

MINUTES OF THE **IBCS ANNUAL CONFERENCE 2016** INTERNATIONAL MEETING OF THE IBCS COMMUNITY

Kindly hosted by ICV Poland in Warsaw
2016-06-03



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Zürich, June 24, 2016

Objective and target group

The IBCS Annual Conference is the place where IBCS professionals exchange experiences. These are consultants, software developers, thought leaders as well as employees from finance and IT departments on the way of implementing the IBCS Standards.

Participants

Here you find a list of participants: www.ibcs-a.org/association/annual-conference.

Johannes von Mulert led us through the agenda in a highly professional manner.

Agenda

1. Karol Sikora (ICV Warsaw) und Piotr Bilinski (Controlling Partner): Welcome and opening	3
2. Rolf Hichert (IBCS Association): Where do we stand today?	3
3. Dietmar Meyersiek (EXES GmbH): From charts to insight and action	5
4. Elevator pitches of IBCS Sponsors 2016	7
5. Arne-Kristian Schulze (blueforte): Title standards.....	8
6. Jürgen Faisst (HICHERT+FAISST): Scenarios and semantic exes	11
7. Dietmar Pascher (Controller Akademie): The city of Graz report	15
8. Rolf Hichert (HICHERT+FAISST GmbH): Stock and flow measures.....	16
9. Raphael Branger (IT-Logix): Dashboard topics.....	18
10. Jürgen Faisst (IBCS Association): IBCS outlook beyond 2016	22
11. End of the conference	23
12. IBCS sponsors 2016.....	23
13. Conference impressions on Twitter.....	24

1. Karol Sikora (ICV Warsaw) und Piotr Bilinski (Controlling Partner): Welcome and opening

The conference was opened by Karol Sikora from ICV Warsaw. He presented IVC Poland.

In a brief introduction Karol told about recent events related to the International Business Communication Standards such as controlling workshops in a Regional IVC Work Group with the main focus on controller reports and visualization.



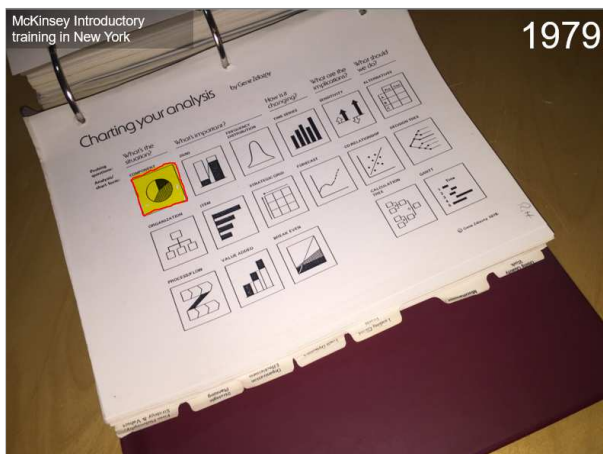
Piotr Bilinski from Controlling Partner carried on. He told about a survey dedicated to the IBCS chart types and diagrams. Polish controllers participated in this survey. According to the results of the survey most users recognized the need of IBCS chart types for certain purposes such as using charts with horizontal axes for the presentation of time series (69%) and charts with vertical axes for structures (58%).

2. Rolf Hichert (IBCS Association): Where do we stand today?

Rolf Hichert started his presentation with a brief look back. He took us through a journey from his time with McKinsey until founding the IBCS Association. At the end he gave an insight into the current status of the IBCS association and the most interesting highlights of the last year.

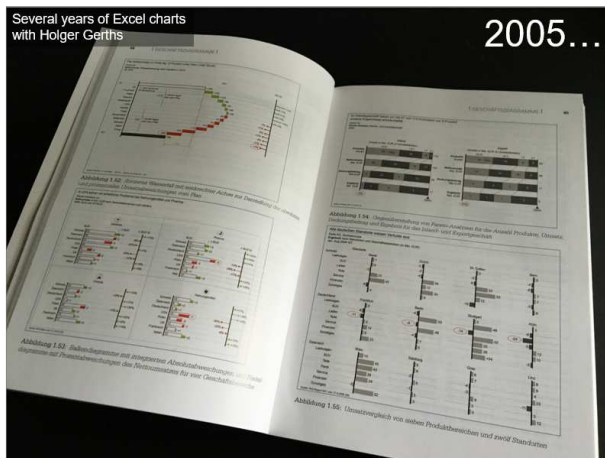
+ How it began...

Rolf told us about his work for McKinsey where he met well-known people like Barbara Minto and Gene Zelazny. In 2004 he met Edward Tufte on one of his seminars.

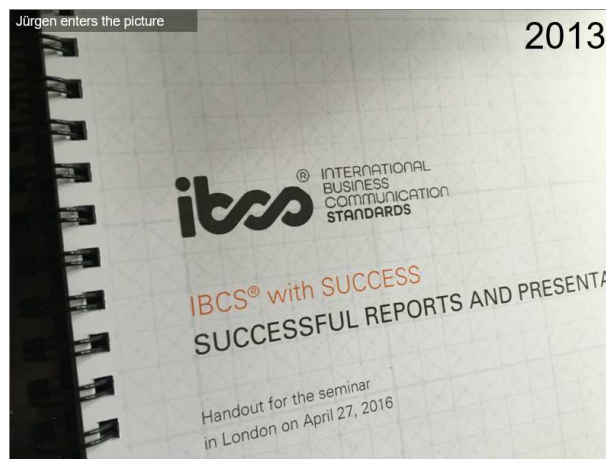
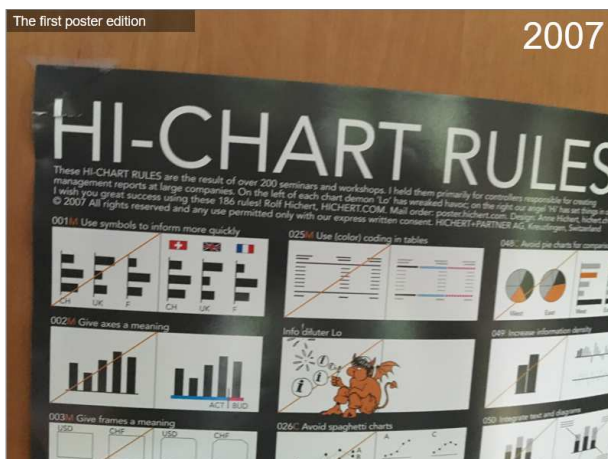


Rolf mentioned the training he received from Gene Zelazny (here a photo of the training material in 1979).

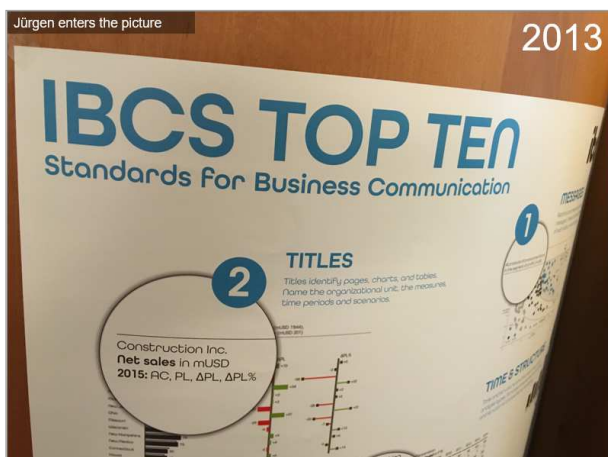
Rolf's showed us some pages with charts from his 2005 book "Geschäftsdiagramme mit Excel nach den SUCCESS-Regeln gestalten" together with Holger Gerths.



We learned how Rolf started very early with the idea of standardizing visualization of business content. Before using the acronym "SUCCESS" he used the German term "MEHR GÜTE".



