



Business Intelligence – Metrics, Analytics, and Reporting at Citrix Systems, Inc., in Partnership with eThORITY

By Rich Berger, Citrix Systems

Citrix Business Information Environment

Analytics are all around. Metrics illuminate key performance indicators (KPIs). Reports reveal operational opportunities.

The opportunities are endless – so what are we to do when trying to find the right mixture of, and source for, our reports, analytics and metrics? At Citrix, it is a journey we have embarked upon with eThORITY to be able to identify and quantify the important, observable, and actionable measures that provide useful information for decision-making – otherwise known as *Business Intelligence*.

Before you start down this road, remember that not everything needs to be a trend, and that dashboards have their place, but so do reports from your HR applications. There are many stakeholders in this process – HR, Finance, IT and business leaders, to name a few. Let's look at how we decided on the best combination, and what we have implemented at Citrix.

Four years ago, our HR information environment was disconnected, with redundant manual entry of data in multiple places. This meant that the possibility for error existed, and the ability to perform cross-functional reporting was highly limited. Our first step was to create and implement a comprehensive three-year operational strategy – *tightly aligned with our corporate strategy* – to integrate our systems, standardize our processes, and simplify the interface to needed data and systems. The result of our strategy is depicted in Figure 1.

With the accomplishment of this strategy, we were then able to focus on leveraging the relevant, valuable HR data that had been kept in separate silos as a foundation for an integrated decision-support system for use by individual managers and senior business leaders alike. The ability to tie performance data and pay data, or internal turnover to external benchmarks, is now possible through this unified data reporting environment.

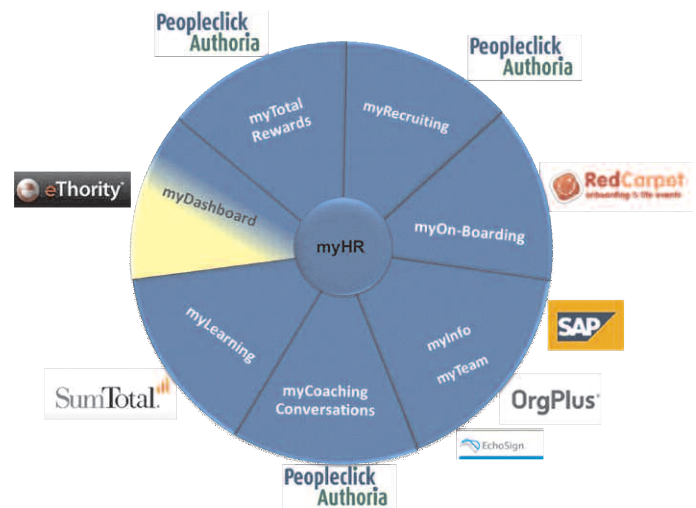


Figure 1. The Result of Citrix Three-Year Operational Strategy.

Importance of Common Definitions

According to Towers Watson's article: *Human Capital Metrics – Metrics that Matter, Companies that Count*, <http://www.towerswatson.com/assets/pdf/3379/Towers-Watson-Human-Capital-Metrics-2011.pdf>, "Pressure to continually improve operating efficiency means senior leaders need up-to-date, accurate information and analytics in order to set and refine their priorities for workforce investments." This provides the foundation for securing management support for including workforce analytics in the company KPIs. You can also advance your success in this area by working with all stakeholders to create a dictionary that explains the data and any calculations that are used for analytics or key metrics. In Citrix's case, we looked at the important areas of turnover, internal movement, and recruiting by various dimensions of business and geography.

For dictionary definitions to be successful, a key component is the partnership we have formed with HR and Finance to look at the differences that occur between the actual head count HR measures and the forecasting head count Finance uses for planning. This is a subtle, yet important difference that may cause many companies to encounter a roadblock. Actual head count is a snapshot of the population at a specific time, using a reporting hierar-

chy that shows management visibility up and down the reporting chain. Forecasting is a financial activity that aligns costs and budgets in accordance with the total cost of the current and predicted human assets using the cost center hierarchy. Both of these elements are important to Citrix. The realization that they are not the same is also a turning point as you move forward with your company decisions. Understanding that these measures have different purposes allows the base of human capital data – the source HR systems – to provide key data for both purposes.

Citrix HR Golden Rules for Building Great Metrics and Useful Analytics

1. Rely on fewer metrics that matter more.

- Choose them carefully and don't be afraid to throw away the ones that don't add value. Make sure that most of your KPIs can be sliced and diced by the different views of your business, so your customers can drill down and zoom back out.

2. Establish one version of the truth.

- Make sure everyone who receives and shares numbers uses the same data pulled at the same time/date from the same source using the same algorithm to compute the metric. This is harder than it sounds and takes time while you are automating and instrumenting your reporting and dashboard tools.

3. Remember that it's a two-way (or three-way) street.

- The folks who specialize in the data, the experts in the subject matter, and the "customers" of the data all have an equal share in understanding the data and in shaping its analysis, but have different roles in validating its accuracy. Talk with each other while you're building the metrics and after you publish them. If you're communicating fully (in all directions) when the data changes, everyone will know and understand why.

