May 25, 2012

Dresner Advisory Services, LLC

2012 Edition

Wisdom of Crowds ™
Business Intelligence Market Study ®

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Disclaimer:

This report should be used for informational purposes only. Vendor and product selections should be made based on multiple information sources, face-to-face meetings, customer reference checking, product demonstrations and proof of concept applications.

The information contained in the Wisdom of Crowds Business Intelligence Market Study Report is a summary of the opinions expressed in the online responses of individuals who chose to respond to our online questionnaire, and does not represent a scientific sampling of any kind. Dresner Advisory Services, LLC shall not be liable for the content of the Report, the study results, or for any damages incurred or alleged to be incurred by any of the companies included in the Report as a result of its content.

The Business Intelligence Renaissance:

I've been focused on Business Intelligence for nearly a quarter of a century and I've never been more excited about the industry than today. However, opportunities come with new challenges and this research is designed to help navigate those challenges.

Back in 1993, I first used the term information Democracy to envision a time when every user would have access to timely, relevant and actionable insight. Since that time, we've clearly made progress. But even a few years ago, this vision seemed elusive.

However, much has changed in just a few years. Enter mobility, collaboration, cloud, visualization, big data and social, and predictive – to name just a few. And these phenomena have made Business Intelligence more complete, more accessible, more usable, more flexible, more scalable and more affordable than ever before. It's nothing short of a Business Intelligence Renaissance!

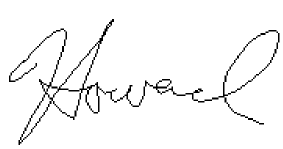
Many of these innovations are targeted at, and are being adopted and deployed by line-of business. In many organizations, end users have taken the "wheel" and are now driving Business Intelligence. But those that have been in this industry for many years know that Business Intelligence got its start with line-of-business. Early solutions targeted these users – especially Marketing and Finance. So, perhaps Business Intelligence is returning to its roots. Or, it may be that an entirely new paradigm is unfolding, with many surprises yet to be discovered.

This year marks our third publishing of the Wisdom of Crowds ™ Business Intelligence Market Study ®. Since our inaugural edition in April 2010, Dresner Advisory Services has worked to deliver a fresh and objective view of the market. With this as our mission, we continue to address shifts in the market - changing and expanding our research agenda to reflect the needs of our constituents.

This year's endeavor takes a hard look at key areas such as collaboration and cloud – as well as traditional BI - to understand the nature and rate of change; what's real and what's hype.

Like the original, the Business Intelligence Renaissance will foster complexity and conflict. Those with the proper perspective on the market will be able to leverage these changes and thrive!

Best,



Chief Research Officer
Dresner Advisory Services

Contents

Benefits of the Study:

The Wisdom of Crowds TM Business Intelligence Market Study ® provides a wealth of information and analysis – offering value to both consumers and producers of Business Intelligence technology and services.

A Consumer Guide:

As an objective source of industry research, consumers use the Wisdom of Crowds TM Business Intelligence Market Study ® to understand how their peers are leveraging and investing in Business Intelligence and related technologies.

Using our trademark 33-dimension vendor performance measurement system – users glean key insights into BI software supplier performance, enabling:

- Comparisons of current vendor performance to industry norms
- Identification and selection of new vendors

A Supplier Tool:

Vendor Licensees use the Wisdom of Crowds TM Business Intelligence Market Study ® in several important ways:

External Awareness

- Build awareness for the Business Intelligence market and supplier brand, citing Wisdom of Crowds TM Business Intelligence Market Study ® trends and vendor performance
- Lead and demand-generation for supplier offerings through association with Wisdom of Crowds TM Business Intelligence Market Study ® brand, findings, webinars, etc.

Internal Planning:

- Refine internal product plans and align with market priorities and realities as identified in Wisdom of Crowds TM Business Intelligence Market Study ®
- Better understand customer priorities, concerns and issues
- Identify competitive pressures and opportunities

About Howard Dresner and Dresner Advisory Services:

The Wisdom of Crowds™ Business Intelligence Market Study ® was conceived, designed and executed by Dresner Advisory Services, LLC - an independent advisory firm - and Howard Dresner, its President, Founder and Chief Research Officer.

Howard Dresner is one of the foremost thought leaders in Business Intelligence and Performance Management, having coined the term "Business Intelligence" in 1989. He has published two books on the subject, The Performance Management Revolution – Business Results through Insight and Action (John Wiley & Sons – Nov. 2007) and Profiles in Performance – Business Intelligence Journeys and the Roadmap for Change (John Wiley & Sons – Nov. 2009). He lectures at forums around the globe and is often cited by the business and trade press.

Prior to Dresner Advisory Services, Howard served as Chief Strategy Officer at Hyperion Solutions and was a Research Fellow at Gartner, where he led its Business Intelligence research practice for 13 years.

Howard has conducted and directed numerous in-depth primary research studies over the course of the past two decades and is an expert in analyzing these markets.

His most recent market studies include the DAS Mobile Business Intelligence Market Study (September 2010, February 2011 & October 2011) and the widely acclaimed Wisdom of Crowds™ Business Intelligence Market Study ® (April 2010 & May 2011).

Howard (www.twitter.com/howarddresner) conducts a weekly Twitter "tweetchat" on Fridays at 1PM ET. The hashtag is #BIWisdom. During these live events the BIWisdom "tribe" discusses a wide range of Business Intelligence topics.

Dresner Advisory Services offers a membership destination site for Business Intelligence professionals – www.businessintelligenceinsider.com – with insightful BI research and analysis, recorded webinars, live presentations, interactive applications and customer podcasts.

More information about Dresner Advisory Services can be found at www.howarddresner.com, www.dresneradvisory.com or www.dresnerblog.com.

Survey Method and Data Collection:

As with the original Wisdom of Crowds™ Business Intelligence Market Study ® we constructed a survey instrument to collect data and used social media and crowd-sourcing techniques to recruit participants.

We expanded data collection to include our own research community of roughly 1,000 organizations as well as vendors' customer communities (Figure 1).

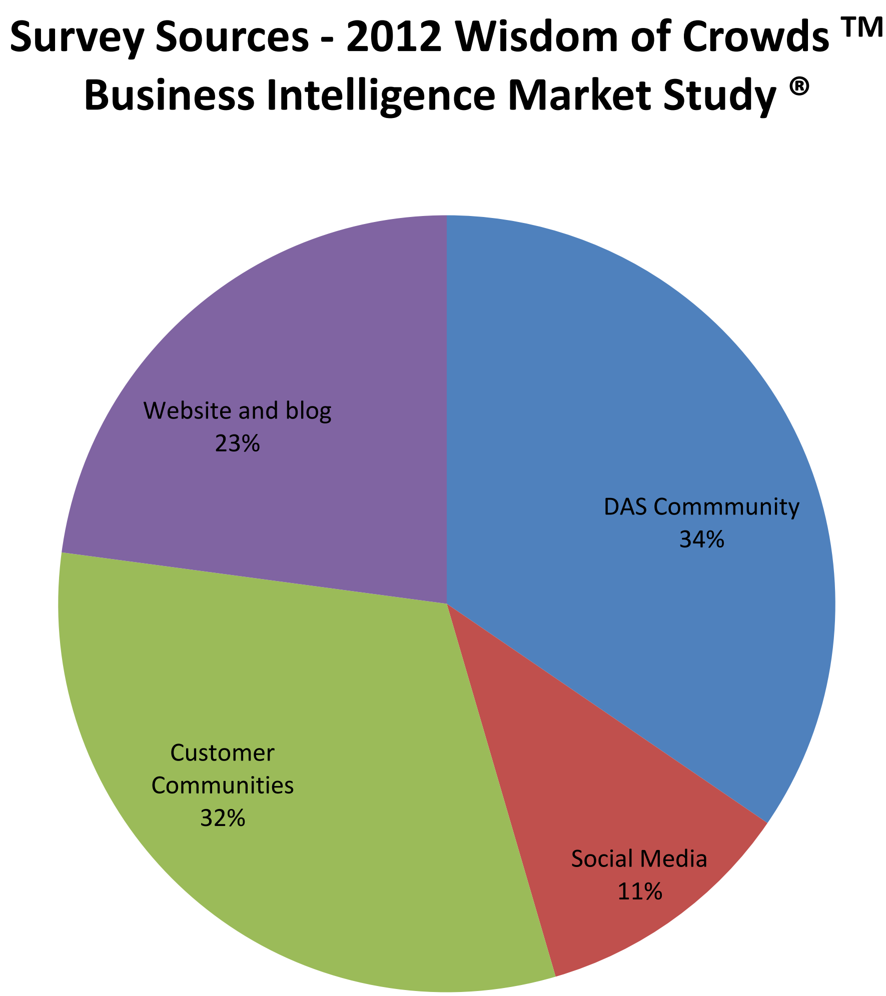


Figure 1 - Survey Sources

Data Collection

The volume of data collected continues to expand each year. For 2012, we collected 859 completed surveys - 35% growth over 2011 (Figure 2).

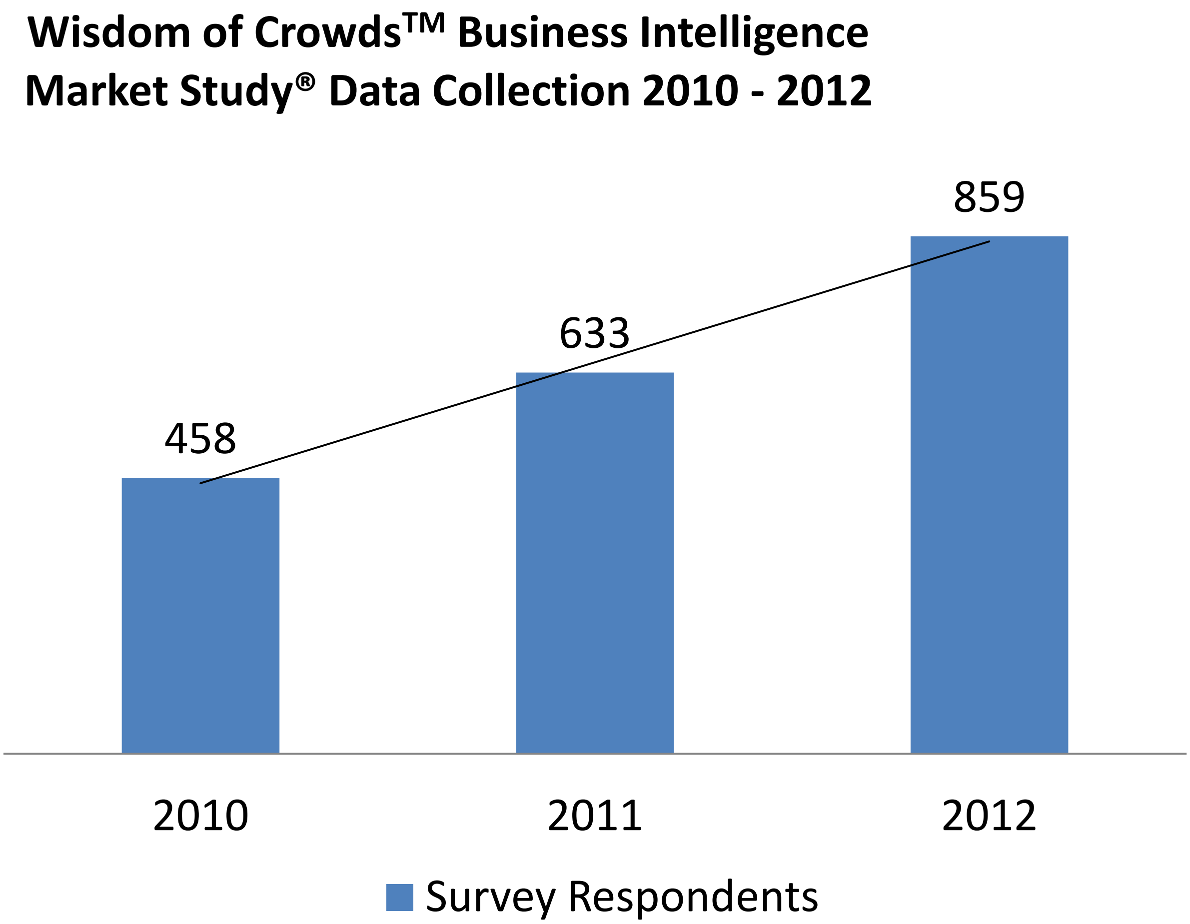


Figure 2 - Numbers of survey respondents 2010 - 2012

Data Quality:

All respondent entries were carefully scrutinized and verified to ensure that only qualified participants are included in the study.

New for 2012:

Building upon our 2010 and 2011 successes, we have expanded the 2012 study to address a wide range of technology and usage issues, offering more actionable insight for users and suppliers of Business Intelligence solutions:

- Our technology section has been expanded (16 areas versus 9 in 2011) testing perceptions and intentions concerning: social BI, complex event processing (CEP), text analysis – as well as more traditional areas including: data warehousing, end user self service, dashboards and more.

- Respondents were asked if their Business Intelligence initiatives have been successful. We've used this information to better understand the indicators and determinants of BI success.

- For the past two years, we have used our trademark 32-dimension system for rating Business Intelligence vendors. This year we have added a 33rd measure: "integrity" – underscoring the importance of honesty and truthfulness in our professional dealings.

- For 2012 we added a new market segment: "High Growth" to categorize those vendors with both critical mass and a growth rate well above the industry average. We have also discontinued the "Open Source" category and have integrated those vendors into the remaining four segments.

Vendor/Market Categories:

For the purposes of this report, we utilize four different BI industry sub-categories in which to group vendors and analyze market behavior and direction. As in 2011, these include the "Titans", "Established Pure-play", and "Emerging" vendors. For 2012, we added "High Growth" as a fourth category and have discontinued "Open Source".

Titans are the largest vendors, with extensive product and service offerings – including Business Intelligence. In all cases these vendors have acquired Business Intelligence vendors. Included in this category are: IBM/Cognos, Microsoft, Oracle and SAP/BusinessObjects.

Large Established Pure-Play BI vendors are predominately focused upon Business Intelligence software and services and have typically been in business for 15 or more years - with well established customer bases and revenue streams. Several are publicly held concerns. These include Actuate, Information Builders, MicroStrategy and SAS Institute.

High Growth BI vendors have achieved critical mass in the market and are growing at an extremely high rate – well above the industry average. Vendors include: QlikTech, Tableau and Tibco/Spotfire.

Emerging BI vendors are typically younger than other categories and offer unique and often innovative business models, technologies and/or services. This category includes: Arcplan, Dimensional Insight, Jedox, Pentaho and Yellowfin.

Executive Summary

Executive Summary:

- Globally, functional alignment (and adoption) of Business Intelligence remains nearly evenly split between the IT Department (45%) and various business functions. Increasingly, functions other than Finance and Sales and Marketing have grown in their adoption of Business Intelligence.

- Very large implementations of Business Intelligence solutions (more than 1,000 users) remain unchanged since 2010, with most implementations ranging between one and one hundred users. While there has been expansion and growth in recent years, still only a minority of users within most organizations have access to BI.

- Industry growth for 2012 was driven predominately by mid-sized organizations (1,000 – 10,000 employees), Retail & Wholesale and Technology verticals, and EMEA and APAC regions.

- The proliferation of multiple BI tools continues to accelerate as line of business independently invests in solutions. Nearly half of the largest organizations reported the use of four or more tools.

- Only 41% of respondents completely agreed that their Business Intelligence initiatives have been successful, with smaller organizations reporting greater success than larger ones. Users of Emerging and High Growth segment products were more likely to report success than other segments.

- Related technology initiatives, with the greatest priority (and investment), include traditional areas such as: “Dashboards”, “End user ‘self service’”, and “Data warehousing”. Hot areas such as “Advanced Visualization”, “Data mining and advanced algorithms” and “Mobile device support” also topped the list.

- Three of four Business Intelligence market segments showed growth in numbers of new deployments over 2011. This includes “Titans”, “Large Established Pure-plays” and “High Growth” segments.

- While most measures of industry performance declined somewhat over 2011, a majority of users believe vendor integrity is “good” or “excellent”.

Study Demographics:

As with last year, we're seeing a rich cross-section of data across geographies, functions, organization size, and vertical industries. We believe that, unlike other industry research, this supports a more representative sample and better indicator of true market dynamics.

Cross-tab analyses have been constructed using these demographics to identify and illustrate important industry trends.

Geography:

As in previous years, we've been able to attract survey respondents from a wide array of geographies – including 28% from EMEA (19 countries) and 11% from APAC (7 countries). Although North America represents the largest group, it is in itself diverse – representing four Canadian provinces, 34 US states and the Commonwealth of Puerto Rico (Figure 3).

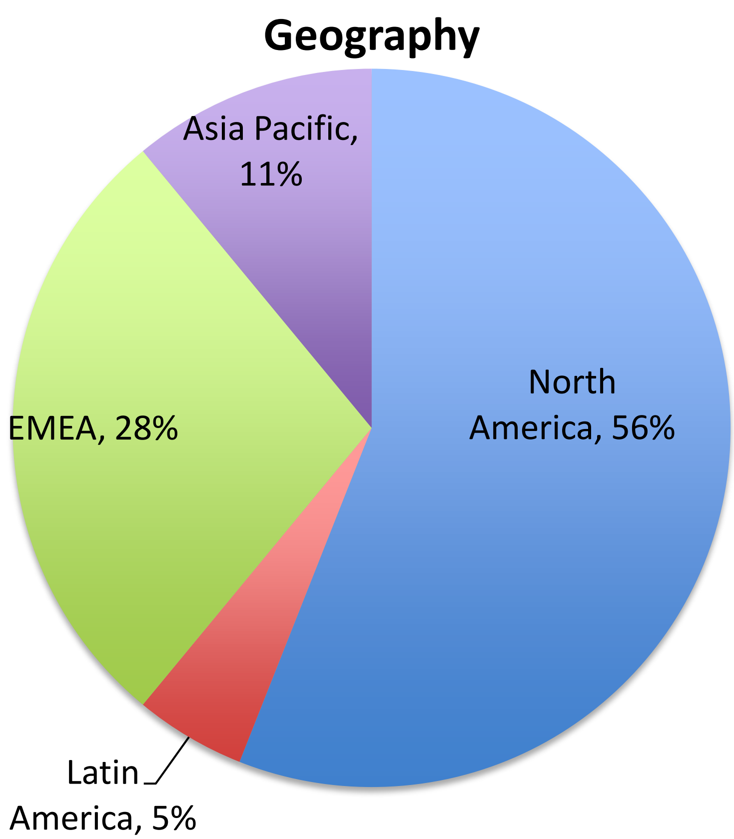


Figure 3 - Geographic Distribution

Functions:

The IT Department represents the largest single group of respondents, representing roughly half of the sample. We also experienced strong participation from the Sales and Marketing, Executive Management and Finance functions (Figure 4).

This distribution across functions has enabled us to develop analyses comparing and contrasting the plans and priorities of the different departments within organizations.

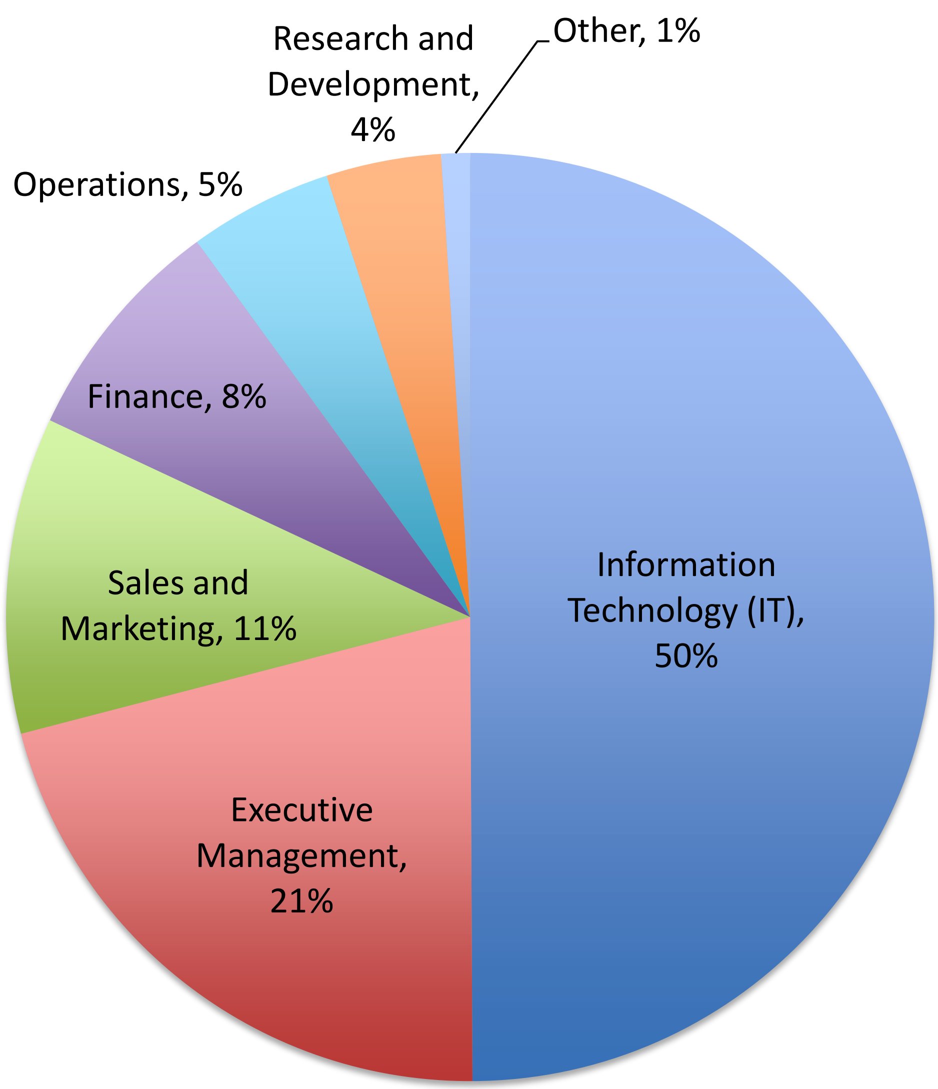


Figure 4 - Functions Represented

Vertical Industries:

For 2012, vertical industry distribution was similar to 2011 and 2010– with pronounced participation from Health Care, Financial Services, and Retail & Wholesale. We encourage the participation of consultants – who oftentimes have deeper industry knowledge than their customer counterparts. This also yields insight into the partner ecosystem for BI vendors (Figure 5).

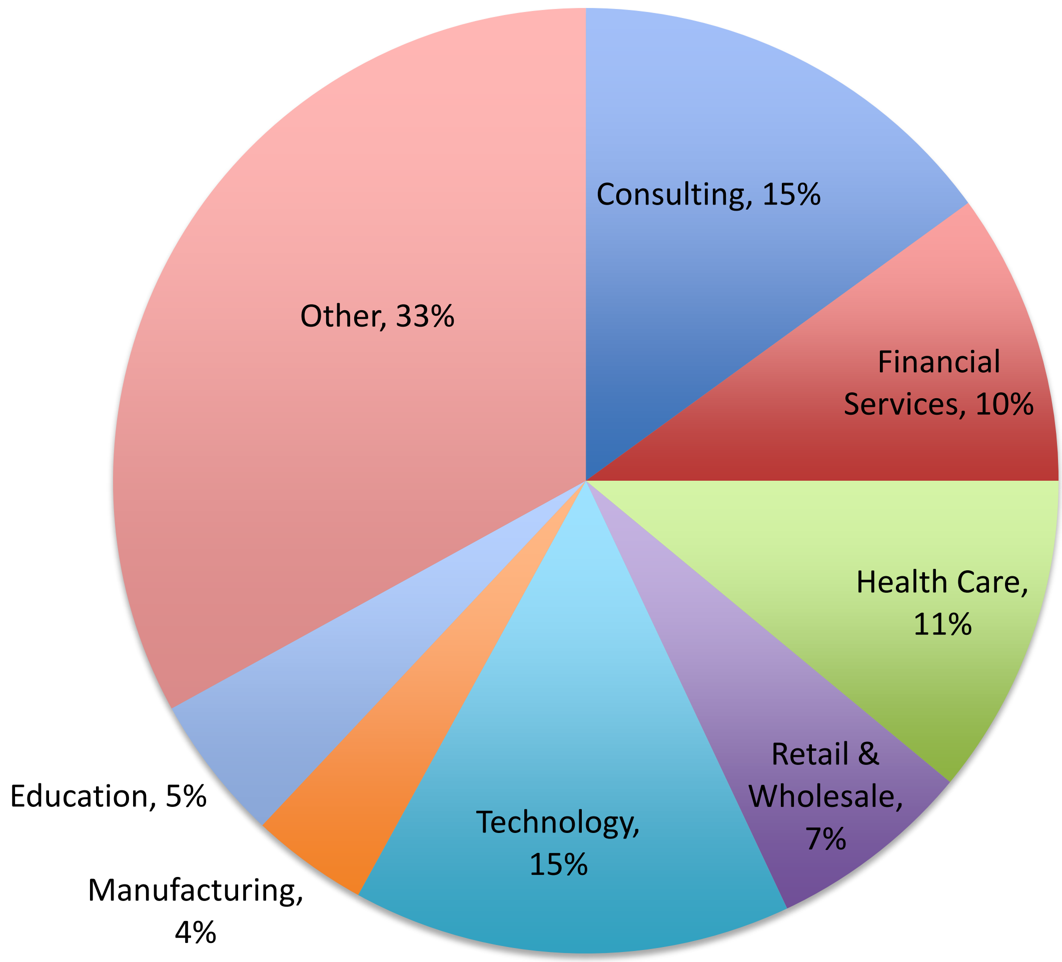


Figure 5 - Vertical Industries

Organization Size:

We saw strong participation from a balanced mix of small, medium and large organizations (Figure 6). This year the largest of organizations represent 26% of the sample, mid-sized organizations at 42% and the smallest of organizations at 32%. As with previous years, we have found important differences by organization size.

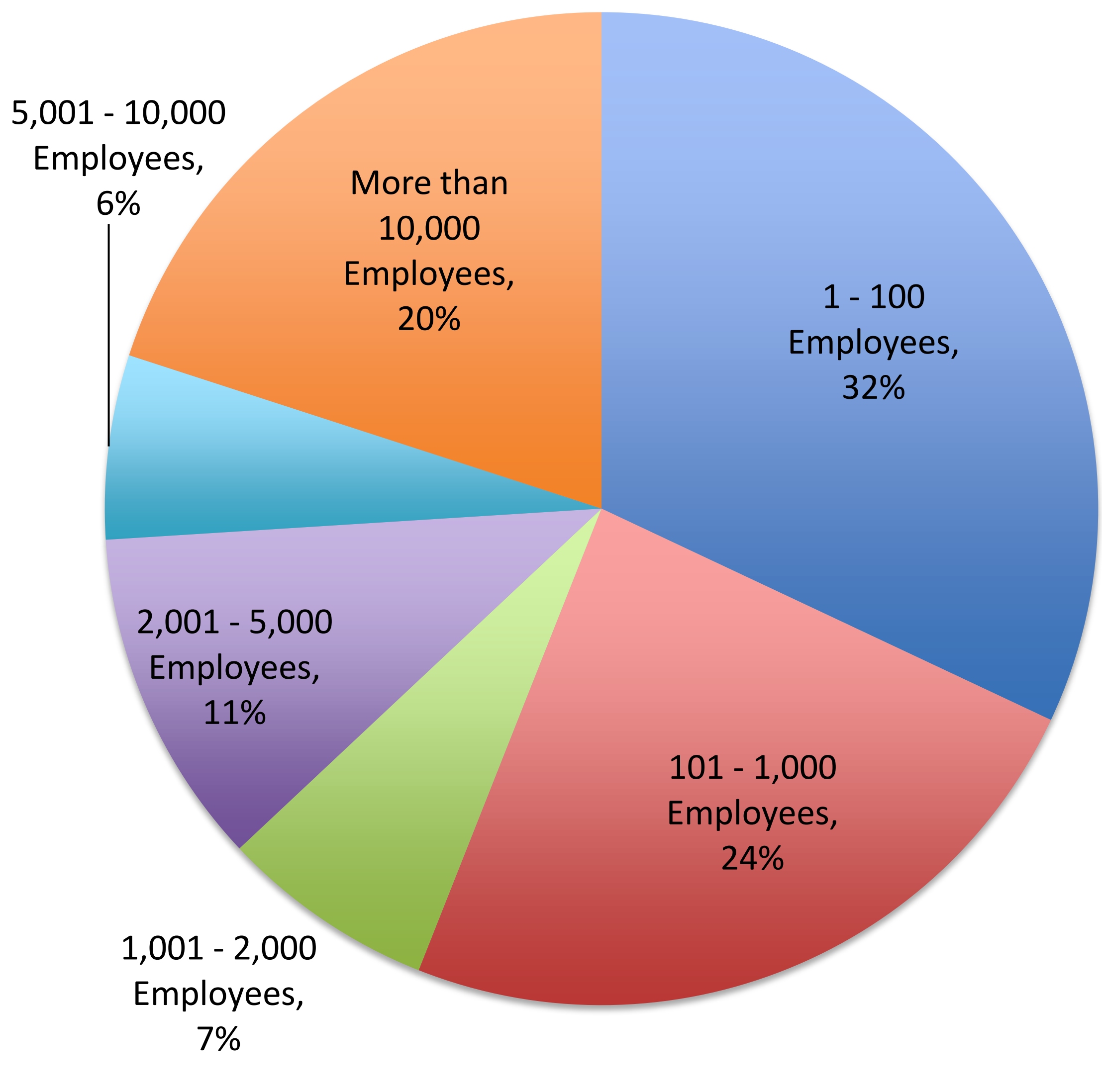


Figure 6 - Size of Organization

Analysis & Trends

Analysis & Trends

Departmental/Functional Alignment with BI Tools:

For the past three years we have observed a shift away from IT alignment (and deployment) of Business Intelligence, in favor of line-of-business management and users. In this year's study, we see this trend continuing, with IT-aligned deployments holding steady at 45% and deployments, which are more aligned with business users, at ~ 54% world-wide (Figure 7).

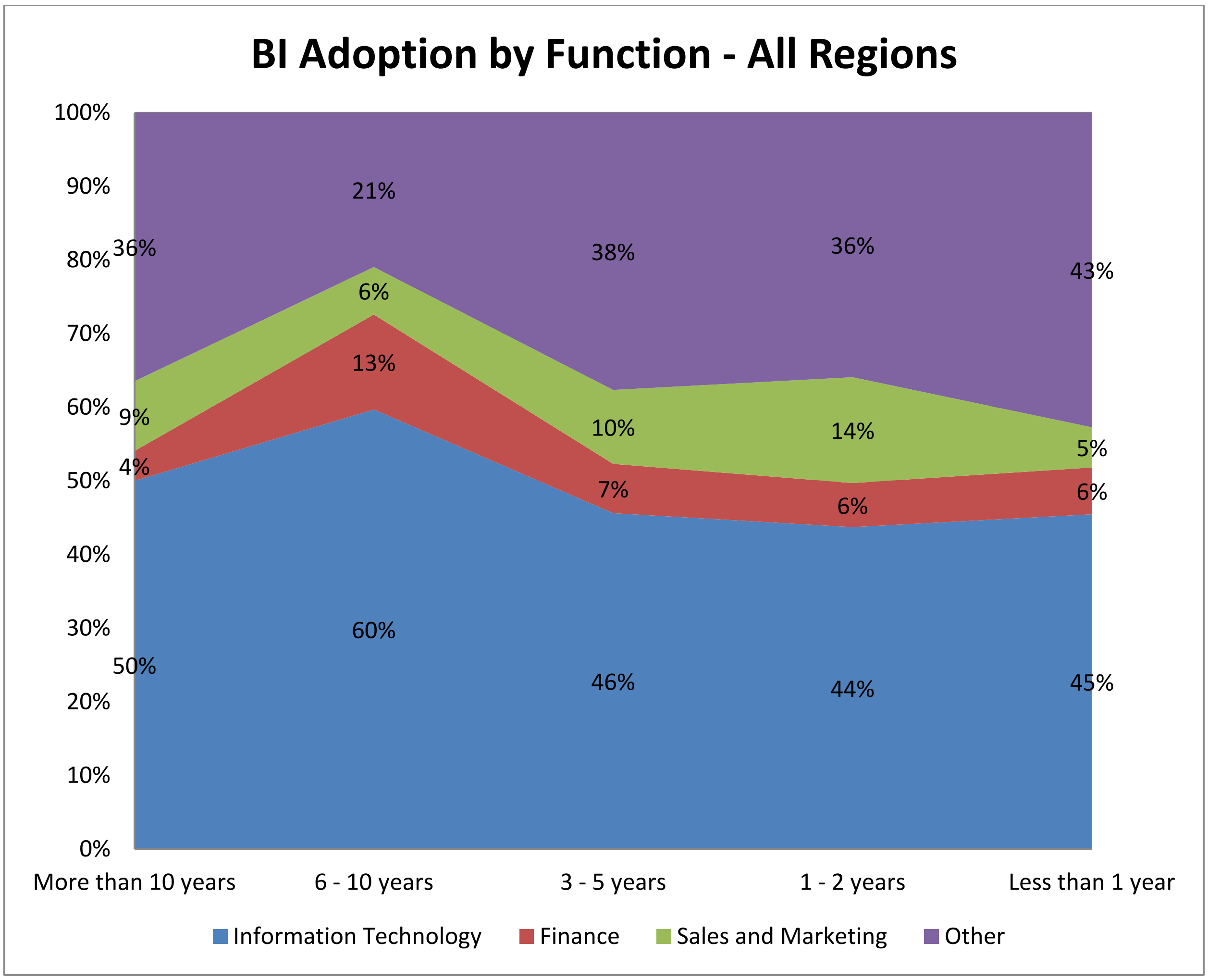


Figure 7 - Business Intelligence Adoption by Function

Scale of Business Intelligence Deployments:

In last year's report we noted a new "center of gravity", with BI implementation sizes ranging between 6 and 50 users - an increase over 2010. For 2012, this dynamic has remained largely the same – with only a minor shift in favor of slightly larger implementations. Nevertheless, the greatest majority of BI implementations (64%) involve 100 or fewer users (Figure 8).