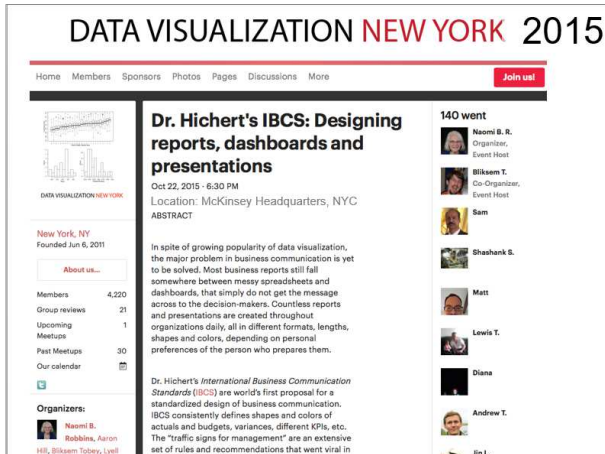
The first poster "HI-CHART RULES" was printed in 2007 not using the acronym SUCCESS yet. In 2015 the "TOP TEN" rules of IBCS were presented at the Amsterdam conference of 2015.



+ Some highlights

After that Rolf gave an overview of highlights of the last year.

- Andrej Lapajne giving a presentation on IBCS at a meeting of the community “Data Visualization New York” at the McKinsey headquarters in NYC.
- Rolf and Jürgen giving a one-day seminar on “IBCS WITH SUCCESS” in Istanbul (Turkey) with more than 80 participants.



- The first real international IBCS certification course in Konstanz with participants from Australia, Spain, Netherlands, United Kingdom, Germany, Austria, and Switzerland)
- Cooperation and projects with Philips, Coca-Cola, and SAP

+ Status quo

- The IBCS association has currently more than 350 active and passive members
- New poster “IBCS WITH SUCCESS” with more than 70 changes was printed just one week before the conference.
- Updated chart templates for the software certification process

3. Dietmar Meyersiek (EXES GmbH): From charts to insight and action

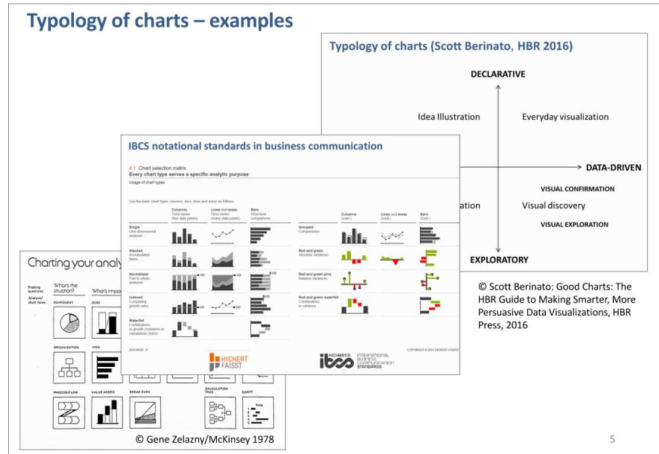
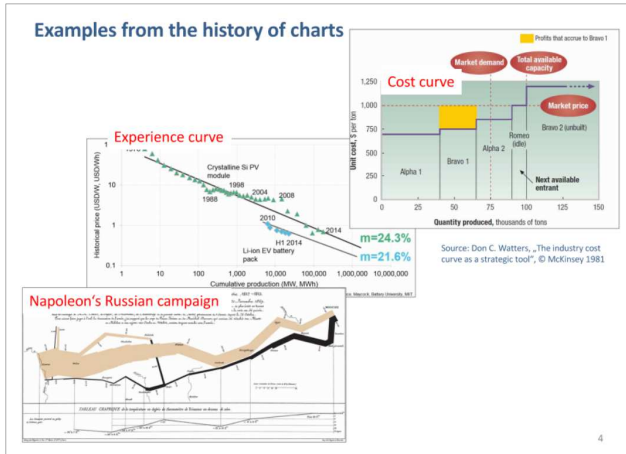
Dietmar was a partner at McKinsey for whom Rolf worked in the late 70s. Here his CV:

Dietmar Meyersiek studied economics and business administration in Münster, Berlin and Indiana University. He worked for McKinsey & Company from 1970 to 1992 in the Düsseldorf, Chicago, and New York offices. Since 1993 he is an independent management consultant focusing on using advanced analytics for problem-solving in business. His clients are internationally operating companies in manufacturing, process industries, consumer goods and retailing.

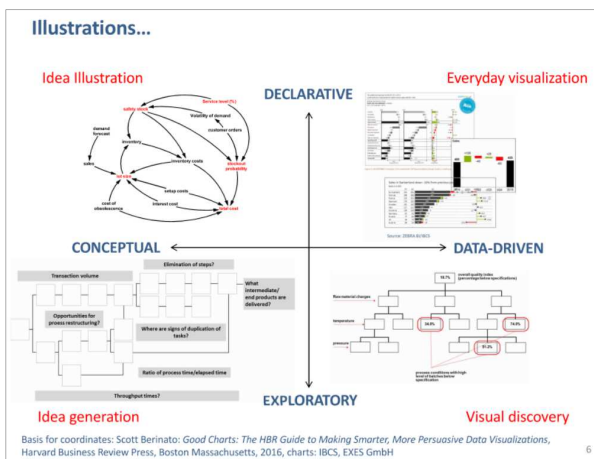
The main idea of his presentation was creating business value with a problem-solving perspective.

+ Significant advances in the quality of business communication

Dietmar started with a brief history and typology of charts.



On the basis of different methodologies he then showed the importance of visualization for the quality of business communication.



+ Untapped information sources and analytical instruments

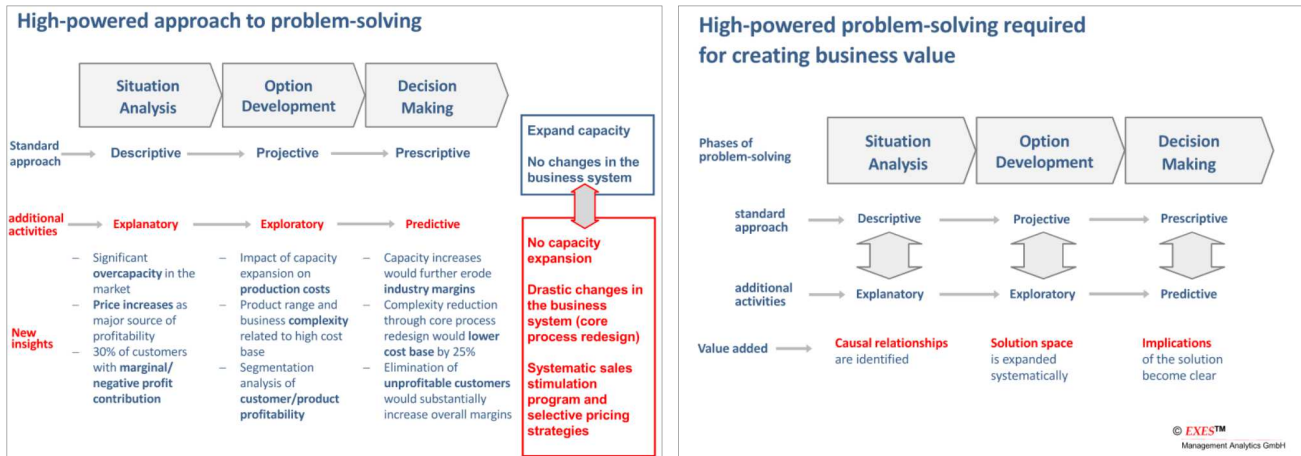
He continued with different information sources and analytics instruments. He showed important developments in advanced analytics platforms in relation with current and upcoming trends such as Big Data.

After that he talked about business concepts and importance of IBCS for business communication.

+ Problem-solving perspective required for creating business value

He showed why visualization is important from a problem-solving perspective. "Problem-solving has become a key instrument for business performance". Understanding a problem, finding solution and getting things done are steps required for creation of business value.

On the base of different approaches he demonstrated the process of problem solving. He demonstrated in detail the main steps of problem solving process: situation analysis -> option development -> decision making.



Finally he summarized: “Most of problems are solvable with correct technic and methodology”

It was an extensive and very informative session. Thank you, Dietmar.

