

POST-CONFERENCE SUMMIT REPORT

TDWI BI EXECUTIVE SUMMIT

SPECIAL FOCUS ON AGILITY AND ALIGNMENT DEDICATED PROGRAM FOR BI DIRECTORS AND BI SPONSORS

Thank you for joining us in Las Vegas for our TDWI BI Executive Summit. We hope you had a productive and enjoyable time.

We want your feedback! Please send your ideas, suggestions, and critiques to Wayne Eckerson (weckerson@tdwi.org). Specific evaluations of course content and speakers are especially appreciated.

For a complete list and descriptions of all courses offered in Las Vegas, [view the conference at a glance](#) or [download the conference brochure](#).

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SUMMIT OVERVIEW

By all accounts, the February 2009 BI Executive Summit was one of the best ever. Our only chagrin was that more people did not attend due to the faltering economy. We're planning an even better Summit for the first week of August in San Diego, so those who missed this one can participate in the summer.

Most agreed the quality of the speakers and scope of content was unparalleled. We were inspired by our keynote speakers (Bill Branch of Sibridge, Al Schellhorn of Alfa Insurance, and Adrian Sannier and John Rome of Arizona State University); we were engaged by our workshop cases (Dell and the University of Illinois); we were edified by our many panelists and breakout speakers; we were challenged by several speakers with provocative topics (Sean Van der Linden, Oliver Ratzesberger, Larissa Moss, and Steve Dine); and we were encouraged to think outside the box by our "Future of BI" panelists (John O'Brien, Laura Edell-Gibbons, and Mark Madsen) and sponsor representatives (Harriet Fryman of IBM, John Trigg of QlikView, Dave Schrader of Teradata, and Jake Freivald of IBI).

Special thanks to Professor Hugh Watson of the University of Georgia; Philip Russom, senior manager at TDWI; Dan Evans, senior consultant at Avanade; and Justin Manes, independent consultant, for contributing to this BI Executive Summit report.

MONDAY MORNING

CONFERENCE KEYNOTE

CREATING A METRICS DRIVEN ORGANIZATION: MEASURE THE WORK AND WORK THE MEASURES

David Hsiao

Naznin Shroff

We learned from David and Naznin the importance of tracking the gap between customer perceptions and experiences and developing initiatives to close that gap. We also learned the importance of establishing a comprehensive governance program and tracking user adoption of BI solutions.

SUMMIT KEYNOTE

CIO PERSPECTIVE: THE KEYS TO MANAGING CHANGE AND BUSINESS TRANSFORMATION

Bill Branch, *Principal, Sibridge Consulting*

Bill Branch, a former CIO who helped orchestrate the successful integration of IT capabilities in the Sprint-Nextel merger, emphasized the importance of the first 100 days in any transformation project and the need to communicate to staff how the change will affect and benefit them.

PANEL

STRATEGIES FOR BUSINESS ALIGNMENT

Celia Fuller, *CBIP*

Matt Schwartz, *CBIP*

David Hsiao

Celia Fuller, director of data warehousing strategy at Blue Cross Blue Shield of NC, encouraged attendees to go to lunch two or three times a week with a business person and establish personal relations crucial to success. Matt Schwartz, formerly the director of business intelligence and analytics at Corporate Express, said the best way to align is to steal talent from the business to seed the BI team and later let the business steal talent from you to seed the business with BI. He also offered a great comeback for business managers who think BI will solve all their problems: "A report won't make you thinner."

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WORKSHOP

DELIVERING A GLOBAL VIEW AT DELL: HOW TO TRANSFORM A DW ENVIRONMENT

Tim Leonard and Mike Lampa, Senior Managers, EBI 2.0, Dell

Tim and Mike showed that it is possible to turn a freighter on a dime. With top-level executive support, Dell is nearing the completion of a complete overhaul of its existing data warehousing environment to help the company centralize information management, eliminate tens of thousands of spreadsheets, and deliver a global view of the company using consistent metrics and KPIs. Cool.

