

Pre-call:

Open which resources you can, just in case people want to see examples. One each of the LMS reports from our demo sites, maybe a PowerBI or Tableau demo, sites or screenshots from other competitors.

## Intro

Hello, welcome, etc.

Today we're going to discuss IntelliBoard, our main competitors, and some of the things we can do to differentiate ourselves in the market.

Some of this may be familiar to you already, but I want to make sure we're all starting from a level field.

## Slide 2

IntelliBoard is a learning analytics platform. It connects natively to several Learning Management systems: Moodle (and Moodle-based LMS), Canvas, Blackboard, and D2L Brightspace. We have also branched out into communications tools such as Mongoose and Zoom, attendance tools like Qwickly, and are developing Student Information System connections with Workday and Ellucian.

*(native connection simply means there is no user input required beyond supplying access credentials)*

IntelliBoard aggregates learning data, stores, and transforms this data into a useable format – ie: a name appears with proper formatting, dates aren't UTC time codes, and user tracking totals can be displayed in minutes or hours rather than seconds. This allows us to create standardized reporting across all platforms, so we don't have to worry about customizing for each client! These reports answer common questions about things like student and instructor participation, engagement with course activities, outcomes, and even utilization.

Using LMS data makes us rather proactive in the space rather than reactive. Remember this for later in the presentation when we discuss education specific tools, since overall it means IntelliBoard's data is much fresher and more up to date than most competitors.

This is similar to what our competition does. Each platform that we'll touch on during this call also collects data and presents it in useful ways – though that utility is greater in some places than others! The purpose of this training is to identify where IntelliBoard has strengths in comparison to the competition, what this means to end users, and how we can get the most out of prospect meetings.

The first thing to remember is to stay user-focused! Many times people get caught up in features without a clear picture of how those will be used effectively. It is important to identify **why** an institution needs reporting, **what** their challenges are, **where** the knowledge gaps exist, and **who** will use the platform.

*(I'd include a when, but everyone's answer is always "yesterday!")*

## Slide 3

Let's take a look at our main competitors. There are 3 major categories: native LMS reporting, Business Intelligence Tools, and Education-specific platforms. I also included AI since it is probably going to be a big one this year, but we don't have a clear picture of how our competition will use it.

#### Slide 4 - Native LMS reporting

Each LMS we connect to does indeed have its own reports. These run the gamut from emailing csv files to a suite of charts. While they can often answer some common questions, there are few options for customization, reports must typically be run by LMS administrators, and must be manually sent to end users. If you want to report on several courses at a time, this often requires manually compiling the data.

There are some outliers, even within this space. Blackboard's reporting is an add-on feature if you want something more than bare minimum. Moodle has few native reports, and otherwise requires plugins or add-ons anyway. D2L only offers csv files via data hub, which is difficult to use on a regular basis like IntelliBoard. Canvas reporting does offer more out-of-the-box for its users, but these reports are limited to single courses.

Where IntelliBoard shines in this space is in our accessibility and permissions. Reporting isn't limited to admins, and updates more frequently than some internal reports! We also offer the ability to combine data points across courses, instructors, departments, etc. and offer more participation metrics such as discussion posts and time spent. To top it off, all this data allows for conditional notifications!

And last but not least, running reports can also impact LMS performance as it queries the database! IB typically runs overnight and simply extracts the data, minimizing load on the server.

*(allow space to view native reports)*

#### Slide 5 – Business Intelligence

Business Intelligence tools include platforms like Microsoft's Power BI, Tableau, AirTable, Domo, etc. All of these allow users to connect to data sources, extract and transform data, and create reports and visualizations. The sky or your imagination is kind of the limit with these platforms – collect all the info you have and discover all the beautiful ways you can show it off!

They can even be somewhat easy to use. Power BI in particular has fantastic training documentation (owing in no small part to Microsoft's budget, of course) – and offers some pre-built connections for popular platforms. If you've used Excel, Powerpoint, and/or Access, you'll have some understanding of how it works. But that's pretty much where this advantage runs out, as it will take a significant number of user hours to set up, build databases, reports, charts, and then maintain! They typically require a data scientist or business analyst to truly be valuable – and once you speak to enough clients or prospects, you'll usually find that personnel resources are stretched thin enough with no space or budget to employ this kind of person.

Then factor in costs. While you can start with Power BI for free, Tableau is upwards of \$1000/year for a single creator license. Other tools have similar costs, especially when factoring in how you will need to build and distribute the reporting.

Finally, **none** of these tools are configured for LMS or educational data. None have pre-built connectors the way IntelliBoard does, none offer the data transformation IB does, and none have a library of default reports for learning-specific questions. This doesn't even touch on how users will distribute reporting to the right people...which, well, let's just say if you're paying for a single license, sharing isn't high on the list of priorities!

*(allow space to view tools)*

### **Slide 6 – Education Specific**

Now here's where we get into more applicable competitors, but even with these you'll see there isn't too much common ground. Unlike BI tools, these platforms do connect to common education apps, offer reports and dashboards, risk indicators, and even grant access to different user roles.

I did want to spend a little more time with these, so here's some highlights for each:

### **Slide 7**

EAB Navigate – this is mostly a CRM tool that uses Student Information System data to inform risk and retention reporting. It also includes scheduling and communication tools for advisors and students. Kind of a one-stop shop for advising-related data.

Civitas is similar, with a heavy focus on SIS data (though they claim to incorporate LMS data too, I can't find examples of this). It does offer more in the way of course reporting, but primary functions are geared toward advising and planning.

Both of these platforms are – by the type of data they use – reactive. Remember I mentioned that back at the beginning of this presentation? SIS data is a lagging indicator since it's not updated as frequently as the LMS. Therefore, if a student is struggling with specific course modules or assignments, or even with attendance, these platforms won't be able to tell you that until the midterm in most cases.

While IntelliBoard's SIS data is still in the early stages, we're primed to make a big leap forward in this space in 2024.

There are other tools that come up from time to time, such as the twin Z's of Zoola and Zogotech. Both of these have limited info available for us to study, but seem to be small analytics companies that build custom solutions for the institutions they work with. They claim to offer similar functionality to IntelliBoard, though we have no way of verifying this and will need to collect more info if it comes up in the future.

### **Slide 8 – AI**

I felt like I should mention this here, even though we have no explicit competitors that are making use of it at this time. It's inclusion is simply due to being a buzzword for 2024, and indeed something we're working on! Our solution is focused on making data more accessible to the average user who doesn't speak data. Ask IB a question, and our AI assistant will deliver data points or reports that answer the queries. We also offer machine learning models, which should be able to predict students at risk based on historical LMS data.

As with other platforms and needs and wants, this once again comes down to understanding the true needs rather than the wants of a prospect or client. Remember the Ws!

### **Outro/End**

