" oriented data warehouse. For example, data from the programs Vantage (policy information) and DSS (agency information) are linked, allowing integrated reporting of selected data.

Dewey Bushaw, Senior VP of Sales, is excited about the new technology. "What once appeared to be a distant dream is now an everyday luxury—the Data Warehousing Program! Access to customized information (production/region/agent/product/policy etc.) is now available immediately whereas previously, the sales management team was forced to wait for standardized system-generated reports, or do it by hand," says Dewey.

FINDING NICHE INFORMATION

Other components of the project are data scrubbing and data mining. Data scrubbing is as it sounds. Data is cleaned up to maintain authenticity and reporting accuracy. "The data has to be right," says Peter. "In our business, credibility is everything."

Data mining can be used to identify smaller niches within existing and potential customer bases. It presents different ways to view and sort reports so analysis can be performed on all levels of data.

"Annuities has access to volumes of externally prepared market research information, but in the past had limited internal data on our buyers, sellers and products," says **Kathleen Hunter,** Vice President, Annuities Marketing. "We're excited about the level of demographic, trend and other information that the Data Mining team will be able to provide. It will give us the ability to target market by product features, investment options, lines of business and distribution channels."

According to Don, "We're glad that we have received very positive comments. Data warehousing has become a useful tool for our Division."

Another key component of the project is the Executive Information System (EIS).

EIS is a sales and marketing database that employees can access via a Web browser. EIS users can click on Internet Explorer, choose the criteria and even make comparisons with previous years. It can be very specific. Users can drill down for more information and manipulate data to meet their needs.

Bill Doomey, Senior VP of Administration, Annuities Division, has used EIS for sales patterns and was instrumental in getting the data warehousing project off the ground.

"Bill was the business driver behind the data warehousing project," says Peter. "He understood the value of a data warehouse and its hands-on capabilities."

According to Bill, "We have only scratched the surface of the value this data warehouse brings to managing the business and supporting our future e-commerce initiatives."

The data warehouse created by the Annuities' technology team has allowed the Division to gain additional insight into business performance, customer behavior and ultimately, new business opportunities. Today, this is no longer a project—it has evolved into something much more. The data warehouse team is working on new initiatives to continue to add value to the Division.

— *Teresa Minke*

Pacific Life on CNBC

Pacific Life received some airtime on CNBC's cable television program "The Edge" on Friday afternoon, January 7, 2000. CNBC was featuring FileNET, a Nasdaq-traded company based in Costa Mesa, California. FileNET is a recognized leader in the image, document management and workflow software industry, and Pacific Life is among its important clients who use its program to manage information flow.

The customer service area of the Life Insurance Division has been a long time user of the FileNET system that enables any customer service representative to retrieve documents for a client inquiry at a computer keystroke. Featured on tape was **Judy Sapinoso**, Service Associate of the Minke PODS, Client Services, Life Insurance Division.