4. Elevator pitches of IBCS Sponsors 2016

The Elevator pitches of IBCS Sponsors were held by Marita Köpper from Sybit & Peers AG in Tägerwilen, CH and Andrej Lapajne, Zebra BI in Ljubljana, SLO.

+ Sybit & Peers AG

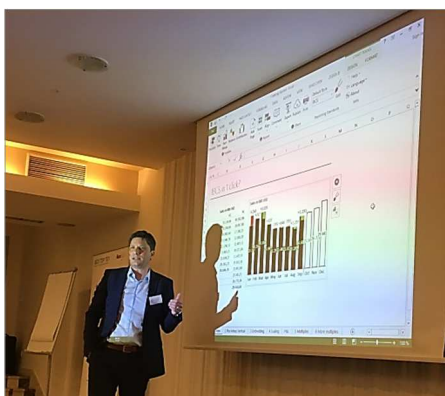
Marita Köpper presented Sybit & Peers, business areas of Sybit & Peers and its portfolio such as DWH and reporting.

Then she showed one of S&P’s actual projects. In this project she presented a before-and-after report for 500 users in a Swiss insurance company.

Finally she briefly named some customers of Sybit & Peers.



+ Zebra BI



Andrej Lapajne presented new Zebra BI features for Excel. Zebra BI tries to make usage of new templates as easy as possible for the end users. He demonstrated a fast and smart way to create an IBCS compliant Excel report just through a couple of clicks. He showed scaled charts and changeable layout as well as an exploratory part of the add-in. The basis of a simple report could be developed to a complex layout without any effort.

Finally with one more click he exported just created Excel-report in a Power Point presentation.

The vision of Zebra BI is to be able to offer an extension for SharePoint in the future. Similar to the export into a PowerPoint presentation it will be possible to distribute reports to thousands of users per one click.

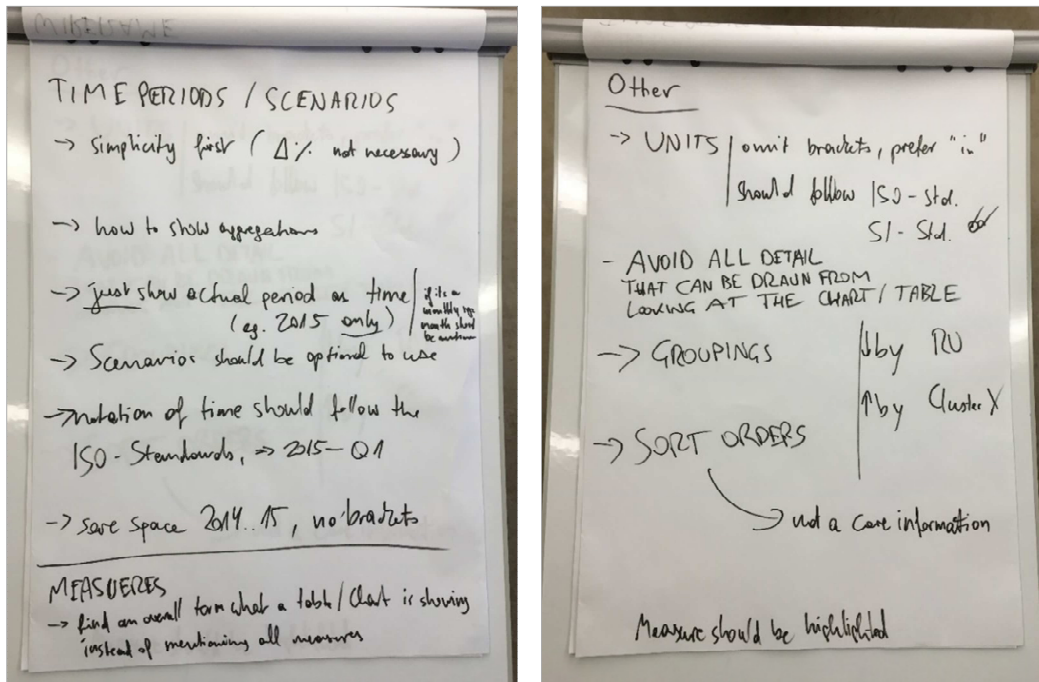
5. Arne-Kristian Schulze (blueforte): Title standards

(Parallel breakout session 1)

In this session Arne-Kristian Schulze thematized some problematic topics from his current project. There were:

- +How do we notate time periods, scenarios, and variances etc.?
- +How does this effect the "third row" of our present title standard?
- +Is there a need to standardize other title elements such as rankings, averages, etc.?

Thanks to active participation and a vigorous discussion it was possible to find an IBCS compliant solution.







(Parallel breakout session 1 – by Arne-Kristian Schulze)

Here follows a summary of this session (Important: There has no decision been made for future changes in the Standards yet – this will be part of a poll to come):

+ Wireframes and titles

- Titles are more important than messages
- Generally the wireframe/layout of static or dynamic reports (where to put messages and title or interactive navigation elements) should be free to choose based on the customer's context.
- IBCS gives best-practice recommendations on how to place message/title/subtitle. If a split layout is preferred, title should go to the top left, messages to the top right.
- Make use of title hierarchies (title, subtitle) to avoid redundancies (whatever concerns all objects on one page to be mentioned on the main title, other elements of the title to be mentioned in the relating subtitles)

	ONE OBJECT	MULTIPLE OBJECTS
STATIC		
DYNAMIC		

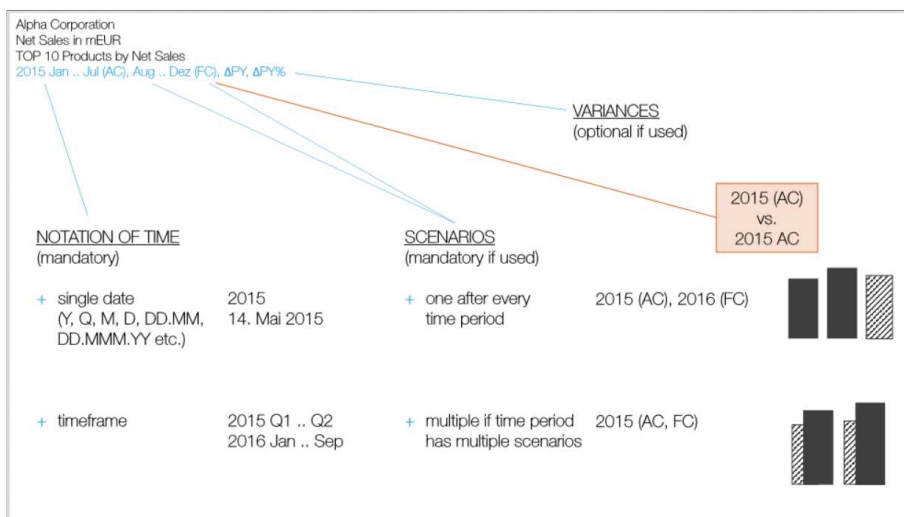
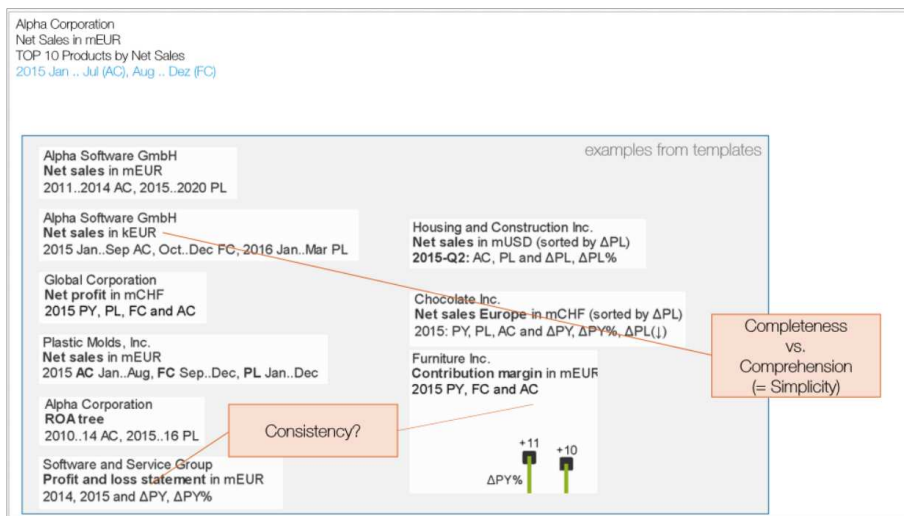
global navigation/message area	
<Reporting Unit(s)> <Scenario(s), Time Period(s), Variance(s)>	
<Measures> <Structure clause>	<Measures> <Structure clause>
content area	content area
DYNAMIC/STATIC REPORT	
<Measures> <Structure clause>	<Measures> <Structure clause>
content area	content area