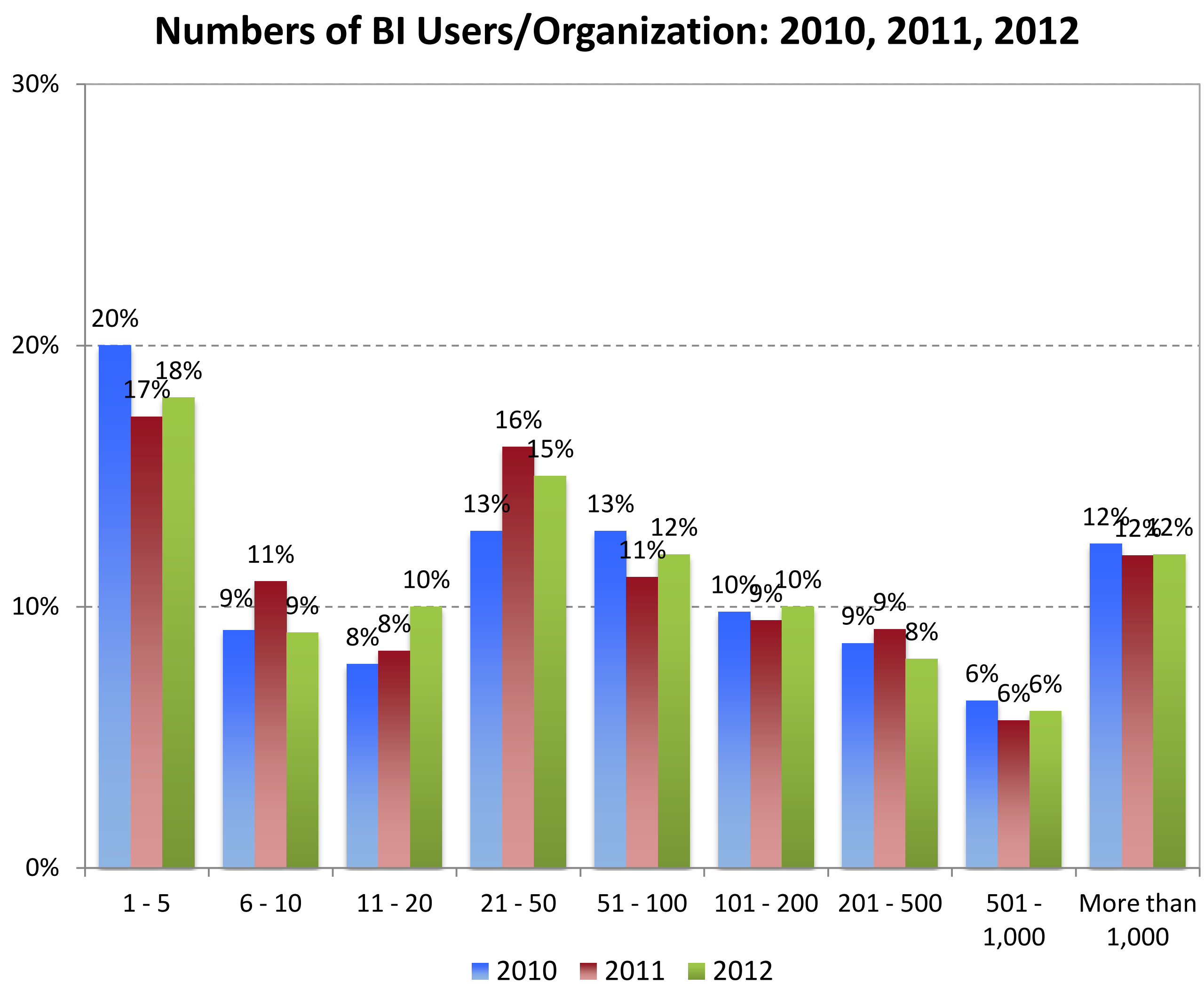


Figure 8 – Numbers of Users/Organization: 2010, 2011, 2012

Although penetration of Business Intelligence (as a percentage of numbers of employees) has been on the rise, progress has been slow. Our latest data suggests that, in most organizations, only a minority of employees have access to Business Intelligence (Figure 9).

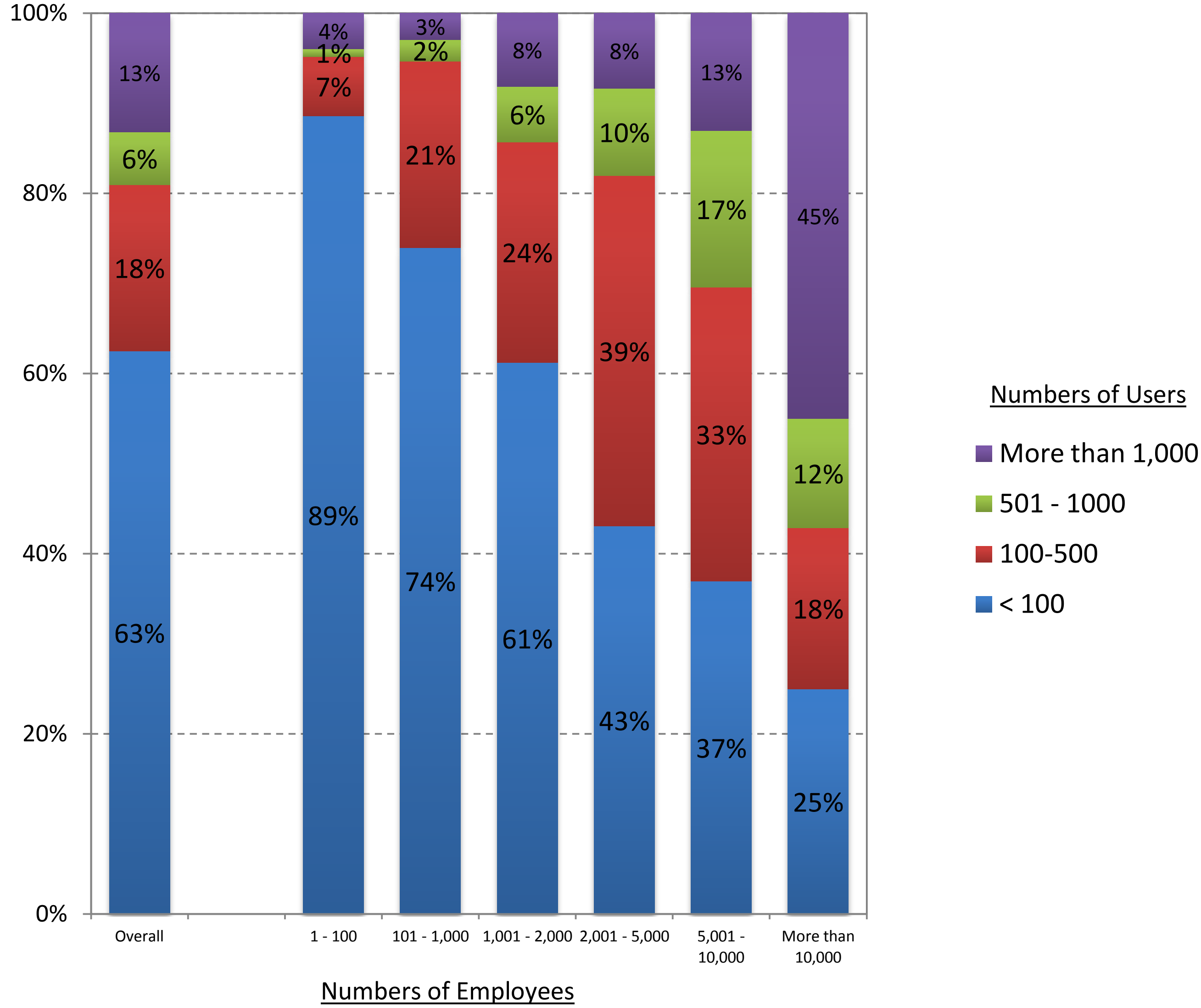


Figure 9 - Business Intelligence Users by Size of Organization

Numbers of Business Intelligence Tools in Use:

Multiple (oftentimes redundant) Business Intelligence tools within organizations remains largely unchanged from year to year – with 2 to 3 tools being most common (Figure 10). With the growing presence of products catering to business users, we don't expect this trend to reverse. And, as in the past two years, these statistics likely understate the issue, as users may be unaware of all the tools being used within their organizations.

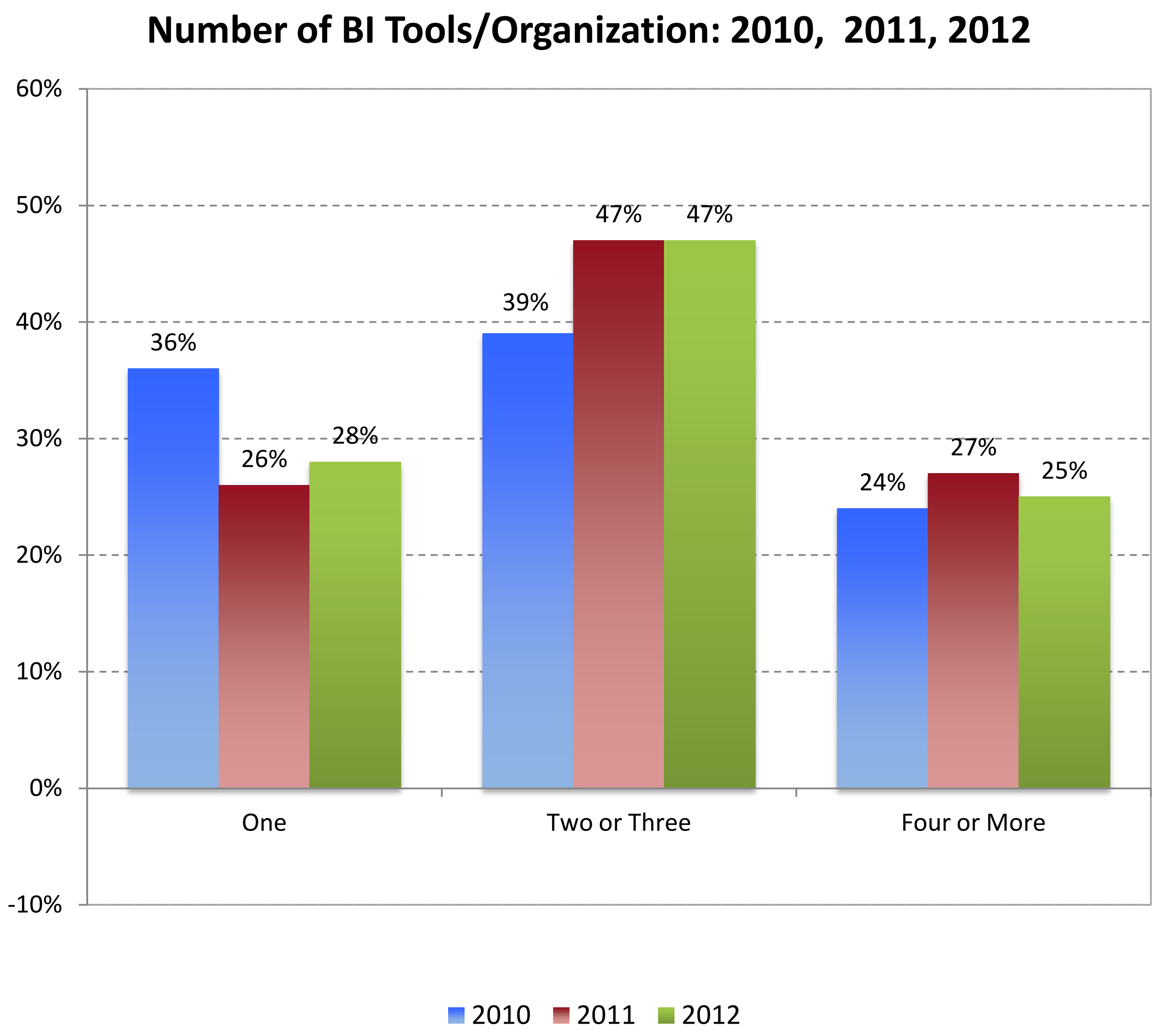


Figure 10 - Number of BI Tools/Organization: 2010 - 2012

Like in 2010 and 2011, the largest organizations tend to have the greatest variety of Business Intelligence tools (Figure 11). This has occurred over time as departmental/functional groups have invested in BI tools without the benefit (or knowledge) of corporate standards or even what other functions might be using.

Anecdotally, budgets continue to shift away from IT and towards end user departments. As line-of-business unilaterally invests in tools, numbers of tools will continue to rise. This may cause a lack of enterprise coordination surrounding metadata and semantics and presents an ongoing problem to organizations seeking information consistency.

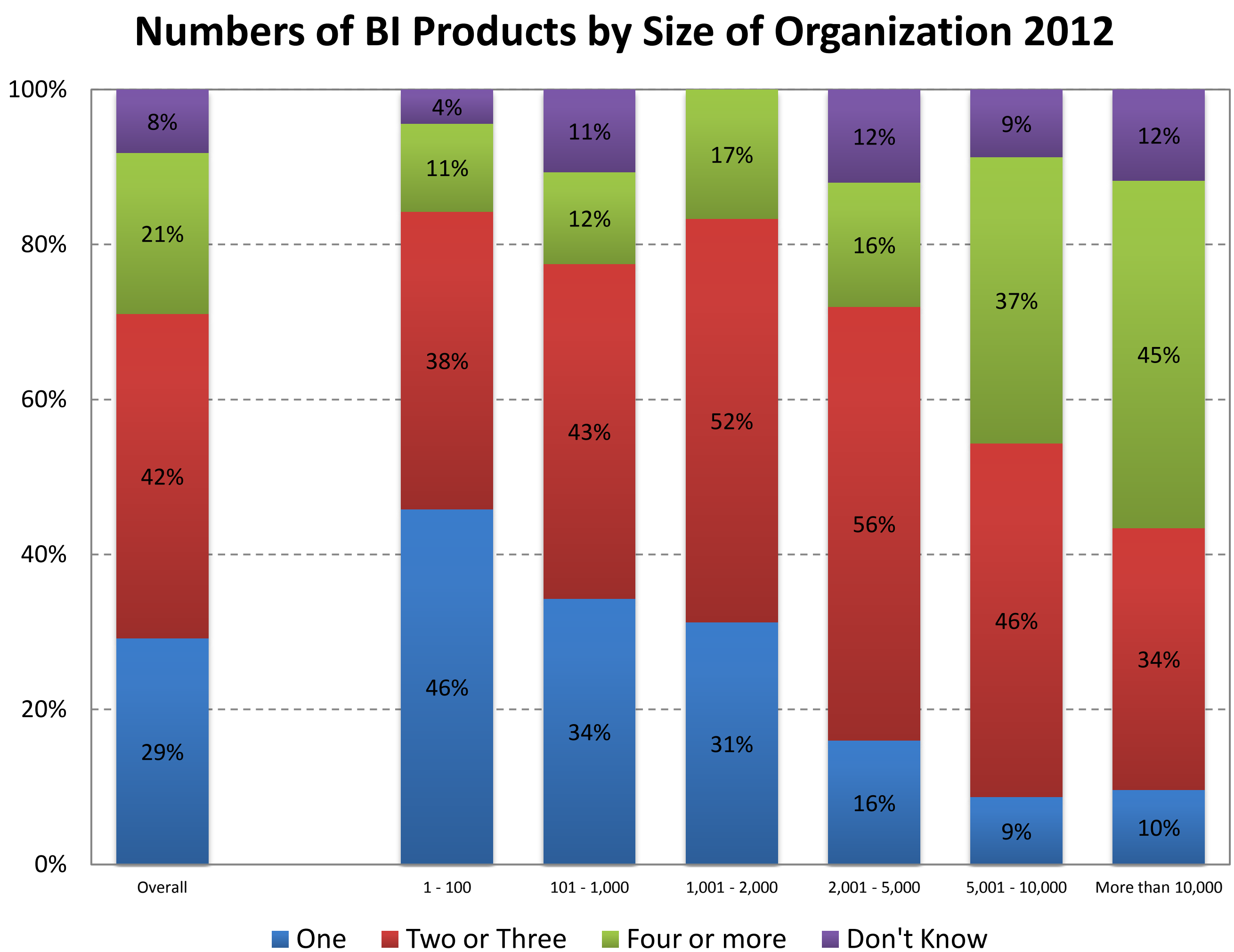


Figure 11 – Numbers of Business Intelligence Products by Organization Size -2012

When looking at numbers of tools by market segment (Figure 12), we observe that the trend towards fewer Business Intelligence tools progresses from left to right with "Titan" customers reporting the greatest number of tools and "Emerging" customers the fewest. In discussions with users we have seen a trend to use multiple tools in parallel or in concert with each other. For example: using a "Titan" tool to extract data from corporate systems and then importing into an "Emerging" or "High Growth" tool for analysis.

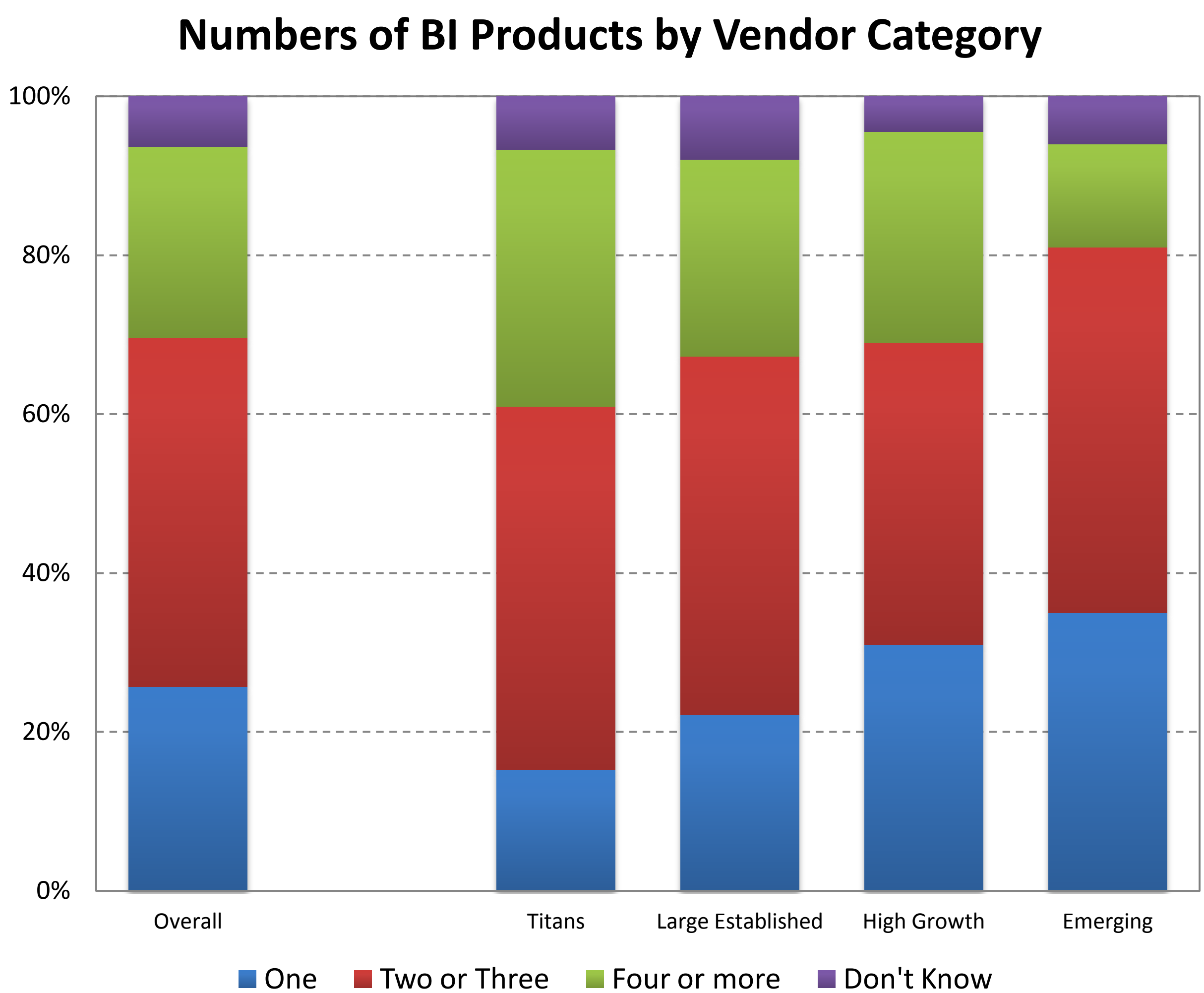


Figure 12 –Numbers of Business Intelligence Products by Market Segment

Although all functions appear to acknowledge the presence of multiple Business Intelligence tools, it is noteworthy that the line-of-business functions were more likely than IT to be unaware of numbers of tools in use. In our opinion, this speaks to the growing independence of line-of-business functions when investing in Business Intelligence (Figure 13).

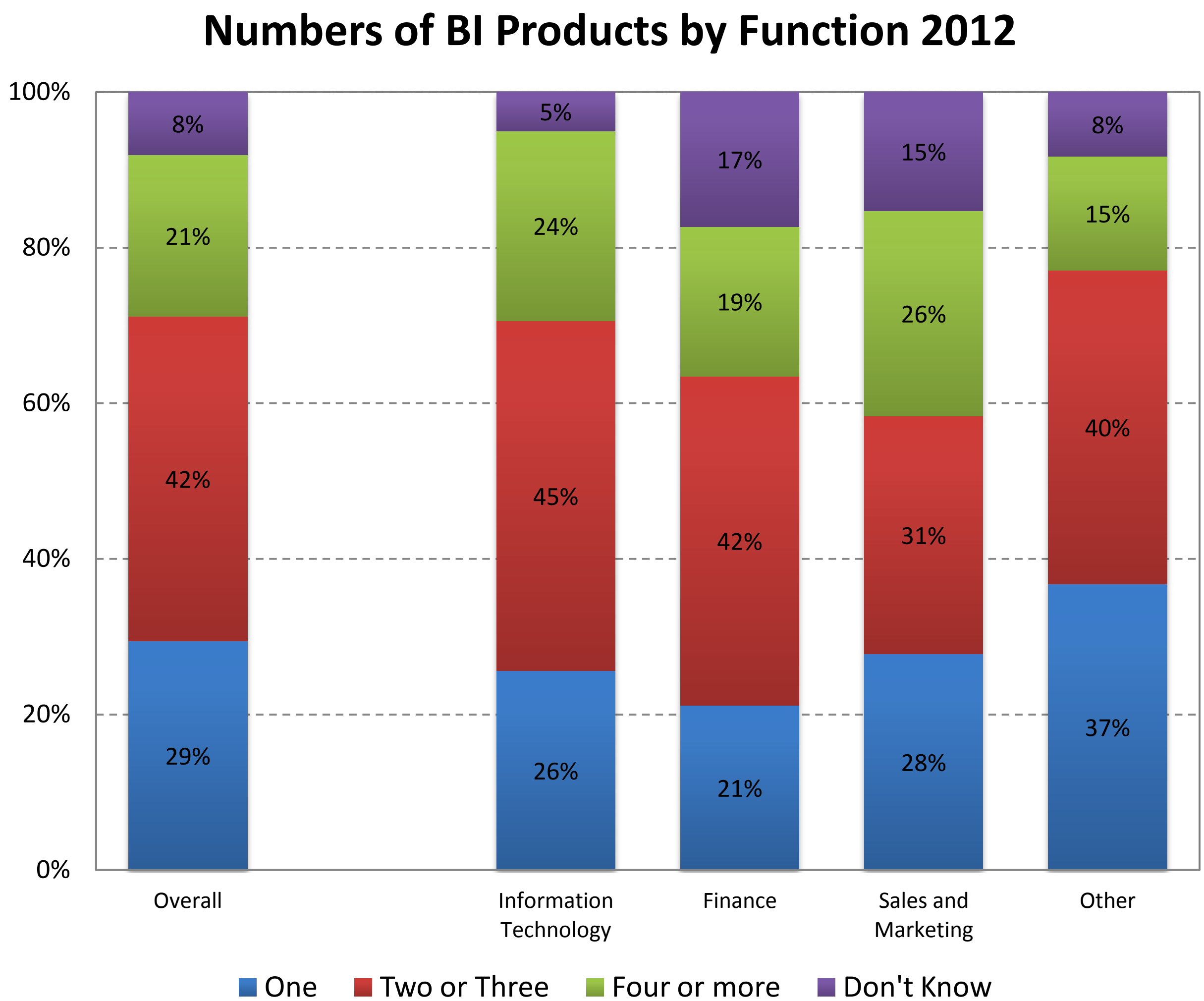


Figure 13 - Numbers of BI Tools by Function

Business Intelligence Adoption:

Based on our data, since 2010, "green field" (wholly new) implementations have declined – with growth coming predominately from expansion of existing customers (Figure 14). This is not surprising or negative. Most organizations already have an investment (albeit modest) in BI, with penetration relatively low. Hence, future growth will need to come from existing customers seeking to expand deployment to a broader number of users.

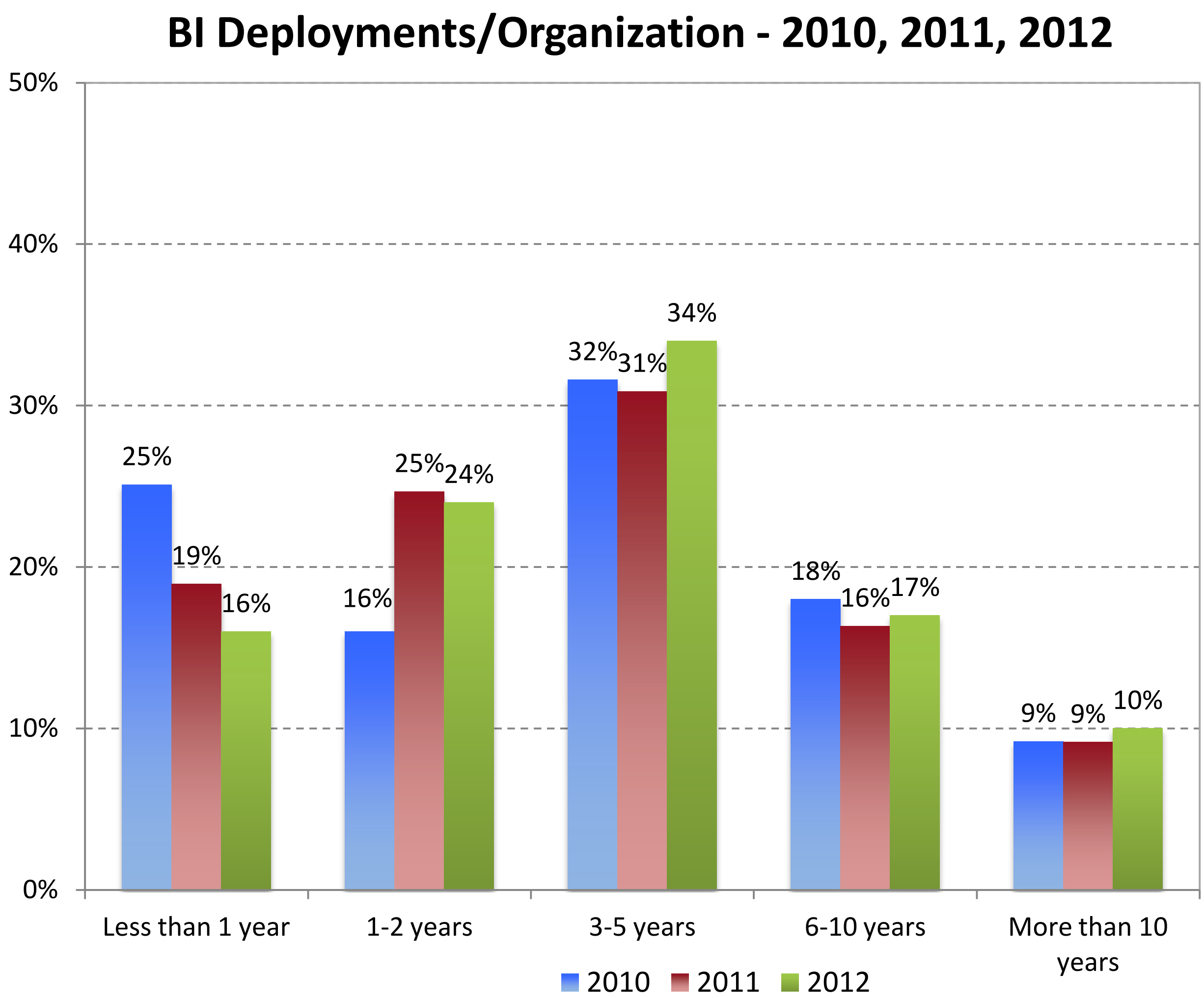


Figure 14 – Business Intelligence Deployments/Organization: 2010, 2011, 2012

From an industry perspective, we observe a decrease of investment by Financial Services and Health Care with an increase in Retail and Wholesale and Manufacturing. Consulting organizations, oftentimes catering to line-of-business, have shown solid growth in implementing BI solutions over 2011 (Figure 15).

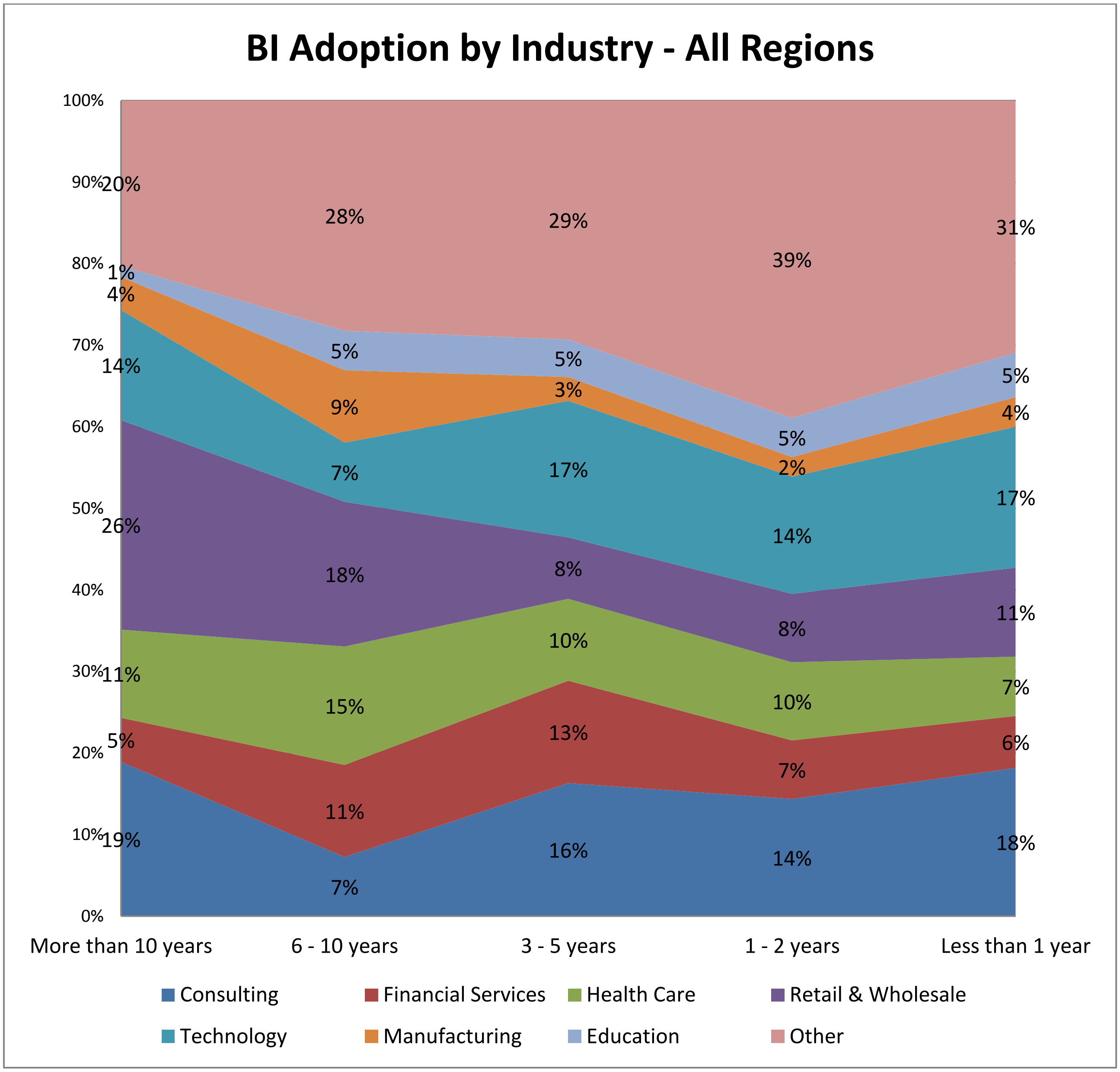


Figure 15 – Business Intelligence Deployments by Industry

Over the past few years there has been a consistent increase in the use of Business Intelligence by the smallest of organizations. However, for 2012 there has been a substantial increase in the numbers of mid-sized organizations deploying BI (Figure 16). In part we attribute this to greater availability and lower costs associated with newer product entries.

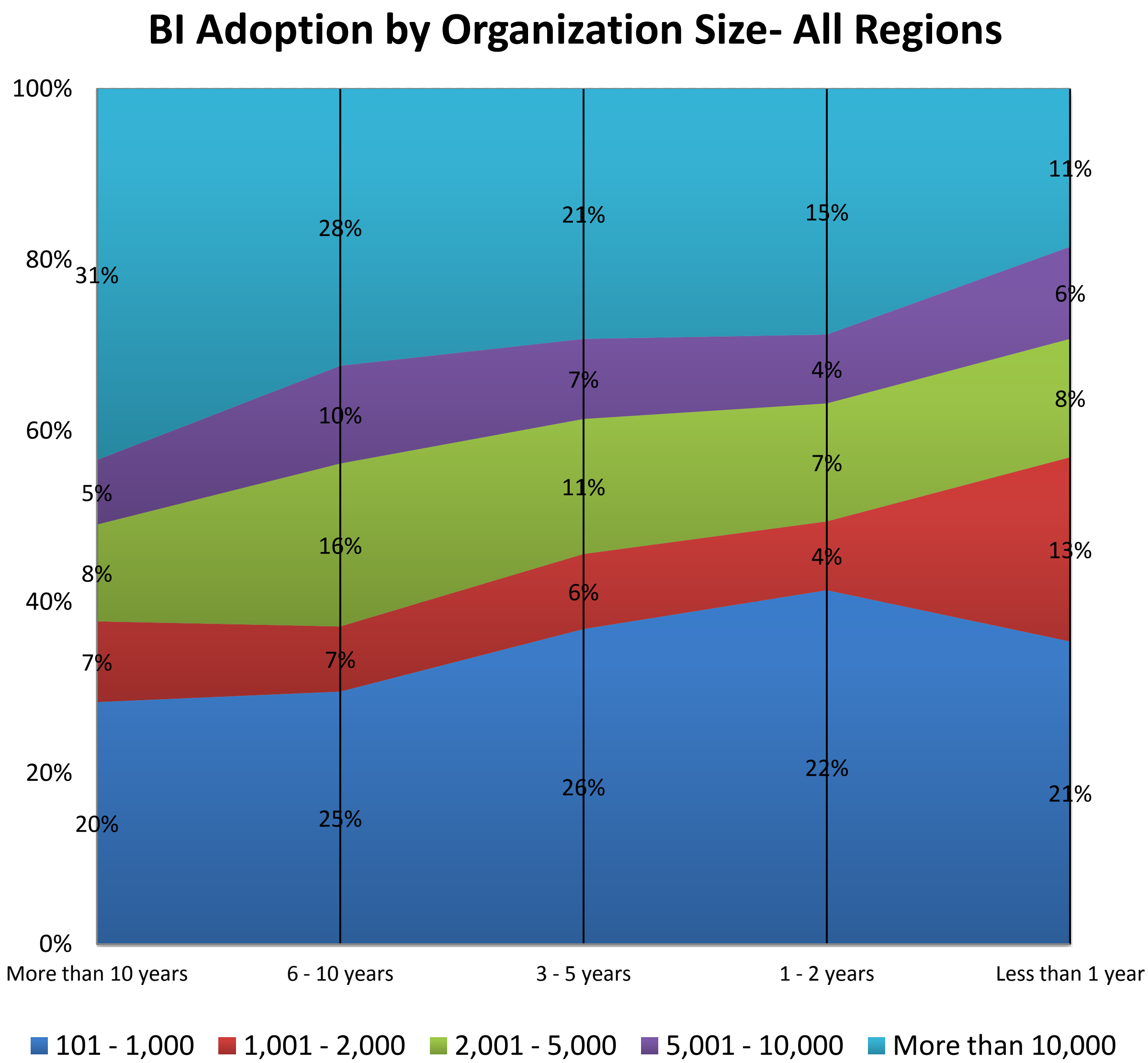


Figure 16 – Business Intelligence Deployments by Organization Size

North American organizations have historically reported the largest numbers of new deployments. This remains true for 2012 (Figure 17). However, North American deployments have decreased from 2011 (56% to 51%), in contrast with consistent growth from EMEA (28% to 32%).

