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2018

## 655-01 Business Intelligence

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*Xavier University*

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### Recommended Citation

Garlich, Joliene, "655-01 Business Intelligence" (2018). *Management Information Systems Syllabi*. 397.  
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# INFO 655 – 01: Business Intelligence Syllabus

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## Instructor

Jolienne Garlich, MBA

## Phone

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## Email (best contact method)

garlichj@xavier.edu

## Office Location

Smith Hall Rm 120B

## Office Hours

M-R 11-6:30

F 10-5:30

Appointment preferred

Can do Video Conf.

## Course Schedule

This will be a fully online class without set meetings. The content will be due/delivered by asynchronous method via canvas. This is a full 3 credit hour course graduate course conducted in an 8-week accelerated format. Please pay special attention to the due dates for each week. I tried to remain consistent where possible with Tuesday, Friday and Saturday due dates. Some team based items will come up in between modules to get you working with your teams as you go along rather than cramming at the end of the course. Working ahead with regard to reading materials when possible will help you tremendously when keeping up with due dates.

## Course Overview

This course is an introduction to Business Intelligence (BI). BI refers to the use of computers to analyze complex information about an organization and its competitors for use in business planning and decision making. The objective is to create more timely, higher quality input to the decision process. This course takes a managerial approach to BI and emphasizes its applications and implementations. We will focus on the applied knowledge of the theory and business outcomes in terms of BI for your business management team and overall strategic goals.

## Student Learning Outcomes

By the end of this course, students will be able to:

1. Define BI and components associated with it.
2. Explain emerging trends in the BI industry.
3. Describe frequently used BI applications
4. Apply knowledge of the issues that affect the success or failure of BI initiatives to a business situation including ethical considerations.
5. Assess a business case for BI to create a suggested option for implementation
6. Effectively present the ROI benefits of BI to managers (especially non-IT)

## Required Text

Successful Business Intelligence Second Edition, *Cindi Howson*

ISBN: 978-0-07-180918-4

Hyper, *Gregory P. Steffine*

ISBN: 978-0-692-42308-0

## Course Materials

You will need to access a course packet from Harvard Business Review. This includes several cases, publication chapter and article as well as a simulation. The link to the specialized packet for the course is below. You will need to create a student account with HBR and login before you can access the packet. You will not need this packet until module 3.

- <http://cb.hbsp.harvard.edu/cbmp/access/72791957>

## Resources

Further resources can be found all over the web and via tech journals. Two specific ones for reference during discussion/short paper can be found below.

- Data Warehousing Institute which sponsors The Business Intelligence Journal as well as regional training and quarterly conference ([www.dw-institute.com](http://www.dw-institute.com))
  - DM Review is a practitioner publication for the BI area. You can register for the site if you are interested in more details
- Xavier Library also gives access to many journals, databases and articles electronically on their site via the hub.

## Grading

Scale: A (100-95), A- (94.9-90), B+ (89.9-85), B (84.9-80), B- (79.9-75), C+ (74.9-70), C (69.9-65), F (64.9 and below)

Distribution of points (rubrics are in canvas):

- Quizzes – 5 points each
- Discussions – 8 points each
- BI Trends Paper – 15 points
- Ethics & Strategy Paper – 15 points
- Sysco Case Analysis – 15 points
- Simulation & Write-up – 15 points
- Project Interview – 10 points
- Team Outline – 10 points
- Team Paper – 25 points
- Team Presentation – 25 points
- Exam – 30 points
- Reflections – 7 pts in all
- Total: 184 Points

## Homework Policy

All assignments are expected to be received on time (especially discussion posts as other rely on you to do their responses). Review rubric of the assignment for loss of points due to late submission. Several of the assignments are due for specific times so you are prepared to fully participate in the next portion of the class. If you have questions about any assignments, please reach out to me. I am happy to answer questions or clarify any assignment requirements. Everything is turned in via Canvas. If you have any loading issues, contact me ASAP to keep from missing any looming deadlines. Please make sure all work is your own on individual assignments and for team work you are participating as part of the team. Put references in all areas where the work is not your original idea. Please refer to the University policies in the student handbook for consequences of cheating/plagiarism.

## **Guidelines for assignments**

All documents should be submitted in Times New Roman font, size 11 or 12, single spaced (excluding titles or cover pages) and all outside references should be noted in some way to give credit to the ideas' origin.

