

## **Post-Conference Trip Report**

### **TDWI World Conference**

November 5–10, 2006

Orlando, FL

Dear Attendee,

Thank you for joining us in Orlando for our TDWI World Conference and for participating in our conference evaluation. We hope you had a productive and enjoyable week.

This report should provide a valuable way for you to summarize your educational experience for your manager and peers. If you would like to make a suggestion about how to make this report more useful, please send an e-mail to Jennifer Agee ([jagee@tdwi.org](mailto:jagee@tdwi.org)).

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## **I. Conference Overview-----**

The Orlando conference drew attendees from 43 states and 25 countries, including visitors from Canada, South America, Europe, and Asia. This was truly a worldwide event! Our most popular courses of the week were TDWI Data Modeling, Enterprise Data Modeling for Business Intelligence, Data Modeling Challenges, and TDWI Enterprise Metrics: Designing Integrated Business Metrics. For a complete list and descriptions of all courses offered in Orlando, [download the conference brochure](#) or visit [www.tdwi.org/orlando2006](http://www.tdwi.org/orlando2006).

## II. TechSurvey Results -----

By Philip Russom, Senior Manager of Research and Services, TDWI

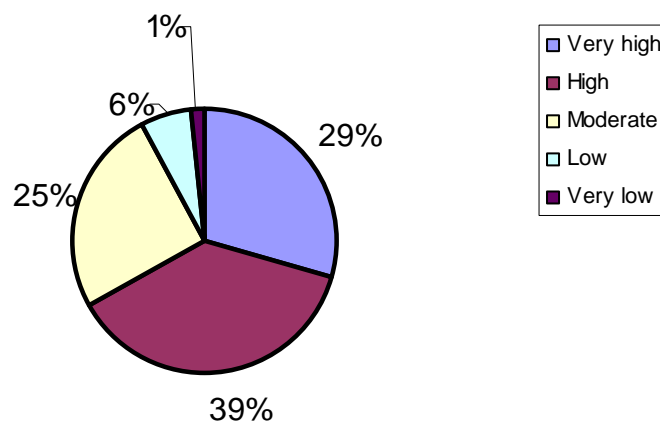
Data warehousing professionals and their business sponsors continue to view their business intelligence and data warehousing initiatives (BI/DW) as highly valuable. That's the overarching message from the TechSurvey conducted at TDWI's World Conference in Orlando. TDWI has asked attendees to rank the value of BI/DW at three other conferences, too, and the responses from all four conferences are aggregated in the charts below.

- **TDWI attendees value BI/DW highly.** The TechSurvey asked attendees to rank “the business value that our BI/DW delivers.” Around two-thirds responded with high (39%) or very high (29%), and a quarter claimed moderate value (25%). Only 7% said low or very low.
- **Executives value BI/DW, too.** Attendees described the value as perceived by “top business executives” to be high (42%) and very high (24%), followed by moderate (28%). According to respondents, only 6% of executives see BI/DW as a low or very low value.
- **Most BI/DW budgets are increasing.** Perhaps these perceptions of high value help explain why budgets for BI/DW are mostly increasing (68%) or remaining flat (29%), with only 3% of respondents reporting a decrease.

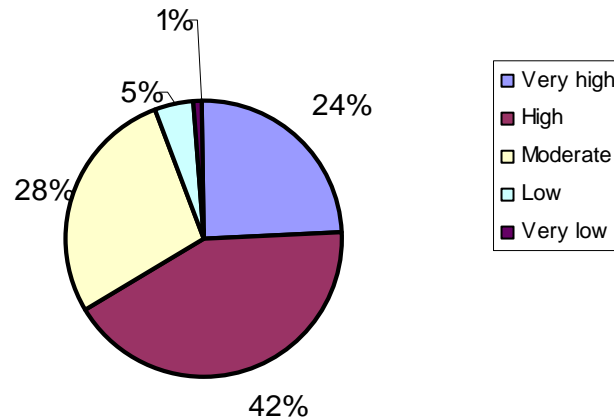
### Questions and Responses from the Survey

