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# David K. Shroyer

Business Intelligence Consultant

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## Professional Biography

Business Intelligence professional with experience in developing OLAP and budgeting solutions within the retail, healthcare, manufacturing, communications, finance, restaurant, hotel, services, and wine industries. Results-oriented person known for solving difficult problems with creativity. Specialties include implementing multi-dimensional databases and business intelligence solutions.

## Project Experience

### Budgeting Applications

#### **Budgeting/Forecasting Application at one of the Nations Largest Clothing Retailers**

**RETAIL**

**Objective:** An Excel spreadsheet budgeting application which allows each of the company's divisions to prepare budget and forecasts and then consolidate the results in an overall "corporate" database. The client was previously using Hyperion Pillar for budgeting, but found the reporting capabilities very limited.

**Technology:** Implemented Hyperion Essbase as the data server along with customized MS Excel spreadsheet templates using the Hyperion Essbase Spreadsheet Toolkit.

**Result:** The project was on budget and on time. Business analysts were able to quickly and easily upload budgeting information using MS Excel. The solution allowed the company a very quick turnaround time and provided them with increased reporting capabilities. It is estimated that this project saved at least one full time person man/hours per division.

#### **Job Cost Budgeting Application at a major transportation manufacturer**

**MANUFACTURING**

**Objective:** An Excel spreadsheet job cost budgeting application which allows analyst the ability to enter job costing estimates and compare them to daily actuals. The application provides for inception to date calculations and automatically updates the ERP system.

**Technology:** Implemented Hyperion Essbase as the data server along with customized MS Excel spreadsheet templates using the Hyperion Essbase Spreadsheet Toolkit.

**Result:** The project was on budget and on time. Analysts have an easy method of inputting job cost estimates along with very flexible reporting. An Excel budgeting workbook was created which provides for easy "drop down" functionality.

#### **Budgeting Application at a major bank**

**FINANCE**

**Objective:** An Excel spreadsheet budgeting application which allows analyst the ability to enter monthly budget estimates and compare them to daily actuals and forecast. The application had to allow for easy input and pre-formatted reports.

**Technology:** Implemented Hyperion Essbase as the data server along with customized MS Excel spreadsheet templates using the Hyperion Essbase Spreadsheet Toolkit.

**Result:** An Excel workbook was created which allowed for easy input of the budgets along with the ability to “roll up” the data into summary reports. The workbook provided for easy navigation, sending of data to Essbase, automation of paramitized calc scripts, and an easy to use printing feature. The workbook was written so that the client could easily maintain the code moving forward.

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### **Sales Forecasting Application at a Broadband Equipment Manufacturer**

**COMMUNICATIONS**

**Objective:** A web delivery system which allows remote sales people to enter forecast information and then compare it against actuals. The client was using Excel spreadsheets to gather forecast information. This proved to be very labor intensive.

**Technology:** Hyperion Essbase was used as the database server and Hyperion Analyzer was used as the web input and analysis tool.

**Result:** Remote salespeople were better able to forecast future sales now that they had actual information to compare against. Sales forecasting became much more accurate which lead to improved production efficiencities.

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### **Beta Budgeting Application at a Services Organization**

**SERVICES**

**Objective:** A web delivery budgeting solution which allows “remote” users to enter budget information via the companies internal web site. The company was using MS Excel spreadsheets to gather and consolidate the information and the continual updating of “spreadsheet links” was causing in-accuracies in the data.

**Technology:** Hyperion Planning was in Beta and this was a “test site” for Hyperion’s new product. Hyperion Planning was the web tool, Hyperion Essbase was the database server, and Hyperion Reports was the report generator.

**Result:** Because the product was in beta, we encountered some implementation difficulties. Met with Hyperion developers and a lot of the issues encountered in this engagement led to further version enhancements.