*Discussion Posts* – These posts are very similar to in-person discussions except you are writing down your thoughts before seeing others' thoughts. From there, responding to others' posts serves as the back-and-forth portion of a discussion. Your comments should answer the questions being asked of you for the assignment while including reference to materials from class and/or additional outside sources. Responses to others' posts should also state where you agree or disagree and why again citing resources from class materials or outside sources (not just your opinion, add substance to your argument/agreement). Quality is more important than quantity here. Make sure you are sharing information that is insightful and helpful to your classmates. Review the rubric for each post to best understand how points are given.

*BI Trends Paper* – This assignment allows you to choose two trends you found most interesting from the video or readings and expand on them. Do a little research about the trend and how it could or is best applied in your industry or field (current or UG major field). Have fun with it and think about future uses that would be nice to have for your field. Include outside sources in your paper and explain why you think this is the next great thing.

*BI Ethics & Strategy Paper* – This assignment allows me to see you can take details from ethical articles and strategy topics to apply to a company situation or issue. Choose a technology related situation searching media stories (i.e. Targets situation with the pregnant teen and targeted coupons). Summarize the situation and discuss the ethical situation the company has found themselves in. Then using article content for your guide, write about how you could create an ethical plan/road map to prevent or decrease the impact of the ethical situation presented. Answer how and what privacy and protections will be included in your strategy steps to define company protocol or industry standards to both legally and ethically cover you and your most important asset – the customer – using data and creating BI strategy for company use.

*Case/Simulation Write-ups* – The goal of cases in this class is to expose you to issues companies have had when determining BI strategies and issues implementing those strategies. The simulation is very similar to a case to but very specific to the use of dashboards and their design. The cases will be done on your own. Include a cover with your name, date, title of the case and the class information listed. The write-ups should be done like a report where quality is valued over quantity. Start by providing a review of the key facts. This not a summary but rather a listing of facts much like you would do for an invitation – the who (company and/or department and roles/persons affected), the what (industry), when (the time line of the decision or implementation) and the question(s) seeking a solution. The next section will be your observations/assumptions (a SWOT, Porter's Five Forces, research on the industry or issue, any assumption you are using), finally end with your recommendation (what should the company do next with their strategy, what is good and what should be fixed and how) and provide your references to show why (use class readings, outside sources, experiences). For the simulation, you will work through the scenario twice. The first time will serve for observation and trying to understand what metrics affect the outcomes and how. The second run through will be your final performance now that you know what the metric outcomes are you can strive for a higher return on revenue. The write-up will be similar to the paper only case, but your SWOT will focus on the dashboards for making decisions for BLUE and recommendation will focus on your experience with the dashboards and your experiences of making decisions with them that gave you the two outcomes. Relate the dashboard observations and strategies you used to class readings, discussions, etc.. from the class content.

*Interview* – First, schedule a time to do an interview with a manager who is part of the BI Value Chain at your employer or other business. This can be via telephone, video conference, in person or if needed via email “questionnaire.” You must come up with questions that you want to ask the person before the meeting. These need to be questions that will be helpful to you in doing the team project. You may work with your team to discuss the best questions to ask or come up with them on your own. I am happy to review your questions or discuss topics of questions. The submission for this interview is the transcription of your interview showing the questions followed by the manager's answers. You should include a title, and an overview at the top of page including your name, who was interviewed, their role and company, method of interview and date completed. The goal of this assignment is to learn about the strategy of your own company

in more depth and perhaps where improvements or issues may need some attention. You may have some idea what the strategy is in your company but maybe not the future plans or from a viewpoint of the overall company (other areas than your own). The interview should be long enough for you to get information on the strategy used by the company and/or where this person would like to see the company go from there. You are encouraged to ask follow-up questions where needed to get the detail level beyond what you could Google about the company.

*Team Project* – Goal: Are you able to take what you have learned in the class to apply a BI strategy to a current company? As a team of managers across a company with unique backgrounds and area expertise, you will work together to give a BI plan for your company to move forward. As a team, you will choose a company from one of your interviews on which to focus. Everyone team's project will be different from a strategy and focus standpoint depending on the company chosen and level or lack of BI strategy already present.

*Team Outline* – This is an outline of what will become your team report. There are four parts. 1) What company are you choosing and what type of strategy does this company currently have (or not have)? 2) What strategy options would the team consider pursuing (total change, updates/additions)? What information and research will you need to do (industry & competitors)? 3) What questions may be asked of you by a management team wanting to know the benefits of your strategy – what's the connection to the company overall strategy, what's the ROI benefit, who will need to be onboarded/trained to make this happen (think change management/org strategy from MGMT 550). This area will prepare you for your final presentation. What questions will you need to answer? 4) Who from your team will do what part of the research/project details? This will come in handy when breaking up the full report and the presentation. Discussing each person's background and what they can bring to the team is always beneficial to make the final project cohesive. A sample is provided on canvas under the assignment.