#### In my opinion, the business value that our BI/DW delivers is...

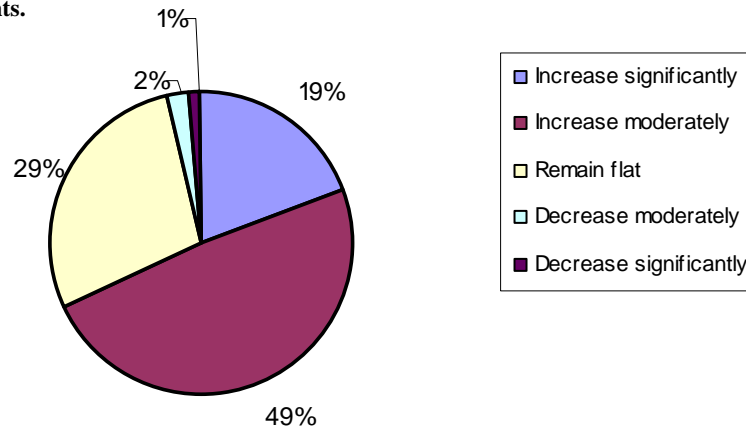
Based on 415 respondents.



**Our company's top business executives think the strategic value of the BI/DW is...**  
Based on 423 respondents.



**During the next budget cycle, I expect our BI/DW funding to...**  
Based on 423 respondents.



### III. Keynotes

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By Eric Kavanagh, Web Editor, TDWI

Monday, November 6, 2006

#### **Your Data Warehouse Is Dead! The Rise of CDI**

Jill Dyché, Partner, Baseline Consulting

**“This is a test of the emergency data warehousing system. This is only a test. Were this a real emergency, your data warehouse would be dead.”**

Sparking concern among the rank-and-file attendees at TDWI’s quarterly conference in Orlando this week, Monday keynote speaker Jill Dyché bravely took the podium as her cover slide silently, yet audaciously proclaimed the unthinkable: “Your Data Warehouse Is Dead! The Rise of CDI.”

(Gasp!)

Fear not, gentle practitioners: the message Dyché evangelized was one of hope (and a bigger slice of the pie, specifically) springing eternal: “The stuff that we’re doing in our data warehousing and business intelligence teams should actually transcend the data warehousing platform.” In other words, she argued, the pastures of customer data integration (CDI) are a plenteous green, and who better to graze them than the practiced, polished crews of decision-support trenches everywhere?

So, your data warehouse is not really dead. “It could have the sniffles,” joked Dyché, a founding partner of Baseline Consulting.

Framing the argument for the rise of CDI, Dyché first outlined common challenges with customer data. Unlike the historical data that comprises the nuts and bolts of a traditional data warehouse, customer data is much more volatile, with frequently changing values. Complicating matters, customers can have more than one relationship with an enterprise: as a customer, vendor, partner, even board member, for example.

There are other challenges as well. Various operational systems can have widely ranging views on what, exactly, constitutes a customer. Such systems can include customer relationship management applications, supply-chain programs, order-taking and fulfillment apps—really, any transactional system that an enterprise might have. Furthermore, the real world presents an array of potential hierarchies for enterprise systems, whether financial reporting hierarchies, organizational, or product hierarchies. Said Dyché: “Hierarchical relationships are not conducive to SQL.”

Then there’s the timeliness issue. In essence, CDI seeks to fulfill the long-promoted promise of CRM: to maximize every customer touch-point by feeding systems and thus workers with the cleanest, most up-to-date information available about a particular customer. Such right-time data can hardly be expected from the historical-minded warehouse. Rather, a more expedient method must be devised to deliver such data to front-line systems while a customer is on the phone, logged into a Web site, or possibly even standing at a checkout counter in an old-fashioned, brick-and-mortar store.

### **Baked In, Not Bolted On**

On the issue of data quality, Dyché makes no bones: quality is absolutely key. The garbage-in, garbage-out paradigm obviously applies to customer interactions, arguably even more so than with inward-looking processes such as reporting. The reason is because customer interactions are where rubber meets road in any organization, and if customers see an organization’s dirty laundry—whether by receiving a mailer that misspells their name, or by being pitched on a product upgrade for something they don’t own—the net effect will likely be a missed opportunity, if not a lost customer.

Consequently, Dyché stressed the importance of tightly coupling data quality with any CDI initiative. The way to accomplish that, she said, is to implement a CDI hub, which is ideally an actual server loaded with sophisticated data quality software, such as complex matching algorithms, as well as data retrieval and delivery functionality. With such a solution, the data quality component is “baked in, not bolted on.”

The definition for CDI provided by Dyché states that it is “the automation of the integration, reconciliation, management, and certification of customer master data from enterprise systems to enterprise systems.” In other words, a CDI hub is a form of middleware that’s designed for the

express purpose of determining and delivering the “golden customer record” to enterprise systems. And CDI, per se, is a subset of the increasingly popular discipline of master data management (MDM).