MONDAY AFTERNOON

TRACK 1—GETTING STARTED

FROM ZERO TO SIXTY IN FOUR YEARS: FROM DATA TO DASHBOARDS

Susan Goubeaux, Director of Business Intelligence, Federal Home Loan Banks

Sue kicked things off with a delightful story about her friend Harry the turtle. The dynamic duo led us through the journey FHLBanks took in starting, stopping, starting, stopping, and starting a BI program using dashboards. The audience learned that regardless of your best efforts, there are factors outside of your control (executive prerogatives, politics, and the economy) that may alter your end results. Remaining flexible and adaptable and sticking it out were the main points Sue emphasized to help carry out BI dashboard initiatives.

BALANCING SHORT- AND LONG-TERM BUSINESS NEEDS: MAKING THE CASE FOR A RIGHT-TIME ENTERPRISE DW

Alicia Acebo, Principal, Rock Paper Data

Alicia discussed how a balanced approach is the best way to ensure that your data warehouse efforts align with the overall business strategy. Alicia recommended planning for right-time data warehousing early in the process to avoid costly changes or redevelopment in the future. Picking the right people with the right skills related to right-time data warehousing is imperative to the overall effort success. Alicia feels that right time, near-real-time, active, and batch loads are all the same.

TRACK 2—DELIVERING VALUE

GETTING THE DATA RIGHT: CREATING AN ARCHITECTURE FOR DATA INTEGRATION, DATA QUALITY, AND METADATA MANAGEMENT AT DELL

Tim Leonard, Mike Lampa, and Jack Speyer, Senior Managers, EBI 2.0, Dell

Tim, Mike, and Jack picked up on their earlier presentation and gave more details about Dell's implementation of a global data warehouse. Dell's movement from a regional to a global warehouse leads a similar business transformation by about a year. The anticipated benefits from the global data warehouse include better experiences for customers, greater operational efficiencies, and better enterprisewide, business-driven reporting. The team provided a detailed description of the warehouse's technical architecture.

TRACK 3—NEXT GENERATION

AGILE ANALYTICS: DELIVERING ANALYTICS AS A SERVICE

Oliver Ratzesberger, Senior Director of Architecture and Operations, eBay

Oliver Ratzesberger (senior director of architecture at eBay) explained that a lot of eBay's innovation depends on analytics, which helps business managers discover opportunities. To encourage analytics (and the resulting innovation), eBay allows analysts to set up analytic sandboxes, sometimes with terabytes of data. Each sandbox physically lives in the EDW, but has an expiration date. This way, analysts can create the datasets they need, but based on high-quality EDW data and controlled by the EDW. Ratzesberger pointed out that sandboxes reduce the number of errant spreadsheets and data marts and provide a more valuable alternative.

NEXT GENERATION OLAP: THE FUTURE OF DIMENSIONAL ANALYSIS

John O'Brien, President, Zukeran Technologies

The sandbox described by John O'Brien is the multidimensional cube that enables online analytic processing (OLAP), one of the oldest and most common forms of analytics. Despite its age, OLAP is more relevant than ever. After all, most business questions are multidimensional, and therefore answerable by a well-designed cube. The new generation of OLAP is defined by the mainstream use of hybrid OLAP (which consolidates multiple approaches), in-memory databases (very large and fast due to 64-bit hardware), and cubes deployed on new data warehouse appliances and column-store databases.

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TRACK 4—AGILITY AND ALIGNMENT

THE WAREHOUSE AND THE WIKI: HOW COLLABORATIVE TOOLS CAN OPTIMIZE YOUR BI INVESTMENT

Sean Van der Linden, Vice President of Business Intelligence, Yellowpages.com

Sean's presentation was a how-to guide for using a wiki to capture and disseminate business metadata, facilitate requirements gathering, improve workflow and productivity, support cross department visibility, and aid in report discovery and use. He also shared a wiki-facilitated approach to data governance and provided some notes on wiki-assisted project management. Sean's wiki-driven methodology requires a roll-up-your-sleeves approach and may take time to gain momentum. However, the payoff is an organic sustainable system that can accommodate a wide variety of systemic and cultural configurations.

MAKING BI A NECESSITY

Alex Crabtree, Senior Manager of BI Solutions, NetJets

Alex said BI is "not just a technology" but a set of tools and methodologies for helping the business identify what's working, what's not, and how to make better decisions based on the right metrics at the right time. Alex's presentation took us through discovery, budgeting, promotion, the right time and place, buy-in at the right level, risk management, governance, stewardship, tools, training, and more. Alex's specific program requires a strong internal leader who can relate to the business on equal terms, and in the case of NetJets, Alex is that person. For less business-oriented BI managers, his methods could serve as a model to work toward.