4. Balance the demands of speed and accuracy.

- The higher the stakes, the more important it is to double and triple check before you publish, but metrics must be timely to be useful. If you're doing steps one through three all along, it's easier to crank the numbers out on schedule under tight deadlines.

5. Tell the story.

- The numbers alone are neither useful nor enlightening. How are we supposed to feel about them? Metrics are the "what?" The analysis provides the "so what?" and suggests a path toward "now what?"

Having successfully identified the important, observable, and actionable metrics needed to achieve our business strategy, the HR department now turned its attention to finding a solution that addressed the back-end data model, as well as a front-end, self-service component, and one we could easily deploy and maintain.

Leveraging Technology

Having successfully identified the important, observable, and actionable metrics needed to achieve our business strategy, the HR department now turned its attention to finding a solution that addressed the back-end data model, as well as a front-end, self-service component, and one we could easily deploy and maintain. Citrix looked at a variety of products that could tie together our various SaaS and SAP environment data. Our research led us to select the DataTalent™ product from eThORITY in 2009. This product has the flexibility we need to enable the HRIS department to create the integrated data structures without having to program and maintain SQL or cube structures. We are able to add and move data elements easily and create links between the data that do not exist in separate applications. One key feature of DataTalent™ – PowerFields™ – allows HR to automatically create calculated fields to extend the native data using the agreed-to definitions. This way, any user of the data has the added calculations available just as if they had been collected at the source. It adds to the standardization and simplification of our environment. It makes the information "actionable" – useful for decision-making.

The other key is that adoption of the tool, DataTalent™, because of its "user-obvious" design, allows us to give access to stakeholders without having to create and deliver extensive or on-going training. At Citrix, user experience is a key component of our decision on software acquisitions. We are able to provide DataTalent™ directly to managers (we started at the top of the company) who are able to see reports on-demand, create their own views, and not be dependent on HR or IT to provide this information. Of course, it is HRIS' fiduciary responsibility to ensure that data quality and confidentiality are maintained. This way, information is distributed in a secure and compliant manner.

Continuing Progress

Today, we are able to use our integrated data ecosystem to satisfy needs across all three business intelligence layers. For tactical reporting, we have worked with our SaaS partners to improve the reporting tools in each of our source systems. DataTalent™ allows us to create dynamic reports, which can be automatically updated and mailed to recipients on a regular schedule. The linking of data allows these reports to be more comprehensive than the results from the separate applications. Secondly, analytics are improved through having access to current and historical data in the same tool. This means we can look back over our past three years' worth of data, and see the impacts of performance, recruiting, and pay practices on people movement and retention. Finally, we are able to provide accurate, timely metrics in support of the company KPIs as needed, on a quarterly basis, enabling our senior leadership to see human capital assets as a component of the overall company direction and strength.

And, with all we have accomplished, our journey continues. In our ongoing partnership with eThORITY, we will be rolling out DataTalent™ to additional levels of the organization. We will be creating a simple, consistent dashboard accessed through our *myHR* portal. We are continuing to refine our definitions in areas such as recruiting efficiency and mobility. We already leverage our DataTalent™ environment in our *Executive Talent Review* to share human capital management linkages from performance management, quarterly metrics and the Global Employee Survey with our senior leaders; in the future, this will be deployed at director and manager levels.

As you plan *your* strategy, start with the data – visibility into data leads to cleaner, more accurate information. Identify the important, observable, and actionable metrics that are critical to achieving your departmental and corporate objectives. Next, create your definitions and use the data to populate your analytics. Finally, use a tool, such as DataTalent™ to surface these insights. Together, easy-to-use analytics and tools really have given us the ability to expand from basic reporting to *business intelligence*.

About the Author and Citrix Systems



Rich Berger, SPHR, HRIP, is senior director of HRIS at Citrix Systems (<http://www.citrix.com>), a leading provider of virtual computing solutions that help people work and play from anywhere, on any device. More than 230,000 enterprises

rely on Citrix to create better ways for people, IT and business to work through virtual meetings, desktops and data-centers. Berger has more than 30 years experience as a practitioner and thought leader in Human Resources and HR technology and is responsible for Global HRIS strategy, metrics & analytics, and HR technology for employees. He is one of the founding members of the International Association for Human Resources Information Management (IHRIM) Global Special Interest Group, and is currently vice-chair of the IHRIM board of directors. He is a frequent speaker at HR conferences and is widely published in both HR journals and books. Berger holds a B.S. degree from the University of Massachusetts/Amherst, and an MBA with a concentration in HR from Western New England University. He can be reached at Richard.Berger@Citrix.com.

About eThORITY

Founded in 1992, eThORITY is the provider of "user-obvious" enterprise performance engine software that empowers end users and offers IT an easily maintainable solution. DataTalent™, eThORITY's award-winning software, is a workforce performance engine designed from scratch to help HR deliver intuitive workforce analytics, reporting, and benchmarking of key metrics from a single source of truth. DataTalent™ allows HR to leverage workforce performance management to meet and exceed corporate goals using its renowned Vital Answers Methodology™ and Analytics Maturity Model™. For more information, please visit <http://www.eThORITY.com>.

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