Dyché explained that an effective CDI hub should incorporate eight core functions, outlined in these layers:

- Client interface
- Business/data rules
- Matching engine
- Merge processor
- Validation and transformation
- Source system interface
- Data administration
- System configuration

Because a CDI hub is designed to feed operational systems in near-real-time, that means speed is obviously critical. In fact, Dyché noted that such a hub really should be treated as an OLTP system, as opposed to an analytical system such as an OLAP cube. Therefore, reliability and scalability are extremely important, especially since the hub must have constant connectivity to front-line, customer-focused systems.

Dyché also offered some key recommendations for building a CDI solution. First and foremost, a service-oriented architecture can make implementation and maintenance easier, since CDI is essentially a service provided to enterprise systems. With an SOA, an organization can loosely couple a customer’s golden record to all connected operational systems. On the other hand, the data quality component must be tightly coupled (e.g. “baked in”) to the hub itself.

The good news, said Dyché: “It’s actually pretty easy to configure a CDI hub. You don’t have to really change the source systems, which is a boon to those operational guys who don’t want to be bothered anyway.” In terms of where and how to begin, she recommends that companies “think big but start small. Let’s start with a small project around MDM, and use it as the jumping-off point.”

On the issue of whether or not to jump, Dyché was clear: “MDM is transcendent,” she concluded. “It’s the future.”

**“This has been a test of the emergency data warehousing system. We will now return to our regularly scheduled ETL processes.”**

Thursday, November 9, 2006

## **The First Word in BI Is Business**

*Claudia Imhoff, PhD, President, Intelligent Solutions, Inc., and TDWI Fellow*

Oh, the magpie! What a curious bird, or *rara avis*, as the Romans would say. Attracted to shiny things, known for something of a temper, he at once exhibits a remarkable ability to remember, and yet a penchant for distraction (usually due to some new shiny thing).

Such is the modern senior executive. If you catch a CxO's attention, be sure to maximize your time: it will be limited! And since such senior execs typically control the purse strings that determine whether or not business intelligence (BI) projects move forward, a blown opportunity can be costly.

Such was the upshot of Dr. Claudia Imhoff's Thursday keynote. Her presentation, entitled "The First Word in BI Is Business," focused on three central themes: misconceptions regarding business involvement, how to get the attention of executives, and what information technology (IT) professionals can do to help their own cause.

For the first category, Imhoff outlined and debunked four classic scenarios:

- "I know better than they do."
- "IT doesn't need to understand the business."
- "Business doesn't need to understand IT."
- "Just give me what I want..."

In all four of those instances, someone is falling short of the requisite mindset. The first example shows the defiance that some IT folks can demonstrate toward management, as manifested by a foolish predilection to avoid input from the business side. The second and third are variations on the same theme: no matter which side of the company you populate (business or IT), you really should gain some understanding of your counterpart. And the final statement above... who hasn't heard that one?

"I don't know what I want, but I'll know it when I see it," joked Imhoff, then offered another common miscalculation: "If I build it, they will come. If I build a BI solution, people will just flock to it." Experience shows—that doesn't work, either.

The good news, said Imhoff: "The business is very much aware of what BI can do. And they're hungry for it! They've been hungry for data for years and years and years."

Once you move beyond the misconceptions, the next order of business is to secure the attention of that important business person, the sponsor for your project. Imhoff offered some insights on the characteristics of a good business sponsor:

- They don't simply wait around for IT to divine the solution
- They take ownership of the process, and effect changes as needed
- They embrace the role of steward and pay heed to data quality

- They promote the importance of user training
- They understand the value of strategic decision-support systems

Of course, good sponsors also show their support throughout the enterprise, sometimes working to fix problems upstream when necessary. Some things to watch out for: users who can't articulate what they want; a sponsor who provides money but no staff, or staff but not much money; a sponsor who may not have the clout or personality to persevere.

### **What IT Can Do**

As with most things in life, Imhoff says it's important to be proactive in making BI projects happen. Here are some key considerations:

- Just say no: be realistic about what can be done; don't over-commit
- Sell it: make sure you evangelize broadly to your target audiences
- Communicate: maintain regular dialogue with all participant groups
- Be practical: make use of inexpensive tools like e-mail and meetings

Incentives can also play a significant role, but only if they're aligned with strategic objectives. "Incentives themselves need to be aligned with the usage of data and the sharing of data, and the strategic objectives," she said. "If those incentives are not lined up, there isn't much of a chance that they're going to use them."