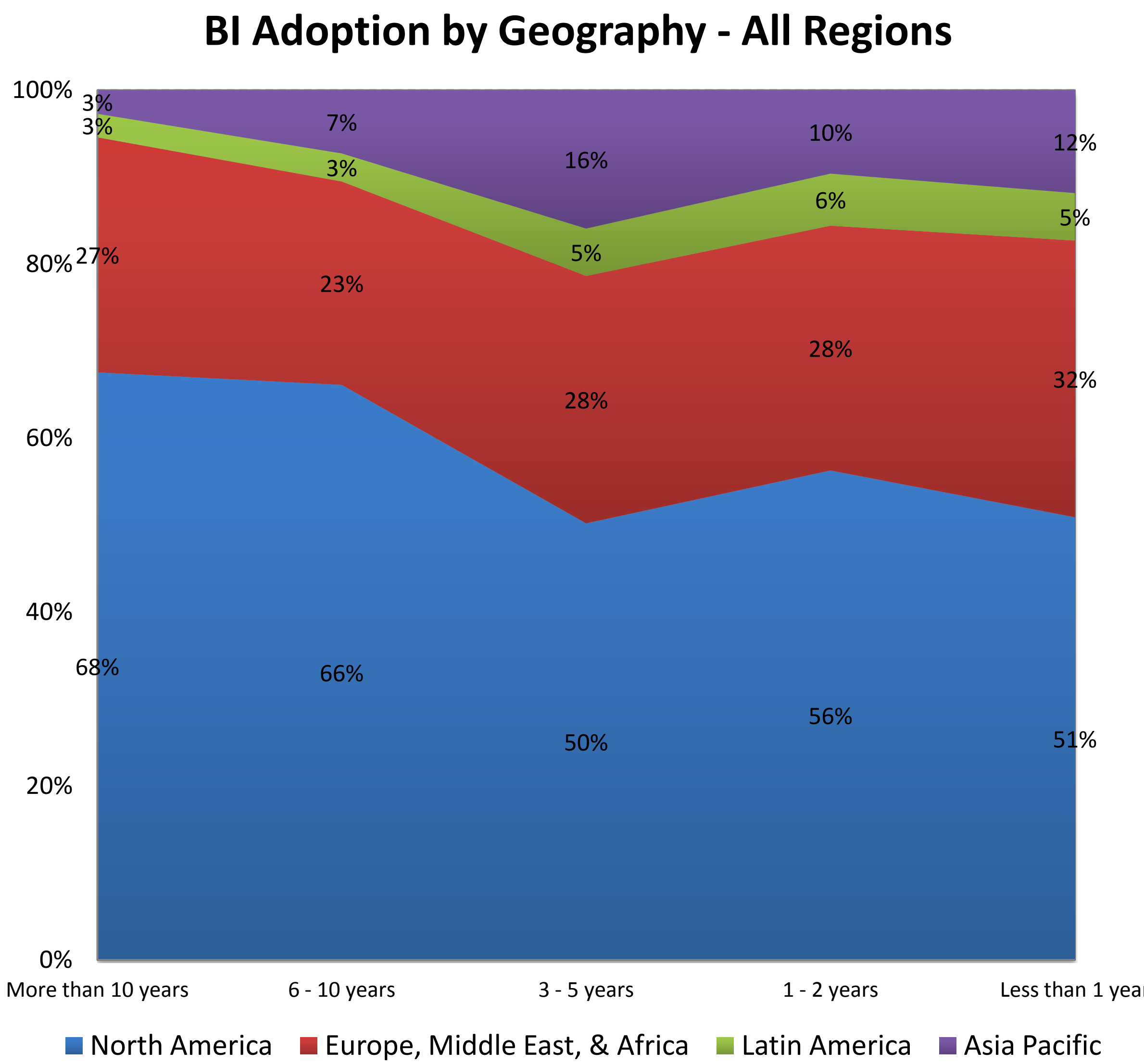


Figure 17 - Business Intelligence Deployments by Geography

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Perceived Success of Business Intelligence:

Years ago it was typical to ask whether organizations perceived their Business Intelligence initiatives a success. However, this is the first year that we've done so as a part of the Wisdom of Crowds BI Market Study. And, we're pleased to see that a majority of respondents view their initiatives as either completely or somewhat successful (Figure 18).

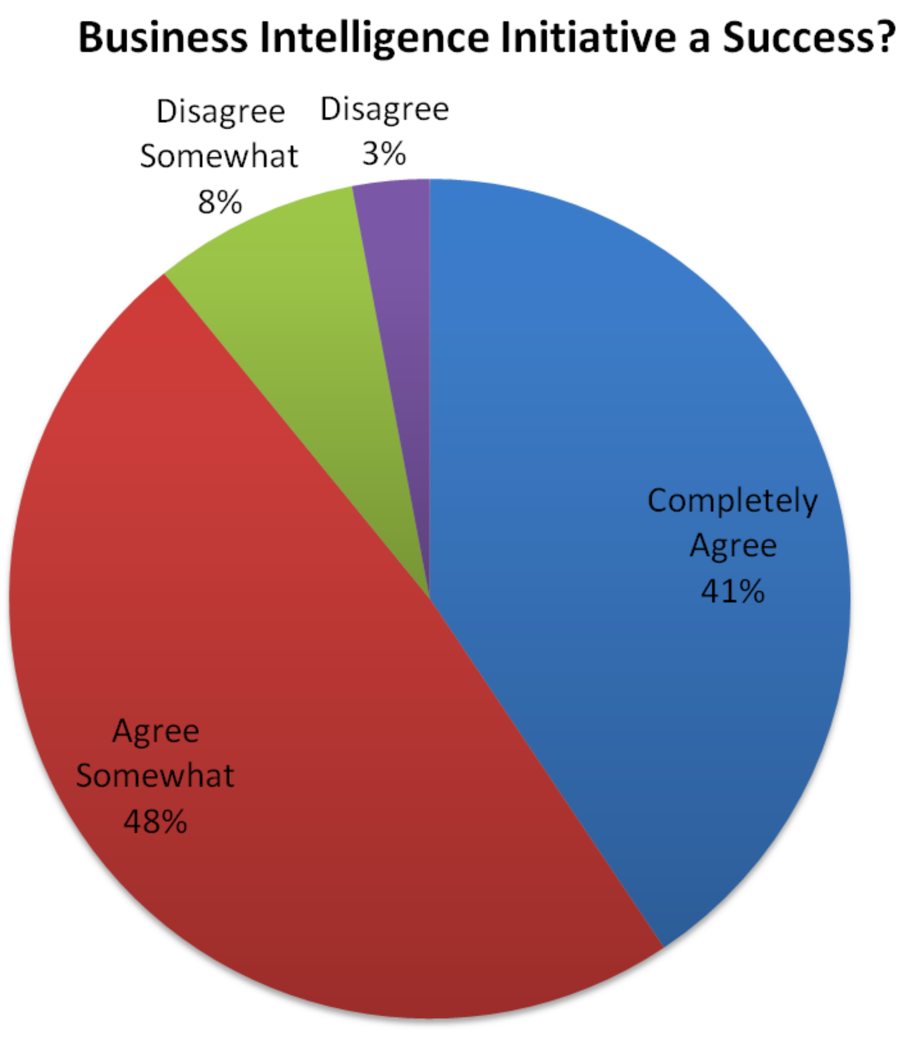

Figure 18 - Perceived Success with Business Intelligence

When examining perceived success by the size of organization, we find that smaller organizations are more likely to have Business Intelligence success than larger ones (Figure 19). This shouldn't come as a surprise as smaller organizations are better able to more quickly deploy BI and receive the requisite benefits due to reduced organizational and business complexity. However, it is encouraging to see that even the largest of organizations (83%) have seen a measure of success with BI.

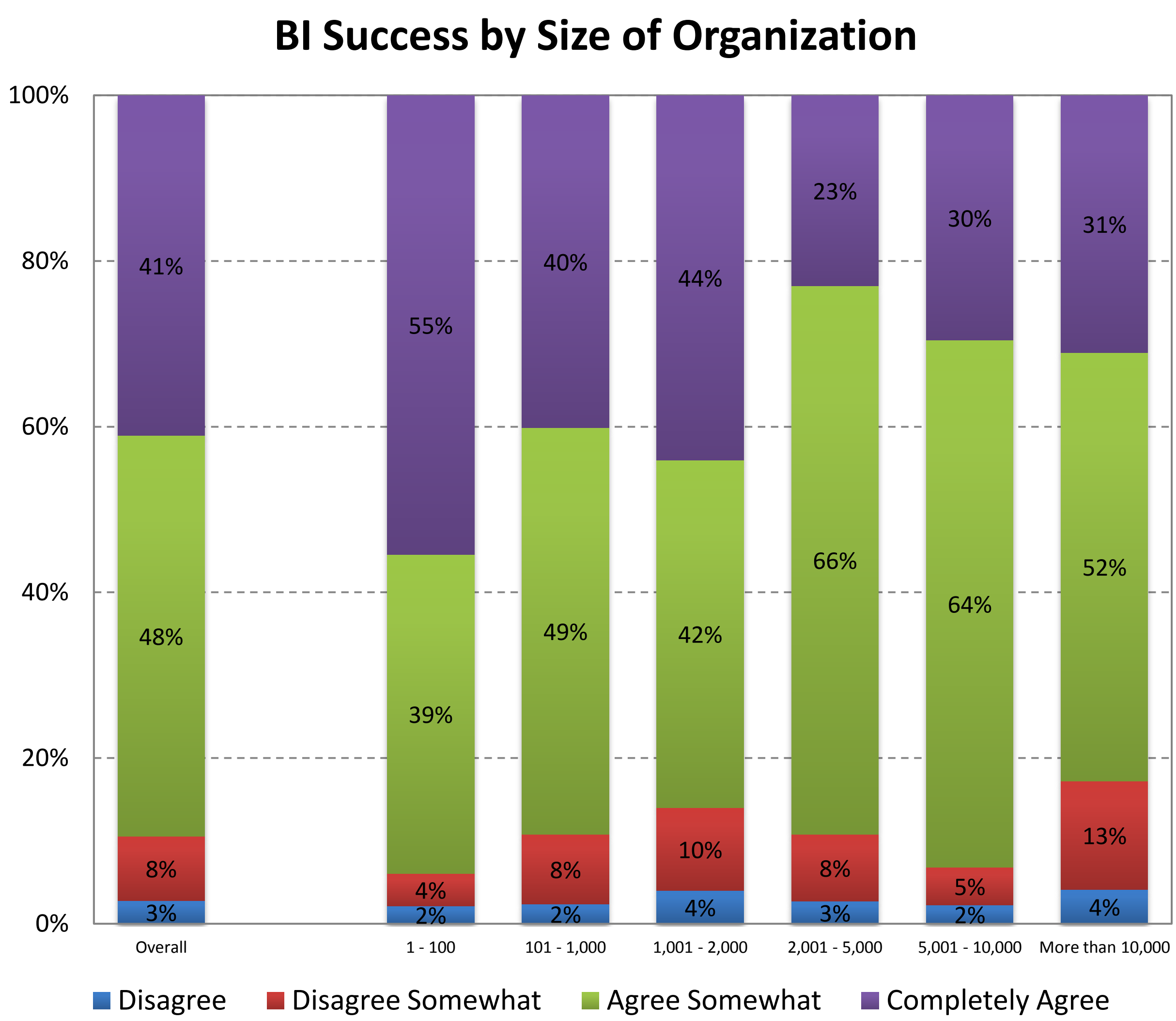

Figure 19 - Business Intelligence Success by Organization Size

Another way of looking at success is by market segment. Those adopting “High Growth” and “Emerging” solutions tend to report greater success (Figure 20). However, those respondents also tend to be end-users (versus IT) and from smaller organizations.

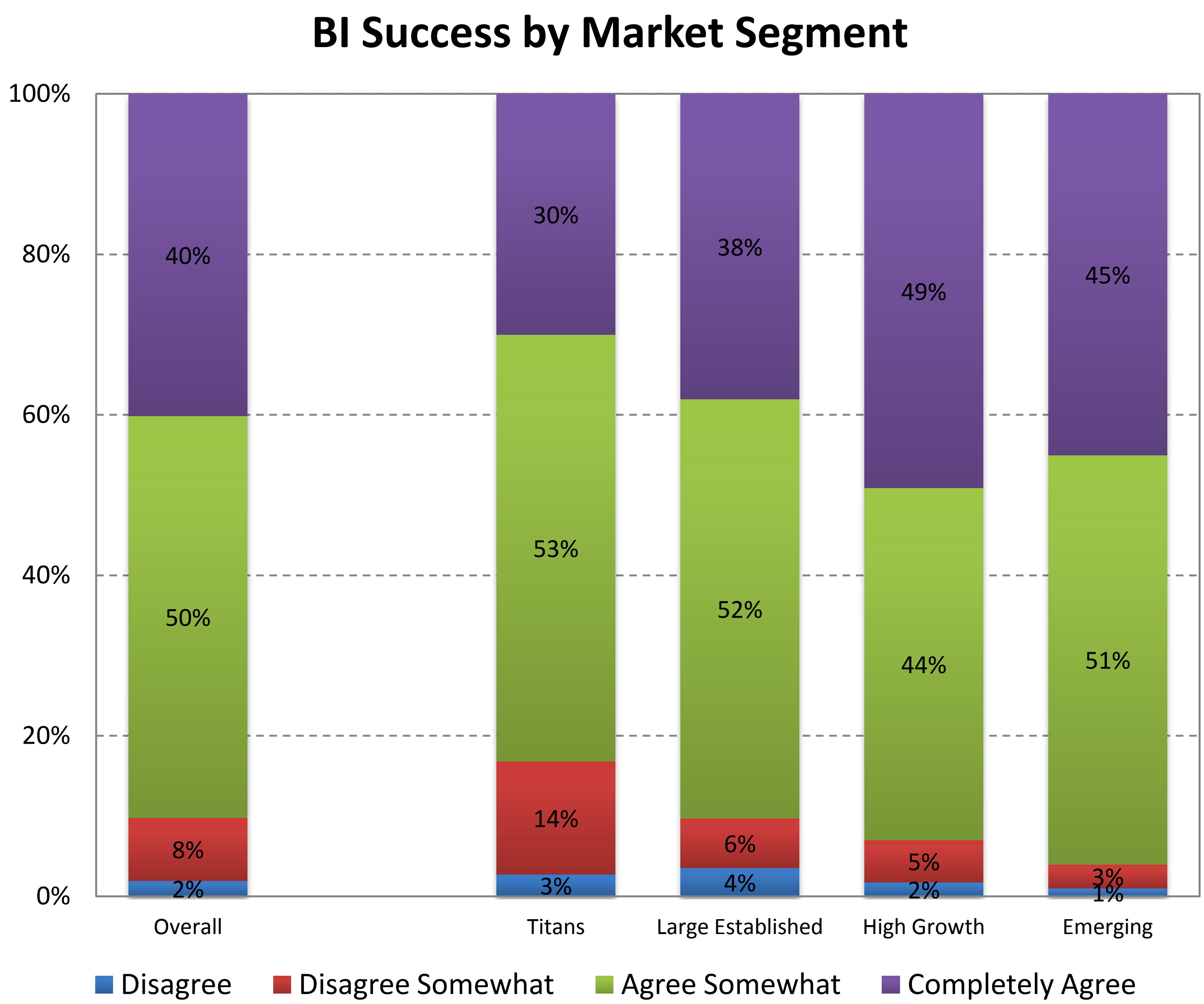

Figure 20 – Business Intelligence Success by Market Segment

Key Reasons for Success or Failure with Business Intelligence

We asked respondents to share reasons for success or failure with Business Intelligence, as an open ended question. We received hundreds of comments and have distilled them down to the major categories below with representative quotes for each (Table 1)

Table 1 - Reasons for Business Intelligence Success or Failure

	Success	**Failure**
Management Maturity and Support	*"Strong executive sponsorship, strong funding, and strong need for data driven decisions via management."* *"Level of commitment from senior executives impacts investment, scope and outcome."*	*"Not enough understanding from top management on potential to invest enough resources and see beyond short term profits."* *"There is still a desire for paper reports among some senior executives."* *"Decisions still seem to be based on 'gut feel' or on incomplete data. Some managers manipulate data to support their decisions."*
Expertise and Resources	*"Talented, well-managed BI team. Reasonable expectations (usually) from business partners. Strong partnerships with business teams. High level of utilization."*	*"Resourcing is a problem. Historically IT owned and built BI but more recently have been trying to move to business/IT partnership."* *"Struggling with the volume of requests and fulfilling user needs in a timely manner."*
Focus	*"We have approached BI initiatives by attacking small, easily scoped projects, and rolling out business value with each release. By restricting scope creep and delivering fewer features, but sooner, we are more responsive to business needs"*	*"We keep biting off more than we can chew."* *"Were successful when implemented, now out of date with focus having shifted to other internal initiatives"*
Organization	*"The Business Intelligence Group in our Organization serves 18 Business Units Globally. It's responsible for building and managing the delivery of integrated information across the enterprise"*	*"We are in the midst of a major reorganization. We have some nice success stories from before but our BI is not well aligned anymore."* *"Recent change in all top management"*
Strategic Value	*"Because of tangible business value, including revenue improvement, cost reduction and risk mitigation. Secondly, the adoption of BI capabilities by a wider business audience - exposing the first benefit on a greater scale. Thirdly, it has brought together some areas of business that are starting to think as a whole and not continue to work in isolation."*	*"No formal BI initiative or strategy"* *"You can push the data out but you can't force people to use it wisely"* *"Too heavily concentrated around IT not enough around Business"* *"No business owners and no resources to proceed past the initial implementation"*
Technology	*"State of the art business intelligence module which is intuitive, easy to use; does not require SQL knowledge"*	*"Problems due to old, inefficient technology stack"* *'Spreadmarts and manually generated reports from disparate systems"*

Key Related Technologies / Initiatives

This year we opted to expand our study to include more technologies and initiatives deemed strategic to respondents' Business Intelligence efforts. In all, we asked about 16 areas (versus 9 in 2011), as noted in Figure 21.

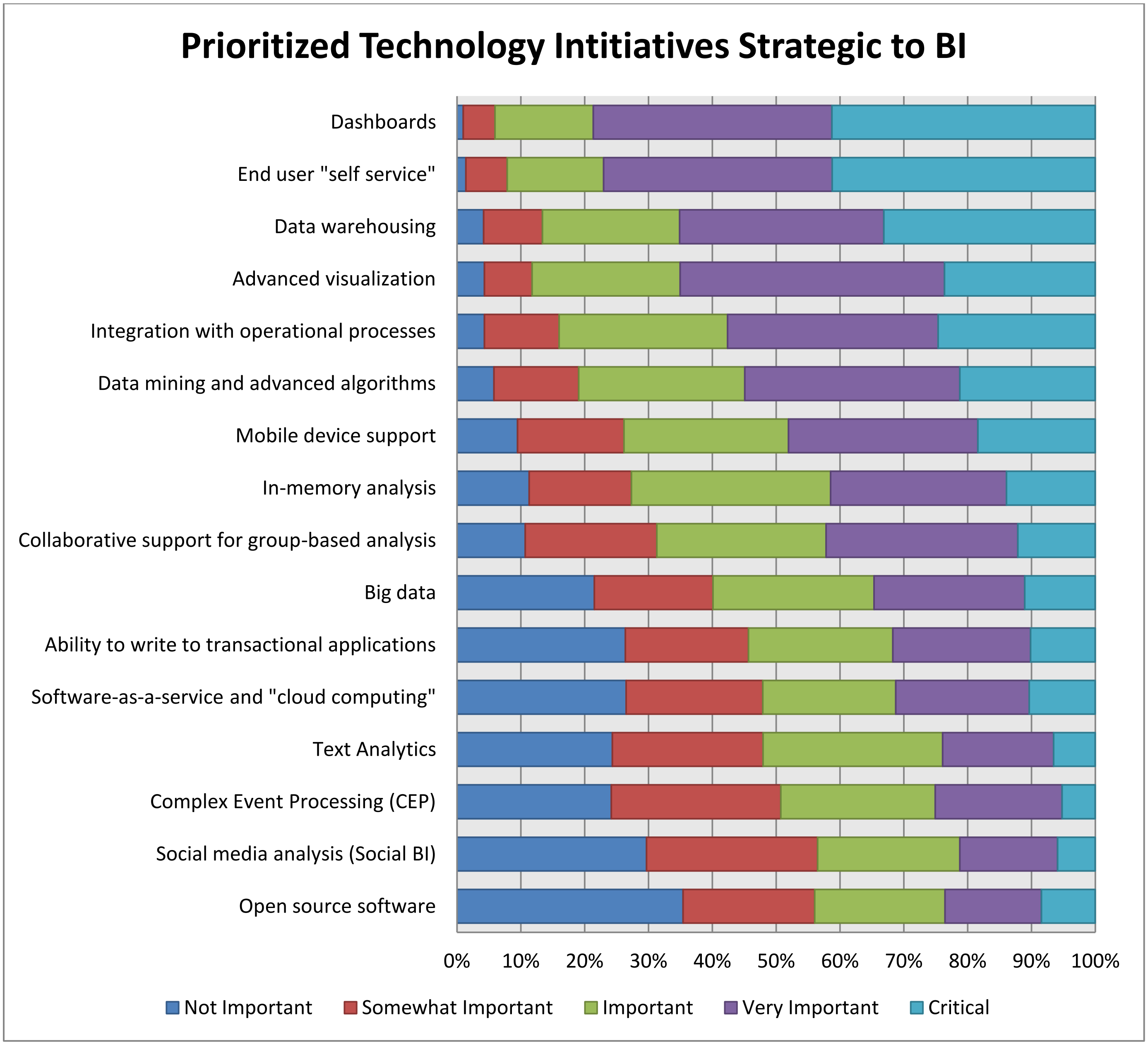

Figure 21 – Related Technologies & Initiatives Strategic to Business Intelligence

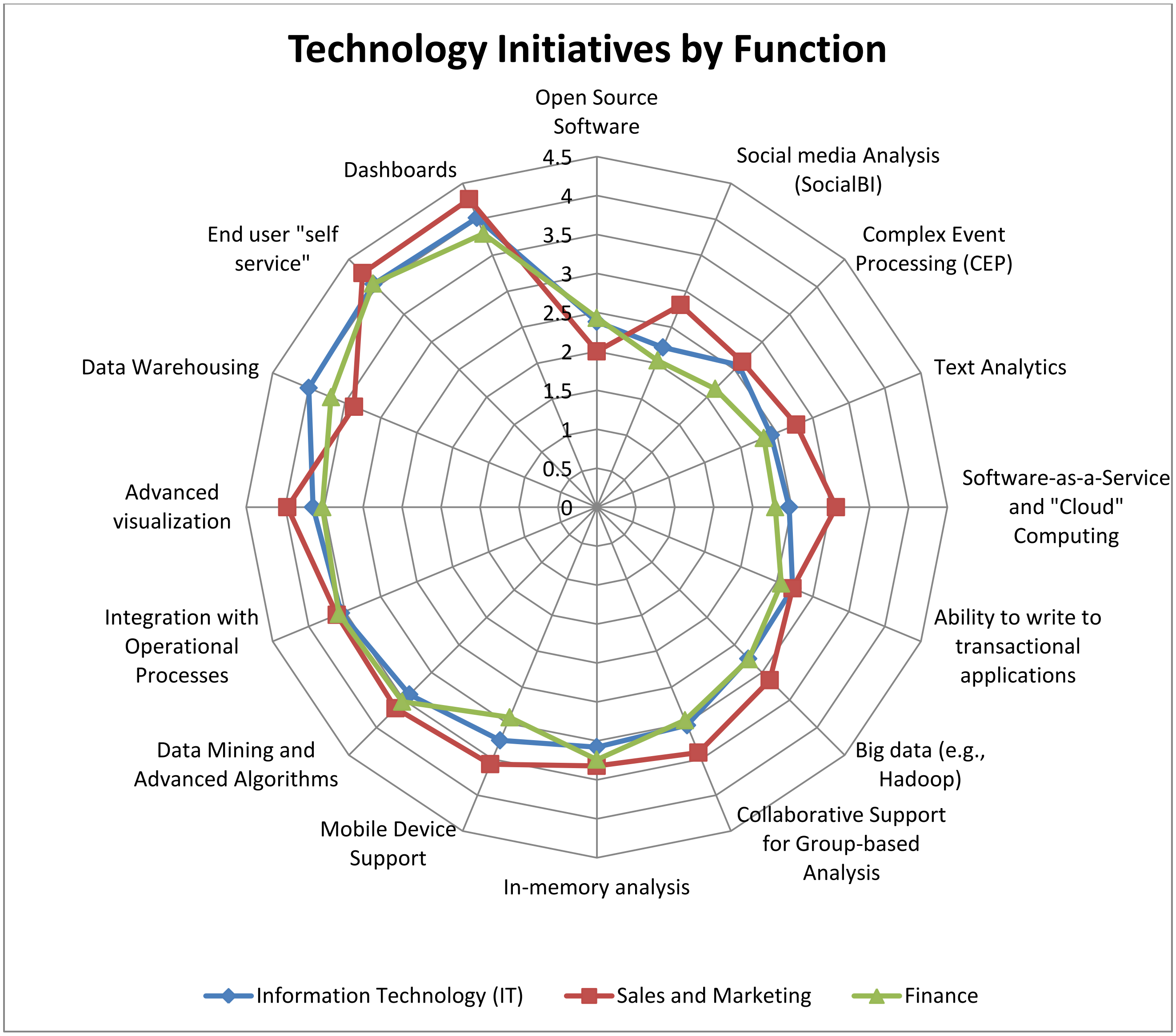

Figure 22 - Technology Initiatives by Function

When examining technology initiatives by function we see substantial differences between IT, Sales and Marketing and Finance functions (Figure 22). The most striking differences are in the areas of Data warehousing, Software-as-a-service and Social media analysis.

In the following section (pages 38 – 51) we have provided related crosstab analyses, highlighting those and other areas of significant contrast.

Although the overall response to “Ability to write to transactional applications” was muted, a notable minority of North American organizations (14%) deemed it “critical” (Figure 23). Anecdotally, these were comprised of larger organizations, which were also interested in “Integration with operational processes”.

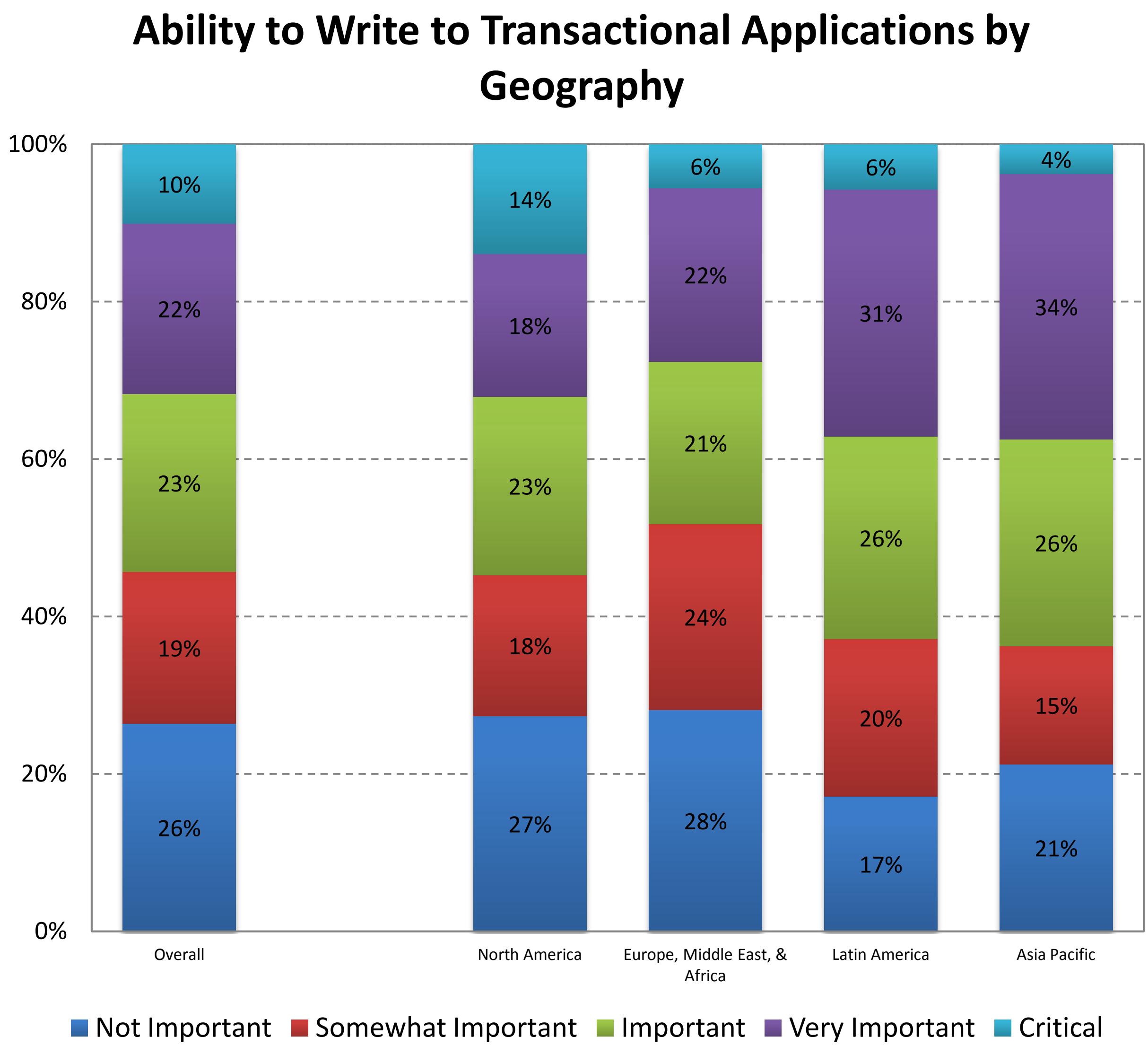

Figure 23 - Ability to Write to Transactional Applications by Geography

A relatively high priority for many organizations, "Data mining and advanced algorithms" resonated most strongly with the Health Care segment, followed by Financial Services (Figure 24). Anecdotally, we have found that, while interest is typically high, few are actually implementing these more advanced solutions.

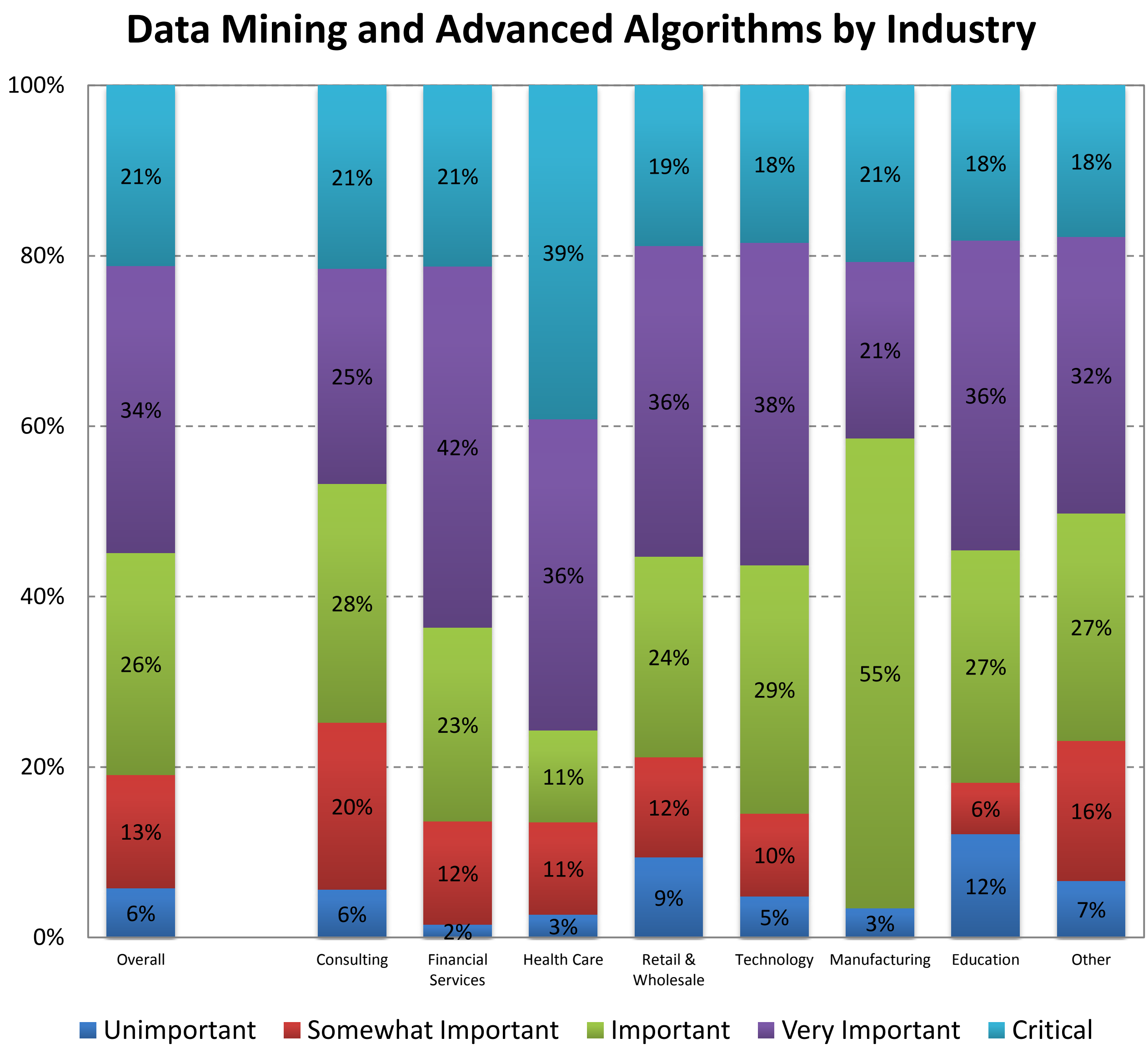

Figure 24 - Data Mining and Advanced Algorithms by Industry

A relatively high priority for many organizations, “Mobile device support” has seen especially strong interest and adoption within the Retail industry (Figure 25). In our Mobile BI Studies we have seen and cited a number of convincing use cases for this vertical industry as well as for the Sales function, across all industries.

