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2018

### 655-W28 Business Intelligence

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*Xavier University*

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# INFO 655 – W28: Business Intelligence Syllabus

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## Instructor

Jolienne Garlich, MBA

## Phone

513 745-3476

## 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 hybrid class with mostly in class set meetings. The content will be due (and the case of online asynchronous dates delivered) via canvas. This is a full 3 credit hour course graduate course conducted in a 10-week accelerated format. Please pay special attention to the due dates for each week. 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 suggested option(s) for implementation
6. Effectively present the ROI benefits of a BI strategy 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.

- Packet link will be posted in the Announcement on Canvas.

## 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

Discussion Questions – 8 points each

BI Trends Paper – 15 points

Ethics & Strategy Paper – 15 points

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 questions as everyone will rely on you to do to do the in-class discussion). Review rubric (in canvas) 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 Calibri 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 Questions* – These questions are to prep you for in-class discussions where you are writing down your thoughts before hearing others' thoughts. Your responses should answer the questions being asked of you for the assignment while including reference to materials from class and/or additional outside sources. Quality is more important than quantity here. Make sure you are giving answers that are insightful and will be helpful to your classmates during the discussion. Review the rubric for each discussion question assignment to best understand how points are given.

*BI Trends Paper* – This assignment allows you to choose one to 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 important thing. This aren't things your company or industry is currently doing but are starting to look toward or could really benefit given current operational strategy.

*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. Just because we can do it, should we?

*Case Analysis*– 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 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-up should be done like a report where quality is valued over quantity. Start by providing a brief 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).

*Simulation & Write-up* - You will work through the dashboard case scenario at least twice, more if you wish. The first time will serve for observation and trying to understand what metrics affect the outcomes and how. The second or additional run throughs will be your opportunity to strive for a higher return on the metrics in which the case is focusing. At least one of your attempts should increase one or more metrics from your first simulations final numbers. The simulation is very similar to a case to but very specific to the use of dashboards and their design. The overall purpose of the simulation is for you to observe the way the dashboard is designed and how this affects your ability to quickly interpret information to make decisions for the case's focus – increasing market share for BLUE. The write-up is loosely related to the case analysis paper, 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 final outcomes (this may include changes you would make to allow the dashboard to be more useful to your decision making process). You do not need to include a Porter's Analysis or spend of a lot time summarizing the case component of the simulation. Relate the dashboard observations and strategies you used to class readings, discussions, etc.. from the class content. Explain how your process to figuring out the best way to increase you outcomes and what was best or worst about the dashboard in doing so.

*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 (how they have gotten where they are now) 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 (sections 1-3). All sections should include resources as appropriate to the content being discussed. The report is one that would be provided to the audience after your presentation to fill in more details about the why and how than could be fully answered in the presentation. I’m looking for quality over quantity as well as clarity of your strategy choices. I will post a sample Report from a previous team who gave me permission to share.

*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 presented using Powerpoint slides. 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. The presentations will be posted to canvas prior to class so that all files may be pulled up on the podium ahead of time. 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. The grading sheet I use for point assessment is included in the canvas posting of the 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, respectful and constructive in any improvement comments. 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) April 4, 2018	Getting started
1) April 11, 2018	What is BI? BI Applications
2) April 18, 2018	BI Trends
3) April 25, 2018	Strategy & Ethical Considerations
4) May 2, 2018	BI Cases
5) May 9 & 16, 2018	Try it out: A simulation for BI
6) May 23 & 30, 2018	BI in Action: Team work, Make your case
7) June 6, 2018	Finishing up

Assignment	Item	Due Date	Notes
Syllabus & Intro Page Review	Syllabus & Introduction Quiz	Apr 4	Know class expectations?
Introduce yourself	Discussion Post	Apr 4	Let's us get to know you, me to create teams
Pre-Knowledge Quiz	Quiz	Apr 4	Do this before you prepare for class!
Intro BI & Applications Readings	Intro Question Document	Apr 11	Answer questions to prep for class discussion
Reflection	Module 1 Reflection	Apr 14	Submit after class meeting
BI Trends Readings/Video	BI Trends Paper	Apr 18	
	Time to meet with Team to discuss Interview Questions	Apr 18	
Reflection	Module 2 Reflection	Apr 21	

Strategy & Ethics Readings	BI Ethics & Strategy Paper	Apr 25
Guest Speakers	In class Discussion	Apr 25
Reflection	Module 3 Reflection	Apr 28
Case Analysis	Case Report, Class Discussion	May 2
Reflection	Module 4 Reflection	May 5
Interview of BI Value Chain	Interview Transcription	May 9 Due at class start.
Simulation	Run Simulations during class	May 9
	*Team time to meet choose company for project and complete outline.	May 9 Submit outline in Canvas by 11:59PM
Simulation	Write-up	May 16
	Class time to discuss simulation, explore dashboards in Tableau. Team time to work on Project report.	May 16
Reflection	Module 5 Reflection	May 19
Team Project	Team class day. Continue work on Report, presentation, etc..	May 23
	Team Draft Report (optional Submission for feedback review)	May 23
Team Project	Team Presentations in class	May 30 Submit presentation before class starts.
Team Project	Final Team Report & Team Ratings	May 30 Submit by End of Day
Reflection	Module 6 Reflection	Jun 2
Exam	Final Exam	Jun 6
Course Evaluation	XU course evaluation	Jun 9