In general, three to four lines suffice to completely describe the content of a page:

- Reporting unit(s): Element(s) of the [structure dimension](#) representing the object of the report, typically a legal entity, an organization unit, or a line of business
 - Measure(s): [Business measure\(s\)](#) being analyzed including currency or physical units with metric prefixes where appropriate
 - Structure clause (optional): Additional information concerning [structure dimensions](#) outlined in rows, columns or as multiples (e.g. "by products") or [analyses](#) (e.g. "top ten products by revenue")
 - Scenario(s), time period(s) and variance(s): Relating [scenarios](#) (e.g. AC and PL), [time period](#) (e.g. Jun 2015), and [variance](#) (e.g. ΔPY)
- In general, position titles at the upper left hand side of a page below the message. If it eases comprehension, highlight the most important part of the title (e.g. the measure) using bold font.

+ Time period, scenarios...

- Simplicity first – avoid all detail that can be drawn from looking at the chart/table
- Show time only as current period (ISO-Standard)
- Scenarios and/or variances only if they contribute to the understanding of report



+ Measures

- to be mentioned only if <2 – otherwise find a name describing the analysis shown
- Should be highlighted using bold letters

Alpha Corporation
Shares in %, Quantity in EUR, Price in EUR, Value spent in EUR
TOP 10 Products by Net Sales
2015 Jan ... Jul (AC), Aug ... Dez (FC), ΔPY, ΔPY%

	Shares [%]				Quantity [EUR]				Price [EUR]				Inv Value [EUR]			
	HY1-13	HY2-13	HY1-14	HY2-14	HY1-13	HY2-13	HY1-14	HY2-14	HY1-13	HY2-13	HY1-14	HY2-14	HY1-13	HY2-13	HY1-14	HY2-14
TOTAL	100,00%	100,00%	100,00%	100,00%									10.347	11.478	12.998	7.210
Materialgroup 1	45,00%	42,00%	41,00%	46,00%	30	50	60	55	155	96	89	60	4.656	4.821	5.329	3.317
Materialgroup 2	21,00%	20,00%	18,00%	20,00%	2	1	3	1	1.086	2.296	780	1.442	2.173	2.296	2.340	1.442
Materialgroup 3	9,00%	5,00%	8,00%	8,00%	3	1	1	2	310	574	1.040	239	931	574	1.040	577
Materialgroup 4	5,00%	2,00%	8,00%	4,00%	2	1	2	1	259	319	520	401	517	230	1.040	288
Materialgroup 5	4,00%	4,00%	6,00%	2,00%	30	28	24	25	14	16	32	6	414	459	780	144
Materialgroup 6	3,00%	6,50%	2,00%	5,00%	30	22	20	28	10	34	13	13	310	746	260	361
Materialgroup 7	2,00%	2,00%	3,00%	3,00%	25	19	26	25	8	12	15	9	207	230	390	216
Materialgroup 8	1,50%	4,00%	2,00%	1,00%	100	98	91	103	2	5	3	1	155	459	260	72
Materialgroup 9	1,00%	2,00%	2,00%	0,50%	2	1	1	1	52	342	520	54	103	230	260	36
Materialgroup 10	0,50%	0,50%	0,50%	0,50%	78	98	5	103	1	1	13	0	52	57	65	36
Other	8,00%	12,00%	9,50%	10,00%									828	1.377	1.235	721

Name all measures shown in one object + their respective units?

+ Other elements

- Units to follow ISO/SI-Standards
- Groups/sort orders are not a core information thus they are omitted in the title concept
- Save space by using symbols instead of text
- Avoid brackets

Alpha Corporation
Net Sales in mEUR
TOP 10 Products by Net Sales (DSC)
2015 Jan ... Jul (AC), Aug ... Dez (FC)

UNITS (mandatory)	AVERAGES (mandatory if used)	SORT ORDERS (mandatory if used)	ANALYSIS TYPE (mandatory if not standard)
+ mEUR	+ ∅	+ ↓ / ↑	+ Statistical analyses
+ Count / #	+ AVG	+ DSC / ASC	+ TOP / FLOP - X
+ brt / KG / L	+ Where to be placed?	+ Add: ..by net sales	+ Reference value and colour-code for heatmaps / treemaps
		+ Where to be placed?	

Chocolate Inc.
Net sales Europe in mCHF (sorted by ΔPL)
2015: PY, PL, AC and ΔPY, ΔPY%, ΔPL(Δ)

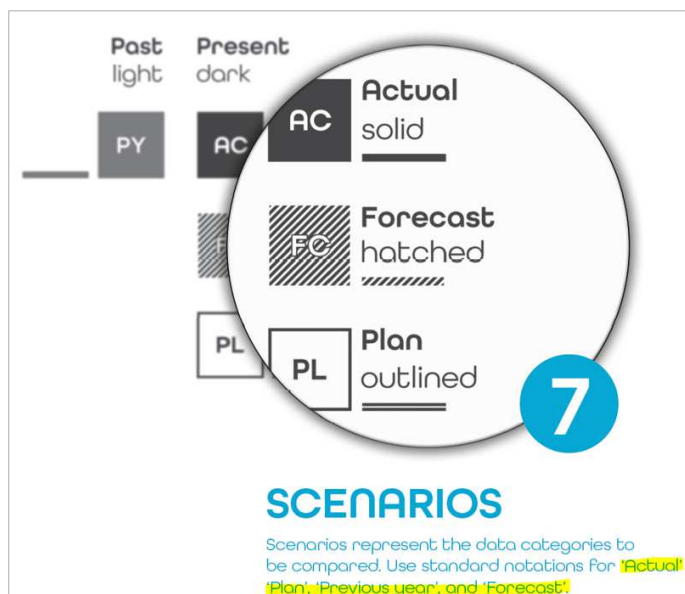
6. Jürgen Faisst (HICHERT+FAISST): Scenarios and semantic exes

(Parallel breakout session 2)

Jürgen discussed concrete changes in the definition and visualization of scenarios:

+Semantic notation for character of scenarios (actual, planned)?

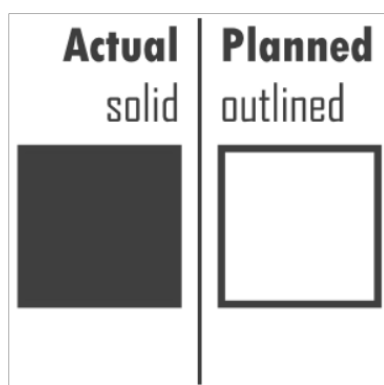
The scenario notation is one of the IBCS TOP TEN topics



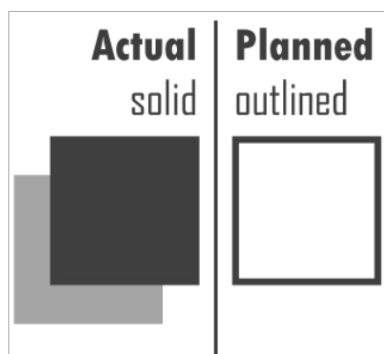
As scenario designations are not limited to PY, AC, FC, and PL, the scenario notation should indicate the character of a scenario, rather than the scenario itself.

There are only two main characters of scenarios: scenarios with actual (measured) data and scenarios with planned (fictitious) data.