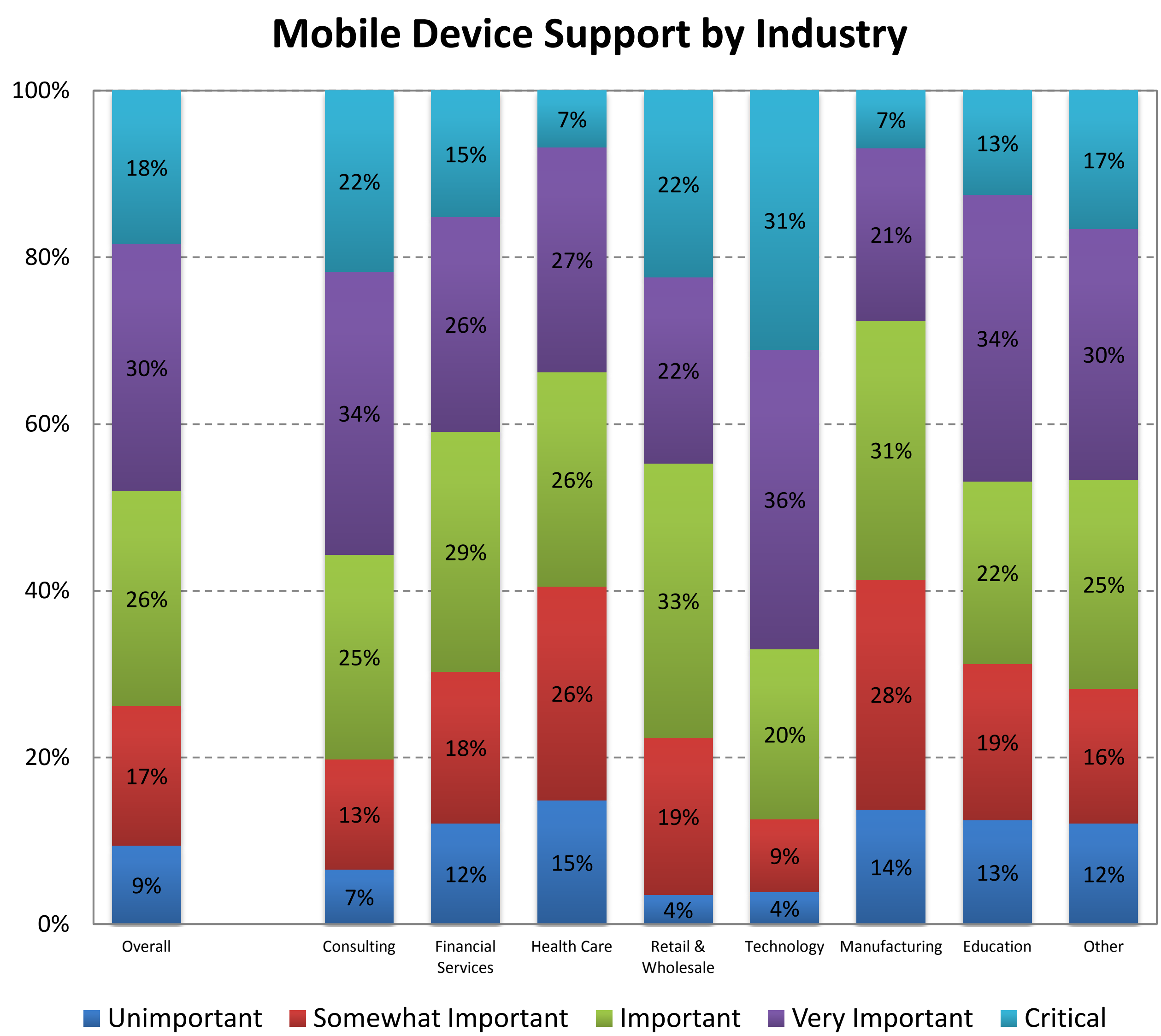

Figure 25 - Mobile Device Support by Industry

Although a nascent trend within the industry, we believe “cloud” BI will continue to grow in popularity and adoption. In particular, line-of-business is more favorably inclined. In contrast, due to concerns of security and privacy, Finance and IT functions are more reluctant (Figure 26). Business functions appear more open to “public cloud” than their IT colleagues.

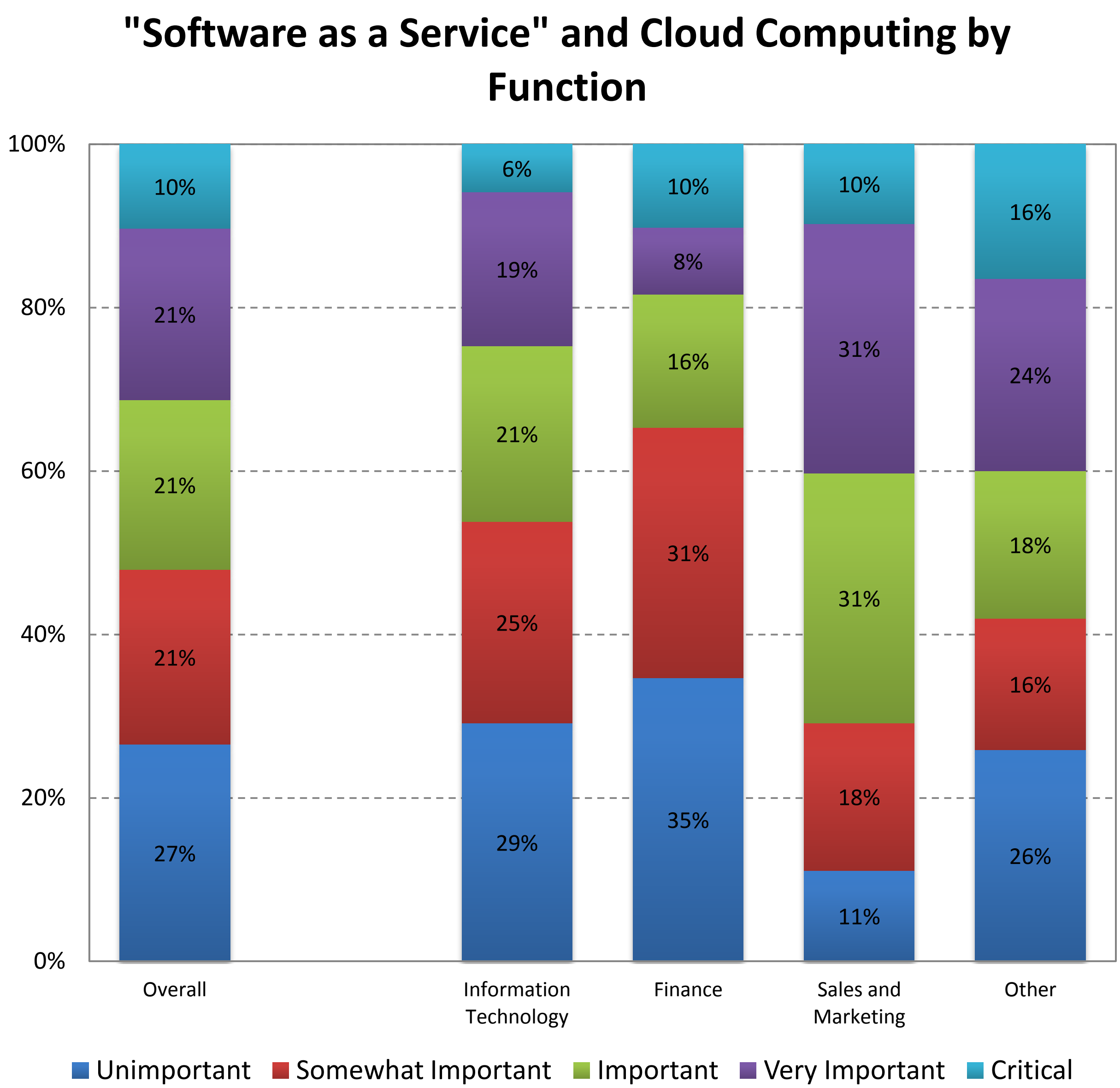

Figure 26 - Software as a Service and Cloud Computing by Function

While technology and consulting organizations are obvious early adopters of cloud-based BI (and advocates of public cloud), we were intrigued to see higher than average interest within Health Care and Financial Services (Figure 27). However, upon further investigation, their interest is mainly in "private cloud" (cloud architecture).

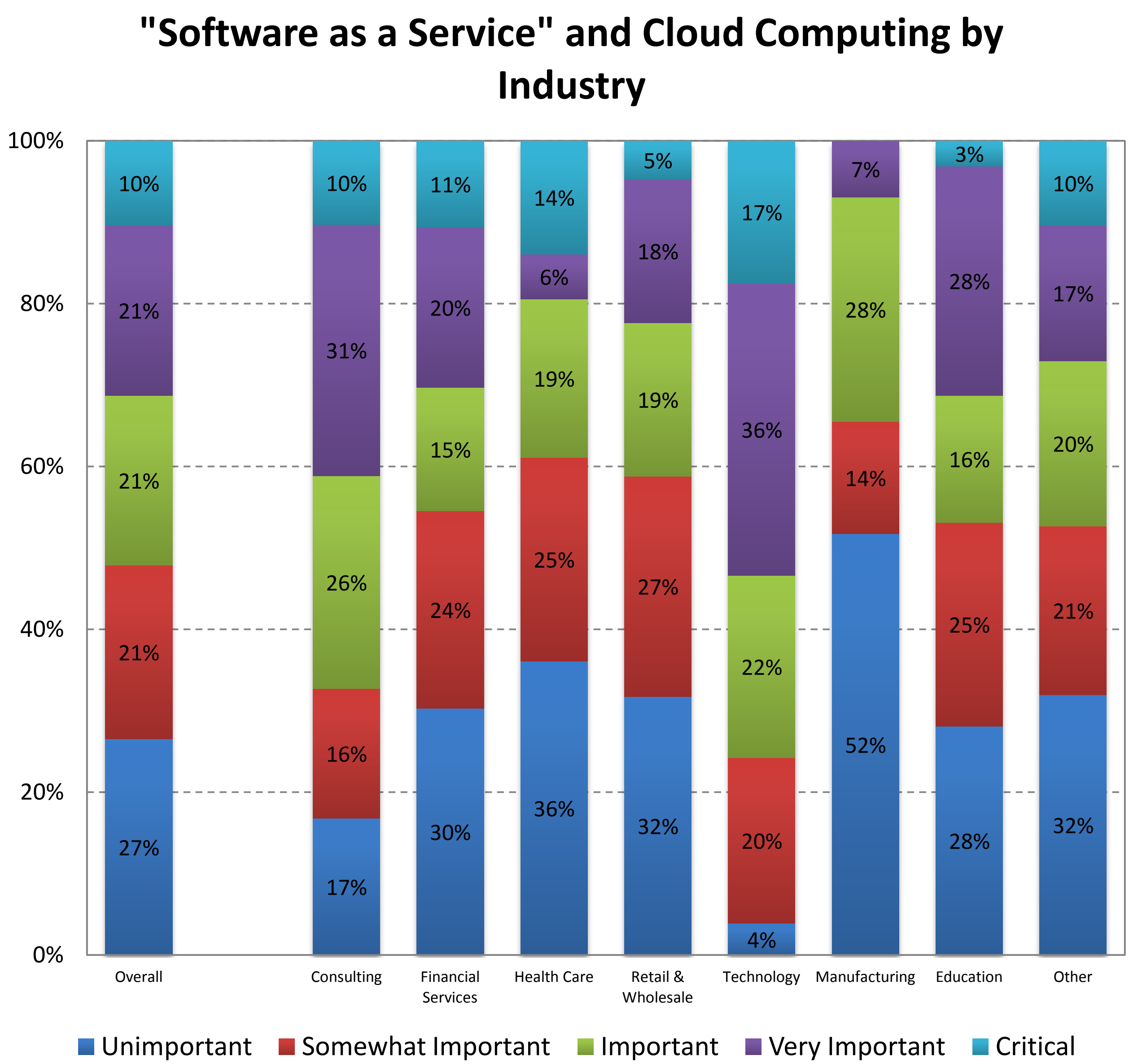

Figure 27 - Software as a Service and Cloud Computing by Industry

It comes as no surprise that smaller organizations are in favor of cloud-based BI. However, we found it interesting that the largest of organizations have a greater interest in cloud than their mid-market counterparts (Figure 28). However, large organizations prefer "private cloud" (cloud architecture) whereas smaller organizations are more open to "public cloud" BI.

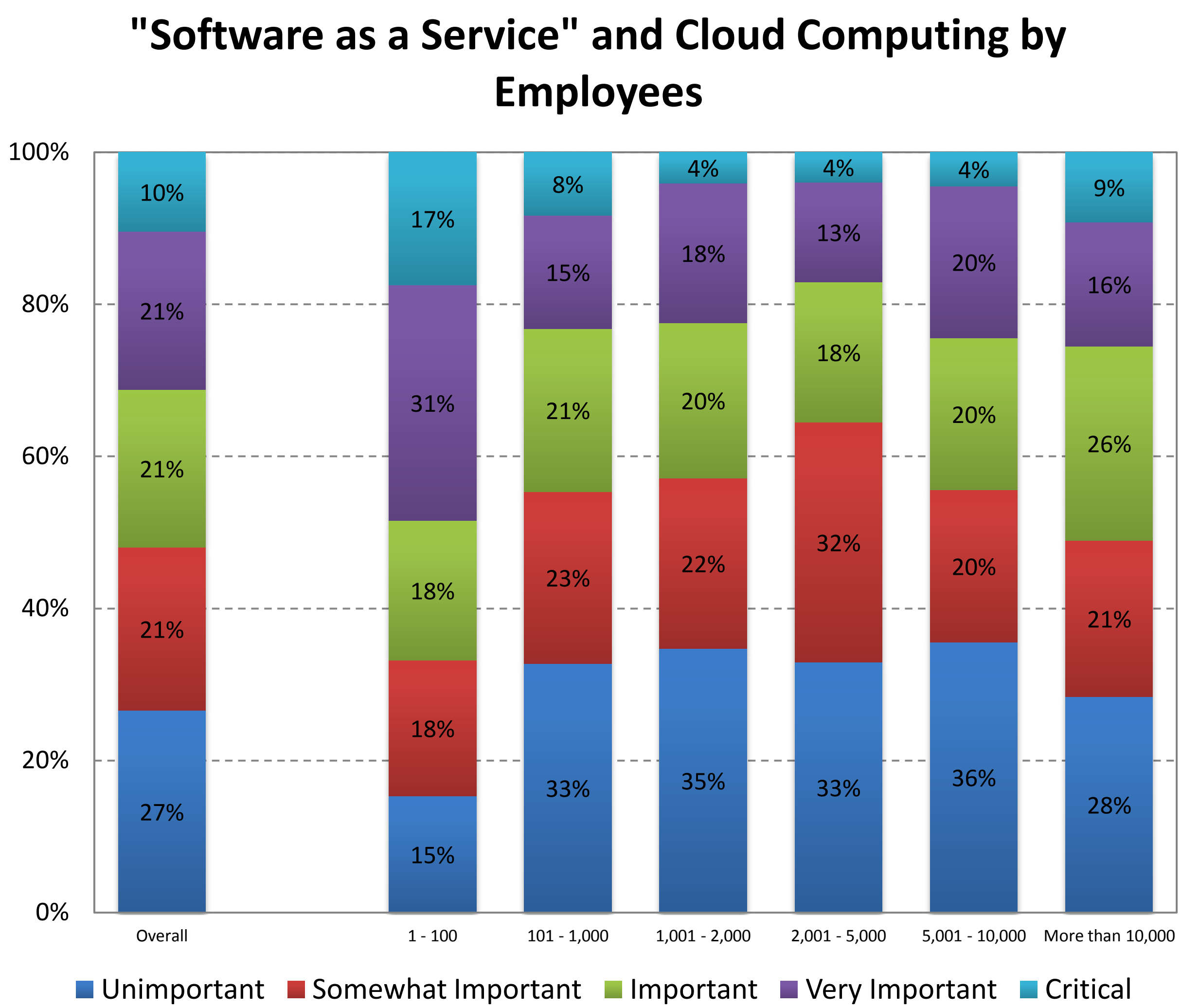

Figure 28 - Software as a Service and Cloud Computing by Size of Organization

Social Business Intelligence or the ability to analyze social media sources (e.g., Twitter, Facebook) for key trends, sentiment, etc. is an emerging discipline of BI. Although there is some interest across all functions, the Sales and Marketing functions have the keenest interest, as it directly aligns with their mission (Figure 29).

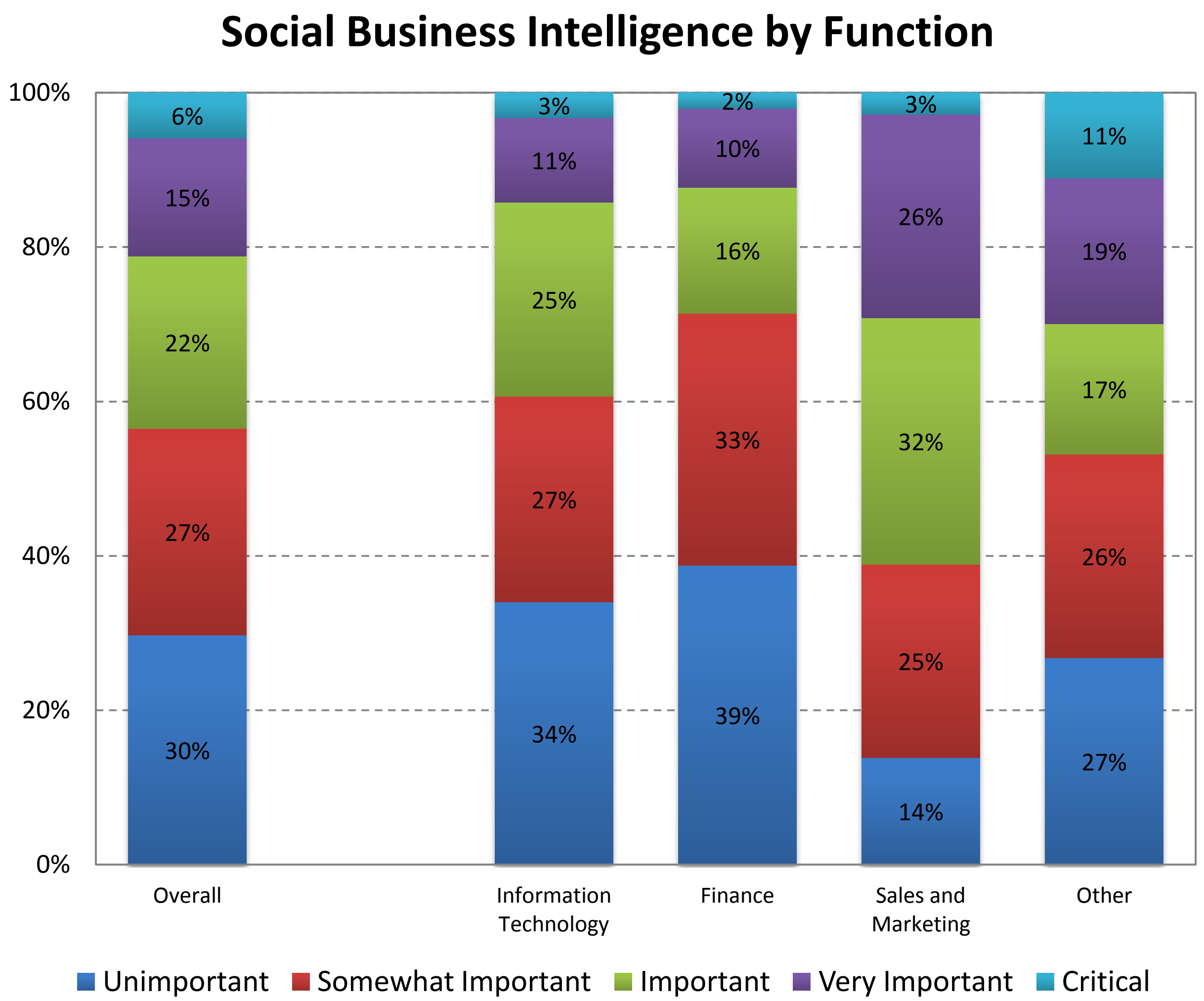

Figure 29 - Social Business Intelligence by Function

Social Business Intelligence appears to resonate with Education and (to a lesser degree) Retail and Wholesale (Figure 30). This makes some sense as both deal with consumers and would find value in understanding "sentiment" in developing and executing marketing programs.

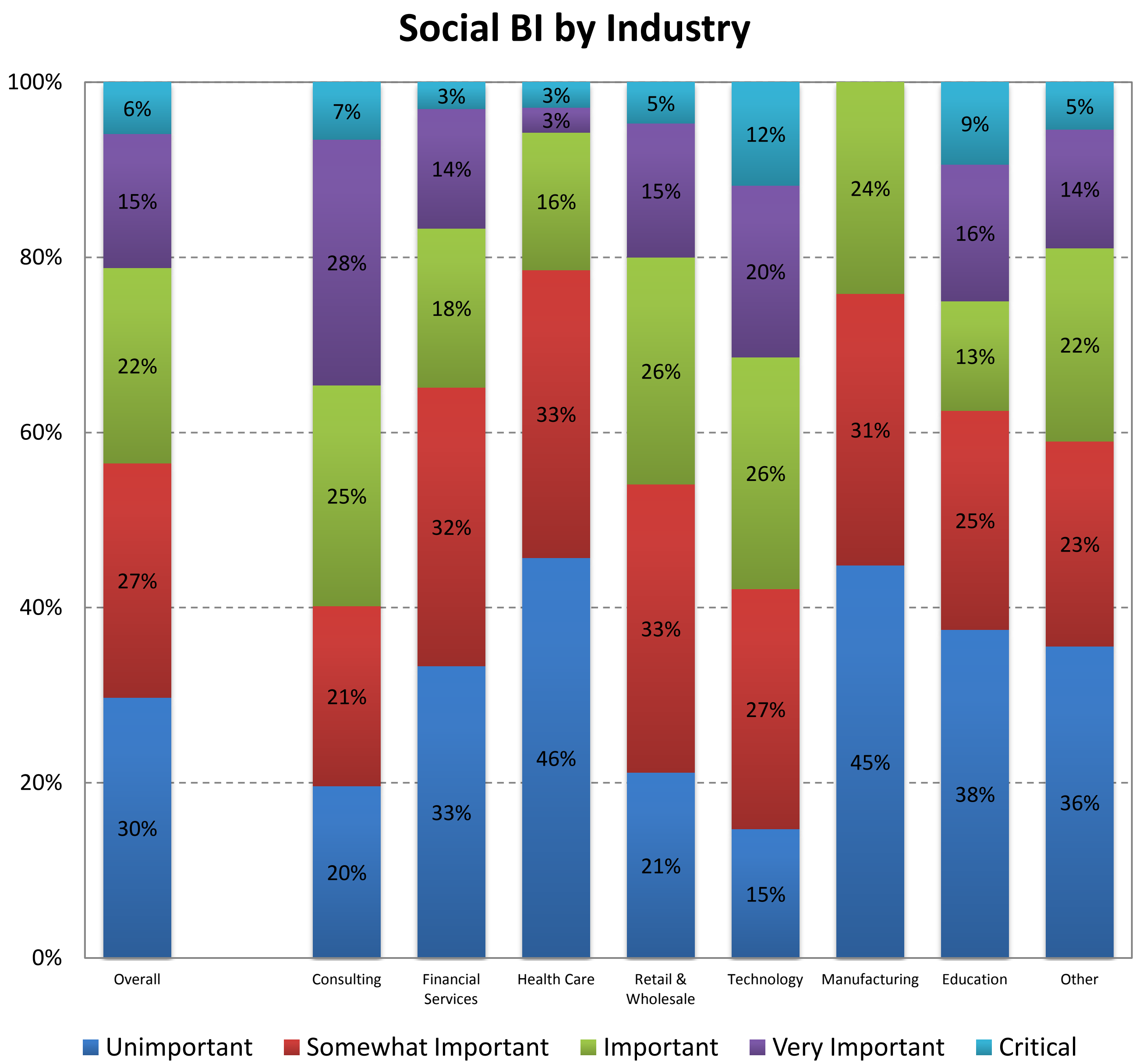

Figure 30 - Social Business Intelligence by Industry

Interest in Social Business Intelligence appears to be consistent across all organization sizes, with the exception of the smallest ones (Figure 31). Organizations of 100 or fewer employees have a markedly higher interest. Many of these are younger organizations – suggesting a younger workforce and (perhaps) a greater generational awareness of its importance.

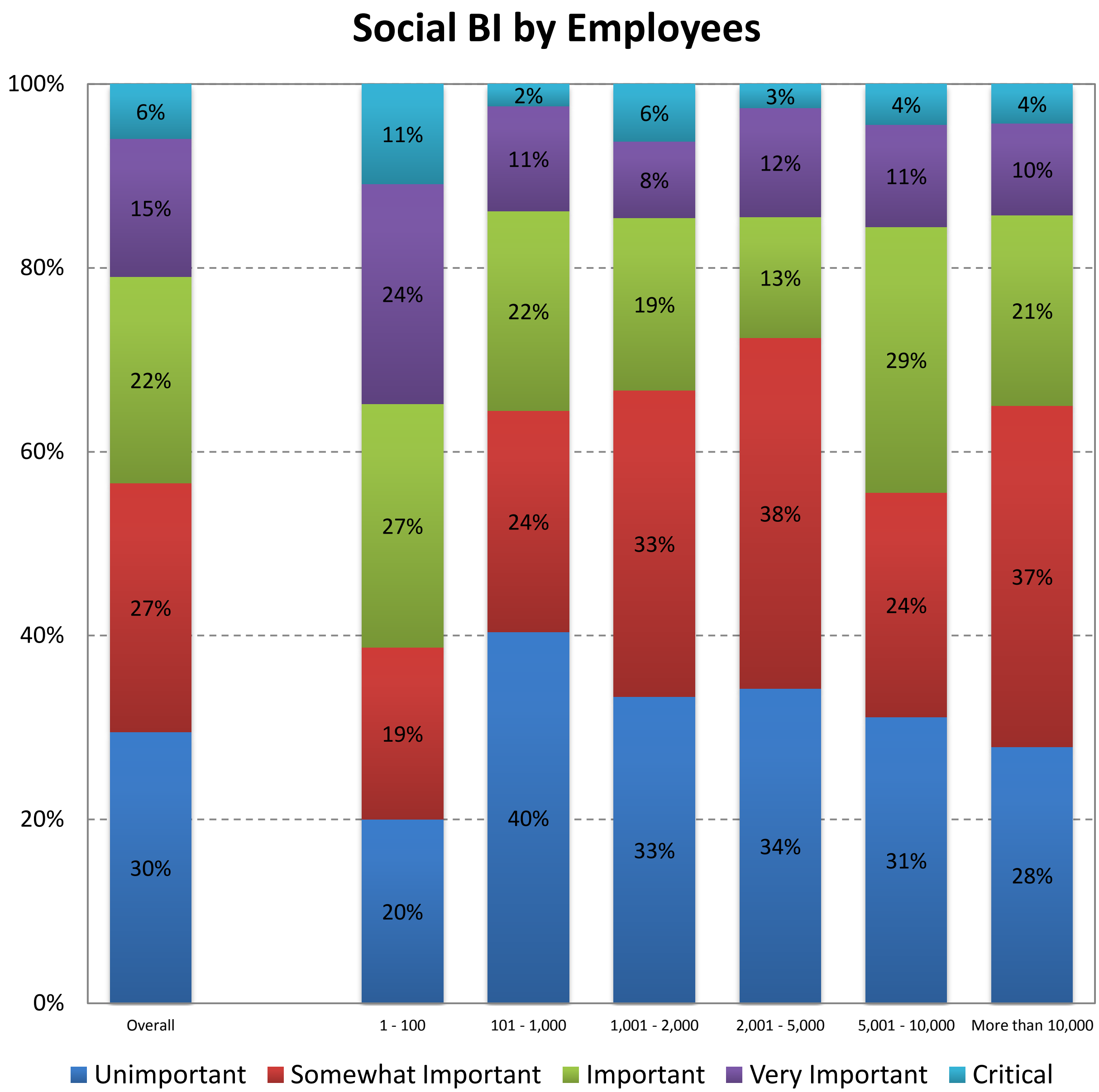

Figure 31 - Social Business Intelligence by Organization Size

Advanced Visualization entails the extensive use of visual treatment: relative size, shape, color, texture depth and movement to assist users in understanding complex data relationships. Although this has a high priority across all functions, Sales and Marketing function and "other" business functions were more likely to rate it as "critical" or "very important" (Figure 32).

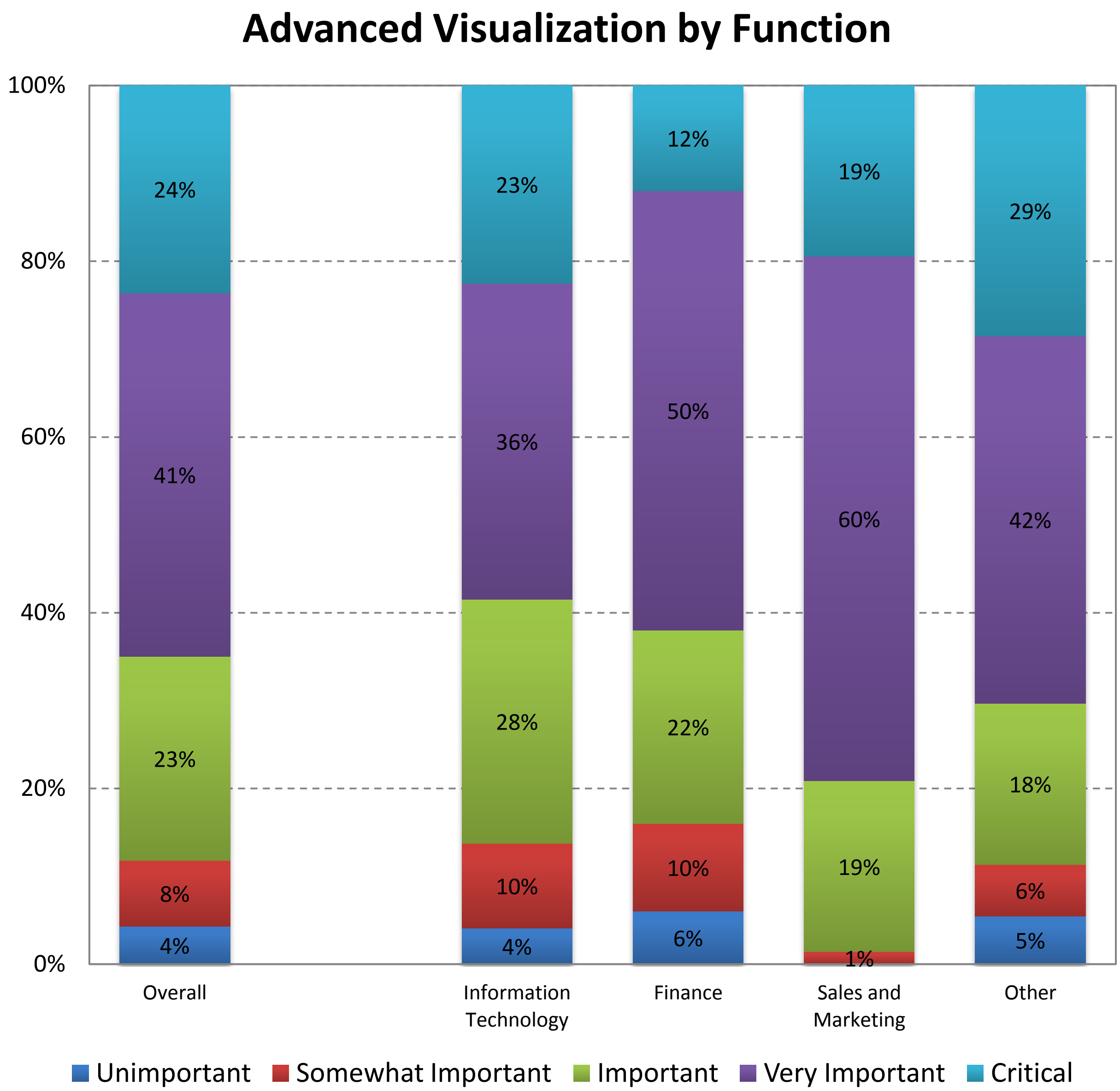

Figure 32 - Advanced Visualization by Function

While there is a high degree of interest across all industries, Technology and Health Care stand out as those with the highest degree of interest in Advanced Visualization (Figure 33).

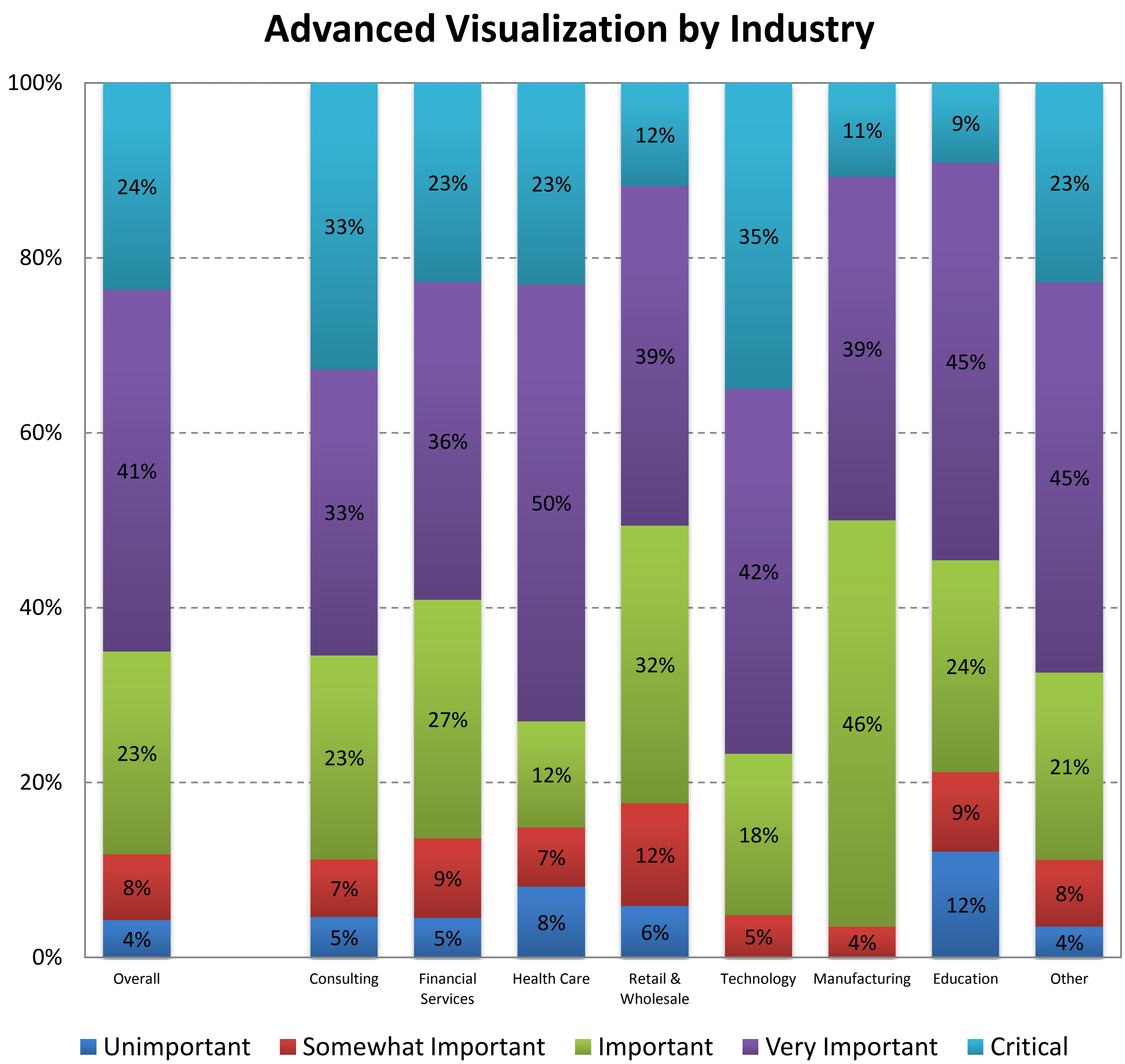

Figure 33 - Advanced Visualization by Industry

A popular Business Intelligence paradigm, Dashboards are a high priority across all functions – especially with Sales and Marketing and "Other" business users (Figure 34). This is not surprising as dashboards offer a simplified and more useful interface for users. In contrast, IT and Finance assigned it less value than other types of users.