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### **Budgeting Application at an Agricultural/ Manufacturing Company**

**MANUFACTURING**

**Objective:** A web delivery budgeting solution to simplify budgeting. The application included balance sheet, income statement, head count, and revenue information. The client was using Hyperion Pillar and found it to be to cumbersome to e-mail files from analyst to analyst. The application included extensive allocations, depreciation, re-classes, taxes and line of credit calculations.

**Technology:** Hyperion Planning was successfully implemented which included Hyperion Essbase as the data server, Hyperion Application Manager as the DTL tool, Hyperion Reoprts as the reporting tool, and Hyperion Analyzer as the analysis tool.

**Result:** Client was able to quickly and easily obtain budgeting information and easily consolidate the values into a robust reporting solution. Financial analysts no longer had to e-mail large Pillar files for consolidation. Once the data was entered on the web, the consolidation was automatic.

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### **Automation of Hyperion Planning at a Retail Web Company**

**RETAIL**

**Objective:** Client had implemented Hyperion Planning and was looking for some “automation” which would simplify the administration of the application.

**Technology:** Microsoft Data Transformation Services was used to automate the Hyperion Planning dimension loads through HAL and all Essbase import/exports.

**Result:** Automated system saved countless hours of “administering the application”.

## Business Intelligence Applications

### One of the Largest Essbase Solutions at one of the Nations Largest Clothing Retailers

**RETAIL**

**Objective:** To develop an enterprise wide reporting system which allows for the analysis of sales and inventory information at the store level. Included in the database were over 200 measures.

**Technology:** Hyperion Essbase was used as the business intelligence data server and MS Excel was used as the analytic tool. The completed cubes when fully calculated were over 1 Terabyte. It was the largest Essbase virtual cube on the planet when it was developed.

**Result:** The project involved; translating business partner's needs into database dimensionality, database design, coordinating of data feeds, and project management. The finished application allows analyst the ability to slice and dice data across 9 dimensions and over 200 measures.

### Statistical Peer Group Application at a Nationwide Measurement Consulting Firm

**SERVICES**

**Objective:** To give their analysts the capability of analyzing cost, user survey and best practices data. Metrics included mean, median, 1<sup>st</sup> Quartile and 3<sup>rd</sup> Quartiles for "on the fly" selected peer groups. Metrics also included "trimmed" calculations, which remove outliers from the statistical set.

**Technology:** Microsoft Analysis Services was used as the business intelligence data server. ProClarity was used as the analytic tool.

**Result:** The firm's analysts can now perform statistical comparisons on their laptops in minutes, rather than hours. The creation of client presentations was also automated which has saved each analyst numerous hours per week. Their analysts now have the luxury of truly analyzing the data, rather than spending their time "trying to get the data into the right format".

### Sales and Purchasing Analytic Application

**MANUFACTURING**

**Objective:** To provide the sales and purchasing departments with the ability to easily access SKU level information. The purchasing department needed to have the ability to trend and forecast sales for particular items. The sales department needed the ability to analyze sales to dealers and the performance of sales representatives. Also included in the requirements was the ability to compare various promotions from their promotion date.

**Technology:** Microsoft Analysis Services was used as the business intelligence data server. The ProClarity Analytic Server was used as the analytic tool.

**Result:** Numerous Analysis Services "cubes" were created which satisfy the needs of each of the departments. The cubes process in a timely manner and the client now has the ability to easily view data which in the past was buried in a relational database. Region managers who used to have to "manually" create reports, can now log in via Citrix and analyze data using the ProClarity web client.

### Sales Analytic Application

**MANUFACTURING**

**Objective:** To provide the purchasing department with sales information so they can properly re-order items. This industry has long "lead times" so it was critical that the purchasing managers have enough lead time to properly order out of stock and popular items.

**Technology:** Microsoft Analysis Services was used as the business intelligence data server. The ProClarity Analytic Server was used as the analytic tool.

**Result:** The finished application provided managers with item sales by store, customer, promotion, and vendor. Calculations included "average pieces per week per store", "GMROI", "Stock to Sales", and "Monthly Sales Rank". ProClarity views were created which "alerted" managers to low levels of stock on hand.