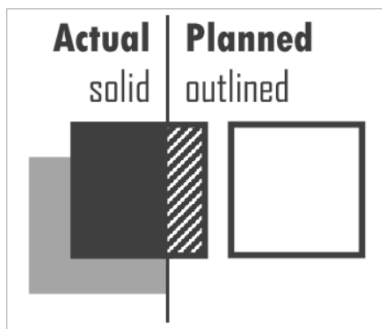
Actual data is notated solid, planned data outlined.



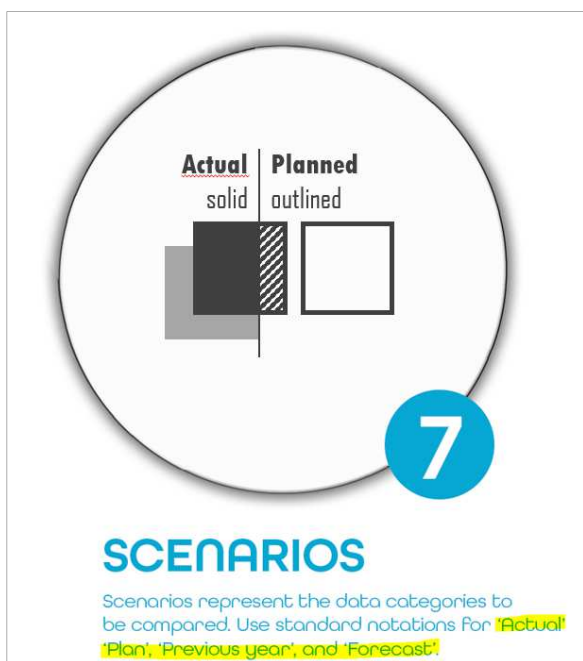
If it is necessary to differentiate between scenarios with actual data of different age (e.g. for the purpose of comparisons), then the older scenario is notated lighter than the younger one.



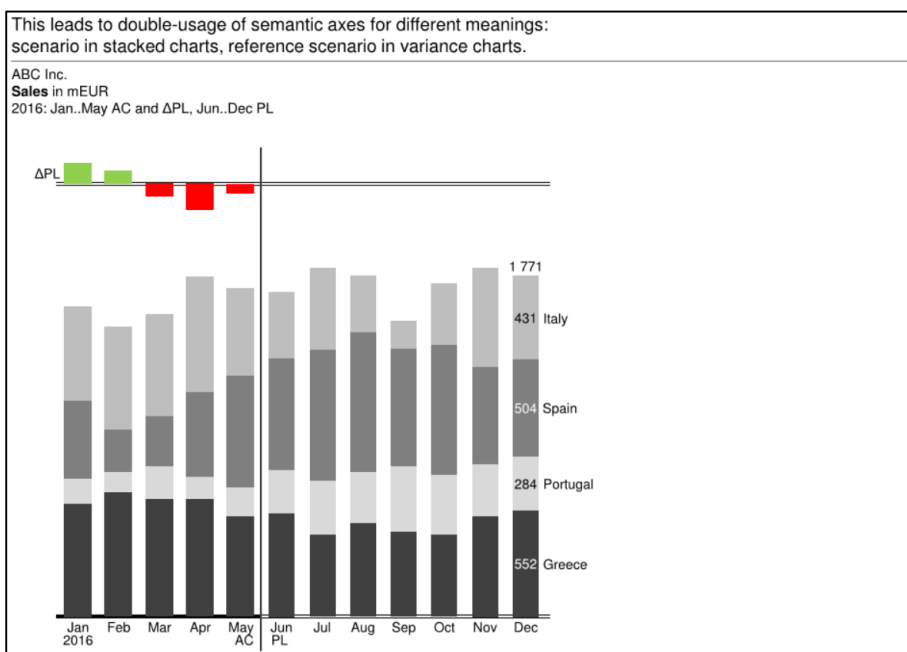
If the purpose of a planned scenario is to complete measured data up to the end of an actual period, then this scenario is notated outlined with a hatched fill.

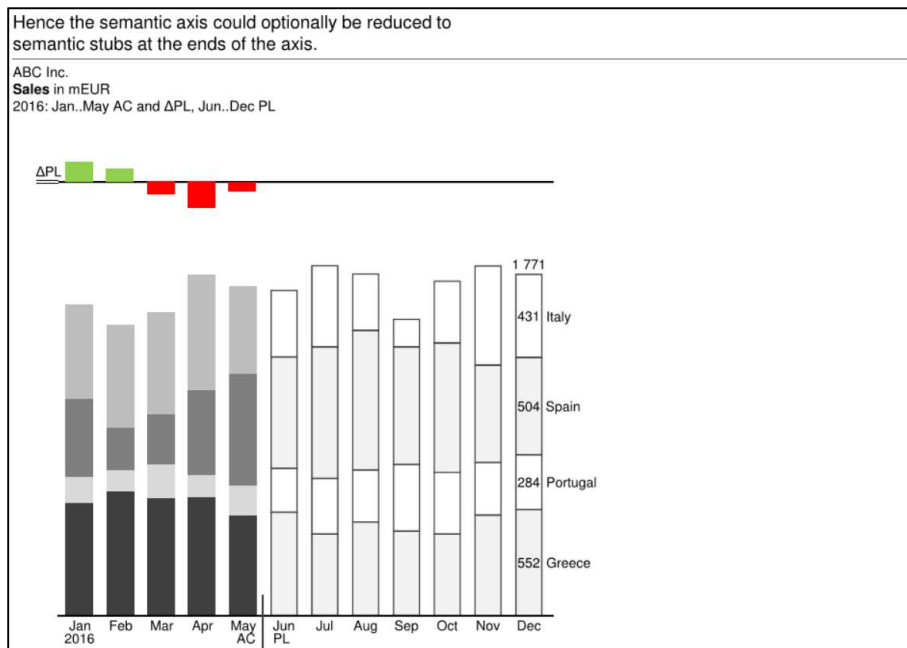


As scenario designations are not limited to PY, AC, FC, and PL, the scenario notation should indicate the character of a scenario, rather than the scenario itself.



+Semantic axes for variance charts only? (How to handle stacked columns and bars?)





Here follows a summary of this session (Important: There has no decision been made for future changes in the Standards yet – this will be part of a poll to come):

+Semantic notation for character of scenarios (actual, planned)?

The suggestion for the notation of the character of scenarios instead of the scenarios themselves was accepted.

1. The group agreed to associate the character of scenarios with the notation instead of the scenario itself.
2. There are only two main characters of scenarios: actual (measured) and planned (fictitious).
3. Actual (measured) is shown „solid“, planned (fictitious) is shown outlined.
4. The naming for the scenario character (measured or actual, fictitious or planned) is still open for discussion.
5. Consequences of this agreement:
 - a. The usage of „light solid“ (gray) is
 - i. not limited to PY, but open to visualize any historical data (e.g. previous month).
 - ii. limited to the visualization of reference scenarios in comparisons. In general, historical data in pure time series will not be displayed in light but in dark solid.
 - b. „Hatched“
 - i. indicates planned (fictitious) data with a higher level of certainty than „outlined“ (forecast).
 - ii. is notated with a border (outlined), because it indicates a scenario of planned (fictitious) character.

+Semantic axes for variance charts only?

The alternatives for the usage of semantic axes in stacked columns and bars were not convincing yet.

1. The group sees the problem of double usage of semantic axes for different meaning (scenario in normal charts, reference scenario in variance charts).
2. The group sees the problem of a different look of the same situation (scenario notation in small multiples showing the same information as stacked columns is completely different).
3. The solutions for replacing semantic axes in non-variance charts are not convincing yet:

- a. Using shades of gray to separate the segments of a „planned“ column looks like historical data.
 - b. Missing values can make it hard to identify the correct data series in stacked PL columns.
 - c. Stacking different hatched patterns for FC columns looks weird.
4. 11 of 20 participants would prefer to accept the problems of semantic axes for non-variance charts to replacing it and facing the problems associated with that.
 5. This issue requires further discussion

7. Dietmar Pascher (Controller Akademie): The city of Graz report

Dietmar Pascher presented city of Graz, reporting challenges he met during his involvement there and some Lessons Learned from this project.