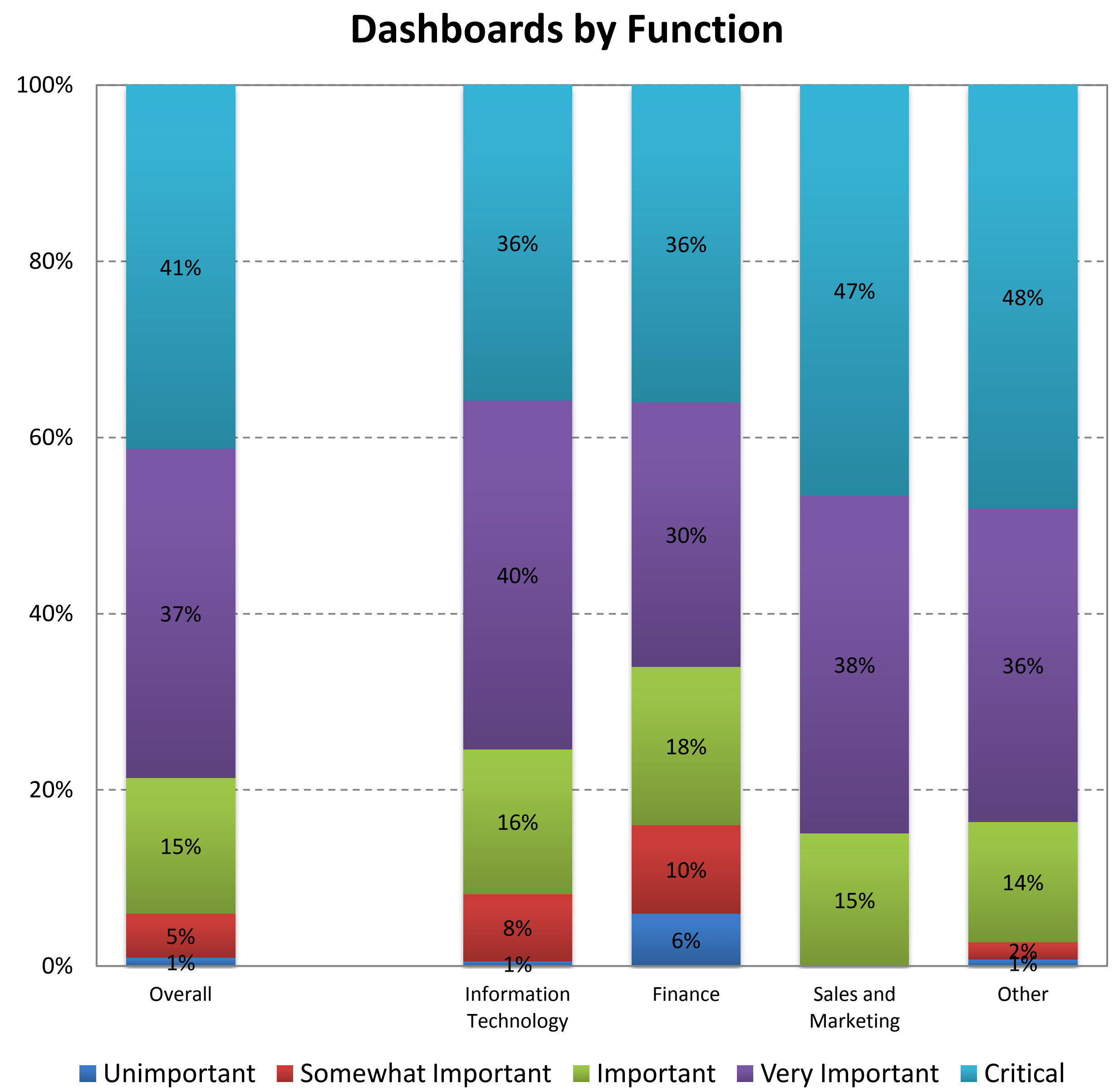

Figure 34 - Dashboards by Function

Text Analytics remains an emerging area and is getting a boost from Social Business Intelligence. However, in general, it is a low priority for most organizations. Sales and Marketing and "Other" business functions assign it a higher priority than Finance and IT (Figure 35).

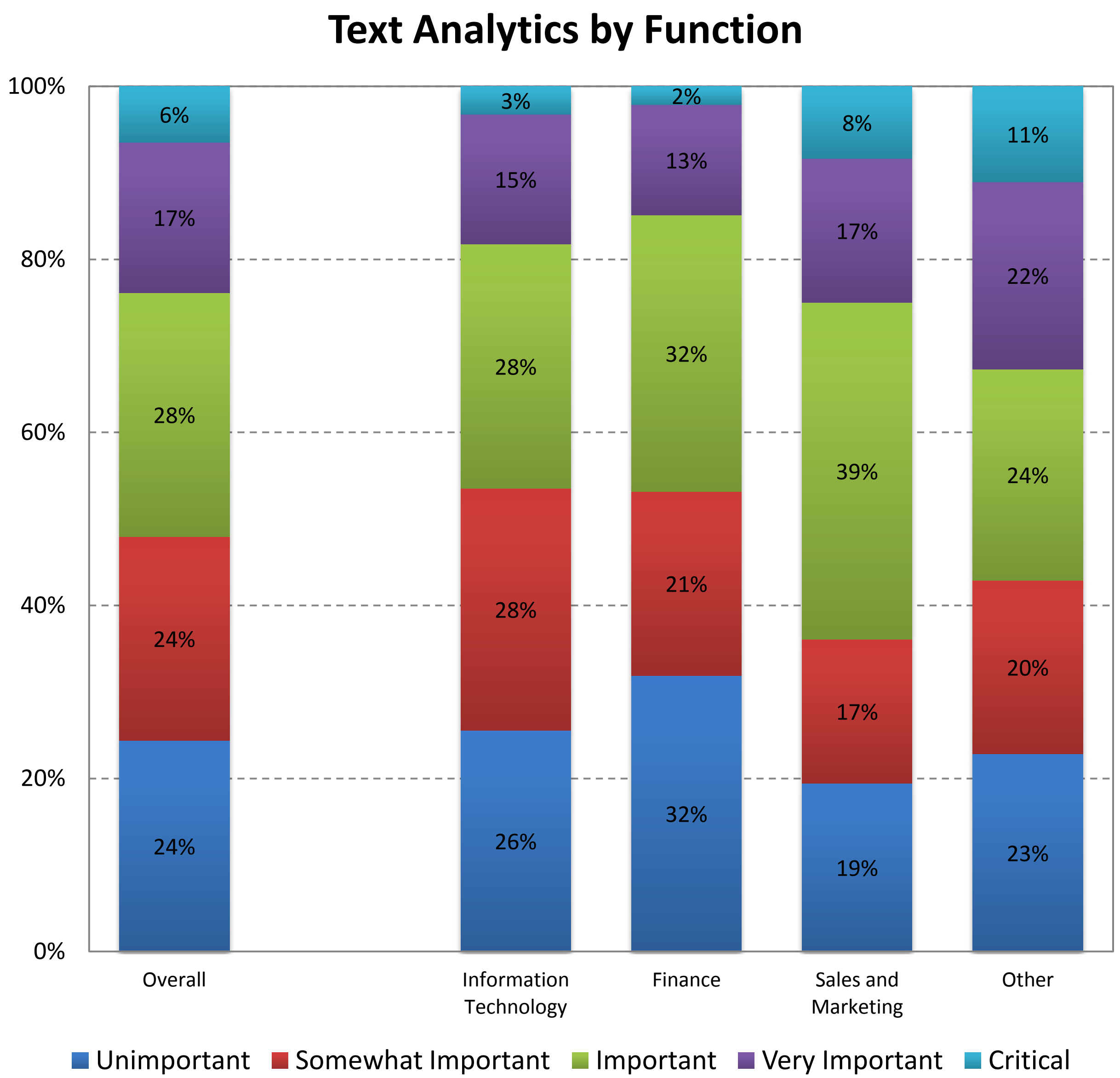

Figure 35 - Text Analytics by Function

Text Analytics is of most interest within the Technology segment – a bastion of early adoption activity (Figure 36).

As related technologies grow in presence (e.g., Social BI and Big Data), interest for text analytics across all industries will likely increase.

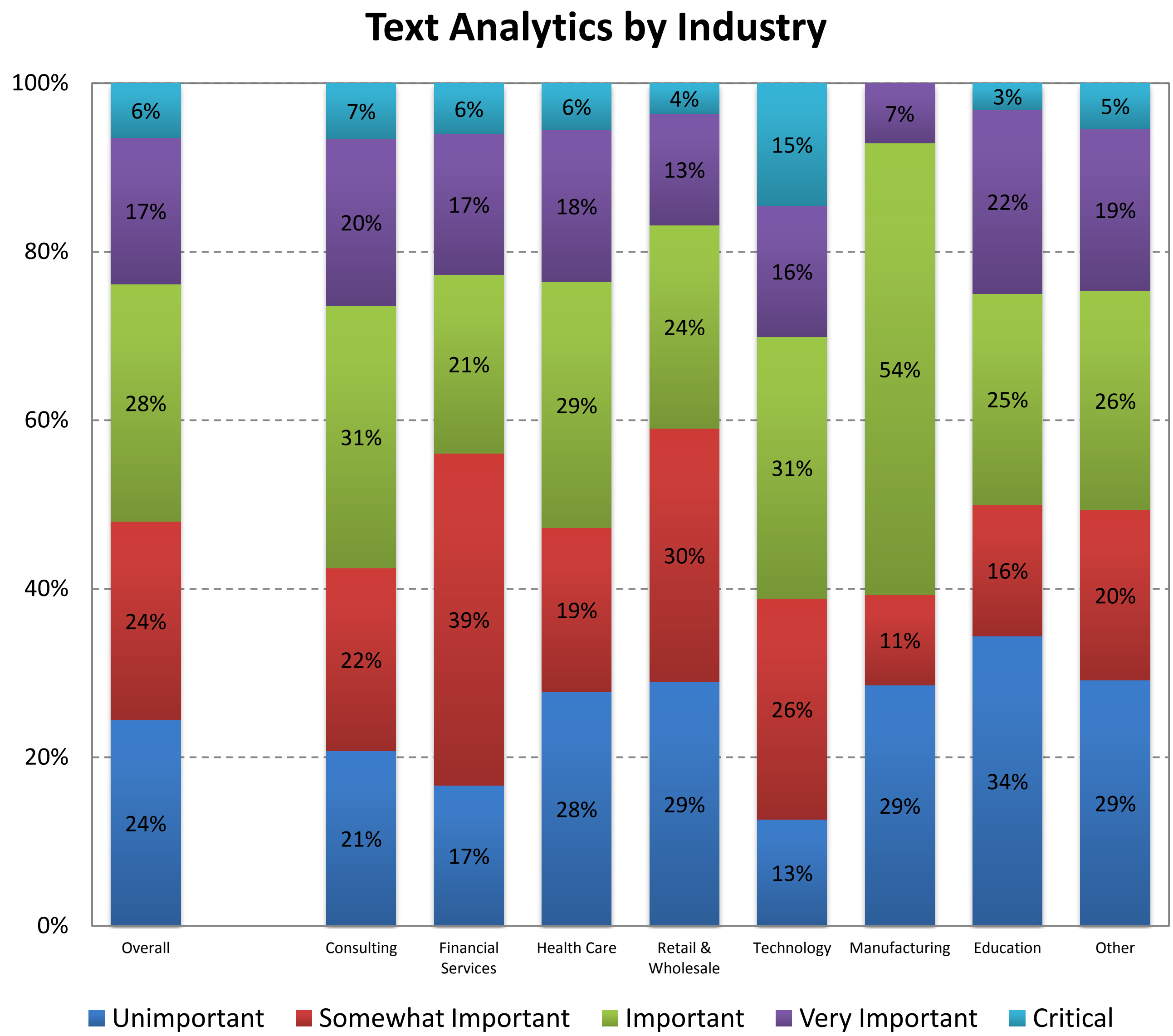

Figure 36 - Text Analytics by Industry

Market Segment Analysis

Market Segment Analysis

For the purpose of analysis and rankings, vendors have been grouped into four categories, based on general market profiles. These categories are: "Titans", "Established Pure-plays", "Emerging" and "High Growth" vendors.

Titans include the largest global enterprise software vendors with Business Intelligence offerings. Established Pure-play vendors include larger vendors that are primarily focused upon Business Intelligence software and solutions. Emerging vendors tend to be younger and smaller, oftentimes sporting new technology or innovative / specialized business models. "High Growth" BI vendors is a new category this year, representing vendors which have achieved "critical mass" and are growing at a rate substantially higher than the overall industry.

When examining alignment by corporate function, the High Growth segment has the highest percentage of business adopters versus all other categories (Figure 37). In contrast, all other segments seemed somewhat more aligned with the IT function.

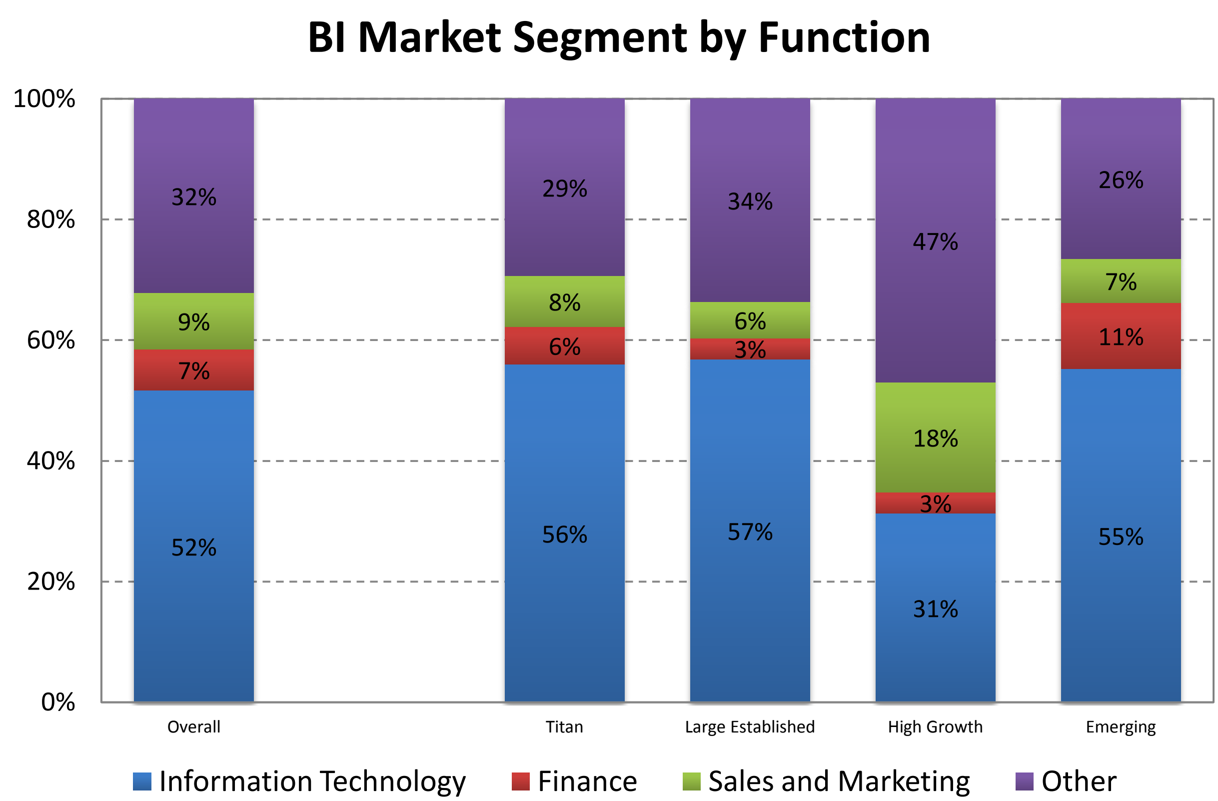

Figure 37 – BI Market Segment Alignment - Business vs. IT

Although the differences are slight, more traditional industries such as Financial Services tend towards the adoption of Titan and Established BI market segments (Figure 38).

In contrast, the Emerging segment has attracted strong interest from the Retail and Wholesale and Health Care industries. Titan and High Growth segments appear to have among the most extensive consulting adoption (and ecosystems).

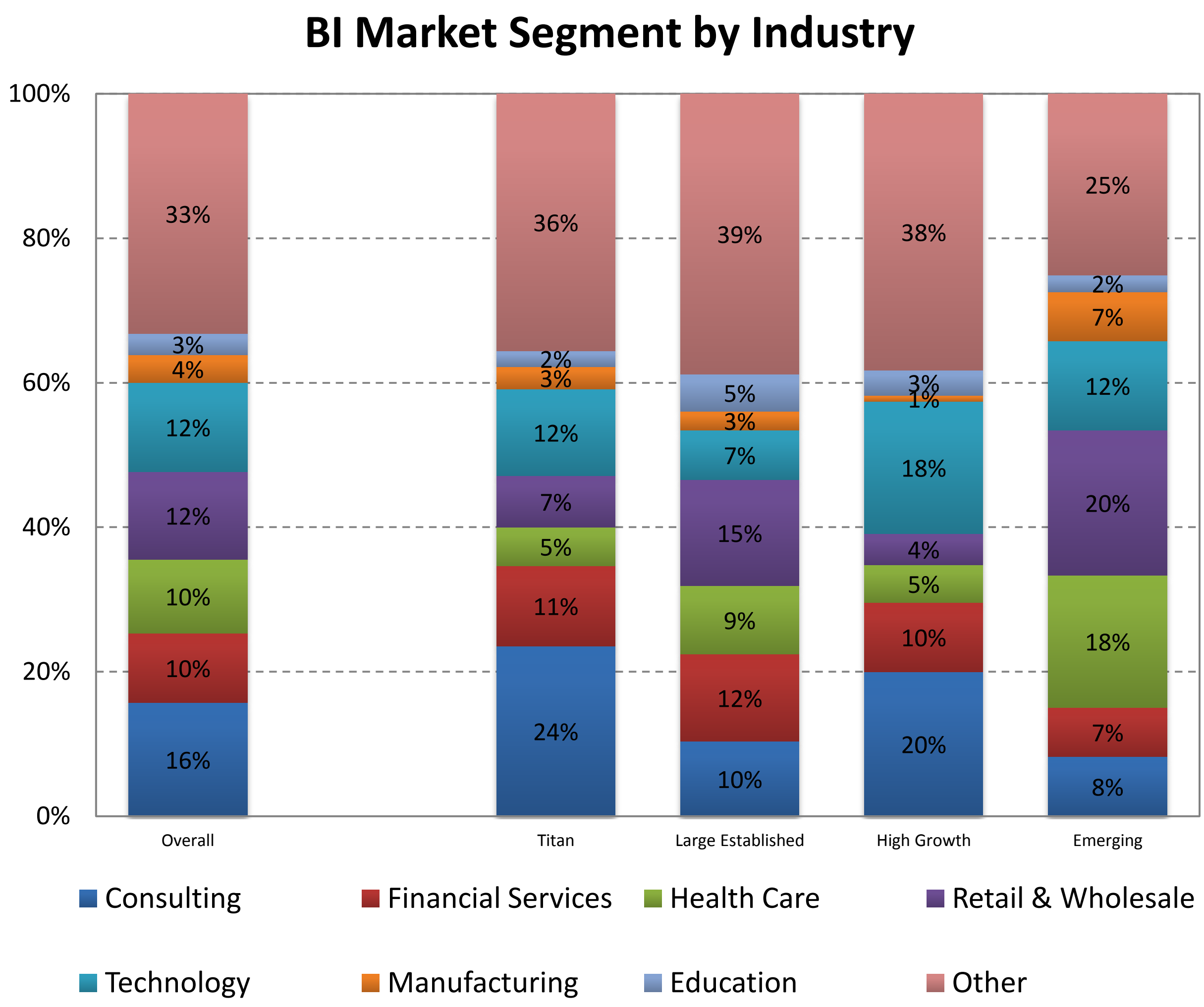

Figure 38 - BI Market Segment Alignment by Industry

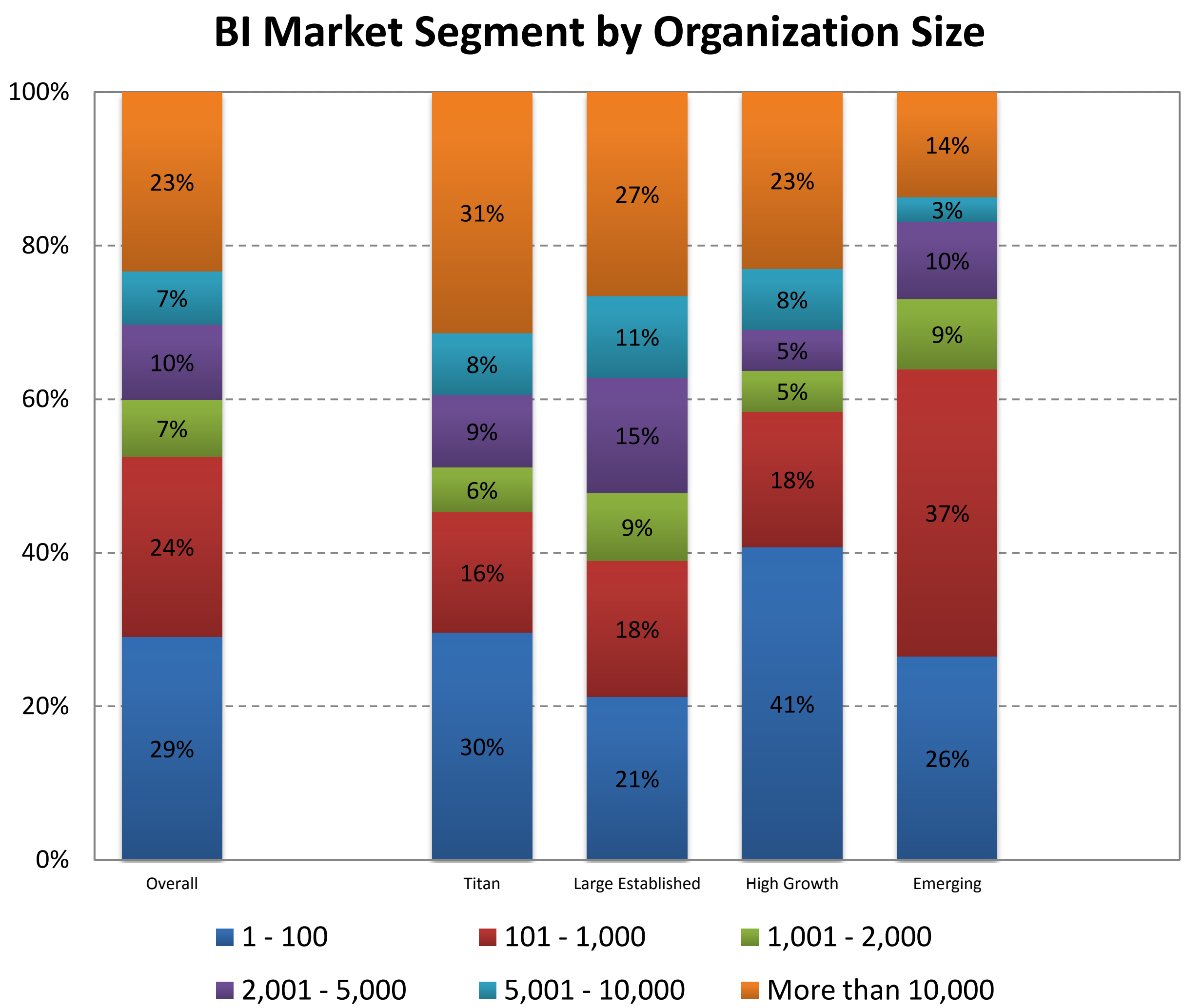

Figure 39 – BI Market Segment Alignment by Organization Size

When looking at size of organization (Figure 39), Titans and Established Pure-play products appear to be distributed across a wide range of organization sizes – and seem dominant in the largest organizations. In contrast, High Growth and Emerging BI products have a strong concentration of adoption within small and mid-sized organizations and in a minority of larger organizations.

If we look at the market segments by the age of the implementation, it appears that High Growth vendors have experienced the strongest growth over the past few years. Titans and Large Established vendors have seen an "uptick" over 2011. In contrast, our data suggests the Emerging segment has had fewer new implementations over 2011 (Figure 40).

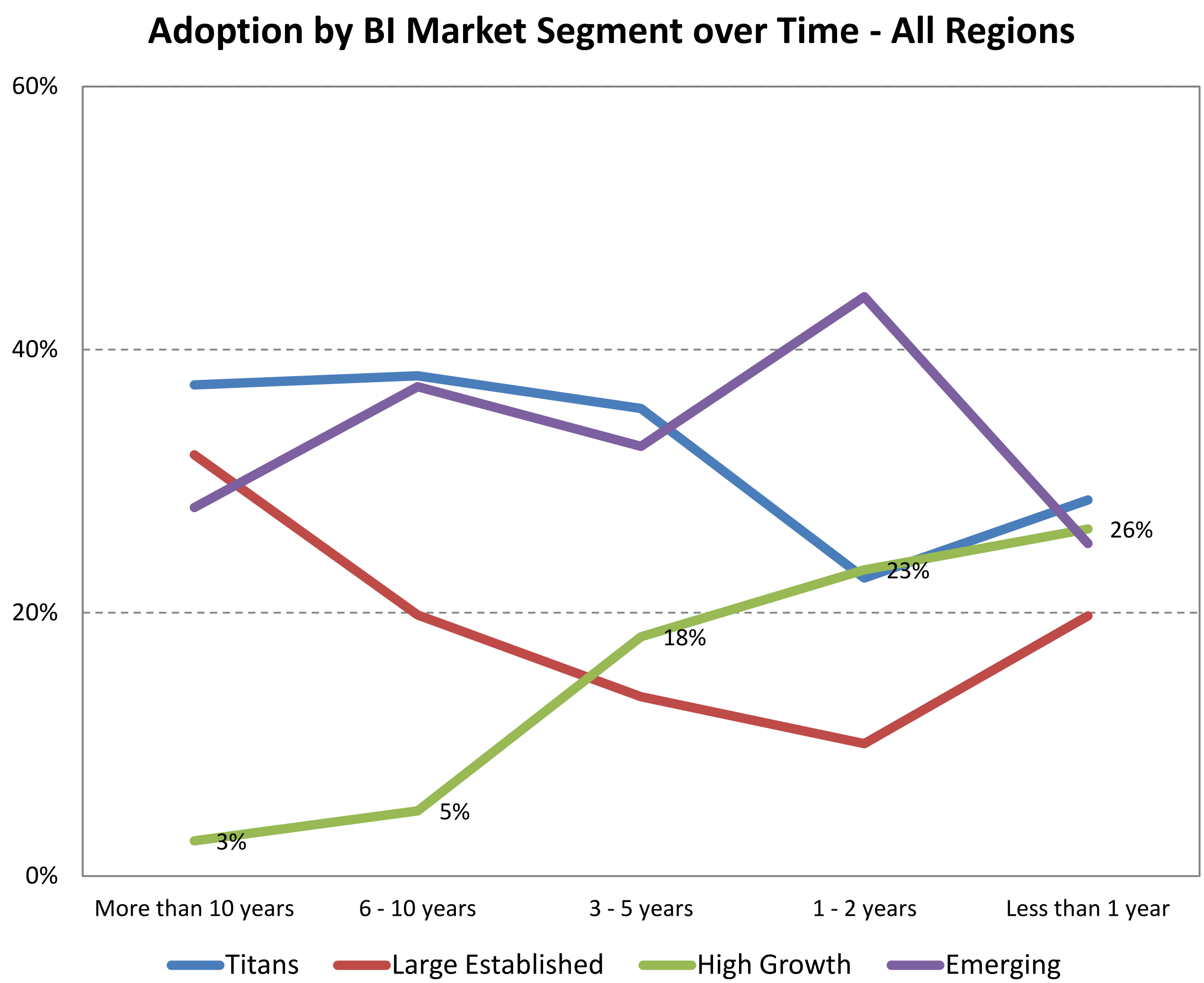

Figure 40 – BI Adoption by Market Segment over Time

The largest deployments can be found at Titan and Large Established BI vendor customer organizations. Vendors in these two segments have been a presence in the market the longest and have had the opportunity to benefit from incremental expansion. In contrast, newer Emerging and High Growth segments are more closely aligned with small and medium-sized deployments of BI (Figure 41).

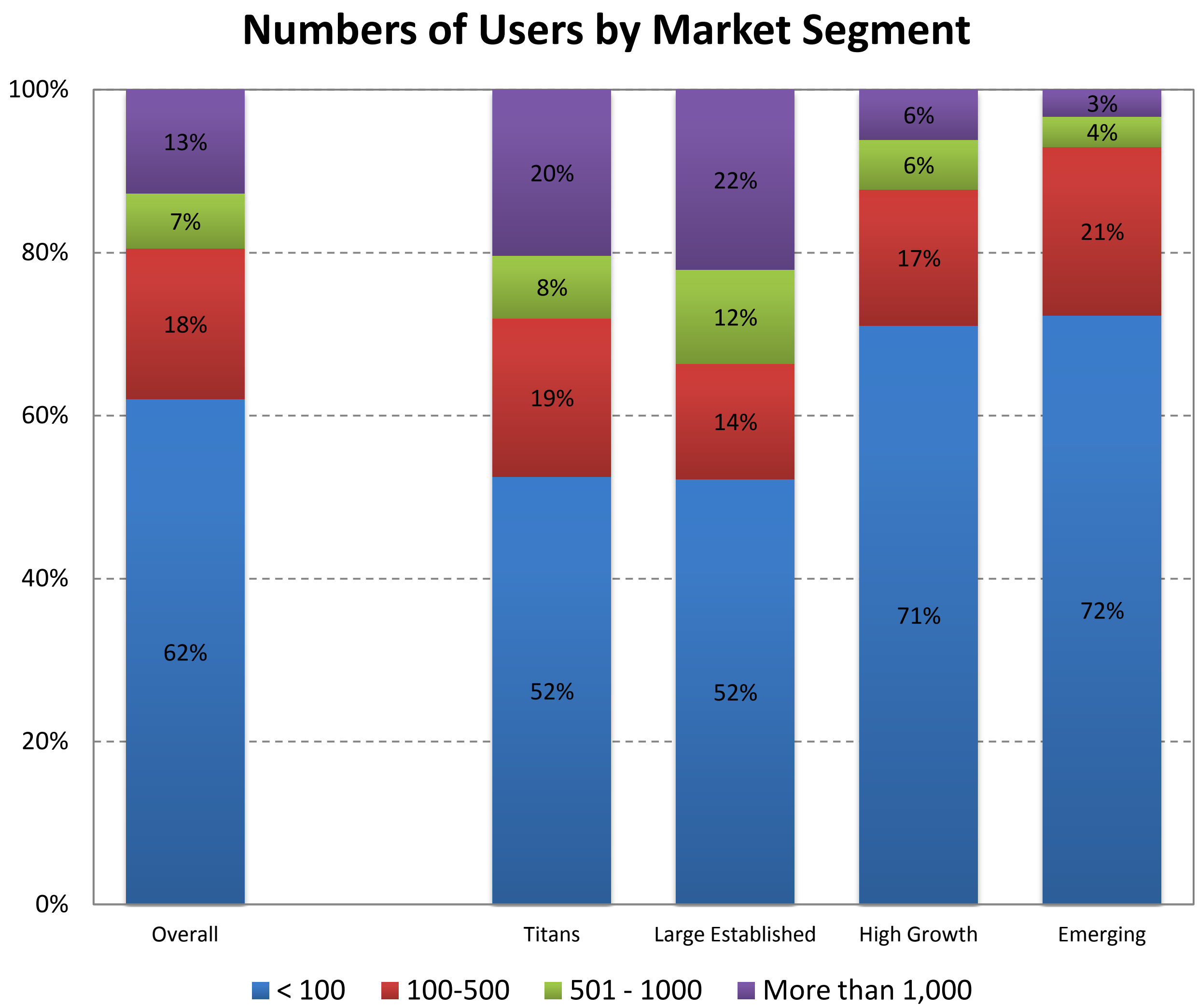

Figure 41 - Numbers of users by Market Segment

Industry and Vendor Analysis

Industry and Vendor Analysis:

In this section we will review Business Intelligence vendor and market performance, using our trademark 33-criteria evaluation model.

Scoring Criteria

The criteria for the various industry and vendor rankings are grouped into six categories including Sales/acquisition experience, Value for price paid, Quality and usefulness of product, Quality of technical support, Quality and value of consulting, Integrity and whether vendor is Recommended.

Overall Industry Performance

After an increase in 2011, industry scores for "Sales/Acquisition Experience" declined for 2012 (Figure 42). We atrribute these lower scores to an influx of new sales personnel within the past year and anticipate improvement in 2013.

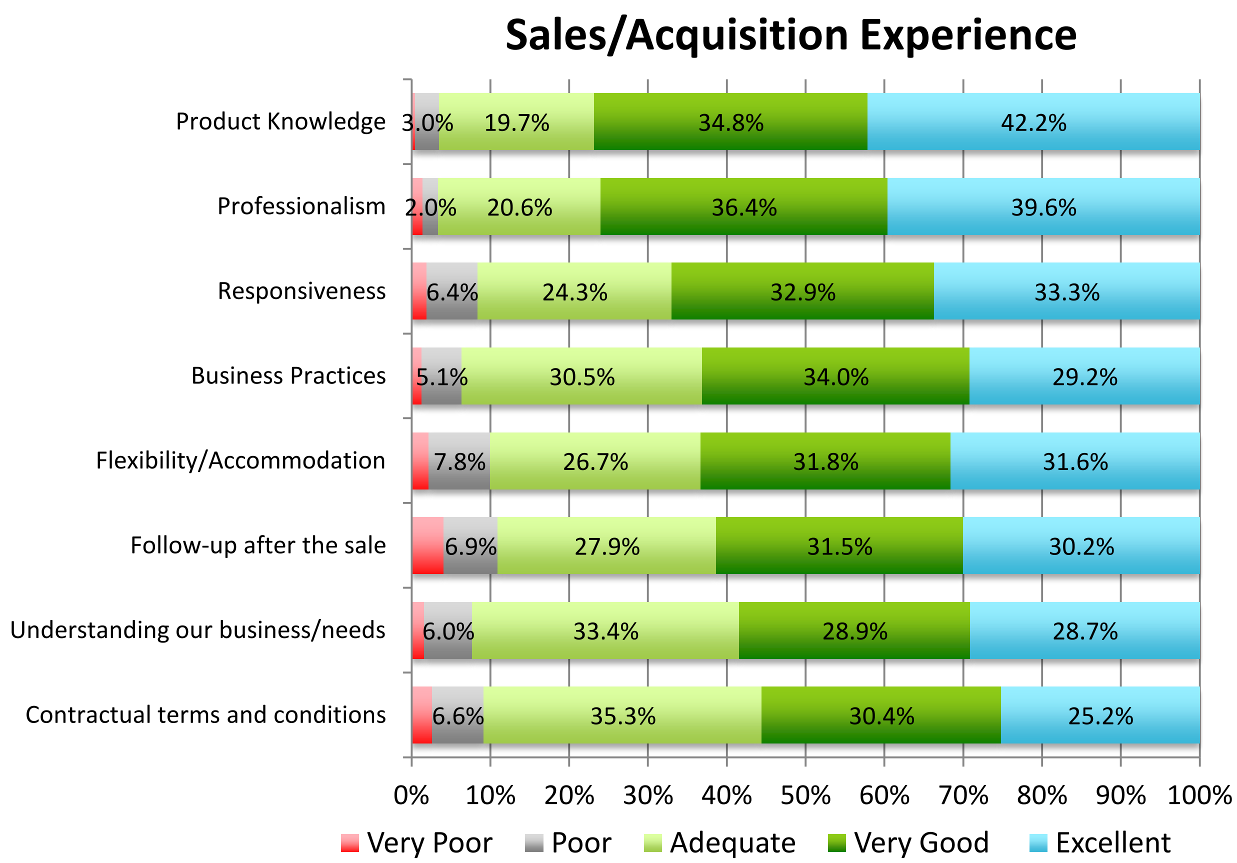

Figure 42 – Industry Performance – Sales/Acquisition Experience

For the Value dimension, we compared current user responses with those from 2010 and 2011. In 2012, users reported less value from their Business Intelligence solutions, than in 2010 or 2011 (Figure 43).