**Objective:** To provide management the ability to analyze sales, discounts, promotions, salaries, and purchasing costs.

**Technology:** Microsoft Analysis Services was used as the business intelligence data server. ProClarity was used as the analytic tool. Microsoft Reporting Services is being used as the primary reporting tool.

**Result:** The company now has the ability to analyze sales, discounts and promotions by employee, menu item, location, time of day, and menu location. Included in the calculations was a “store comp” calculation which allows them to analyze “same store sales”.

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**Sales and Marketing Analytic Application****HOTEL**

**Objective:** To provide the marketing department with the ability to analyze property and promotion information which could then be used to target new marketing campaigns. The application also need to provide “visibility” to upper management in regards to current sales information.

**Technology:** Microsoft Analysis Services was used as the business intelligence data server. ProClarity was used as the analytic tool.

**Result:** The marketing department is using the BI application to measure the effectiveness of past campaigns along with targeting customers for new marketing promotions. Managers can now segment the data by “length of stay” and “number of stays” which allows them to segment their “loyal” customers.

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**Survey Scoring Application at a Major Retail Survey/Auditing Firm****DATA BROKER**

**Objective:** An analytical application that will allow the data broker the ability to quickly and easily provide survey scoring data to its retail customers via the Internet. The application must have the ability to “overwrite” scores when necessary.

**Technology:** Microsoft Analysis Services was used as the business intelligence data server. ProClarity Web Server was used as the analytic tool. Numerous cubes were created to facilitate the “overwriting” of scores.

**Result:** Maintenance of the new solution is less than half of the existing one. The firm was able to provide more information to their customers with less resources maintaining the solution. End users can now easily analyze store information in seconds via the web.

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**Point of Sale Application for a \$2.5 billion Manufacturer****MANUFACTURING**

**Objective:** Enterprise wide business intelligence solution which allowed analysts the ability to track units, dollars, and margins for their products as they are being sold through leading home improvement retailers.

**Technology:** Microsoft Analysis Services was used as the business intelligence data server. ProClarity was used as the analytic tool.

**Result:** The reporting solution allows analysts to analyze business trends as their product is being sold through the retail channel. It also gives upper management access to sales information that is crucial to the development of sales and marketing strategies.

## **Claim Analysis Application at the Largest Healthcare Organization in Ohio**

**HEALTHCARE**

**Objective:** To analyze healthcare claims in respect to providers, diagnosis, procedure, and medical groups. Metrics included various profitability measures along with time sensitive measures, such as “turnaround days”.

**Technology:** Microsoft Analysis Services was used as the business intelligence data server. ProClarity was used as the analytic tool.

**Result:** Client now has access to information that was previously “locked away” in their legacy systems. Client can now easily see relationships between their providers and members along with seeing which providers incur the greatest cost per claim. They can also perform various ranking reports which show which drivers are driving the business.

## **Claims Analysis Application at a Leading Healthcare Management Company**

**HEALTHCARE**

**Objective:** To analyze fee for service healthcare claims for their various IPA groups. Included in the objectives is the ability to analyze procedure costs per member by provider.

**Technology:** Microsoft Analysis Services was used as the business intelligence data server. ProClarity was used as the analytic tool.

**Result:** Client now has the ability to fully analyze their claim information in respect to providers, IPA group, procedures, diagnosis, and time. This ability increases the effectiveness when dealing with its customers. The CEO has quoted the ProClarity application as “the best money I have ever spent”.

## **Lab Analysis and Findings Application at Leading North West Healthcare Organization**

**HEALTHCARE**

**Objective:** To allow physicians and analysts quick access to patient findings and lab results.

**Technology:** Microsoft Analysis Services was used as the business intelligence data server. ProClarity was used as the analytic tool.

**Result:** Health care providers can quickly and easily analyze patient lab findings and results. The flexibility of the application has allowed providers to view data in new ways.

## **Customer Sales System at an Agricultural/ Manufacturing Company**

**MANUFACTURING**

**Objective:** Enterprise wide business intelligence solution which would allow remote salespeople to analyze important customer sales information.

