



BBBT Podcast Transcript



About the BBBT

The Boulder Business Intelligence Brain Trust, or BBBT, was founded in 2006 by Claudia Imhoff. Its mission is to leverage business intelligence for industry vendors, for its members, who are independent analysts and experts, and for its subscribers, who are practitioners. To accomplish this mission, the BBBT provides a variety of services, centered around vendor presentations.

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Guest(s): David Becera, VP, Strategy & Business Development

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Claudia Imhoff: Hello, and welcome to this edition of the Boulder BI Brain Trust, or the BBBT. We're a gathering of leading consultants and analysts in business intelligence who meet with interesting and innovative companies here in a beautiful -- a little snowy today -- Boulder, Colorado. We not only get briefed on the latest news and releases, but we also share our ideas with the vendor on where the BI industry is going, and help them with their marketing direction and messaging. The Podcasts are produced by my company, Intelligent Solutions.

CI: I'm Claudia Imhoff, and I'm pleased to introduce my guest today. He is Dave Becera. Dave is the Vice President of Strategy and Business Development for Roambi. Welcome, Dave!

David Becera: Hi, Claudia. Thanks. Glad to be here.

CI: You know, it's really nice to have you here, because now I know how to pronounce the company name. [laughs] All these years I've been calling it "Roam BI" and it's actually Roambi. It is a relatively new company, it was founded in 2008 or so. Maybe we can start with just an overview of the company. Especially, if you don't mind, I'd like to hear the inspiration for the company, because it has an interesting back story as well.

DB: Sure. Absolutely. I think that's a good place to start. The company was founded by myself and three other founders in a hotel room somewhere scribbling on napkins, kind of a typical startup mentality. What was happening in January 2008, when we founded the company, the year before, September, was when Steve Jobs got up and announced the first iPhone ever.

That was what sparked the creativity and the idea for this product. We saw a new platform we believed was going to change the way that people interacted with devices. We knew that, eventually, this kind of consumer product is, we made an early bet saying these things were, going to make their way into the enterprise, because they're so nice. People are not going to be using Blackberrys anymore. It's funny, because we did a lot of analyst press, and a lot of analyst tours. This was back at the end of 2008. As you can imagine, when we said iPhone and business in the same sentence, people put their pens down and they



started saying Blackberry. I'm happy to see what's happened now, that it's paid off.

CI: You took a huge risk.

DB: A huge risk, but I think it definitely paid off. The inspiration was really this new platform. There was no innovation on it, it was so new. It was like when the Internet first came out. It's a whole new ball game. There's a whole new platform where people can create destructive technology and start from scratch.

CI: Well and it's also a green field. You were light years ahead of anyone else who wanted to do that. But the other thing you mentioned is that you didn't want to be a traditional BI company, and I think that's an important message, as well. Most companies, they work on the laptop, a desk unit, or something like that. You really went off the whole cliff there [laughs], and said, "We're going to be Apple-based and we're not going to be a traditional BI tool."

DB: Absolutely. That goes to being a green field, because being a BI tool is not a green field. There's plenty of vendors there and incumbents there. What we saw is a green field is specifically mobile. We began only as a mobile company. Today, we're still mobile only. That's where we saw the opportunity to get in early to really change the way that enterprise software typically gets developed, and set the standard of what can be done on mobile devices.

CI: Yeah. Very nice. One of the things that always comes up with mobile devices, of course, is the big fear of security. That just seems to be the elephant in the room. As soon as you mention mobile devices, everybody starts, or at least IT starts, shaking in their boots.

DB: Starts squirming.

CI: Yeah, a little bit. You've got a pretty mature, pretty sophisticated, security architecture. Tell us about that, as well.

DB: Yeah, that's a really good story for us, because we're in the same boat. There is no way, as a new start up company, we were going to be able to



get the customers we wanted without a security story. We put a lot of emphasis and a lot of focus [on security]. A lot of our development team comes from that BusinessObjects background, so they know the enterprise side of creating a server and making sure it's secure, and all that. We did a few things in security, some of which are very innovative, actually. The first one, I wouldn't classify this as the innovative one, but as I showed in my presentation earlier, the ability for us to integrate with an existing BI report or data that already has named users around it. IT has already defined a data model that says, "This person here has access to this report and this data."

CI: All the security metadata, basically, is there.

DB: All the security metadata behind it, right. If we were to go in and say, "Throw that out of the door. Now, let's put it somewhere else," there is no way we would have any of the customers we have today. It's a very seamless integration. When you log in to Roambi on a device, you're still using that same credential that you are as a Cognos user, whatever it is you are. But, because it's authenticating through our server and to their enterprise infrastructure, it already knows. Maybe in Roambi it's a different application, but I can only get access to the same data that IT has already defined for me. It was very important for us to create a seamless experience, so that there's no new management, new data sitting elsewhere, which raises alarms within IT.