MONDAY EVENING

DIAL-A-DIVA

Jill Dyche, Partner, Baseline Consulting

Maureen Clarry, President and CEO, CONNECT: The Knowledge Network

Claudia Imhoff, President and Founder, ISI Solutions

Nancy Williams, Vice President and Principal Consultant, DecisionPath Consulting

Our divas were beautifully insightful in offering advice to address attendees' most pressing problems. They also took the opportunity afforded by the informal atmosphere (fueled by a touch of San Sebastian cabernet) to strut their inner diva-ness. One diva (to remain nameless) responded to a question about governance and alignment with this: "Marry the CEO!"

TUESDAY MORNING

AGILE DEVELOPMENT: WHAT IS IT AND WILL IT WORK WITH BI?

Larissa Moss, President, Method Focus

We learned from Larissa that agile methodologies, such as Scrum and Extreme Programming, can be effectively applied to BI but that it's critical to not get religious about a methodology "Do what makes sense for your environment," she said. She added that the cadences (release schedules) for BI projects will vary (unlike software development for transaction systems), largely because BI involves architectural development, not just programming.

PANEL

APPLYING AGILE TECHNIQUES TO BI

Jim Hill, Director of Data Management, 1-800-CONTACTS

Wyatt Weeks, Group Manager, Business Intelligence, Sports Authority

Jim convinced us that agile techniques turn adversarial client relationships fueled by contracts and service-level agreements into collaborative ones that yield positive results on a consistent basis. Wyatt showed how to apply Scrum's one-month release cycles to BI and DW tasks, while Jim's group uses weekly iterations.

LAYING THE GROUNDWORK FOR AN ENTERPRISE BI PROGRAM

Al Schellhorn, Senior Vice President of Corporate Development, Alfa Insurance

A senior executive in charge of mergers and acquisitions and business development, Al encouraged us to run BI programs like they are start-up businesses. He recommended creating a mission statement and a marketing program and getting the best people on the project. With strong sponsorship from the CEO, Alfa plans to use BI to leapfrog better-known competitors by having a comprehensive view of customers and the market.

CASE STUDY

DO OR DIE: RESTRUCTURING FOR AGILITY AT THE UNIVERSITY OF ILLINOIS

Aaron Walz, Assistant Director, Business Information, University of Illinois

Aaron showed how to restructure a BI team to deliver more projects at less cost. He also showed how to evolve from data warehousing to business intelligence by taking responsibility for end-user deliverables and mapping the right tools to users' various information requirements.

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TUESDAY AFTERNOON

TRACK 1—GETTING STARTED

HOW TO MARKET A BI PROGRAM

Laura Madsen, Consultant, Lancet Software

Laura gave the audience a well-rounded description of a comprehensive BI marketing plan and its relevance to a successful BI program. Laura shared her direct experiences of why BI consumers fall into a “user continuum” and how it makes marketing efforts more successful. She provided a template of a marketing plan to help those who have not started. Laura emphasized the importance of the communication plan above all else.

SURVIVAL OF THE FITTEST: ADAPTING YOUR DATA WAREHOUSE TO MEET BUSINESS NEEDS

Janet Nickel, I/T Principal Technology Analyst, Hallmark Cards

Janet used the US Army Field Manual as a guide through the necessary activities for BI S.U.R.V.I.V.A.L. Leveraging industry experts (like TDWI) is key for credibility while engaging with the business. Building a business case for all your BI/DW efforts helps to relate to the business the real value of what work is being done. Janet made sure to let the audience know they are not alone and to reach out for help wherever it is available. She also shared several books and references used for inspiration.

TRACK 2—DELIVERING VALUE

STRATEGIES FOR OUTSOURCING AND OFFSHORING

John O'Brien, President, Zukeran Technologies

John started with an overview of the current outsourcing and offshoring market. Drawing on his personal experiences, he gave practical tips. For example, there are hidden costs and the real value of offshoring doesn't occur until the third year. Don't offshore your core systems; they provide the value stockholders pay for. The best data warehousing functions to offshore are those that are well understood and repeatable. You should expect to have personal onsite with the offshore vendor. Also, name someone to manage and be responsible for the offshore relationship.