+ Reporting at city of Graz

The City of Graz consists of many departments and ministries dedicated to different topics such as family, sports etc. Before Dietmar started to improve reports every single department had its own report with individual design and structure. Despite strong collaboration and vigorous effort from all participants of the city of Graz who tried to make the best for the city, there was no one single report that would unify all existing departments and represent the city as a unit. The report “Haus Graz” should have this function.

https://issuu.com/stadtgraz4/docs/leistungsbericht_2014



+ Challenges

Therefore, the first idea was to create one single report representing all companies and departments of the city. When he started to analyze and improve available reports, he discovered that it was easier to improve tables than to consolidate charts. There were a lot of financial reports in which the scalability had a very important function. But even within one given report there were no consistent scaling. He then demonstrated how change of scaling and resizing can change dramatically the meaning of numbers. He started to apply IBCS rules to the existing reports. His observation was that not just conceptual, perceptual or semantic rules were difficult but the structure in particular. After this he demonstrated successful application of different IBCS rules on some reports. During the project he experienced highly enthusiastic people. They understood immediately the purpose of "Condense", "Check" and "Simplify". But it took time until they were able to put insights into praxis. His conclusion was: a long and difficult rethinking process is needed!

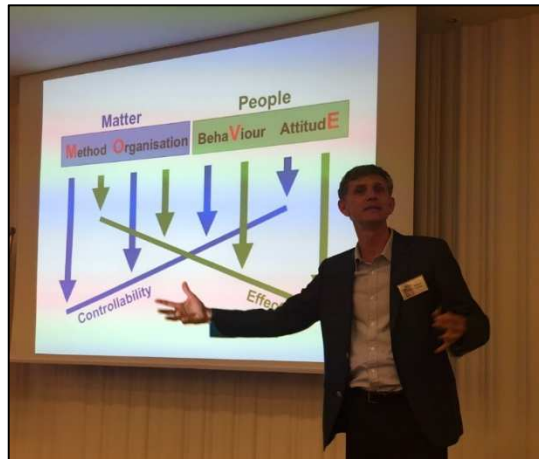
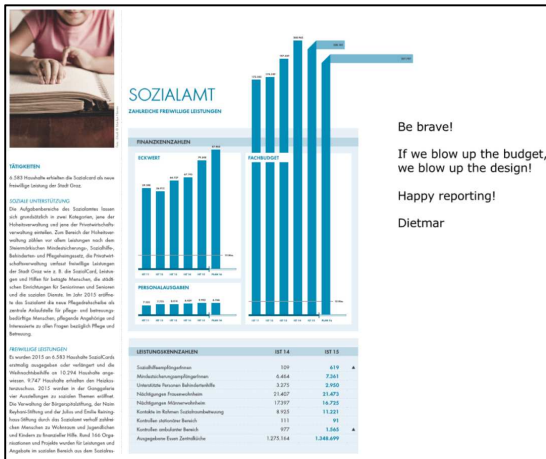
+ Lessons Learned

As a “takeaway” he recommended to use the “MOVE” scheme in IBCS-projects. If we want to change something the change always concerns to a matter and to people. Matter is always related to a method and an organization. Further

the behavior and attitude of the people you work with should be also considered. It is easy to change the method, more difficult is to change the behavior and the attitude of people. These fact should be kept in mind.

Finally Dietmar advised to ask the customer three questions:

- "What do you need information for?"
- "What do you do if the numbers change?"
- "What is the frequency of an actions?"



The project of Dietmar is a splendid example of the fact that IBCS is not just "another design" or "redesign". It involves the whole company and services behind, from graphic to legal departments (as the consequence of the project the city of Graz had even changed the legal structure in parts). At the end it is not just about a visual structure, but about the whole corporate culture.

Thank you Dietmar for this great session!

(Note: you can find the whole report of City of Graz on the IBCS site:

<http://www.hichert.com/en/certifications.html?id=285>)

8. Rolf Hichert (HICHERT+FAISST GmbH): Stock and flow measures

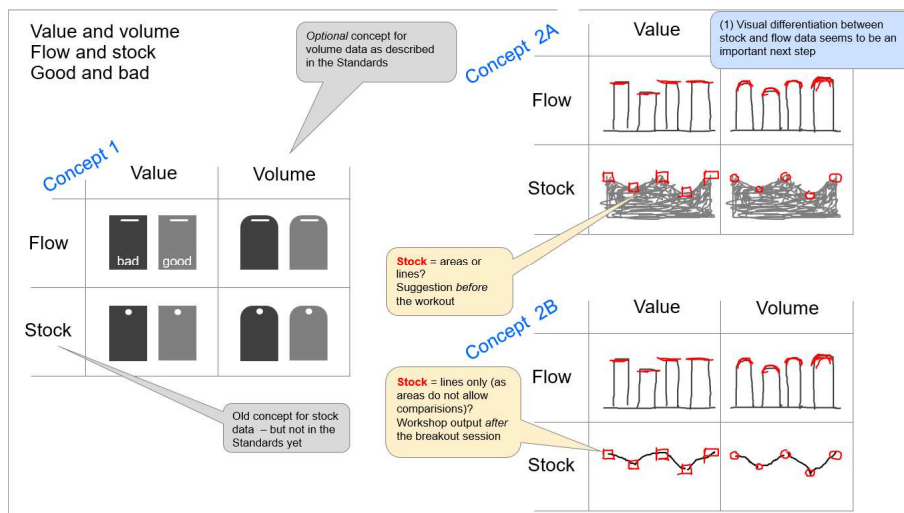
(Parallel breakout session 3)

Rolf's objective has been for a long time to find visual representations for these "dimensions":

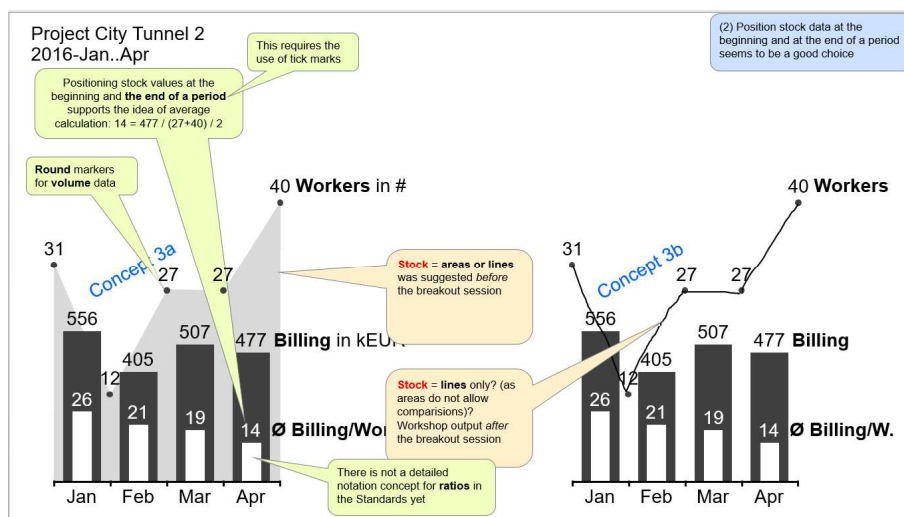
- +Different time periods
- +Different scenarios
- +Value and volume measures
- +Flow and stock measures
- +Different basic measures and different ratios)
- +Absolute and relative variances
- + "Good", "bad", and "neutral" measures

This session was about discussion alternative solutions for the visual identification resp. differentiation of stock and flow measures.

