
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

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 where 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.

Web Log Analytic Application for a Retail Web Company

RETAIL

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.

A Multi-Terabyte Solution at one of the Nation's Largest Retailers using Analysis Services

RETAIL

Objective: Retailer looking to analyze store sales and inventory across the organization. The existing solution was a SQL Server relational data warehouse which was providing slow query times. Included in the objectives was the ability to analyze "same store sales" and the complexities of dealing with leap years.

Technology: Microsoft Analysis Services 2005 was used as the business intelligence server. Excel and ProClarity were used as the user analytic tools.

Result: Users can now analyze data for over 110,000 products with drag and drop capabilities. Most of the analytic calculations were implemented in the cube so users no longer had to create their own calculations in Excel.

Retail Service Provider uses the ProClarity Analytic Server to Provide Analytics to Customers**RETAIL**

Objective: A Retail price and promotion optimization company needed an analytic platform to allow its retail customers to analyze sales and promotion information. The solution needed to provide good query performance and have the ability to be customized to their web portal. Included in the project was the ability to quickly load and calculate a data cube with over 2 billion records. Their existing solution was an outdated OLAP client tool that connected to Analysis Services 2000 cubes.

Technology: Microsoft Analysis Services 2008 was chosen as the business intelligence server and ProClarity Analytic Server was chosen as the thin client analytic tool.

Result: The query performance of the 2.6 billion record cube was more than acceptable and the client was able to deploy a robust analytic solution to its retail customers. The solution was built quickly and efficiently.

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, 1st Quartile and 3rd 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”.

Very large national bank in NY created an application to track assets**BANKING**

Objective: To create an analytic application which would track the bank’s assets across their customer base.

Technology: Microsoft Analysis Services was used as the business intelligence data server. Excel 2007 was used as the analytic tool.

Result: The bank now has the ability to interact with their balance sheet in a way that is meaningful. The cube was considered a huge success.

Enterprise Wide Analytic Solution**RESTAURANT**

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”.

Restaurant Chain Implements ProClarity Dashboard**RESTAURANT**

Objective: To provide upper management visibility into the key performance indicators of the company.

Technology: Microsoft Analysis Services 2005, ProClarity Analytic Server and ProClarity Dashboard Server were used for the final analytic solution.

Result: Top executives log in daily to check the progress of their corporate objectives. The new system has alerted management to trends much quicker than in the past.

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.

Financial Analysis Application**HOTEL/CASINO**

Objective: To provide up to date financial information to top executives. The information needed to be timely and track the company’s business as compared to their operating budget. The information needed to be in an “easy to use” format.

Technology: Microsoft Analysis Services 2005 and PerformancePoint Server 2007 were used in the solution.

Result: PerformancePoint dashboards and KPI’s were created to allow executives easy access to their goals and progress.

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.

Financial Application which tracks the lifecycle of a purchase order**MANUFACTURING**

Objective: To create an Analysis Services cube which gives financial analyst exposure to purchase orders, paid invoices, and the general ledger.

Technology: Microsoft SSIS was used to populate a financial datamart and Microsoft SSAS was used as the OLAP data store. The financial analysts used Performance Point and ProClarity to analyze the information. Microsoft Reporting Services was also used to provide “linked” drill through reports.

Result: The financial analysts were able to quickly and easily analyze their future purchase order futures along with monitoring their invoice payments. Upper management was able to interactively browse the chart of account in the format of an income statement and balance sheet. Users could also “right click” on cells within the grid to pull up detailed Reporting Services reports which proved to be a huge time saver.

Audio manufacturer created financial dashboards for upper management**MANUFACTURING**

Objective: To create sharepoint dashboards which upper management could use on a daily basis which would provide them with the state of the business. The dashboards included numerous KPI's that were relevant to the success of the company.

Technology: Microsoft Analysis Services was used as the OLAP database. The dashboards were created with Microsoft Performance Point and ProClarity.

Result: Provided upper management the ability to see a snapshot of their business each day. The resulting dashboards were easy to use and there was minimal training involved. These dashboards replaced hundreds of statically maintained Excel spreadsheets.

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 where 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.

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: 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.

A small pharmaceutical company deploys sales information to their sales force**HEALTHCARE**

Objective: To allow remote pharmaceutical representatives the ability to log into the network and view physician data. The solution had to be very simple to use and provide flexibility.

Technology: Microsoft Analysis Services was used as the business intelligence data server. PerformancePoint and Sharepoint were used as the user front end.

Result: The results have been amazing. The salesforce needed limited training and they love the fact that they can now see their daily sales AND have the ability to right mouse click and see the physicians that are providing the sales.

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.

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 efficiencies.

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.

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 too 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 Reports 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.

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 Experience

Project Mangement

Managed and/or implemented numerous IT projects for large coporations which involved needs analysis, technology assessments, 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

Over tweleve 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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Healthstream
Healthworld, Australia
Home Decorators Collection
Horizon Food Group
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TimberWest
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United Community Banks
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Veterans Administration
Video Products Distributors
Walter R. McDonalad and Associates
Wells Fargo
Wickes Furniture

Education

M.B.A., Business Administration

*California State University of Sacramento, CA
Sacramento*

B.A., Business Administration - Marketing

*California State University of Sacramento, CA
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