CI: There's that, and there's also a very clever thing you do with the devices themselves. If lose my phone or I misplace my phone, what happens?

DB: Yeah, that's where I get excited to talk about it, because that's where we saw an opportunity to innovate in security, which is typically not what we do. We're focused on data visualization. But it's funny because what's happening with the industry, a lot of companies were, early on, not sure about BYOD. Or, "Hey, do I need to get an MDM server in place? How am I going to manage my applications, manage my devices?" That was lengthening, prolonging people, in some cases, from using our product, because, "Hey, we love your product, but we have to do a 12 month evaluation of MDM before we can even roll applications out."



We don't want people to have to wait that long. We want people to begin using it now. We built into our server a lot of these IT-centric, security-focused features that are a lot of the same features you see from a lot of the mobile application management vendors today, like good technology or a mobile iron.

I think we're unique in a sense that not only are we a data visualization tool, but we've integrated and fused a whole bunch of security technology that's application-specific into our server. Some of those features include being able, like we were saying, to lock out a device from accessing the server, enforce application PIN code locks, at the application level, not at the device level. The ability to remote wipe, obviously, the data, if an employee leaves the company and they can remote wipe critical data off of the device. They can do things like file expiration, so they can set the data to expire and kind of the Mission Impossible, this will self destruct in five minutes.

We've added a whole kind of set of security features that we launched. I think it was about a year and a half ago. I mean, the overwhelming response from IT was just amazing. That's the stuff they love. It's also in a very beautiful interface, like traditionally everything we design is very design centric focus, user experience focused. We've given them a really great user experience to find security.

CI: Well, speaking of that interface, let's jump to that, because I agree with you. I think your visualizations, your user interface, are incredible. They really are brilliant. What was interesting to me, you showed us a type of, I don't know what else you would call it except sort of a Rolodex type of, interface, where you can just kind of spin through the reports, spin through whatever has been made available to you and that sort of thing. What that says to me is that it also must have the embedded metadata in each of these icons, if you will. Is that correct?

DB: Yeah. Basically, the way we built the architecture is that when we're pulling data from a, when the Roambi server connects to a, BusinessObjects report, or a Cognos report, it's not only collecting the data from there, it's collecting the metadata. That's important just because inside that metadata, that tells us, "Hey, this report has X amount



of hierarchies. These are the summary levels. These are the totals." It allows it to map to our visualization very seamlessly. Yes, not only the Cardex view, as we call it, the Rolodex view.

CI: Cardex, yeah.

DB: But all the views when we import them from an enterprise data source, they're pulling metadata, as well.

CI: Excellent. Well, let's get to the new stuff, because you've talked about a couple of launches that you've had. The first one, I thought, was fascinating. It's called Roambi Flow, basically you wanted to go beyond BI, which I thought was kind of cute, as well. I didn't know what you meant until you showed it to us. It is a concept that is different. It's a little bit hard, perhaps, for people to grasp right off the bat, but once you see what it can do, it's actually a phenomenal innovation there, as well. Describe a little bit about Roambi Flow.

DB: Sure, yeah. I mean, the inception of it came from getting outside of the bounds of just BI, or being bound to a BI focus. We strive for our products to be available for everybody. We want it to be useful for any guy that walks through the street can have a use for Roambi, as well as a traditional enterprise customer who wants to get their data.

We looked at being able to create a product that was, again, not just BI but more of a publication type of platform, I guess is the best way to describe it. [A] digital publication platform that includes the analytics, so all the work we've done in creating these really nice user experiences in there, as well as the security around those analytics. But delivering it in a way that is traditionally not what a BI user gets. It's more, again, when you're looking at a magazine, a magazine is really for everybody. It's for the masses. All the employees within a company can use Roambi Flow and can benefit from it, not just a traditional analyst or a very important person that needs a BI license.

That was the inception of it. It's grown organically in different ways, not only for internal use cases, like publishing internal newsletters, or out to partners. But as I mentioned, the South African Census Bureau, the way they used it, where they're actually syndicating information out and in



some cases, free, because they want more people to get access to the data.

We worked with the city DC as well here in US doing something similar where they, I think there is new CFO on board, and one of the first things they wanted to do was increase transparency on how the budget was being spent. We partnered with them, they put it out on the App Store and did a press for us saying, "Hey, go to Roambi. Check out how we're looking at data." It's a new fun modern way that people don't think of. That's not BI, but it's still valuable information.

CI: What I like about it is that it's not just BI, it is a whole flow, a whole workflow which is, hence the name, of course. For example, if you can embed live analytics in a stock report or in some kind of year-end report or whatever it is, you can then look at these analytics over time. You can then change them. You can manipulate them, while you are in this, basically, reader kind of format. I thought that was incredible. It is a tremendous step forward.