TRACK 3—NEXT GENERATION

BI IN THE CLOUD

Steve Dine, President, DataSource Consulting

Stephen Dine spoke about his recent experience implementing analytic sandboxes and other BI solutions in the Amazon Elastic Compute Cloud (or Amazon EC2). He explained that scaling out is easy once BI solutions are deployed in the cloud, because the cloud handles resource allocation automatically, but scaling up is difficult since the cloud doesn't permit you do much tweaking of your solutions. Likewise, access to data and BI tools through services enables new architectures, but cloud-based services aren't very reliable yet. Amazon EC2 charges you for bandwidth, so it's expensive to do constant data integration. Even so, it's cheap to do a one-time data load for an analytic sandbox or similar BI solution.

GAME-CHANGING TECHNOLOGY: THE IMPACT OF HIGH-PERFORMANCE ANALYTICAL SYSTEMS ON BUSINESS INTELLIGENCE

Krish Krishnan, Industry Analyst and Data Warehousing Expert, Sixth Sense Advisors

Krish Krishnan extolled the virtues of data warehouse appliances. These relatively new platforms are purpose-built for analytics, and it's rare to find an EDW deployed on an appliance. Instead, appliances typically host a multi-terabyte data mart—sometimes called a teramart—in support of a specific analytic application. Data warehouse appliances handle massive data volumes, require minimal data preparation, yield high-speed analytic queries, and exist outside the EDW environment. Hence, they are the ultimate analytic sandboxes.

TRACK 4—AGILITY AND ALIGNMENT

FROM SOURCE TO SOLUTION: THE BUSINESS INTELLIGENCE COMPETENCY CENTER

Paul Ormonde-James, Director of Business Intelligence, World Bank

Paul provided a specific tactical road map for achieving success with a large BI implementation. The process was illustrated through a strong case where the parts were put together in measurable and reasonable increments. Paul gave specific insights for leadership methodology, working with the business on a peer level, analysis and project selection, hiring the best people, staffing structure, tools, and much more. Uniquely, Paul showed how to repurpose the Porters 5 Forces model to describe and analyze his BI domain in business terms. From tactical execution to strategic mapping, Paul provided a powerful case to draw from. His presentation was complete and generous. However, to reach a more robust effect, it could also be sliced into four one-hour modules.

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BEST PRACTICES IN RAPID DELIVERY: HITTING A BULLS-EYE WHILE MINIMIZING RISK

Jim Gallo, Senior Data Warehouse Architect, Information Control Corporation

Jim covered an iterative rapid prototyping methodology. He presented risk management, best practices, and how to increase effectiveness through an increased number of short cycle iterations. He illustrated good and bad BI modeling tool use. He also provided guidance on communication between the business, IT, and BI teams. Jim's presentation had a strong footing in the realities of deployment while maintaining a focus on the larger business drivers behind BI initiatives.

CLOSING KEYNOTE

A NEW AMERICAN UNIVERSITY FOR NEXT GENERATION LEARNERS

Dr. Adrian Sannier, CIO

John Rome, Director of Business Intelligence, Arizona State University

Adrian and John blew the doors off the Summit with a rollicking look at how Arizona State University has embraced Google, dashboards, and data warehouses, transforming the way the university does business and meeting the quixotic information habits of the next generation of workers.

WEDNESDAY

PANEL

THE FUTURE OF BI

John O'Brien, President, Zukeran Technologies

Laura Edell-Gibbons, Senior Business Intelligence Solutions Architect, Mantis Technology Group

Mark Madsen, President, Third Nature

Dave Schrader, Teradata

Harriet Fryman, IBM

John Trigg, QlikView

Jake Freivald, Information Builders

Our informed speakers and panelists offered numerous thought-provoking glimpses into the future of BI. John O'Brien said that infrastructure advances are dramatically reducing the cost and complexity of delivering ever-larger volumes of data at faster rates to larger numbers of people to support new and innovative analyses and processes. Laura Edell-Gibbons talked about the importance of visual design and why you should watch your target users interact with your software if you want to increase adoption and usability. Mark Madsen changed our notion of data from a numeric entity to a symbol that is inherently malleable. He encouraged us to liberate data from static models, access methods, and architectures to a new networked environment where users navigate data semantically through mashups and other Web 2.0 implementations.