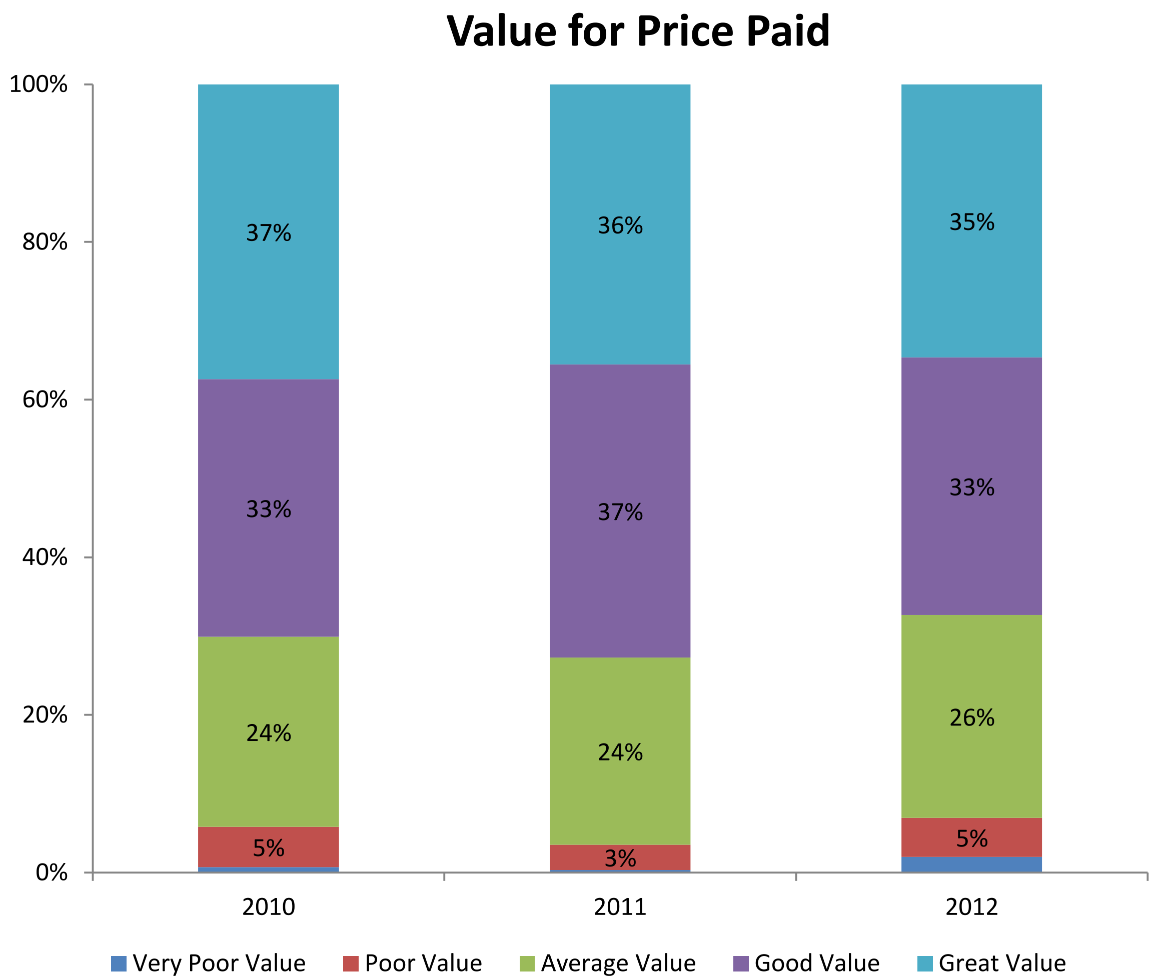

Figure 43 - Industry Performance - Value: 2010, 2011, 2012

Our assumption is that this sentiment is due to a combination of vendor price increases and flat or decreasing corporate budgets.

Taking a look at industry performance related to product (Figure 44), the areas of greatest satisfaction for 2012 include: Robustness/Sophistication of technology, Reliability of technology and Scalability. The areas of lowest satisfaction include Integration with 3rd party technology, Online training, forums and documentation and Customization and Extensibility. These scores are in line with the findings for 2010 and 2011 – suggesting limited industry progress.

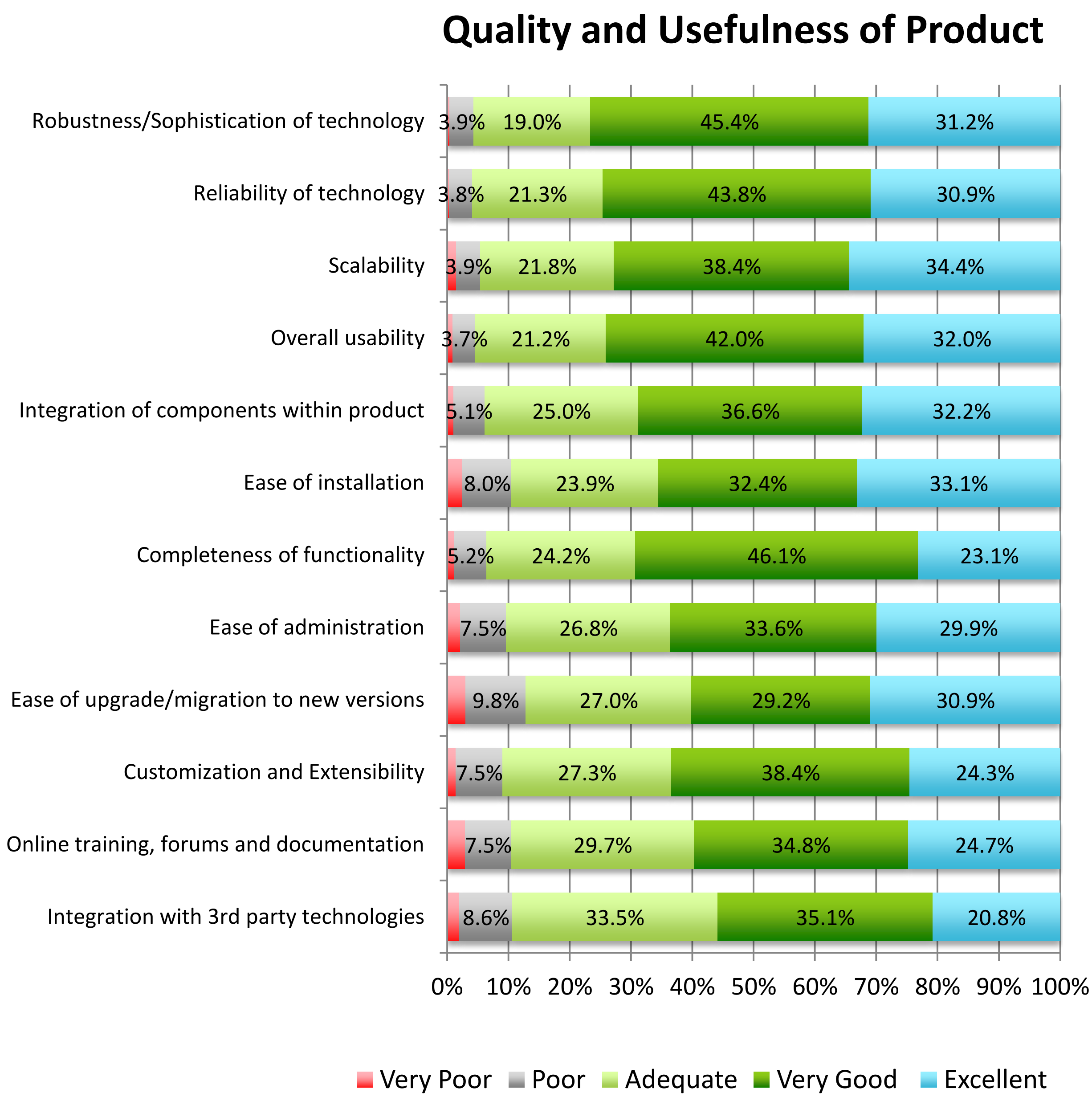

Figure 44 - Industry Performance: Quality and Usefulness of Products

For 2012, Professionalism and Product knowledge were the two top areas of customer satisfaction for Technical Support (Figure 45). This was also the case in 2011 when Product knowledge was in first place. At the bottom of the list are Time to resolve problems and Continuity of personnel – two areas that continue to dog the industry.

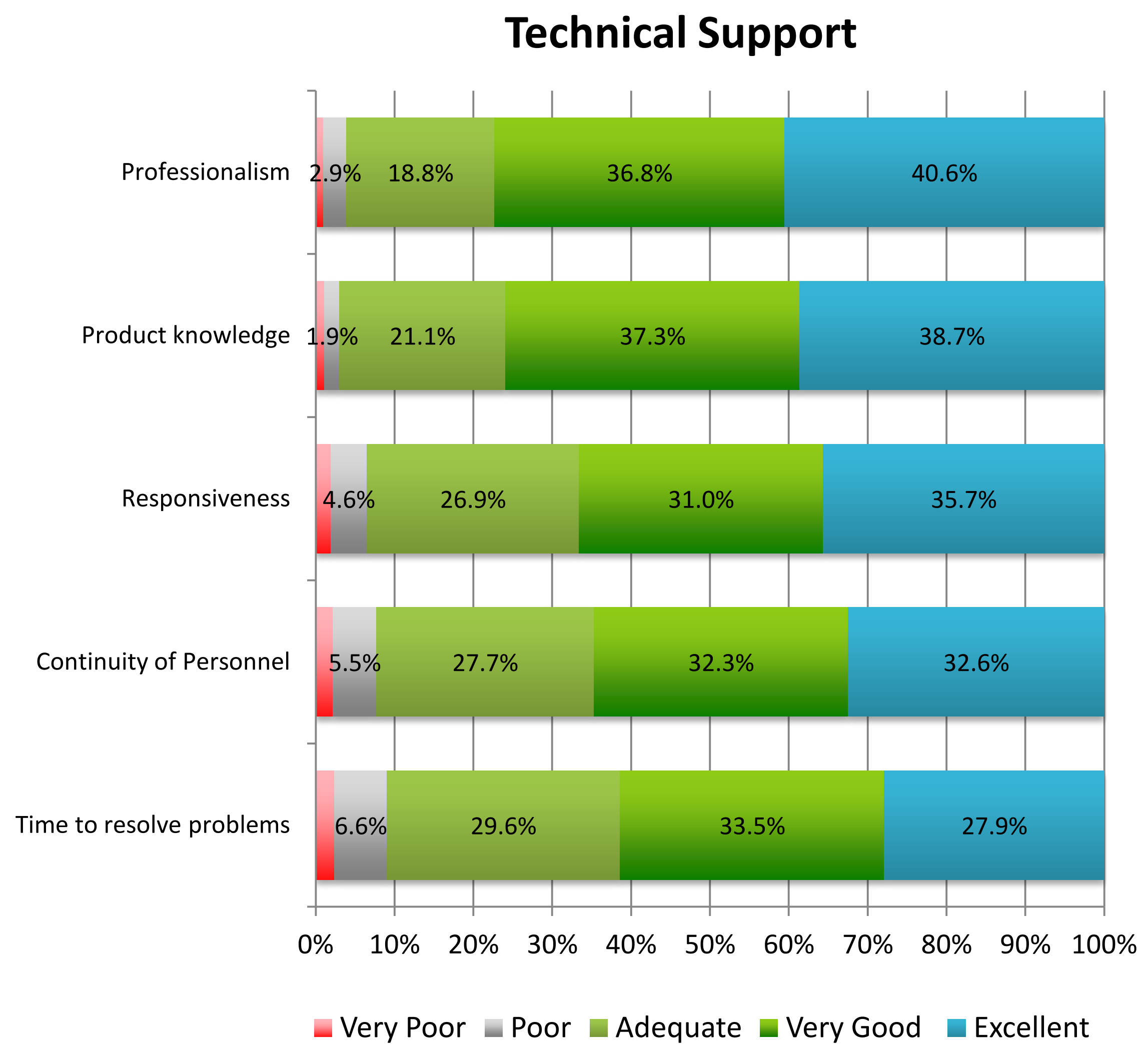

Figure 45 - Industry Performance: Technical Support

For 2012, there was no change in the industry's perceived performance for BI software vendor consulting services (Figure 46). The areas of greatest satisfaction include consultant Product knowledge and Professionalism. Areas of greatest dissatisfaction include Value for the price and Continuity of consulting personnel.

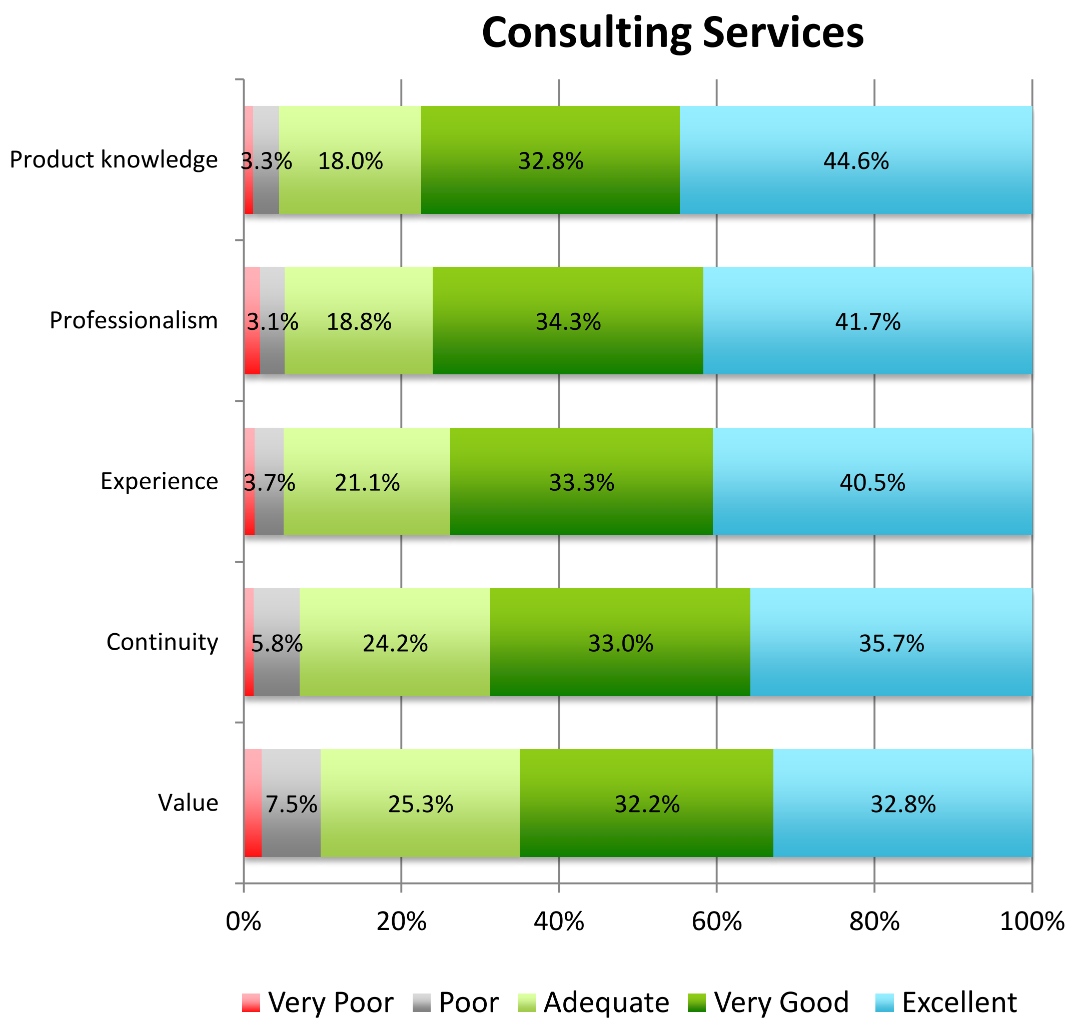

Figure 46 - Industry Performance: BI Vendor Consulting

For 2012, respondents were less likely to recommend their BI software vendor than in 2011 and 2010 (Figure 47). For 2012, 11% said that they would not recommend their vendor versus 5% in 2011 and 9% in 2010.

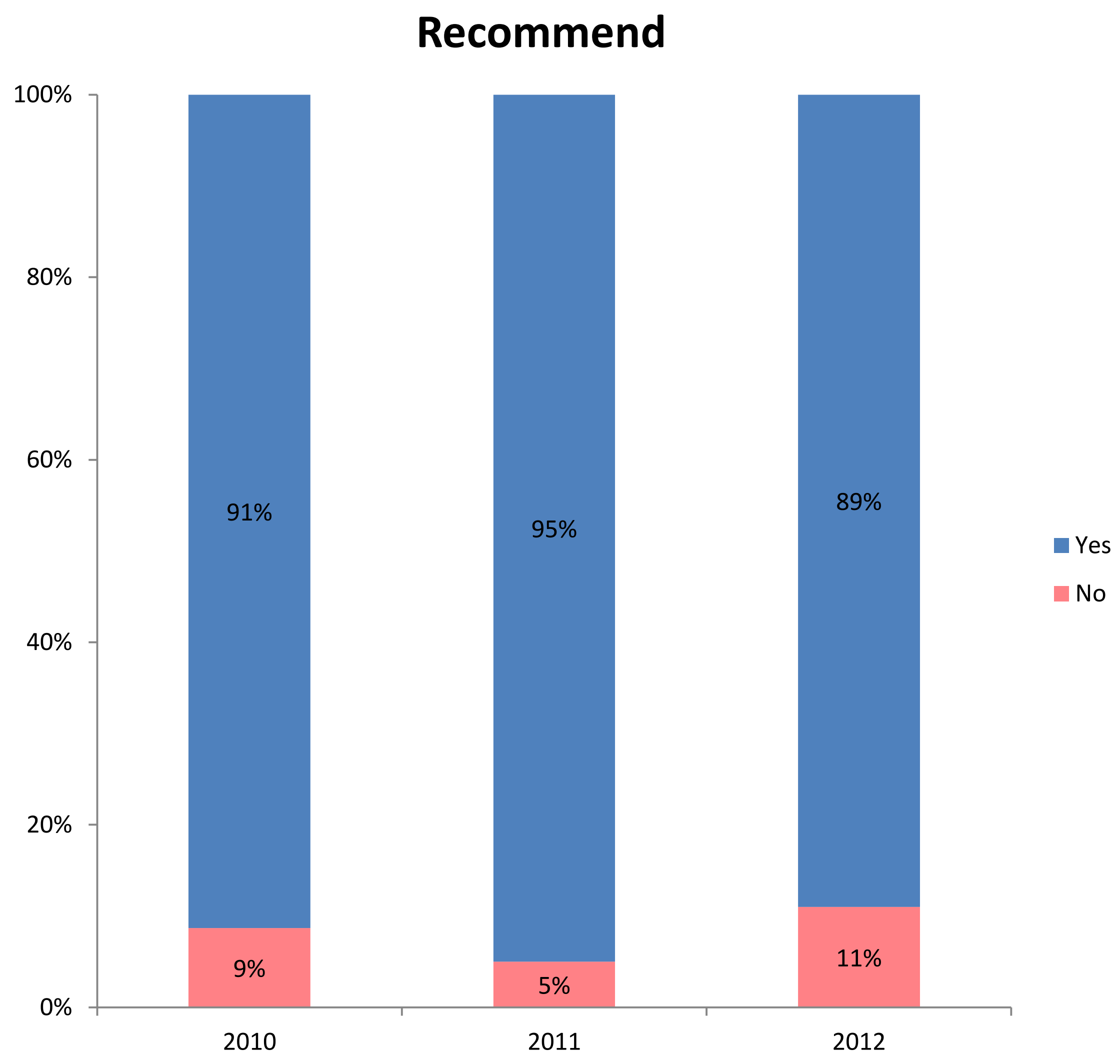

Figure 47 - Industry Performance: Recommended

A new question for 2012 asked whether respondents believe their vendor demonstrates integrity – honesty and truthfulness – in all their dealings. While the greatest majority have indicated that vendor integrity is “good” or “excellent”, 25% feel that vendor integrity is “average” or worse (Figure 48). Yet, in spite of this, 89% of respondents would still (seemingly) recommend their BI vendors.

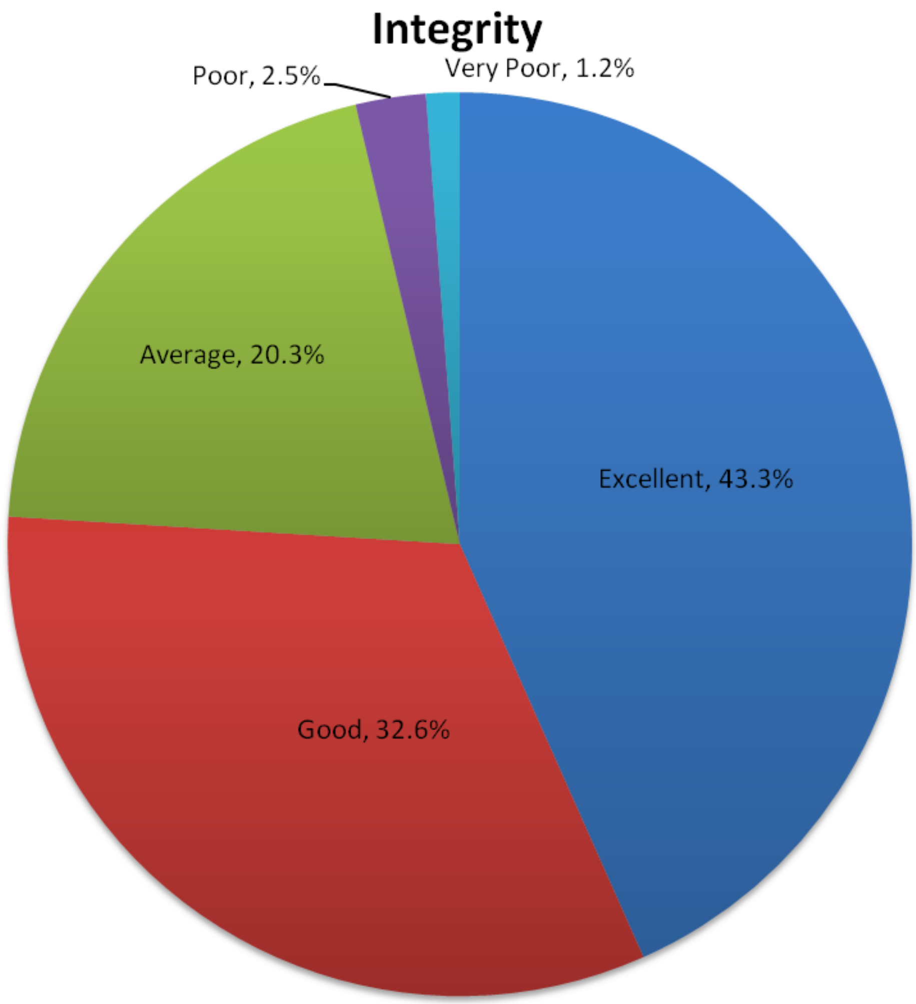

Figure 48 - Industry Integrity

Vendor Rankings

Vendor Stacked Rankings:

In this section we offer stacked rankings of Business Intelligence software vendors. Vendors were ranked using 33 different criteria, on a 5-point scale for each. Criteria covered sales /acquisition experience (8 criteria), value for price paid (1), technology/product (12), technical support (5), consulting services (5) and whether they would recommend this vendor (1). In addition, for 2012, we have added an "integrity" measure (1). The result is a stacked ranking with an average score for every one of the seven categories and an overall average score for each vendor.

As we begin to explore vendor performance in more detail, it's important to understand the scale that we used in scoring the industry and vendors:

- 5.0 = Excellent
- 4.0 = Very Good
- 3.0 = Adequate
- 2.0 = Poor
- 1.0 = Very Poor

As in 2011, market segments include the "Titans", "Established Pure-play", and "Emerging" vendors. For 2012, we added "High Growth" as a fourth category and have discontinued "Open Source".

Within each segment, vendors have similar traits and, as a result, similar score-average ranges. So, while comparisons can (and no doubt will) be made between these sub-segment "peer groups", it's not always a reasonable comparison.

Based on our scoring methodology, all vendors performed at a level that is considered more than "adequate" for all categories of criteria.

**Please note that "Average Score" is the mathematical mean of all items included in vendor ratings. Each column in the chart represents a scale consisting of varying numbers of items (for example "Sales" is a scale consisting of 8 items, while "Value" for price is 1 single item). As such, each column is weighted differently (based upon the number of items represented and the number of respondents rating those items) in calculating the overall Average rating. The Average Score cannot be calculated by simply averaging across the subscale scores.*

Business Intelligence Titans

As you might expect, the "Titans" (Table 2) are the largest vendors, with extensive product and service offerings – including Business Intelligence. In all cases these vendors have acquired Business Intelligence vendors (e.g., Oracle and Hyperion, IBM and Cognos, SAP and BusinessObjects). Vendors in this category include: IBM/Cognos, Microsoft, Oracle and SAP/BusinessObjects.

Table 2 - Business Intelligence Titans - Stacked Rankings

Vendor	Sales	Value	Product	Tech Support	Consulting	Recommend	Integrity	Average
Microsoft	3.37	3.75	3.61	3.41	3.58	4.55	3.75	3.74
IBM	3.45	3.48	3.52	3.47	3.59	4.28	3.75	3.65
SAP/Business Objects	3.16	3.16	3.32	3.24	3.37	3.98	3.53	3.37
Oracle	3.18	3.22	3.22	3.23	3.55	3.63	3.32	3.29

Large Established Pure-play Business Intelligence Vendors

"Large Established Pure-Play" vendors (Table 3) are focused primarily upon Business Intelligence software and services and have typically been in business for 15 + years - with well established customer bases and revenue streams. Several are publicly held. These include Information Builders, MicroStrategy, Actuate and The SAS Institute.

Table 3 - Business Intelligence Established Pure-plays - Stacked Rankings

Vendor	Sales	Value	Product	Tech Support	Consulting	Recommend	Integrity	Average
Information Builders (IBI)	4.16	4.26	4.07	4.25	4.16	4.58	4.42	4.29
MicroStrategy	3.99	3.80	3.96	3.99	3.96	4.61	4.27	4.09
Actuate	3.70	3.74	3.77	3.88	3.80	4.31	3.89	3.87
SAS Institute	3.47	3.38	3.46	3.66	3.86	4.24	3.67	3.68

High Growth Business Intelligence Vendors

This year we separated out several vendors into a new "High Growth" category (Table 4). These BI vendors have achieved critical mass in the market and are growing at an extremely high rate – well above the industry average. Included are: Tableau, Tibco/Spotfire and QlikTech.

Table 4 - High Growth Business Intelligence Vendors – Stacked Rankings

Vendor	Sales	Value	Product	Tech Support	Consulting	Recommend	Integrity	Average
Tableau	4.42	4.51	4.45	4.40	4.68	4.89	4.73	4.57
Tibco/Spotfire	4.19	4.15	4.02	4.25	4.31	4.88	4.54	4.33
Qliktech	3.88	4.21	4.10	3.82	3.79	4.81	4.05	4.10

Emerging Business Intelligence Vendors

The "Emerging" vendors (Table 5) are typically younger than the other categories and offer unique and often innovative business models, technologies and/or services. This category includes: Arcplan (new), Dimensional Insight, Jaspersoft, Jedox (new), Pentaho, and Yellowfin.

Vendors Birst, Entrinsik, Good Data, IntuitiveBI, LogiXML and Panorama also belong in this category, but could not be ranked due to small numbers of completed surveys.

Table 5 - Business Intelligence Emerging Vendors – Stacked Rankings

Vendor	Sales	Value	Product	Tech Support	Consulting	Recommend	Integrity	Average
Yellowfin	4.52	4.52	4.40	4.55	4.52	4.84	4.64	4.57
Dimensional Insight	4.44	4.32	4.24	4.53	4.53	4.96	4.74	4.54
Jedox/Palo	4.16	4.65	4.04	4.37	4.23	5.00	4.37	4.41
Arcplan	4.18	4.23	4.11	4.35	4.20	5.00	4.41	4.35
Pentaho	3.75	4.09	3.65	4.03	3.88	4.70	4.19	4.03
Jaspersoft	3.67	4.18	3.73	3.71	3.67	4.64	3.82	3.96

After you have reviewed the stacked rankings of vendors, carefully examine the detailed, vendor-specific rankings for a more complete perspective and deeper understanding of individual vendors' strengths and weaknesses.

Detailed Vendor Scores:

In this section, we offer detailed vendor scores. Using our 33 criteria evaluation model, we compare each vendor's performance to their direct peer group and to the average for all vendors (all records in the study population).

The detailed criteria are below. We have adding "clock" position information to assist in locating specific scores:

Table 6 - Detailed Vendor Rating Criteria

- **Sales/acquisition experience** *(12 – 2 o'clock)* o Professionalism o Product Knowledge o Understanding business/needs o Responsiveness o Flexibility/Accommodation o Business Practices o Contractual terms and conditions o Follow up after the sale - **Value for price** *(3 o'clock)* - **Quality and usefulness of product** *(3 – 7 o'clock)* o Robustness/sophistication of technology o Completeness of functionality o Reliability of technology o Scalability o Integration of components within product o Integration with 3rd party technologies o Overall Usability o Ease of installation o Ease of administration	- **Quality and usefulness of product (continued)** o Customization and Extensibility o Ease of upgrade/migration to new versions o Online forums and documentation - - **Quality of technical support** *(8 – 9 o'clock)* o Professionalism o Product Knowledge o Responsiveness o Continuity of personnel o Time to resolve problems - **Quality and value of consulting services** *(9 – 10 o'clock)* o Professionalism o Product Knowledge o Experience o Continuity o Value - **Integrity** *(11 o'clock)* - **Whether vendor is recommended** *(12 o'clock)*

We have also noted when a vendor is in the "Top 10" out of the 17 vendors, across all segments, that were ranked this year and precisely where they achieved that distinction.

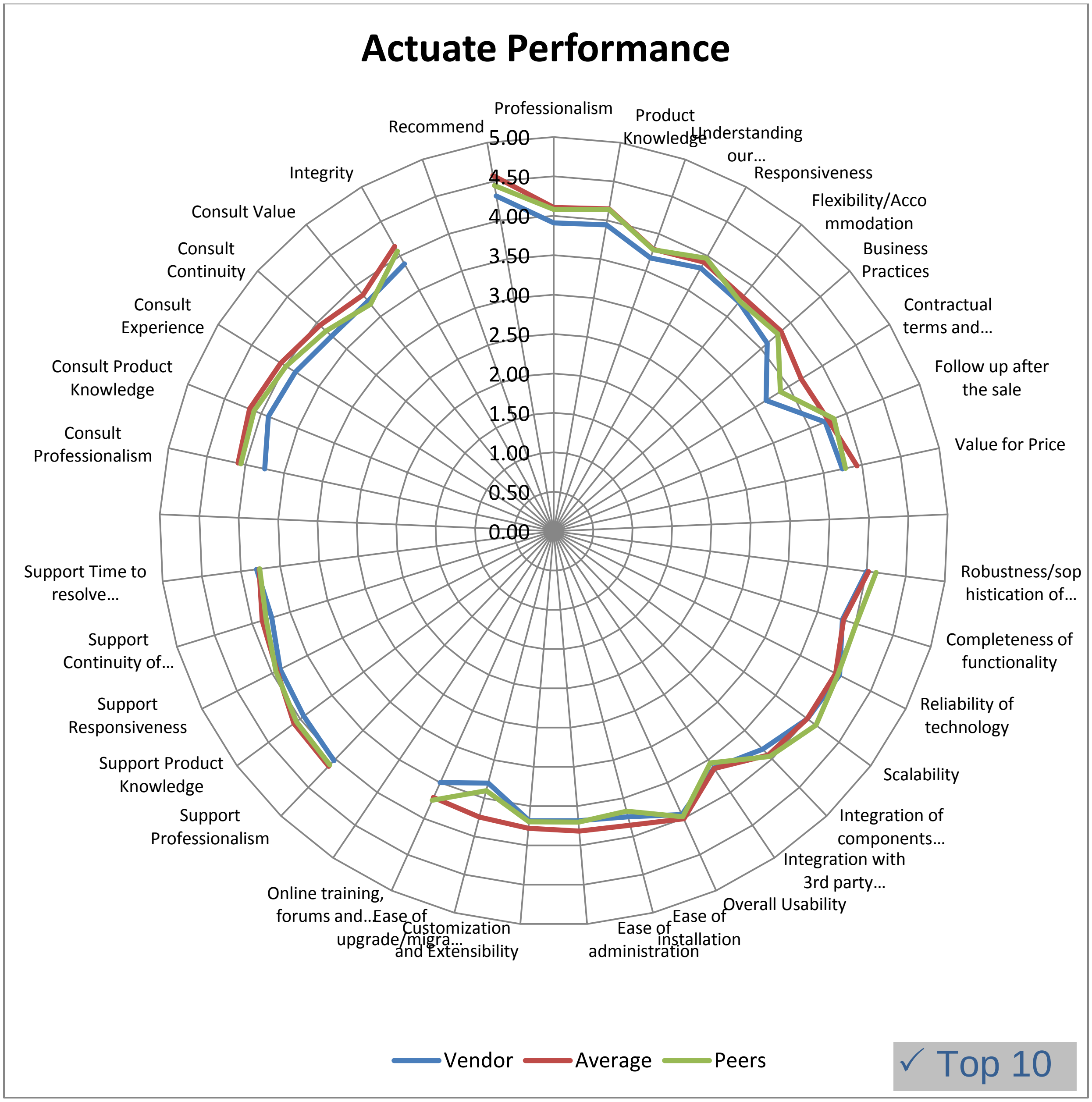

Figure 49 – Actuate/BIRT Detailed Score

A member of the Large Established Pure-play category, Actuate was mostly in-line with peer and overall sample averages. It is considered a “Top 10” vendor for “Quality and usefulness of product” and “Quality of technical support” categories.