DB: Absolutely. Again, it is step for us outside of BI which was really the intention.

CI: You succeeded. The other thing you launched, I think it was launched last week was "Roambi ES 4.5." Tell me a little bit about that. It is another big step forward for the company. You've gone from reports to something that is a bit different. Why don't you talk about that a little bit?

DB: We're really excited to launch it. There were basically two main components of the 4.5 release. One was actually now a connector to QlikView reports. So, kind of the traditional model where we're connecting to new reporting layers, and with every new release we have the connect to a new one. QlikView was one of the last BI tools where we really wanted to have a story to integrate with.

But the bigger overarching story, I think, is really the JDBC connector, as we call it. Mainly because it has removed a lot of barriers for our customers. To be able to get the data out into the mobile devices and to their end users, we created by design when we launched a company. We wanted this to be a compliment to BI tools. We want to be seen as



friendly by BI companies. We stayed away from going directly at databases because it was complimentary thing to BI.

As markets have evolved and as demand has grown for our product, we've really noticed that there is so much data in so many different databases out there today that companies are having trouble accessing. They have to have a BI layer in between. We just removed that barrier, which has been huge for us. We have now opened our addressable market to 12 new different databases and that just the ones that have been certified. Any other JDBC compliant database, we can certify within a few days. Some of the main ones I'm very excited about are, think like, SAP HANA which is huge.

SAP is basically betting a lot of their future on this in-memory technology. It's massive to be able to go directly at that and capture data. When we have tested, it is amazingly fast. It's literally like you snap your fingers, and it makes the calculation and sends it.

Amazon Redshift is another one, a possible type disruptor of technology. Even going to legacy systems where a lot of data lives in today, you have an Oracle database, SQL Server database or in Teradata.

I think it's great story for us building our customers now and say, "Hey, you can just go directly out there or you can go through a BI reporting layer." What we offer is options, and I think the biggest message from me to our customers, or to the world at large, is that the data access is no longer an issue for us. We can access almost any -- I would say 95 percent -- of the data that companies are using.

CI: It means a data warehouse, an operational system or whatever. You can go after the data that's in them. That's wonderful. I'm excited to hear anything about the future. You've got some good stuff now, what's coming up?

DB: That's a great question. We are looking at our strategy for 2013. We have based four pillars of our strategy of where we are going to focus. Maybe not specifically from roadmap product perspective, but where we see the business growing and things we want to focus on. We have learned from



in the past, and one of them is partners. We have been tremendously successful working with partners abroad.

We are forced to work with partners, but when you open up and international business, you have limited resources and you have to work with a lot of partners to work on deals, to work with customers, and we've seen tremendous success being able to scale our technology with partners. Some of the communities, from BusinessObjects, from Cognex, who want to leverage this technology for their existing customer base.

We are looking to incorporate that more and more into our strategy, as well as here in the US where traditionally we have been a direct sales channel.

Another area that we are focusing on for this year and future is looking at the mid market and the cloud as well. All these things, partners, mid market and cloud, they are all tied together. They all relate to one another. You know, partners typically sell more in the mid market.

In the mid market, companies are more apt to use things like software in the cloud. We are seeing that it's strategic, because we want to be able to, as we did with the JDBC connector, remove barriers. So we removed barriers for data access.

The next step for us is how can we beef up and work more on our SaaS hosting model, what we call Roambi Pro, and make it even easier for an end user to be able to go to our website, begin using our product, and already begin signing up without IT -- maybe never even having them to get involved. We are looking to focus a lot of on the cloud as well which will affect a lot of our mid market potential customers as well as our partners who to partner with us.

Then we come to the last leg of the four pillars, you don't want to forget, and again they're all intertwined, is working more on solutions -- finding the right solution. If you look at our tool and you look at our customer base, it has such a wide application of what it can do. It can be used for so many things. We probably have customers from, I would say, probably about 26 different industries and sub industries that use our product, because it can be used for so many different things.



What we've really tried to hone in on this past year, is what are the specific solutions that mobile and our tool are empowering people on the field that are using mobile. We have found a few different verticals that are very big sweet spots for us, typically like pharma and retail. These are the companies, and industries, that are actively embracing mobiles [as] a way to make their business more effective. That's not true for all industries. They move at different paces. We are focused more on solution selling as opposed to selling a broader horizontal application.

CI: Excellent. I think the future looks pretty darned good. Unfortunately, we are out of time. So that's it for this edition of the BBBT podcast. Again, I am Claudia Imhoff, and it has been a great pleasure to speak with Dave Becerra of Roambi today. Thanks again, Dave.

DB: Thanks Claudia. The pleasure was mine.

CI: I hope you enjoyed today's session. If you want to hear more about this session, please go to our website to listen to other podcasts or search our hash tag on Twitter, that's #BBBT. Please join me again for another interview. Goodbye and good business!