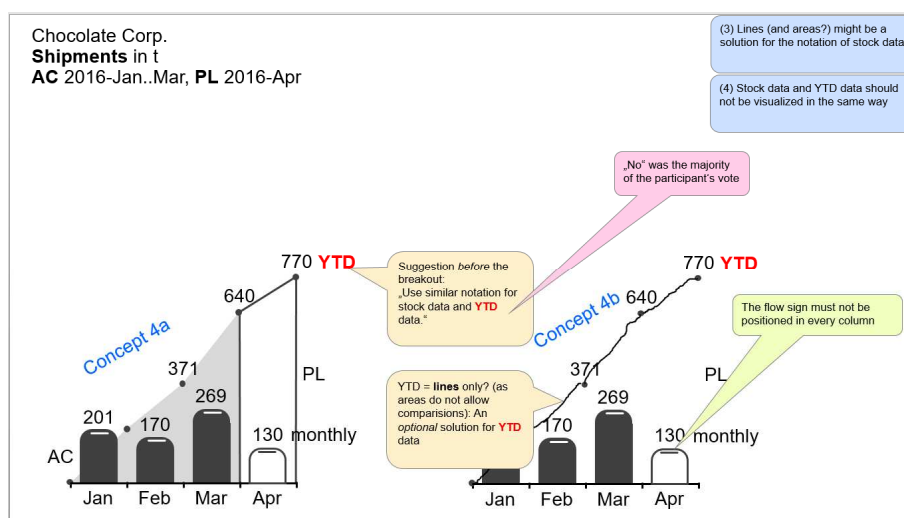
Here follows a summary of this session (Important: There has no decision been made for future changes in the Standards yet – this will be part of a poll to come):



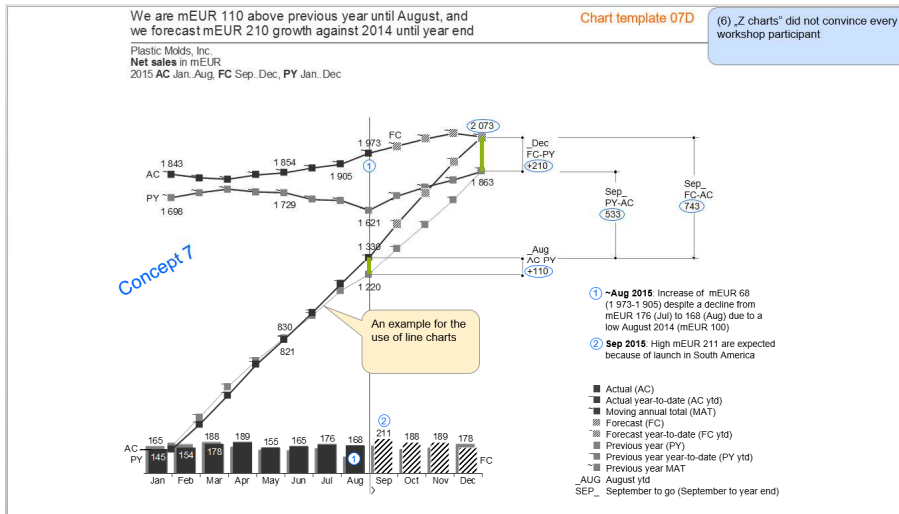
1. In charts with time axes, positioning stock data at the **end of a period** seems to be a good choice



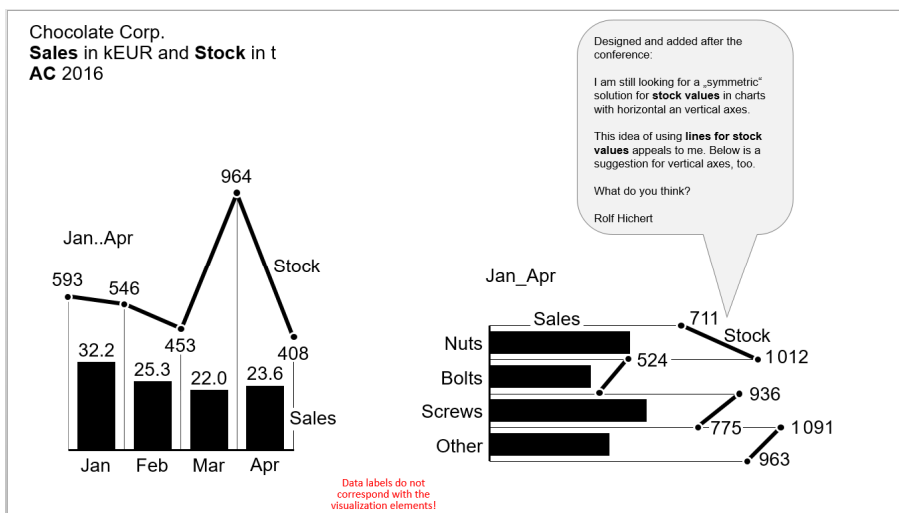
2. Lines and areas might be a solution for the notation of stock data
3. Stock data and YTD should not be visualized in the same way



„Z charts“ did not convince every workshop participant



Rolf sent to me the following proposal after our session. I have included it for further discussion:



9. Raphael Branger (IT-Logix): Dashboard topics

(Parallel breakout session 4)

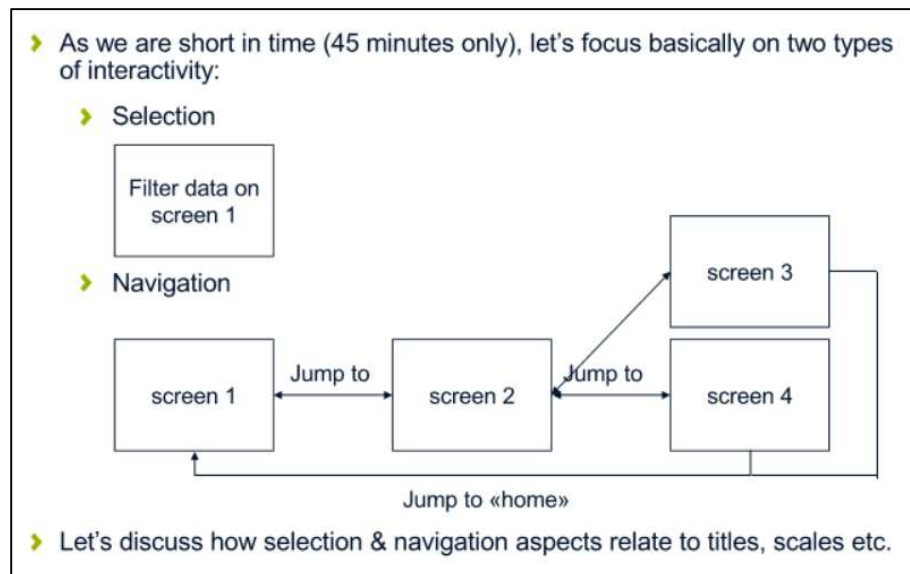
Raphael discussed some suggestions and collect the ideas from the participants about the following topics:

+Should the IBCS Standards also cover interactive elements?

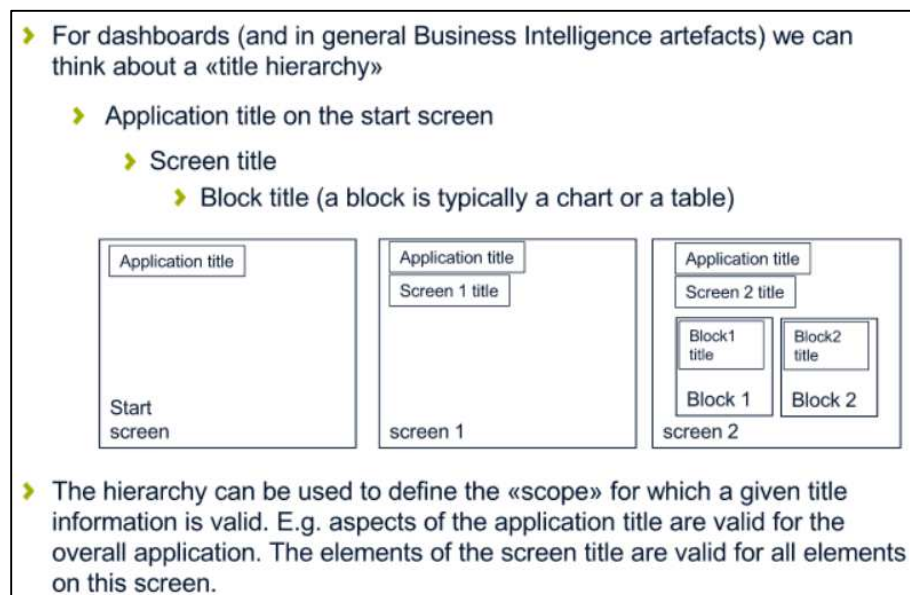
+How do they interact with titles?

