

CBIP—Not Just Any Four-letter Word

By Lawrence Bercini

We need to establish new techniques that bring together internal and external views, forecasting and monitoring perspectives, and business context to identify the right metrics and define the glue that holds them together. The *internal views* align with those described by the Balanced Scorecard—finance, customer, process, and people. *External views* include economic, political, social, and technological perspectives. *Forecasting and monitoring* points of view support a balance of leading and lagging indicators. *Business context* is found by high- level decomposition of business mission and resources.

At the intersection of these four factors we'll discover and formalize things worthy of measuring. For example: "Leading indicators of the financial impact of tax law changes on Internet sales":

- Leading indicators (*forecasting*) • of the financial impact (*internal view*—finance) During my 15 years at my company, I've worn a lot of hats: programmer, project leader, and analyst. For the last 12 years, I've functioned as a facilitator and data modeler for our Data Services Group, consisting of database administrators and data resource management personnel supporting commercial database implementations. We are part of a shared services division that lends professional consultants to various other business units within the company.

About five years ago, one of the business units I had been supporting decided it needed to finally get a handle on some 300-odd different reports it generated on a monthly basis. The management of that business unit brought in a consulting firm with BI expertise to implement a new architecture that would replace the reporting system, which had been in production since the Jurassic era. Armed with ETL and BI tools, the consultants began to crank out all sorts of database designs. In order to support this brave new world, I had to learn dimensional modeling—PDQ!

One TDWI World Conference and a couple of courses later, I was up to speed and cranking out data mart designs faster than shoppers at the blue light special! But the more I worked, and the more I learned, the more I began to suspect that the consultants were taking shortcuts and/or not dealing with the complex issues. The few times I attempted to raise these issues, the management summarily dismissed me, since after all, the consultants were the "experts"!

When shared services was challenged to raise its own standards as a company center of excellence, my managers encouraged all employees to look for ways to earn professional certification. Having already attended TDWI conferences, I learned of the then-brand-new CBIP certification process and brought it to my manager's attention. He gave me the green light, and soon I was winging my way to Las Vegas for the Winter 2004 TDWI World Conference.

Now, I have zero fear of public speaking or other activities that give most folks the jitters. But to me, taking an examination is the worst kind of nightmare. I think I would have preferred to be at my high school graduation wearing nothing but my underwear! But there I was, a part of the very first group scheduled to take the certification exam. As grueling as it was, it was a good thing I took the "Exam Cram" course first, since it helped me get the "rhythm" of the exams.

On testing day, it was clammy hands that worked on that core exam. I'll never forget what it was like when I finally clicked that Submit button: I entered into a spatial anomaly where time had ceased and nothing else existed except that monitor and me. When the score popped up and I was able to breathe normally again, I was first relieved that I had survived it, but also thrilled with my score. The two specialty exams (data administration and data modeling) were a breeze by comparison. I was delighted to get mastery level in those two. A month following my exam, I was amused to overhear my boss on the phone with another department head. He was explaining why I would be replacing the data modeler normally assigned to that business unit.

"Lawrence is the one you need. He's a CERTIFIED Business Intelligence Professional." [Enter fugue state. Cue music: Aretha Franklin's voice fills my head: "R-E-S-PE-C-T...find out what it means to me..." Regain normal function.] Hmmmm... Where did I put that list of issues that the "experts" left us to deal with?