*Team Report* – This is the formal report for your team's work and should include all the pertinent information shared in your presentation. All details from your outline should be included in the various sections of the paper. All sections should include resources as appropriate to the content being discussed (more details on this in canvas).

*Team Presentation* – Create a slide deck to discuss your project with the rest of class (as if they are your management team from which you need buy in to make the strategy happen!). You will have approximately 10 minutes to present. The presentation should be recorded using slides and voice (video may be used as well if you choose) from the team. You may use Zoom within the canvas page do so. Points will be based on presentation of content areas from your report and effective communication of the benefits of your BI implementation for the company as well as clarity of slides/visual information. Please use online resources to find best etiquette for slides to be used. Slides that are too crowded, hard to see/read will lose points. Also, refrain from reading content directly off the slide. All team members should present part of the slide deck/report content. Reach out to me if you have questions on how to do the recording, etc... The recorded presentations will be posted to at least one other team for question posts and review. As a team you are expected to respond to questions as they pertain to your strategy and company and this will be included in your points for this assignment.

*Team Ratings* – You will fill out a rating for each team member on their performance within the team. Things like contribution, being inclusive and collaboration will be rated. This may influence your overall grade if there is consistently low feedback/glaring issues from your other teammates. If you have any team issues throughout the course, I'm happy to discuss with you.

*Reflections* – These are short answers to a few questions at the end of each module. The intention of the reflections is so you may take a moment to look back at the module. This lets me know if learning outcomes are being met as we go through the class. Your feedback in the reflections will let me know if changes need to be made as the class goes rather than finding out at the end there was a real problem or issue with the flow of the class or content. Please be honest and respectful. Points are given based on completion of the questions not content. You are getting easy points for your time to give honest feedback.

\*\*Schedule is subject to change. Any updates will be done via canvas and will be shared in an announcement\*\*

### Course Schedule

Module) Dates	Topic
S) Jan 8-11, 2018	Getting started
1) Jan 12-16, 2018	What is BI?
2) Jan 17-26, 2018	BI Applications & Trends
3) Jan 27-30, 2018	Strategy & Ethical Considerations
4) Jan 31-Feb 10, 2018	BI Cases
5) Feb 11-17, 2018	Try it out: A simulation for BI
6) Feb 17-27, 2018	BI in Action: Team work, Make your case
7) Feb 25-Mar 3, 2018	Finishing up

Assignment	Item	Due date	Notes
Syllabus Review	Syllabus Quiz	Jan 8	Know class expectations?
Introduce yourself	Discussion Post	Jan 8	Let's us get to know you, me to create teams
Pre-Knowledge Quiz	Quiz	Jan 9	Do this before you prepare for class!
Introduction Response	Discussion Response Posts	Jan 11	Ask questions and respond to others' intro posts
Intro BI Readings	Discussion Post, Response Posts	Jan 14, Jan 16	
Reflection	Module 1 Reflection	Jan 16	
BI Applications & Trends Readings/Video	BI Trends Paper	Jan 20	
Speaker Audio Reactions	Discussion Post, Response Posts	Jan 23, Jan 26	
Reflection	Module 2 Reflection	Jan 26	
Strategy & Ethics Readings	BI Ethics & Strategy Paper	Jan 30	
Reflection	Module 3 Reflection	Jan 30	
Interview for BI Value Chain	Interview Transcription	Feb 3	
Case Discussion	Discussion Post, Response Posts	Feb 6, Feb 9	
Case Analysis	Sysco Case Analysis Report	Feb 10	
Reflection	Module 4 Reflection	Feb 10	
Simulation	Results of 1 <sup>st</sup> run, 2 <sup>nd</sup> run	Feb 13	

Simulation	Write-up	Feb 17
Reflection	Module 5 Reflection	Feb 17
Team Project	Draft Team Report (optional)	Feb 20
Team Project	Presentation Recording, Review Responses	Feb 24, 27
Team Project	Final Team Report & Team Ratings	Feb 27
Reflection	Module 6 Reflection	Feb 27
Exam	Final Exam	Mar 3
Course Evaluation	XU course evaluation	Mar 3