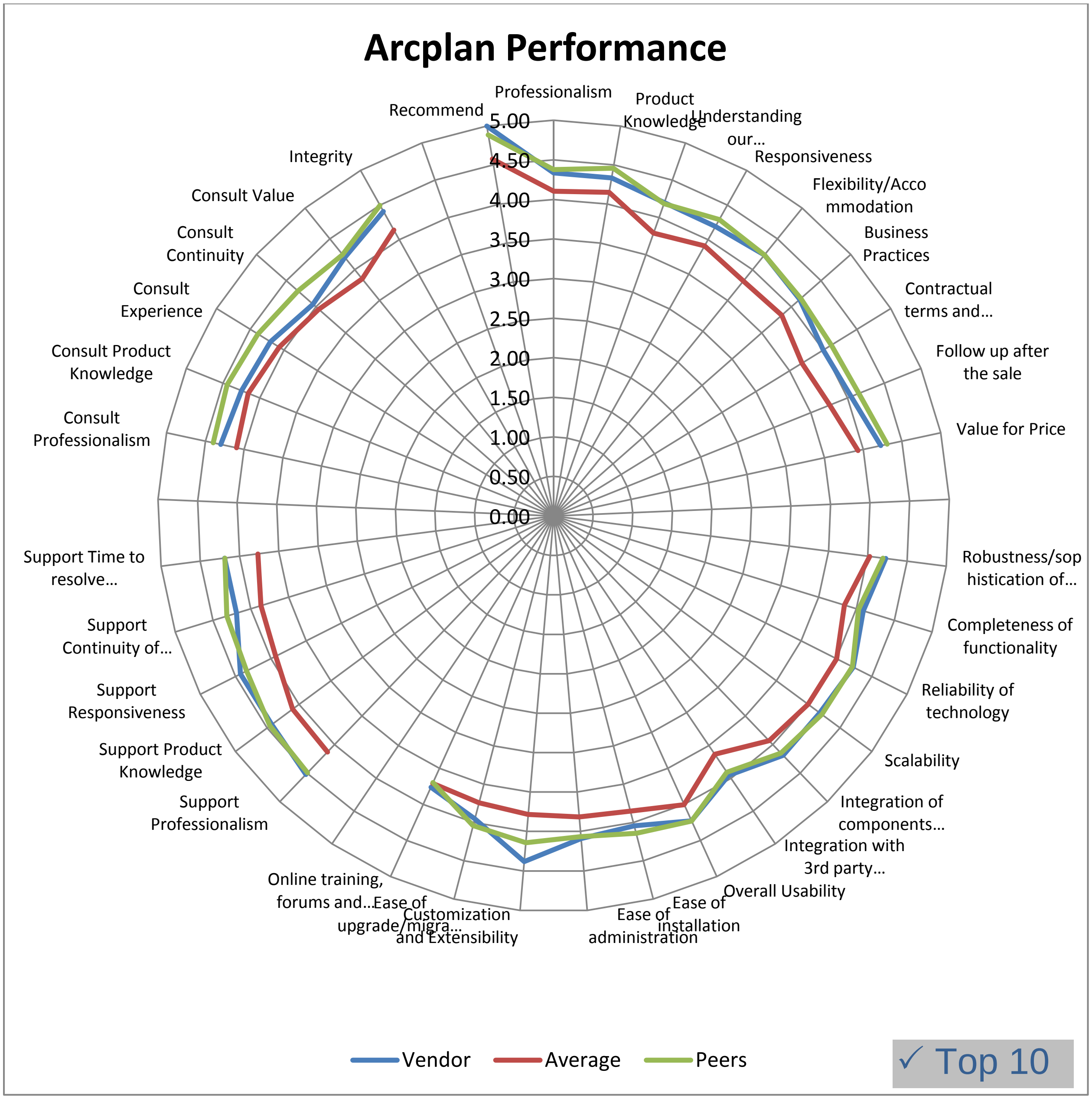

Figure 50 - Arcplan Detailed Score

A first time entry for 2012, Arcplan is a member of the Emerging category. It was generally in-line or below the peer average and above the overall sample average. It is considered a “Top 10” vendor in several categories, including “Quality and usefulness of product”.

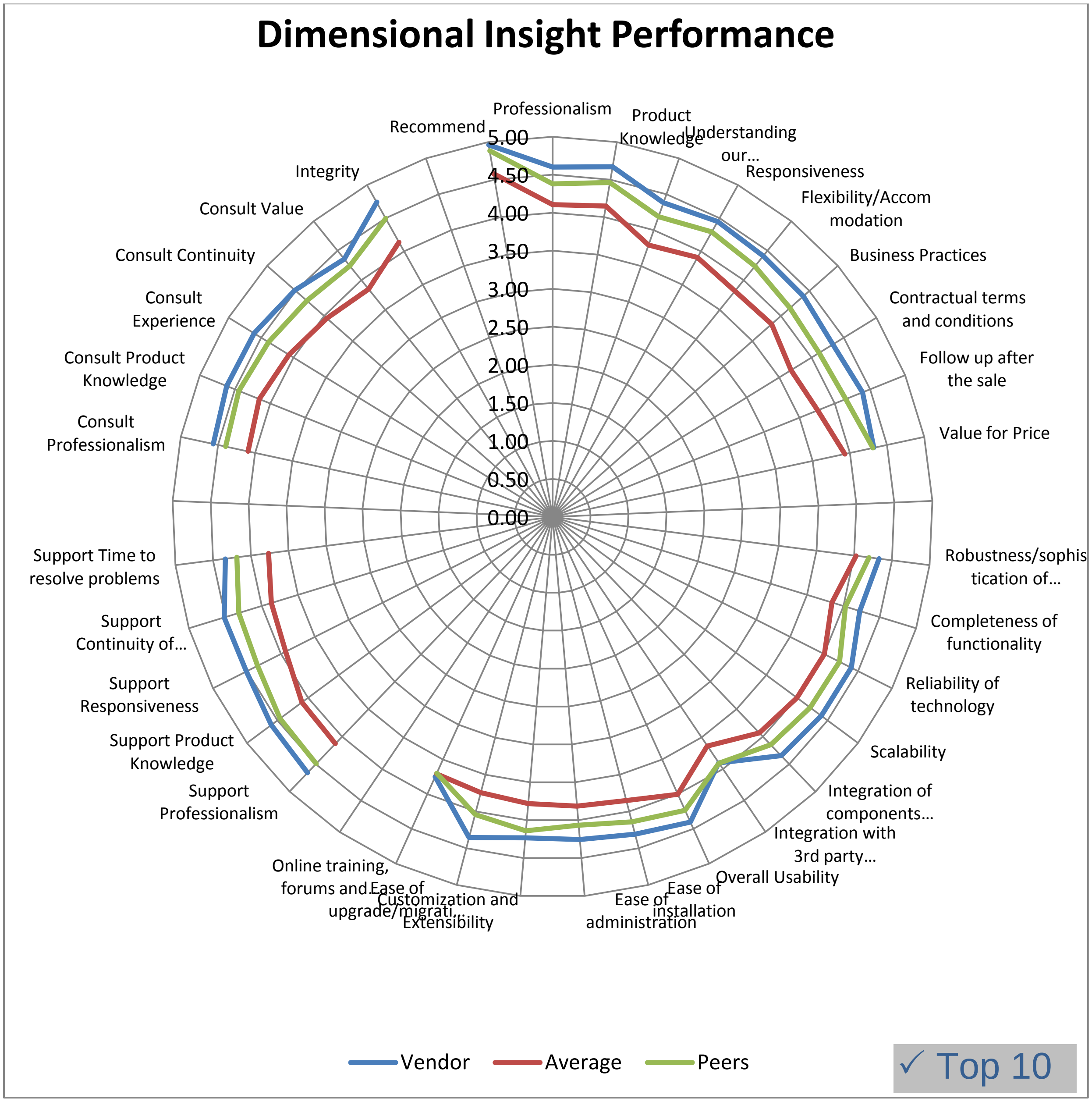

Figure 51 – Dimensional Insight Detailed Score

A member of the “Emerging” market segment, Dimensional Insight succeeded in securing the number two spot in this segment for a second year in a row. It exceeded its peer group and the overall sample for most every metric. Dimensional Insight is a “Top 10” vendor across all categories.

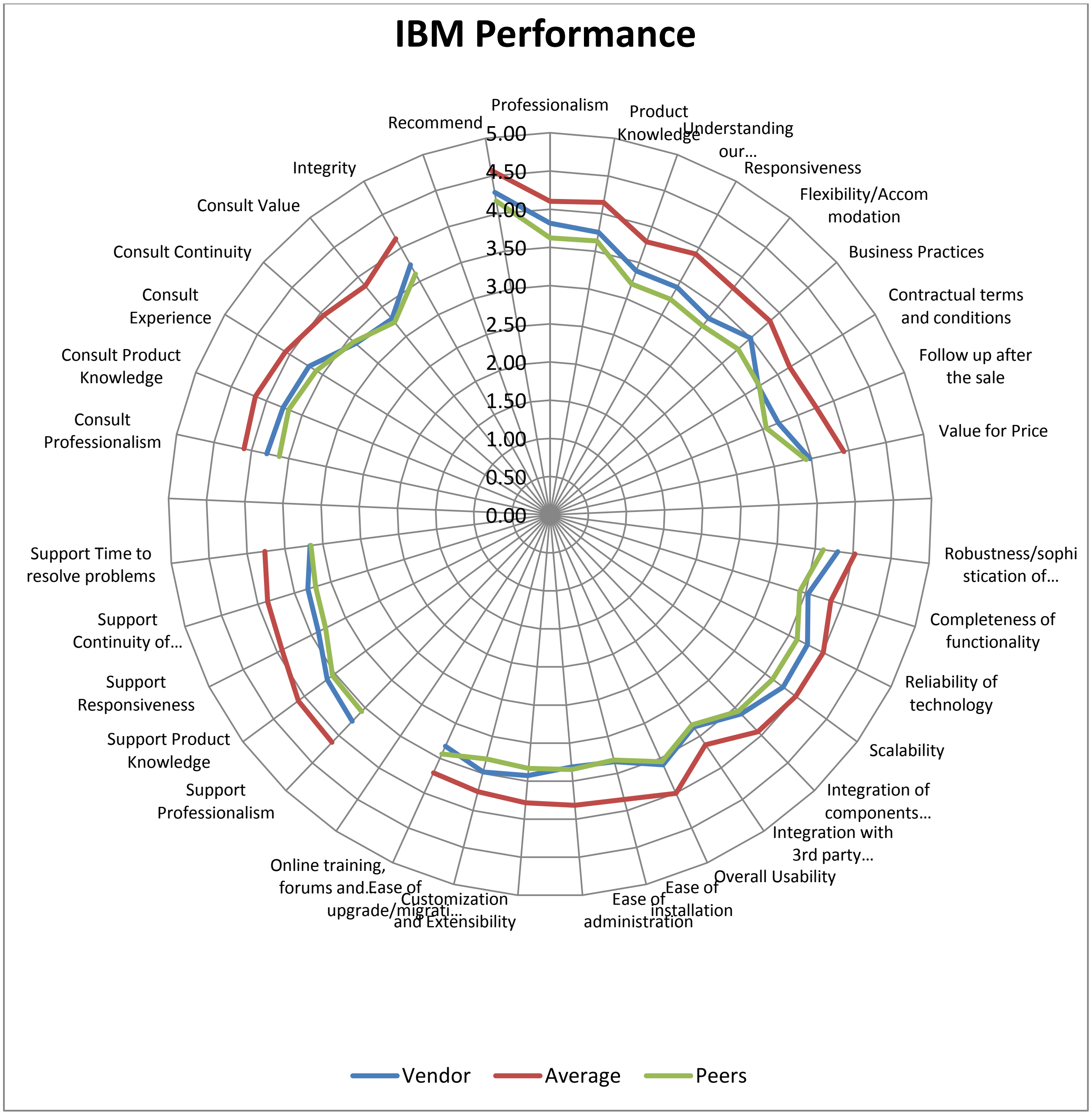

Figure 52 - IBM/Cognos Detailed Ranking

A member of the “Titan” market segment, IBM/Cognos was generally above its peer group average – a solid increase in performance over 2011. It was ranked number one in its peer group for “Sales/Acquisition Process”, “Quality of technical support”, Quality of consulting”, and “Integrity”.

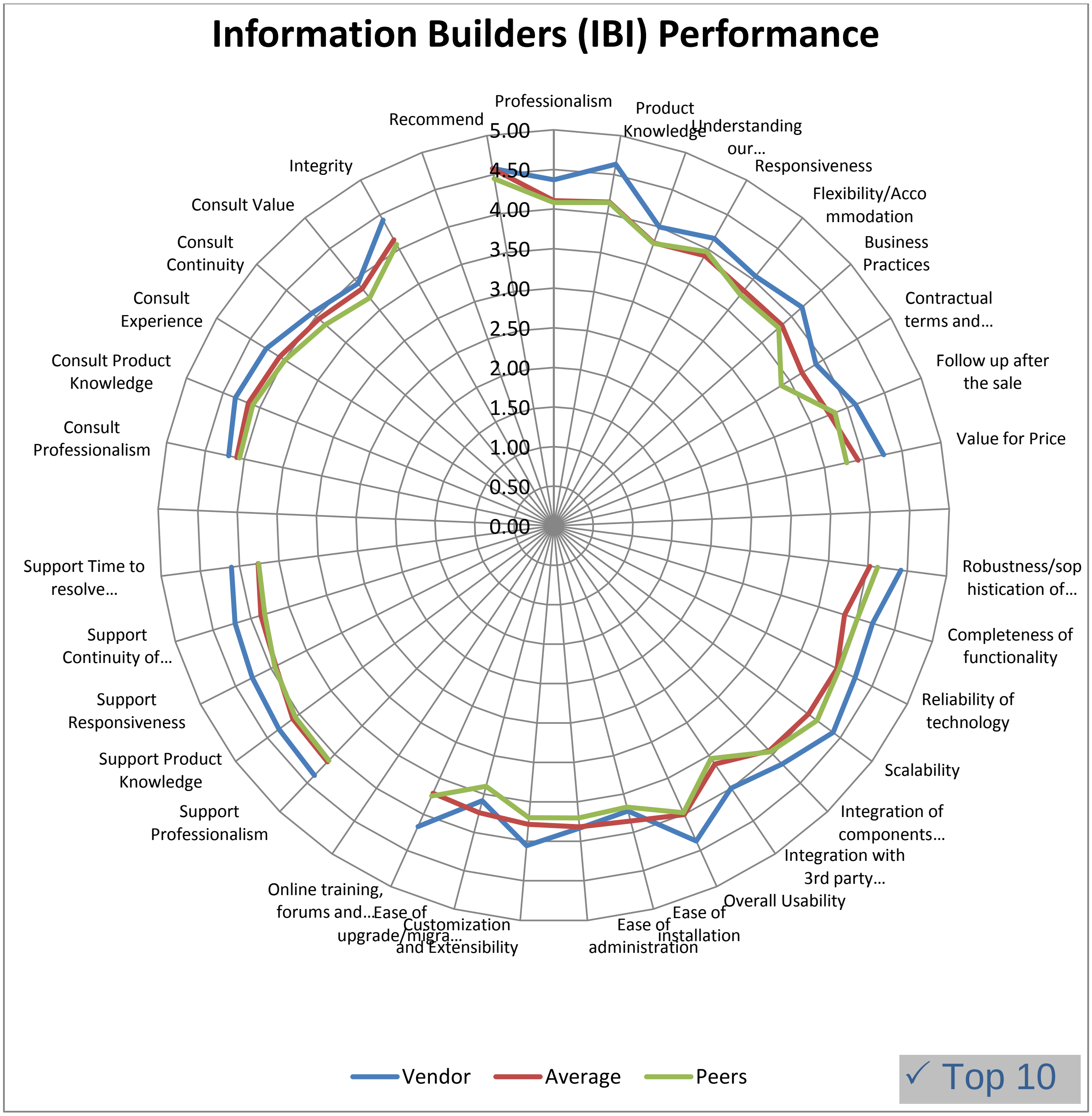

Figure 53 - Information Builders Detailed Score

A member of the “Established Pure-Play” market segment, Information Builders achieved the top position for a third year in a row. It exceeded the peer group average for virtually all metrics and was above the average for the entire sample. Information Builders is a “Top 10” for nearly every category.

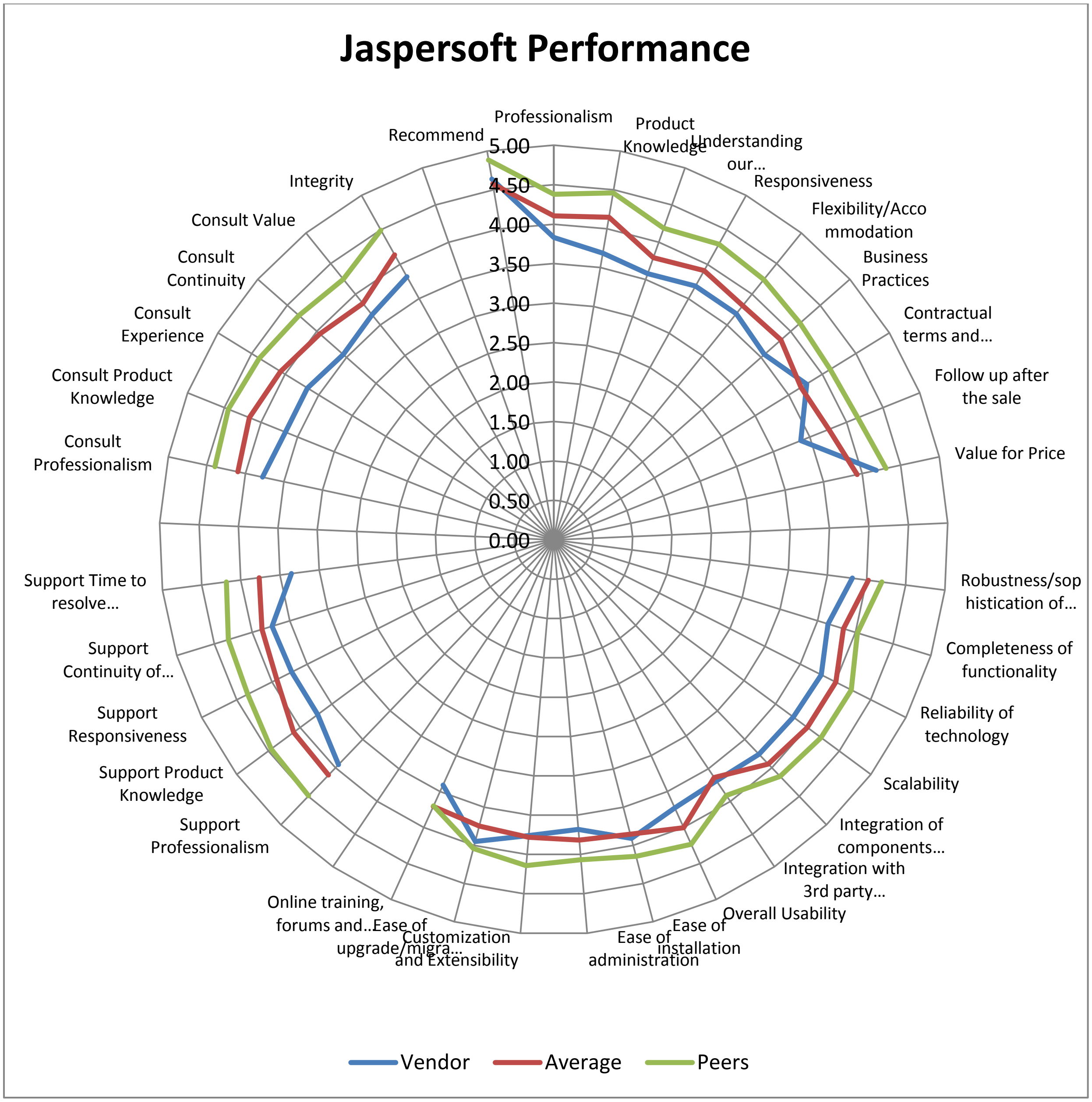

Figure 54 - Jaspersoft Detailed Score

A member of the "Emerging" market segment, Jaspersoft was generally below peer and overall sample averages. However, for "Value for price paid" and "Recommended" it exceeded the overall sample. It also improved scores over 2011 for "Value for price paid" and "Quality and usefulness of product".

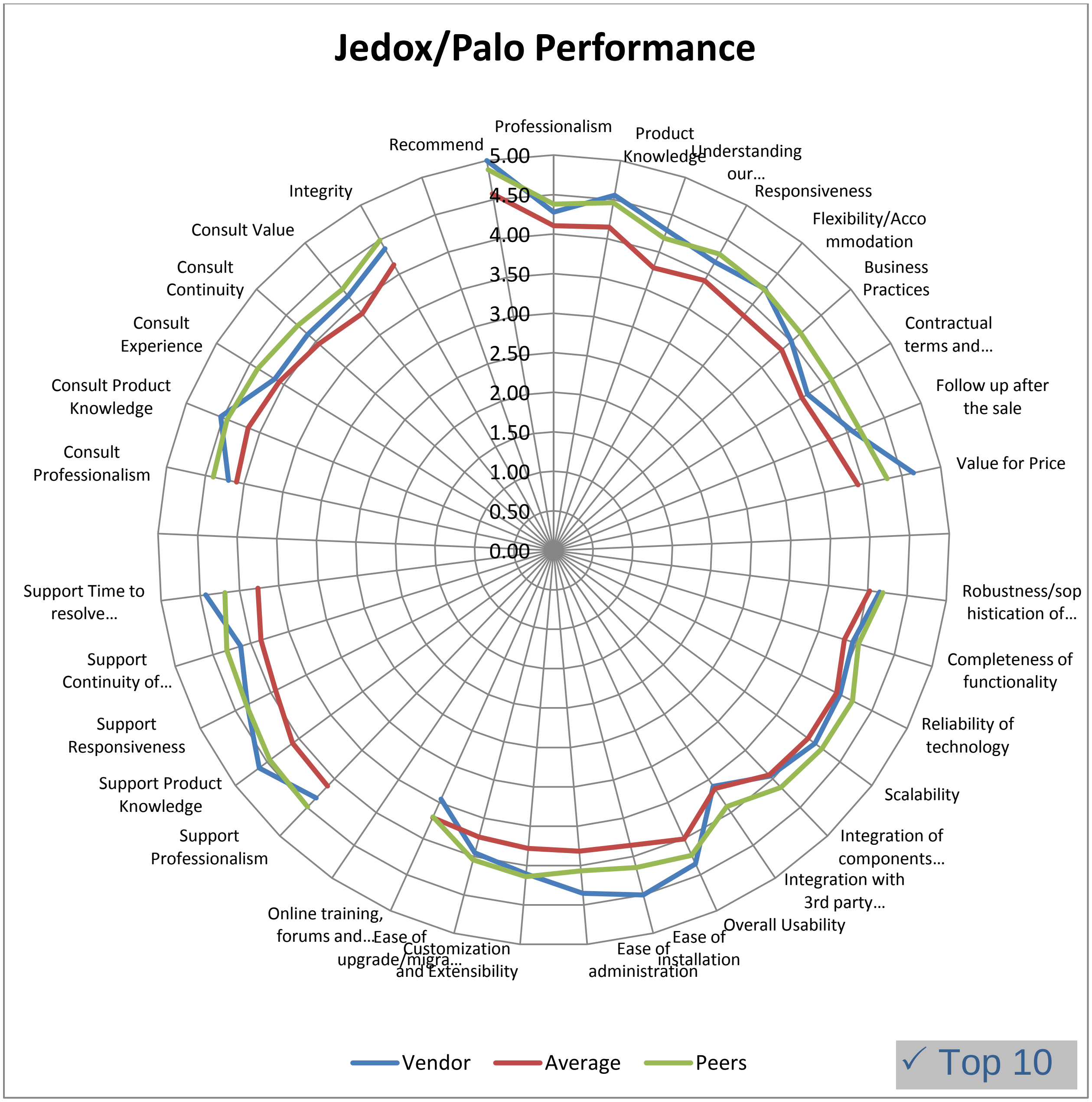

Figure 55 – Jedox/Palo Detailed Score

A first time entry for 2012, Jedox is a member of the Emerging category. It was generally in-line with and occasionally above its peer group average. It was generally above the overall sample for all measures. Jedox ranked #1 in “Value for price paid” and for “Recommended” and is a “Top 10” vendor across all categories.

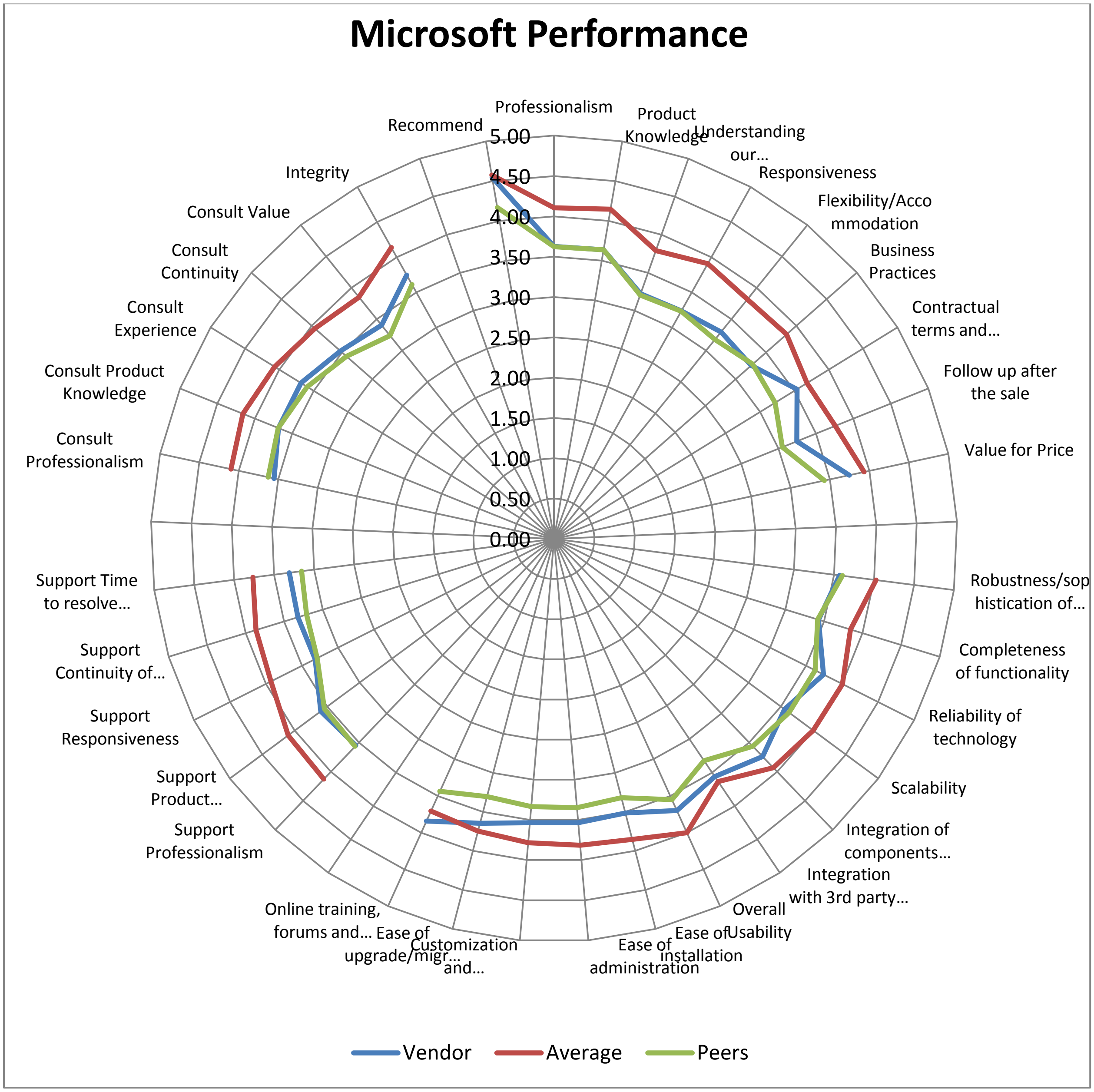

Figure 56 - Microsoft Detailed Score

A member of the "Titan" market segment, Microsoft is in first place for this category for 2012. It was generally above the peer average for most measures and was above the overall sample for Online Training.

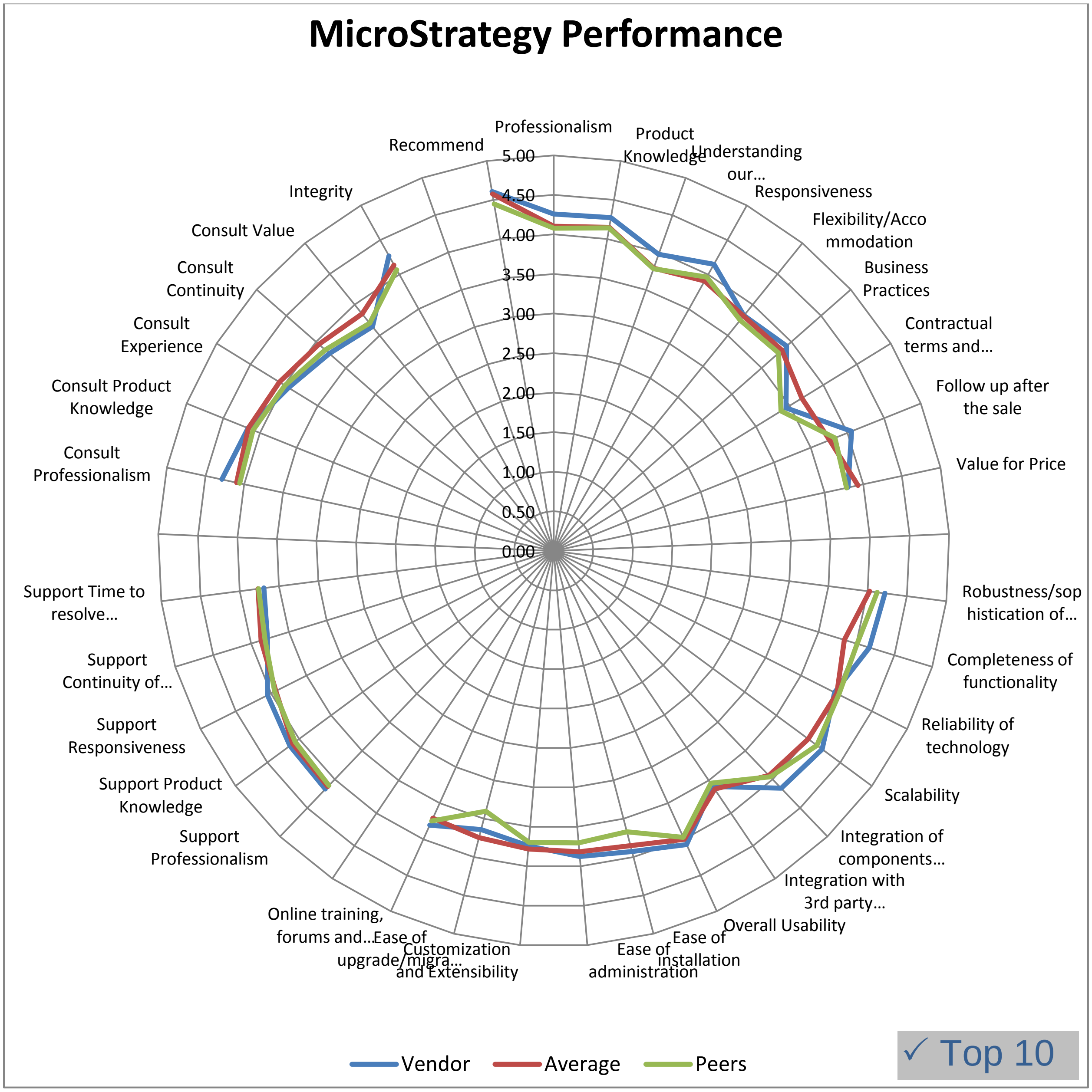

Figure 57 - MicroStrategy Detailed Score

A member of the "Established Pure-Play" segment, MicroStrategy was generally above average for the entire sample and its peer group. Its scores improved for Sales, Product, Support, Consulting and Overall from 2011. It is considered a "Top 10" vendor in most categories.

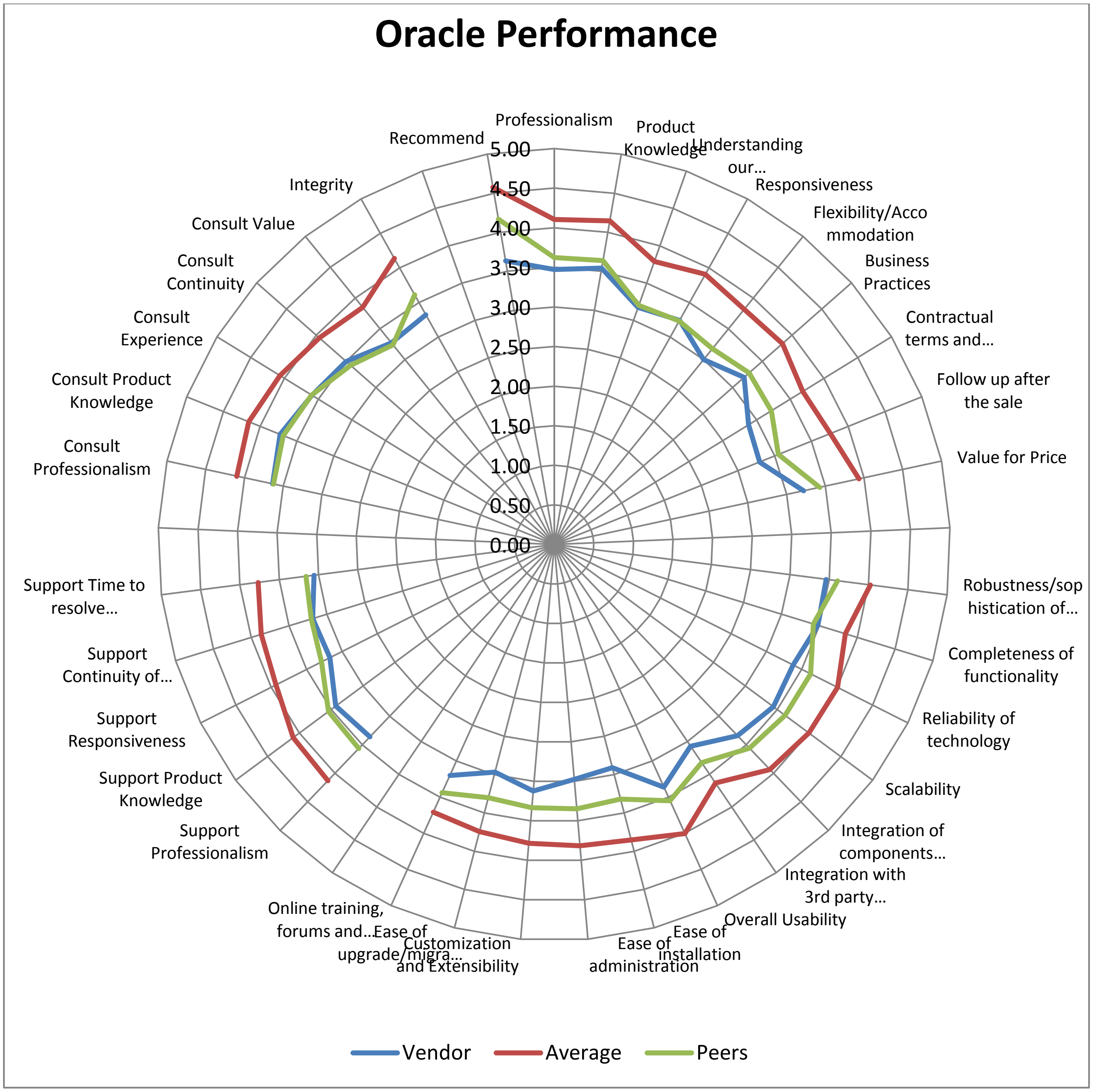

Figure 58 - Oracle Detailed Score

A member of the "Titan" market segment, Oracle was generally in line or below its peer group. It exceeded peer scores for several "Quality of Consulting" metrics and for "Completeness of functionality".