**Technology:** Hyperion Essbase was used as the business intelligence data server and MS Excel was used as the analytic tool. Remote users were able to access the cubes via MS Excel and their VPN.

**Result:** Provides remote salespeople with customer sales analysis and information via their laptops. The off-line reporting system allows salespeople to analyze business trends and set sales goals with their distributors. This technology provides the winery a competitive advantage in the marketplace. Salespeople are able to quickly and easily identify sales trends at the customer level and manage customer relations. It also gives upper management access to sales information that is crucial to the development of sales and marketing strategies. The application empowered salespeople to better manage their areas and thus increase profitability.

**Objective:** Retail web company looking to analyze retail promotions and customer retention. The existing solution included MS Excel spreadsheets that were linked to Access queries.

**Technology:** Microsoft Analysis Services was used as the business intelligence data server. Panorama NovaView was used as the analytic tool.

**Result:** Analysts now use NovaView to directly interact with the order information. Analysts have increased productivity because of the ease of use with the system. Numerous metrics were added to the cube which was currently not possible.

# Business Experience

## **Project Mangement**

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Managed and/or implemented numerous IT projects for large coporations which involved needs analysis, technology assesments, and project planning. Managed projects included financial forecasting and budgeting, production demand modeling, and sales and marketing analysis applications. Oversaw the development and execution of all Sales & Marketing systems projects, which included providing strategic direction and new software recommendations and solutions, while at Robert Mondavi.

## **Business Analysis**

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Over eight years experience in analyzing business information. Business analysis includes retail, forecasting, budgeting, sales and marketing systems. Analyzed sales and marketing information extensively while at Robert Mondavi which included intense analysis with AC Nielsen and IRI store scanner data. Experience with financial P & L analysis.

**Consulting and Training Services Provided for the following Companies:**

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AMB  
Bold and Decisive Maneuvers  
Cacique  
Certiport  
College Invest  
Commerce Bank  
Cost Plus World Market  
Domaine Chandon Winery  
Elephant Bar Restaurants  
Emerald Health  
Extended Stay Hotels  
Field Marketing Inc.  
Fox Racing  
Gap Inc.  
Gartner Group  
Health Services  
Healthstream  
Insurance Corporation of British Columbia  
International Rectifier  
Jackson Rancheria Casino  
Katun  
Kendall Jackson Winery  
Lifemasters  
Masco  
Michigan Millers  
Microsoft  
Next Level Communications  
New Century Mortgage  
New York Presbyterian Hospital  
Option One  
Peace Health  
PPMC  
QCSI  
Rent Cash  
Robert Mondavi Winery  
Service Bench  
Siemens Transportation  
Shutterfly  
Sundance Catalog  
Teligence  
TimberWest  
United Community Banks  
Versign  
Veterans Administration  
Video Products Distributors  
Wells Fargo  
Wickes Furniture

## Education

### **M.B.A., Business Administration**

*California State University of Sacramento* Sacramento, CA

### **B.A., Business Administration - Marketing**

*California State University of Sacramento* Sacramento, CA

## Technologies

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|--------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Development Tools  | ProClarity Analytic Suite of Products, Panorama NovaView Suite of Products, Hyperion Planning, Hyperion Application Link, Hyperion Excel Spreadsheet Toolkit, Excel, Microsoft Access, Microsoft Visual Studio and Microsoft Reporting Services. |
| Database Systems   | SQL Server 2000, SQL Server 2005, Analysis Services (SSAS), SSAS, SSIS, Access, and Hyperion Essbase OLAP.                                                                                                                                       |
| Computer Languages | Visual Basic for Applications, MDX, SQL, T-SQL, HTML, XML, ASP and VBScript.                                                                                                                                                                     |
| Client Software    | ProClarity, NovaView, Excel, Access, Hyperion Analyzer, Hyperion Reports, and Microsoft Project.                                                                                                                                                 |