+How to handle scaling in interactive systems? Consistent per application or per page?

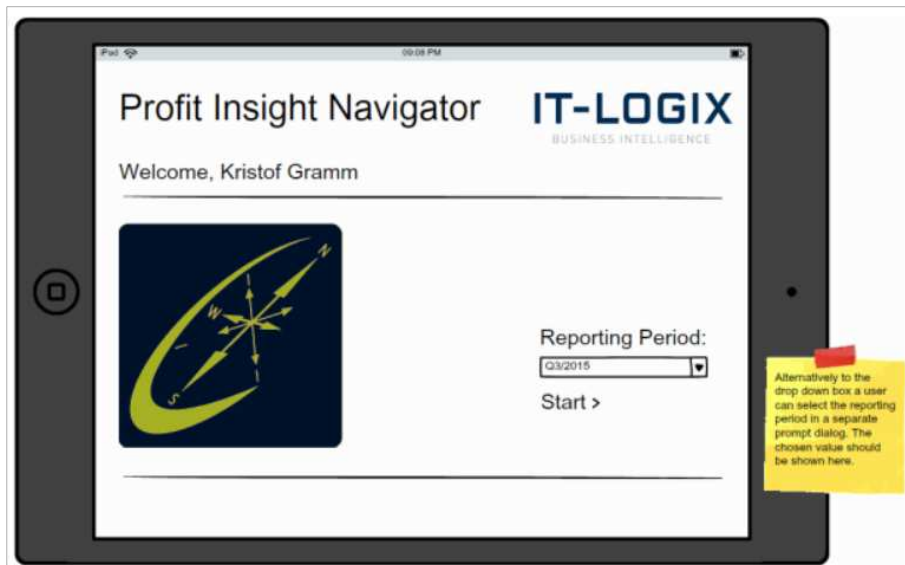
+ Selection versus navigation



+ Think about a title hierarchy...



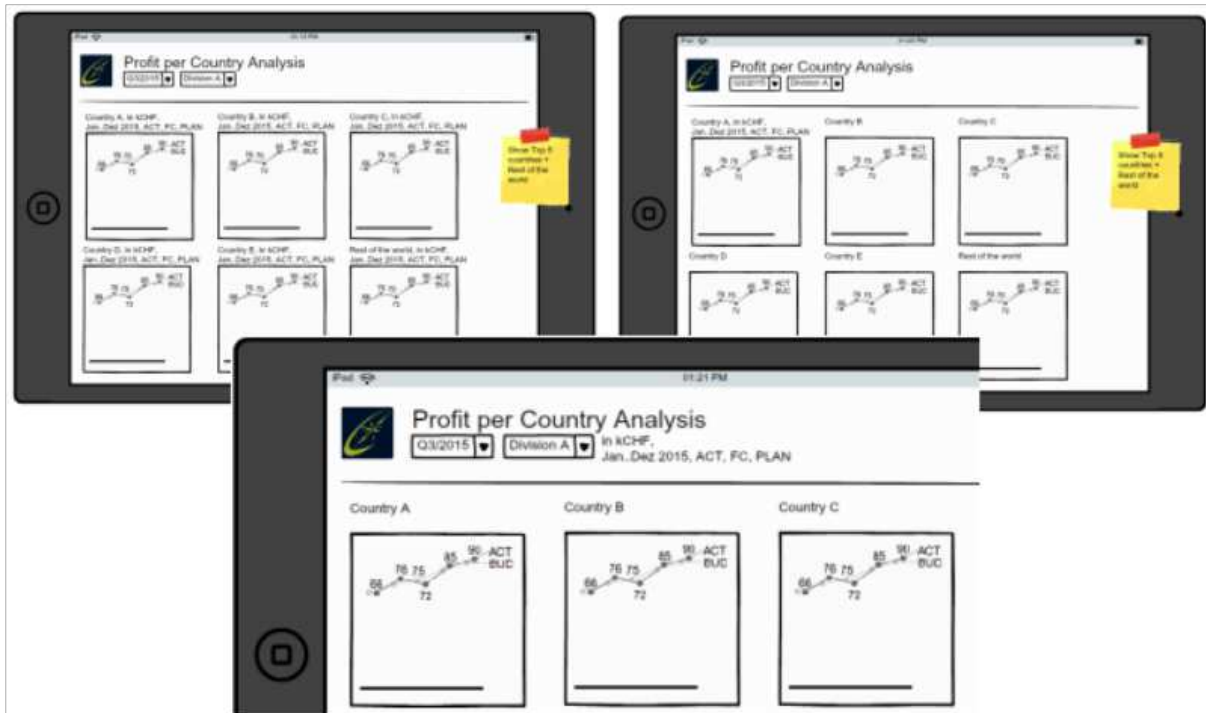
+ Start page versus overview page



+ Division overview page and product live overview



+ Country overview



Here follows a summary of this session (Important: There has no decision been made for future changes of the Standards yet – this will be part of a poll to come):

+ Semantic for interactivity

- It is not the task of IBCS to provide a standard for the visual representation of selection and navigation aspects on an interactive dashboard
- Stick to the basic principles of IBCS and SUCCESS as a benchmark

+ Scaling

- Context matters -> "Conscious" scaling is a must!
- On the same screen, in most cases a consistent scaling for the same measure is the right way to go
- Looking at multiple screens (or interactive single screens) scaling highly depends on the purpose of the analyses
- Stick to the basic principles of IBCS and SUCCESS as a benchmark



10. Jürgen Faisst (IBCS Association): IBCS outlook beyond 2016

Jürgen started with a couple of pain points and continued then with most important milestones of the past year and upcoming intentions.

+ Status quo

- Although IBCS is well known in German speaking countries more than a half members (57% of 321) of the IBCS community are from non-German speaking countries!
- Thanks to the international participants English as a conference language is no problem anymore.
- Well known global players, for instance SAP have huge interest in IBCS.
- Many international seminars (public in Warsaw, Istanbul, London, Bosch + on premise) and lectures (Andrej, Bojan, Rolf, Jürgen) were realized till now.
- A first online assessment with over 50 questions has been launched.
- LinkedIn is now the communication platform of IBCS. Jürgen asked to invite customers, to ask questions e.g. about visualization of specific problems. He also asked to keep LinkedIn community clean, to keep high quality and to put valuable information.

+ To Do

- rebuild the IBCS web side with better look&feel with focus on conversation (SUCCESS side is old fashioned, at the moment it is difficult to become a member)
- sharpen IBCS profile (e.g. IBCS appears too complicated and typical German from USA perspective), make it more visible and more effective
- write a book
- offer additional events and education
- multiply content
- learning from other organization
- continue networking with IMA, AFP, ICV, SAP, IIRC
- establish Activate global IBCS Corporate User Group within IBCS Association
- find an international member on the Board
- find additional ways of international growth
- bring more customers
- find third partner (native speaker) for the US market
- international trainers giving SUCCESS seminars under a license agreement

+ Planned

- international webinars, e.g. with IMA (Enter IMA education program) and SAP (OpenSAP Thought Leadership Channel)
- online learning an assessment platform with „low level“ certification (Driver license for „HICHERT®IBCS Certified Analysts“)

All ideas for improvement of IBCS community and extension of the standard are welcome!
Many thanks to the members for their active participation and help!

11. End of the conference



12. IBCS sponsors 2016

A special thanks to the IBCS sponsors presenting their software and services. In an “elevator pitch” kind of presentation they were given the opportunity to present their USP in the market for IBCS compliant software:

Sponsor



The Sybit & Peers AG has positioned itself as a highly specialized IT consulting company in the Swiss market with the following on SAP technologies oriented portfolio focus: Business Analytics, Corporate Reporting, External Quality Management, Customer Relationship Management and E-Business.

Exhibitor



Zebra BI proudly presented its recently awarded HICHERT®IBCS Certified Charts and Tables seal. Zebra BI's goal is to produce IBCS compliant charts in Excel with only one click. They proved their capabilities by reproducing a complex IBCS template from scratch within two minutes.

13. Conference impressions on Twitter