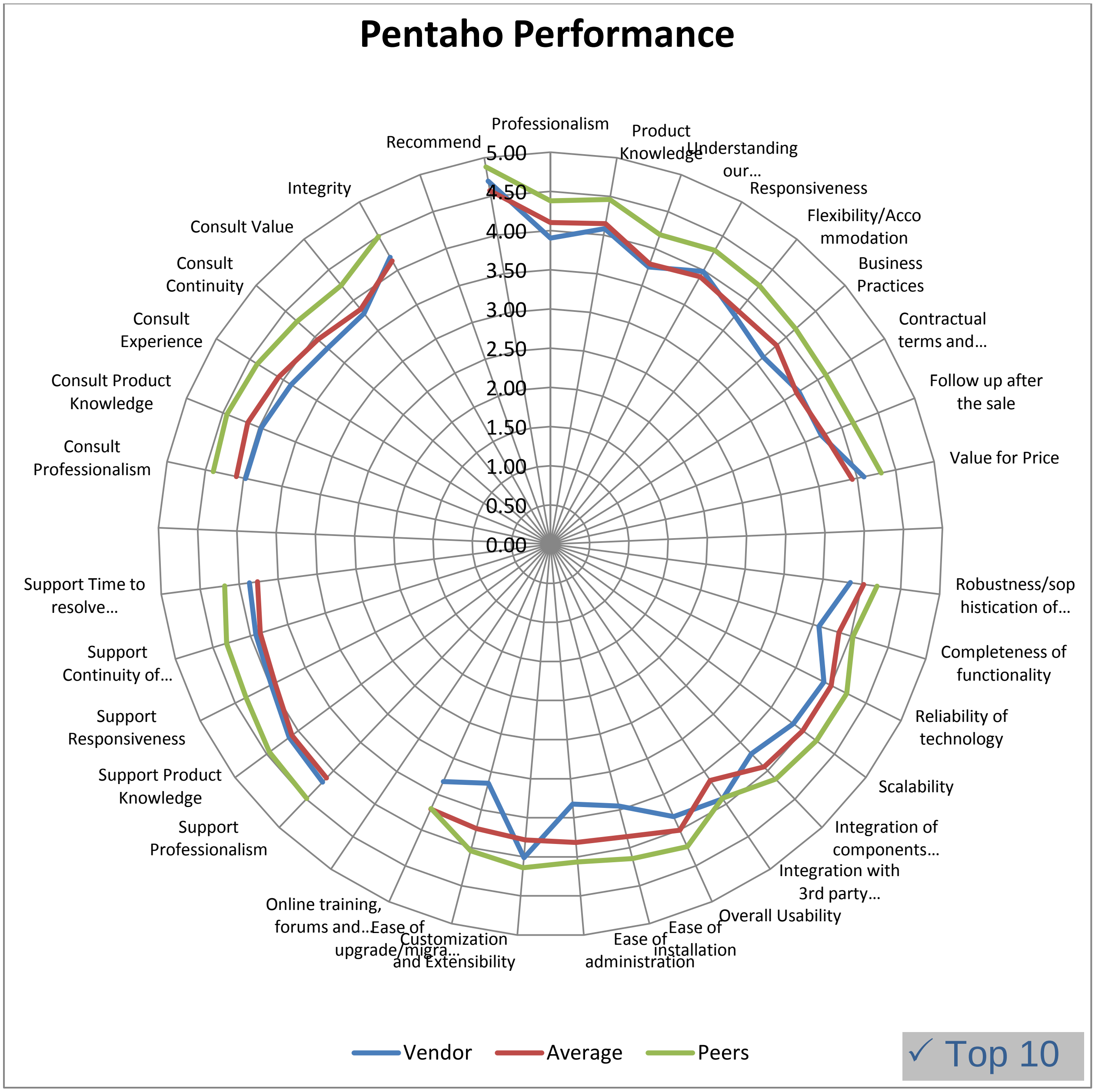

Figure 59 - Pentaho Detailed Score

A member of the "Emerging" market segment, Pentaho was generally in line with the overall sample average but below its peer average for most measures. For 2012, Pentaho improved its performance for the "Quality of technical support" and is a "Top 10" vendor across most categories.

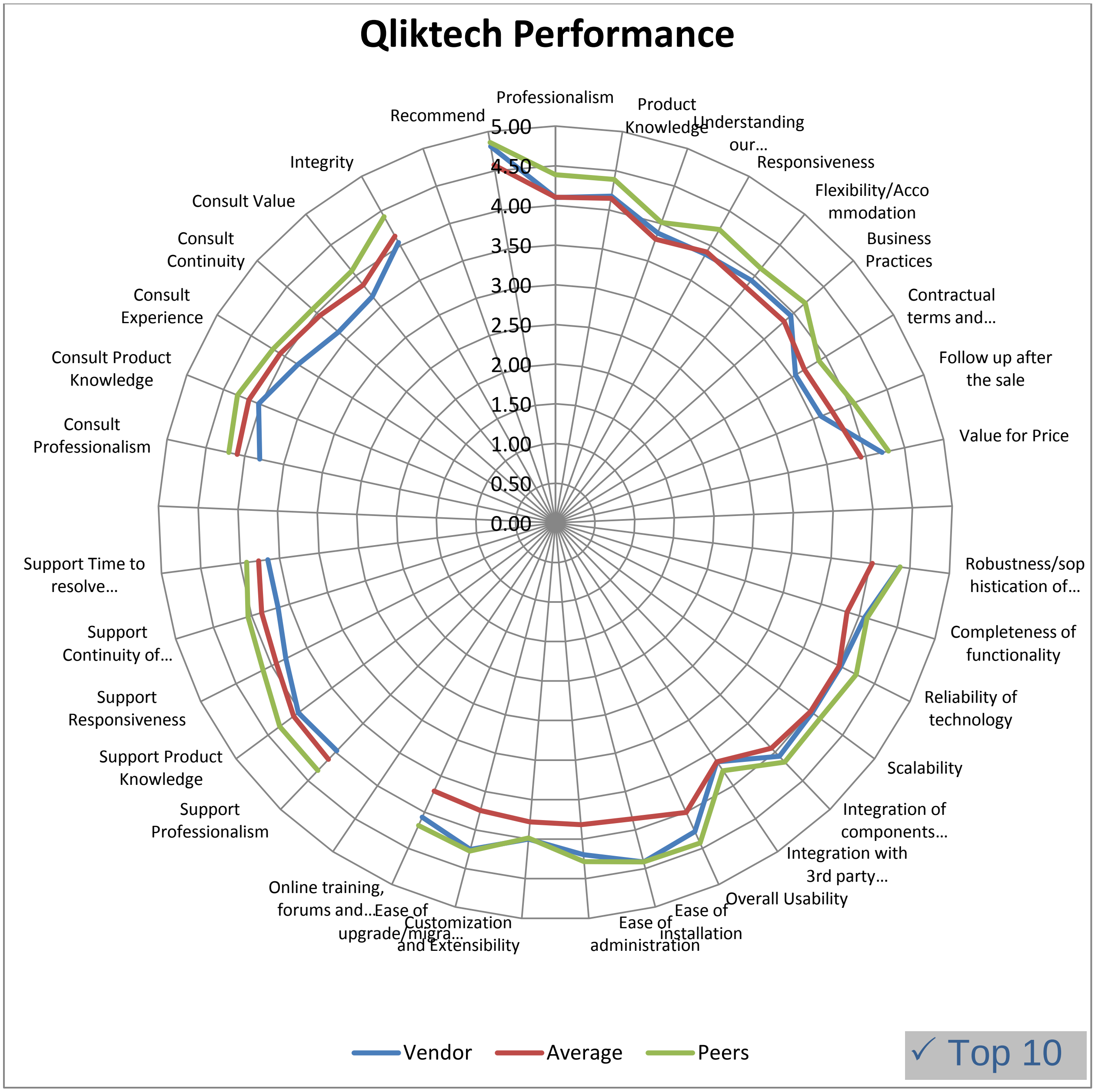

Figure 60 - QlikTech Detailed Score

A member of the “High Growth” category QlikTech showed improvement in 4 out of 6 categories for 2012. In key areas such as “Quality and usefulness of product”, “Value for price paid” and “Recommend”, it was in-line with both peer and overall averages. For “Sales/Acquisition Experience” it was in line with the overall sample. For “Quality of technical support” and “Quality of consulting”, it was below both averages. QlikTech is a “Top 10” vendor for a majority of categories.

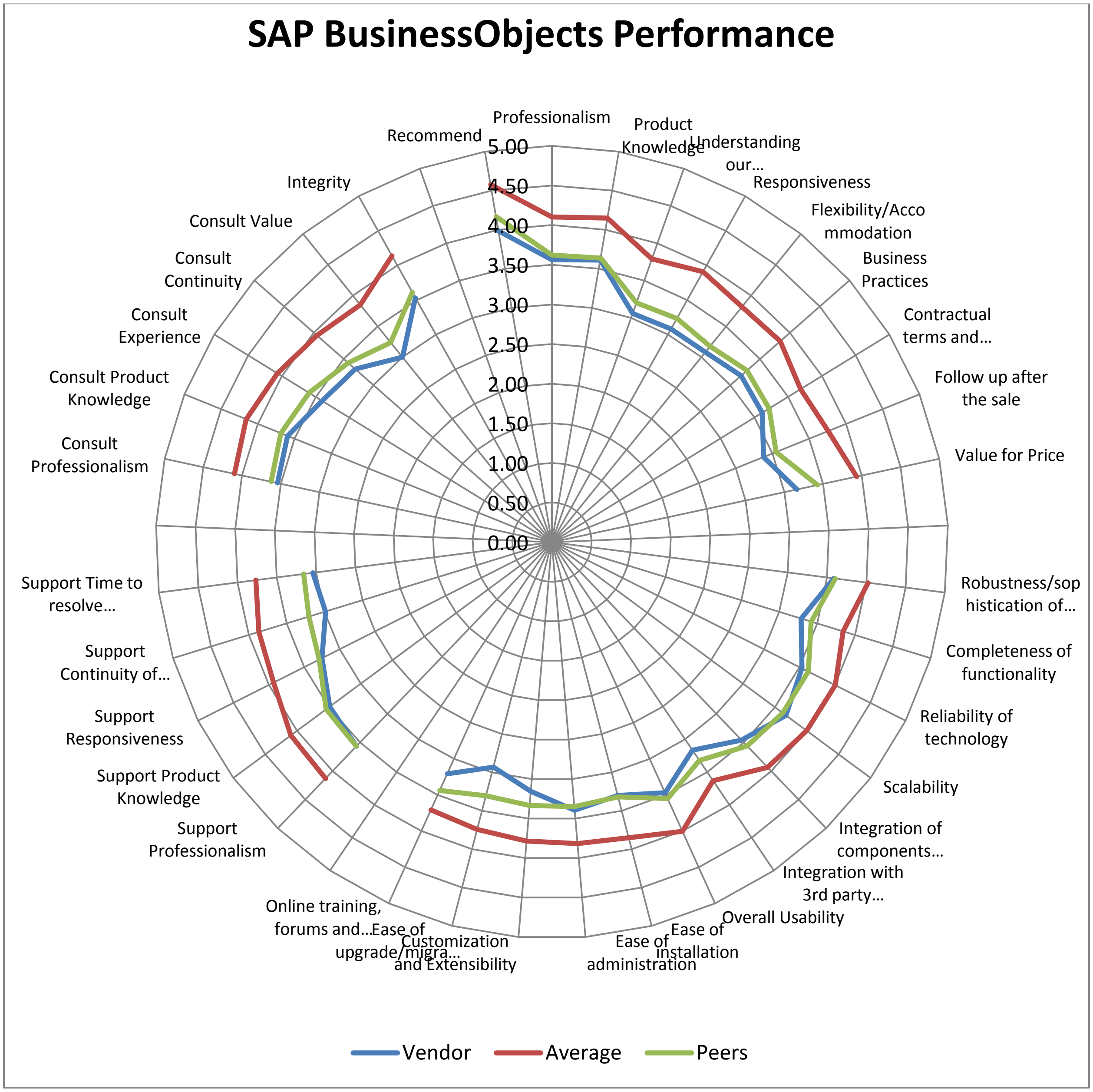

Figure 61 – SAP BusinessObjects Detailed Score

A member of the "Titan" market segment, for 2012, SAP/BusinessObjects was generally in-line with its peers – a substantial improvement over 2011. SAP/BusinessObjects demonstrated key improvements in both "Quality and usefulness of product" and "Quality of consulting". It also climbed a notch into third place.

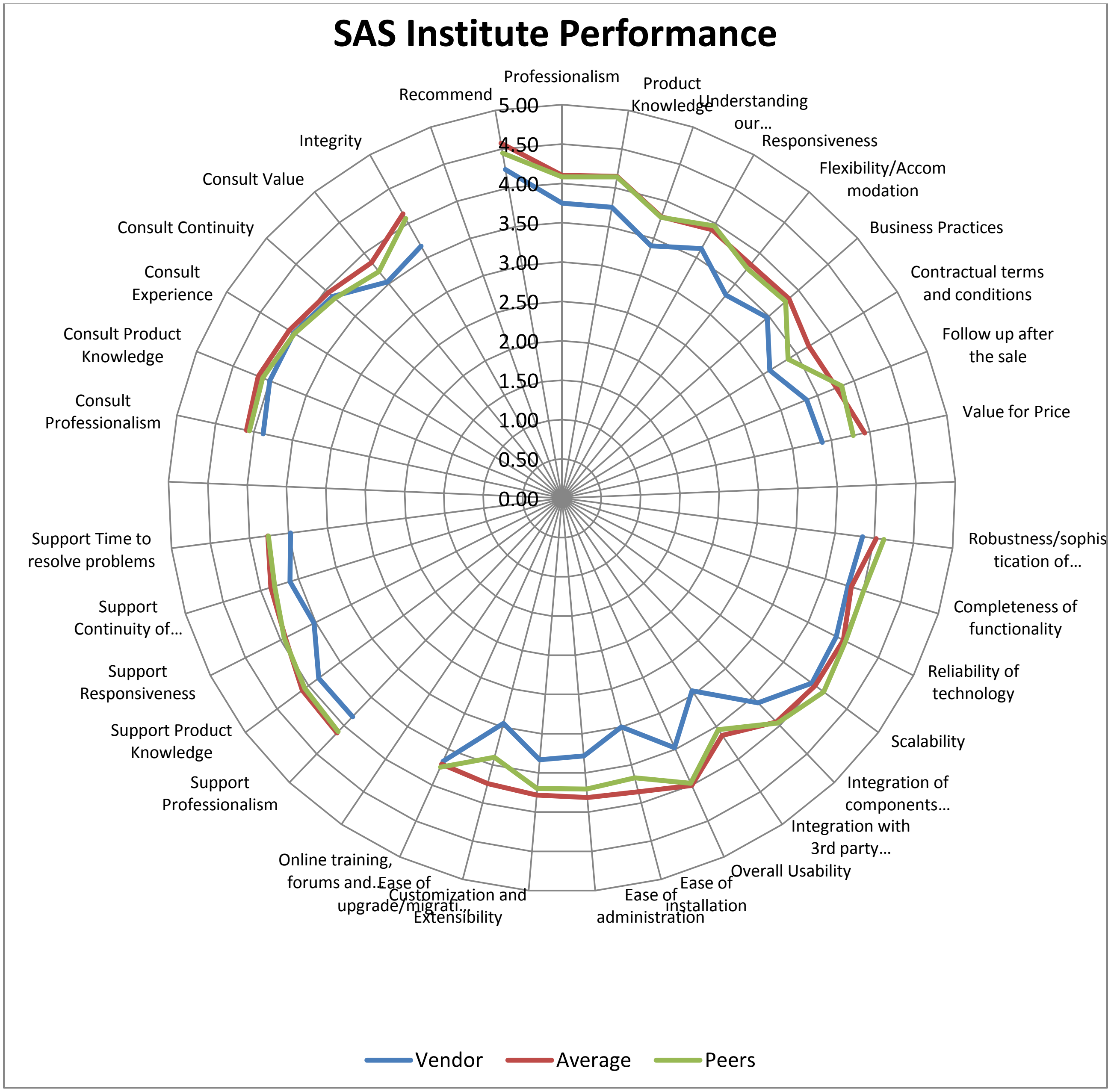

Figure 62 - SAS Institute Detailed Score

A member of the "Established Pure-Play" market segment, The SAS Institute showed improvement in its overall score and in 4/6 categories. It was generally below average when compared to its peer group and the overall sample. However, for several "Quality and usefulness of product" and "Quality of consulting" metrics, it was in line with the peer and overall sample averages.

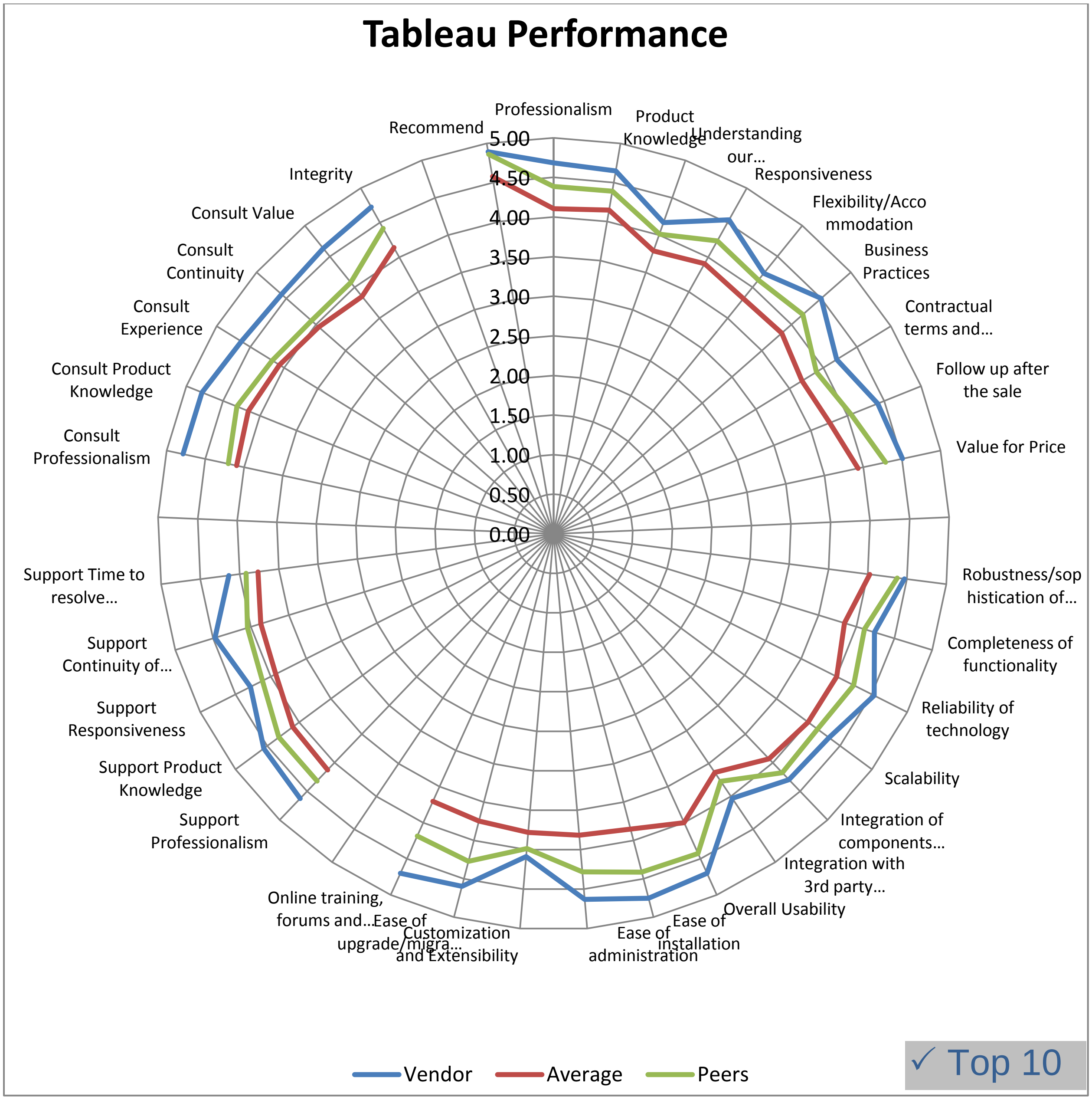

Figure 63 - Tableau Detailed Score

A member of the “High Growth” category, Tableau is ranked as the #1 vendor amongst its peers. It scored substantially above both peer and overall sample averages for all categories. Tableau is a “Top 10” vendor across all categories.

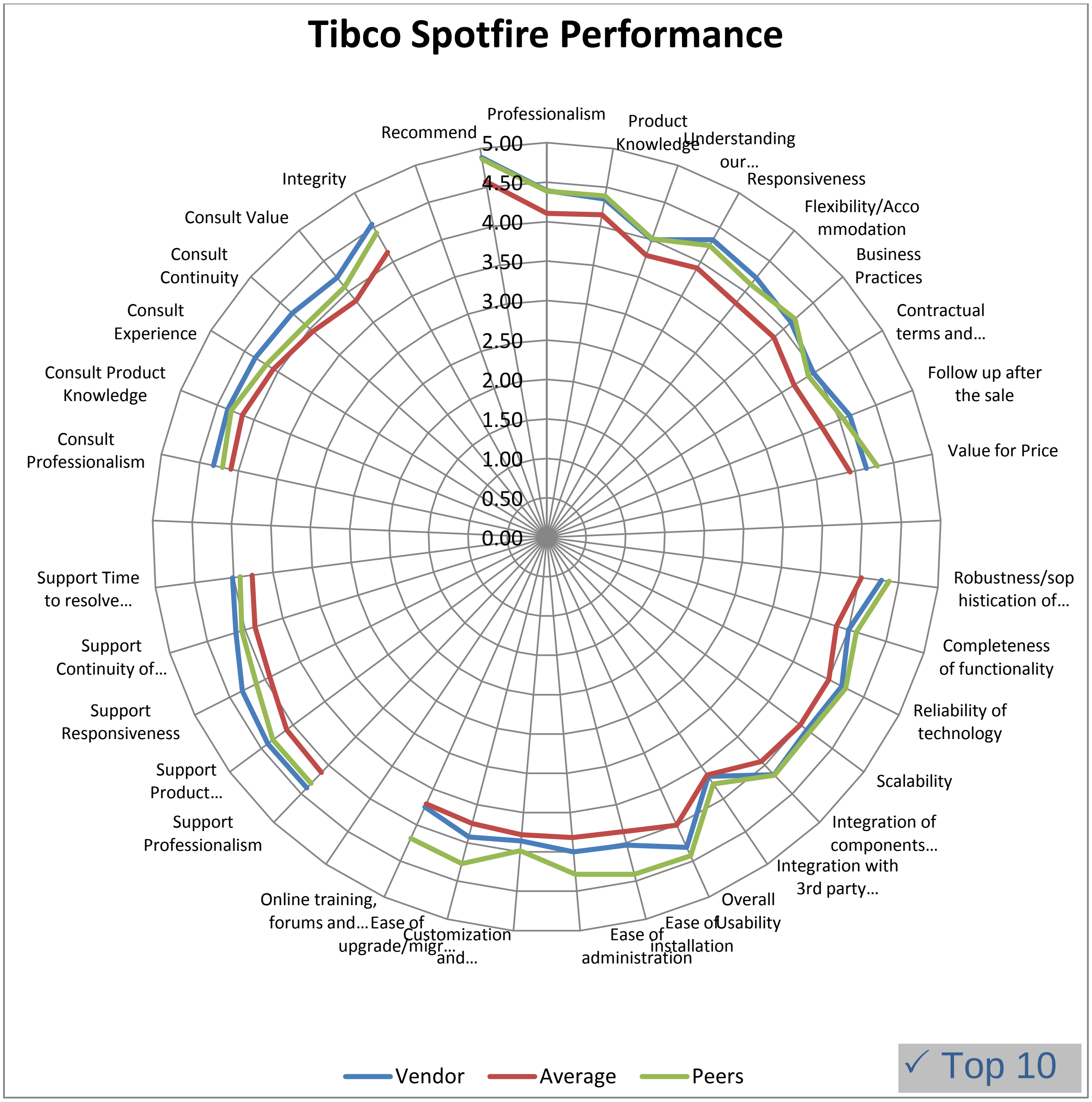

Figure 64 - Tibco/Spotfire Detailed Score

A member of the “High Growth” category, Spotfire was the only vendor to show increased performance for every measurement category as well as its overall score over 2011. Its scores were above the overall sample and generally in line with its peer group average. In the areas of “Quality of support” and “Quality of consulting” it was above both peer and overall sample averages. Spotfire is a “Top 10” vendor across all categories.

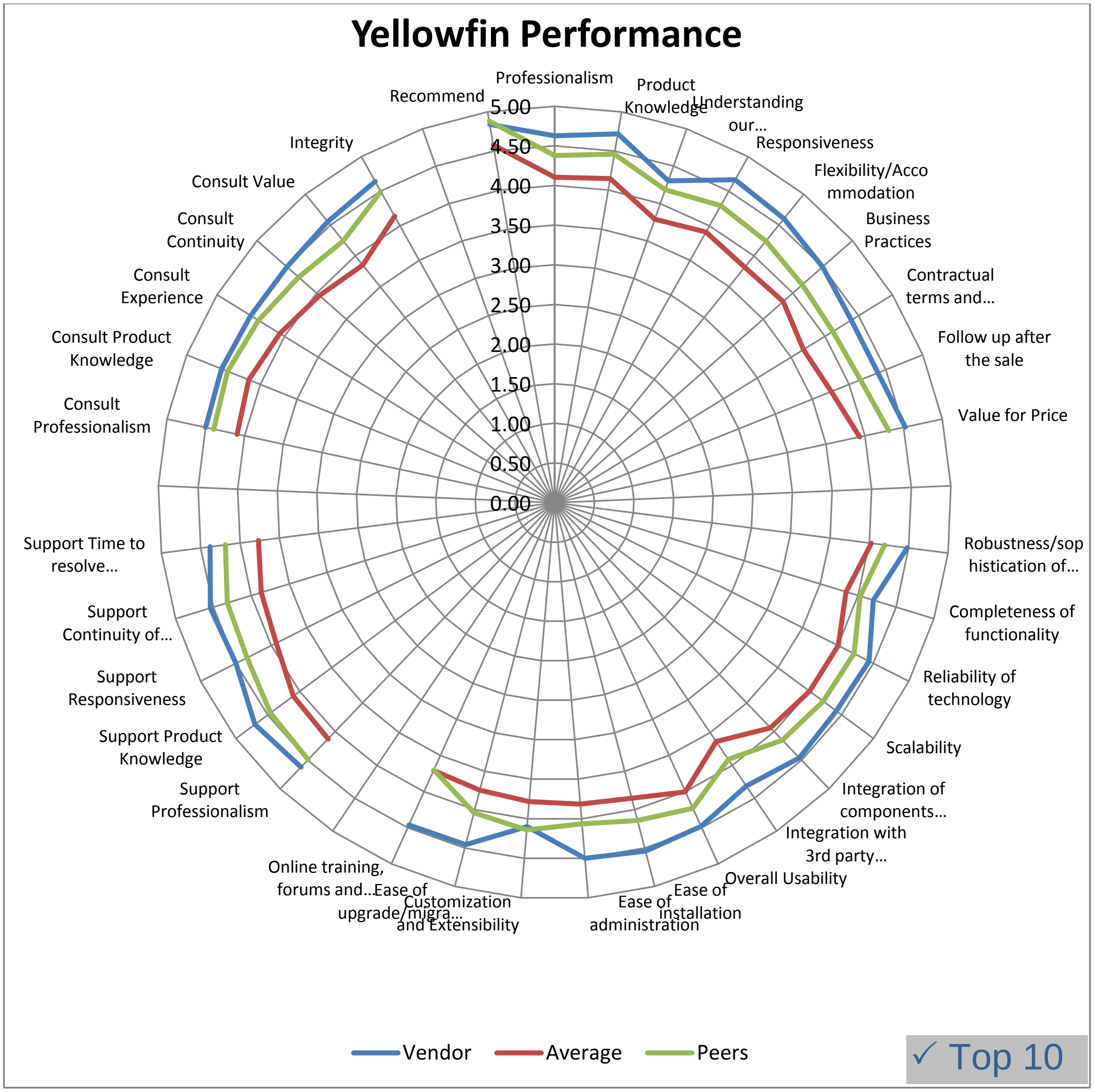

Figure 65 - Yellowfin Detailed Score

A member of the “Emerging” market segment, Yellowfin moved into the #1 spot for 2012 (up from #3 in 2011) with increased performance in nearly every category. It exceeded both peer and overall sample averages by a wide margin. Yellowfin is a “Top 10” vendor across all categories.

Appendix - The Wisdom of Crowds Business Intelligence Market Survey Instrument

Welcome to the Wisdom of Crowds ™ Business Intelligence Market Study ® - 2012 Edition.

Qualified users that complete the survey will get a complimentary copy of the findings for their personal use.

The objective of this study is to collect data on trends, vendors and products in the Business Intelligence marketplace. As a result we will be able examine the realities, plans and perceptions surrounding this important market. We will also rank vendors and products - creating an important tool for those seeking to invest in Business Intelligence Solutions.

The underlying principle is this: the more data we collect, the more accurate the results.

This study is NOT sponsored by vendors (or anyone else) and none of your detailed data will be shared with the outside world. So, we respectfully request that you provide us with complete and accurate information - including your name, company, title and business email address.

Incomplete survey entrees cannot be accepted.

Thank you for participating. I am confident that this will provide an important and fresh perspective into the marketplace for all!

Sincerely,

Howard Dresner
Chief Research Officer
Dresner Advisory Services, LLC

***1. To receive a copy of the analysis, please provide your contact information below:. This information will be kept confidential:**

Name (Required):

Company (Required):

Address 1:

City/Town:

State:

ZIP/Postal Code:

Country:

Company Email Address (Required):

***2. What major geography do you reside in? (Required)**

- North America
- Europe, Middle East, & Africa
- Latin America
- Asia Pacific

3. How did you learn about this study?

- #BIWisdom TweetChat
- Dresner Advisory Blog
- Dresner Advisory Email
- Dresner Advisory Website
- Facebook
- LinkedIn
- Trade Press
- Twitter
- Vendor Email
- Vendor Phone Call
- Vendor Website/Blog

Other (please specify)

4. What is your current title?

5. What function are you primarily a part of?

- Executive Management
- Finance
- Human Resources
- Information Technology (IT)
- Manufacturing
- Operations
- Research and Development (R&D)
- Sales and Marketing
- Supply Chain

Other (please specify)

6. Please identify your primary industry

- Advertising
- Defense
- Manufacturing
- Aerospace
- Education
- Motion Picture & Video
- Agriculture
- Energy
- Pharmaceuticals
- Apparel & Accessories
- Entertainment & Leisure
- Publishing
- Automotive
- Executive Search
- Real Estate
- Biotechnology
- Federal Government
- Retail & Wholesale
- Broadcasting
- Financial Services
- Sports
- Business Services
- Food, Beverage & Tobacco
- State and Local Government
- Chemical
- Health Care
- Technology
- Consulting
- Hospitality
- Telecommunications
- Consumer Products
- Legal
- Transportation

Other (please specify)

7. How many employees does your company employ worldwide?

- 1 - 100
- 101 - 1,000
- 1,001 - 2,000
- 2,001 - 5,000
- 5,001 - 10,000
- More than 10,000

8. Please respond to the following statement:
"My organization considers our Business Intelligence initiatives a success."

- Completely agree
- Agree Somewhat
- Disagree Somewhat
- Disagree

Why have they been successful or unsuccessful?

***9. Please indicate the importance of the following technologies to your Business Intelligence strategy and plans. (Required)**

	Critical	Very Important	Important	Somewhat Important	Not Important
Ability to write to transactional applications	○	○	○	○	○
Advanced visualization	○	○	○	○	○
Big data (e.g., Hadoop)	○	○	○	○	○
Collaborative Support for Group-based Analysis	○	○	○	○	○
Complex Event Processing (CEP)	○	○	○	○	○
Dashboards	○	○	○	○	○
Data Mining and Advanced Algorithms	○	○	○	○	○
Data Warehousing	○	○	○	○	○
End user "self service"	○	○	○	○	○
In-memory analysis	○	○	○	○	○
Integration with Operational Processes	○	○	○	○	○
Mobile Device Support	○	○	○	○	○
Open Source Software	○	○	○	○	○
Social media Analysis (SocialBI)	○	○	○	○	○
Software-as-a-Service and "Cloud" Computing	○	○	○	○	○
Text Analytics	○	○	○	○	○

Other (please specify)

10. How many Business Intelligence products are currently being used in your organization today?

- ○ Don't know
- ○ 1
- ○ 2
- ○ 3
- ○ 4
- ○ 5
- ○ 6
- ○ 7
- ○ 8
- ○ 9
- ○ 10 or more

*11.

Please specify the primary BI vendor used in your organization.

You will have the option of returning to this section up to 4 more times to complete surveys for additional vendors.

- Actuate
- Alteryx
- Arcplan
- Birst
- Datawatch
- Dimensional Insight
- Domo (Corda)
- Entrinsik
- Good Data
- IBM/Cognos/SPSS
- Infor
- Information Builders (IBI)
- IntuitiveBI
- Jackbe
- Jaspersoft
- Jedox/Palo
- Klipfolio
- LogiXML
- Microsoft
- Microstrategy
- Oracle
- Panorama
- Pentaho
- PivotLink
- Qliktech
- Quiterian
- Roambi (MeLLmo)
- SAP/Business Objects
- SAS Institute
- SiSense
- SpagoBI
- Tableau
- Tibco/Spotfire
- Yellowfin
- Other (please specify)

12. Please specify product name and version (if known)

13. How long has this product been in use?

- Less than 1 year
- 1 - 2 years
- 3 - 5 years
- 6 - 10 years
- More than 10 years

14. How many users currently use this product?

- 1-5
- 6-10
- 11-20
- 21-50
- 51-100
- 101-200
- 201-500
- 501 - 1,000
- More than 1,000

***15. How would you characterize the sales/acquisition experience with this vendor:**

	Excellent	Very good	Adequate	Poor	Very Poor	N/A
Professionalism	○	○	○	○	○	○
Product Knowledge	○	○	○	○	○	○
Understanding our business/needs	○	○	○	○	○	○
Responsiveness	○	○	○	○	○	○
Flexibility/Accommodation	○	○	○	○	○	○
Business Practices	○	○	○	○	○	○
Contractual terms and conditions	○	○	○	○	○	○
Follow up after the sale	○	○	○	○	○	○

Additional Comments

***16. How would you characterize the value for the price paid?**

	Great value (Well exceeded expectations)	Good Value (Somewhat exceeded expectations)	Average Value (Met expectations)	Poor Value (Fell short of expectations)	Very Poor Value (Fell far short of expectations)
Value	○	○	○	○	○

***17. How would you characterize the quality and usefulness of the product**

	Excellent	Very good	Adequate	Poor	Very Poor	N/A
Robustness/sophistication of technology	○	○	○	○	○	○
Completeness of functionality	○	○	○	○	○	○
Reliability of technology	○	○	○	○	○	○
Scalability	○	○	○	○	○	○
Integration of components within product	○	○	○	○	○	○
Integration with 3rd party technologies	○	○	○	○	○	○
Overall Usability	○	○	○	○	○	○
Ease of installation	○	○	○	○	○	○
Ease of administration	○	○	○	○	○	○
Customization and Extensibility	○	○	○	○	○	○
Ease of upgrade/migration to new versions	○	○	○	○	○	○
Online training, forums and documentation	○	○	○	○	○	○

Other comments

***18. How would you characterize the vendor's technical support**

	Excellent	Very good	Adequate	Poor	Very Poor	N/A
Professionalism	○	○	○	○	○	○
Product Knowledge	○	○	○	○	○	○
Responsiveness	○	○	○	○	○	○
Continuity of personnel	○	○	○	○	○	○
Time to resolve problems	○	○	○	○	○	○

Other (please specify)

***19. How would you characterize the vendor's consulting services**

	Excellent	Very good	Adequate	Poor	Very Poor	N/A
Professionalism	○	○	○	○	○	○
Product Knowledge	○	○	○	○	○	○
Experience	○	○	○	○	○	○
Continuity	○	○	○	○	○	○
Value	○	○	○	○	○	○

Other comments:

***20. How would you rate the "integrity" (i.e., truthfulness, honesty) of this BI vendor?**

	Excellent	Very Good	Average	Poor	Very Poor	N/A
Integrity	○	○	○	○	○	○

***21. Final ranking of vendor, product and services**

	I would recommend this vendor/product	I would NOT recommend this vendor/product
Would you recommend this vendor/product?	○	○

Any additional comments:

***22.**

Do you wish to provide ratings for a second vendor?

○ YES

○ NO