Some other words of wisdom: "Fix the problems where they're actually occurring. Maybe we need some new edits, or new training for the operational personnel," said Imhoff. And beware of the IT-to-IT relationships. "It's important that we maintain a good relationship with other members of IT."

But most importantly: "Whatever it takes, help the business understand."

### **TDWI Fellowship Granted!**

In a surprising development, immediately following the conclusion of her keynote address, Dr. Claudia Imhoff received the prestigious TDWI Fellowship. TDWI's director of education, Dave Wells, slipped back onstage following her closing remarks, called her back to the podium, and unveiled a plaque proclaiming Imhoff as an official TDWI Fellow—a rare distinction given to professionals who accomplish outstanding achievements in business intelligence and data warehousing. Imhoff was visibly moved by the honor, and received a hearty standing ovation.

## IV. Drilldown Series-----

By Dave Wells, Director of Education, TDWI

The Orlando conference introduced TDWI's new education concept: the Drilldown Series, which offers a series of courses that provide both breadth and depth of education in a specific area. This conference included two Drilldown Series: Master Data Management (MDM) and Data Quality.

### Master Data Management / Customer Data Integration

Master data management (MDM) is a hot topic both for practitioners of data integration and for business people who seek a single version of the truth from data. Many in IT are excited by the promise of new technology to reduce the cost and complexity of managing enterprise reference data. Customer data integration (CDI) is a unique variation of master data management that focuses on what is perhaps the most important component of any business—the customer.

Eight full- and half-day courses and the Monday keynote address covered the topic of MDM/CDI, from business motivation to technical architecture and implementation challenges. Each instructor brought unique experience and perspective to this relatively new technology—often with conflicting descriptions of the “what, why, and how” of MDM.

This was the first volley in the many MDM/CDI debates that are sure to come. Through six days of MDM education, we heard something like eight different definitions. Expect this area to generate as much controversy and confusion as the Inmon-Kimball divide in the early years of data warehousing. Good, healthy debate means that there really is something to this technology. It may take time to complete the cycle from confusion to convergence, but ultimately MDM will become “under-the-hood” technology that is at the core of data integration and data management.

### Data Quality

The data quality Drilldown Series featured 13 half- and full-day classes, some of which overlapped with the MDM series (the two topics are closely related). This comprehensive lineup of courses covered the full range of data quality topics, including governance and stewardship, profiling and discovery, association with business rules and processes, quality metrics and measures, data cleansing, and much more. Perhaps the highlight of the series was “Data Quality for Data Warehousing: A Practical Guide” from Tom Redman, author of *Data Quality: The Field Guide* and *Data Quality for the Information Age*—two of the most practical and widely read books on the subject.

Arkady Maydanchik continued the theme of practical skills with two full days. His “Practical Skills for Data Quality Assessment” started with the assertion that data quality can't be managed until it is measured. In “Practical Skills for Monitoring Ongoing Data Feeds,” Maydanchik illustrated applied measurement techniques and showed how to apply measurement for continuous quality improvement in data. This full-day course was followed by a highly effective HandsOn evening session.

With other courses and instructors discussing topics ranging from governance and stewardship to data certification, data quality practitioners found much to take away from this conference. High attendance and positive response to this series of courses makes it clear that data quality is an ever-present issue—perhaps the most widely shared problem among data management organizations throughout the world. By learning from the experts, many practitioners took steps toward resolving the issue.



## V. Certification Program -----

TDWI continued the industry's leading certification program at the Orlando conference. In partnership with the Institute for Certification of Computing Professionals, TDWI offered both a day-long Exam Prep course and opportunities to test for certification.

TDWI offers certification at the Practitioner and Mastery levels. Becoming certified requires a combination of in-depth education and real experience to pass examinations that test knowledge, skill, and understanding of application. The credential is offered in five specialties: Leadership & Management, Business Analytics, Data Analysis & Design, Data Integration, and Administration & Technology.

For more information on certification and testing, write to [cbip@tdwi.org](mailto:cbip@tdwi.org) or visit [www.cbipro.com](http://www.cbipro.com).

## VI. Evening Education -----

### Night School

Night School sessions were offered after regular courses ended to promote networking among attendees and to test new topics. Click on the course titles below to view descriptions of each Night School session.

- [Corporate Governance for BI Programs—Bridging the Business-IT Gap](#)
- [Data Governance](#)
- [Data Warehouse Appliances—Too Good to be True?](#)
- [HandsOn-Evening: Enterprisewide Metadata Integration](#)
- [Social Network Analysis](#)
- [Top Ten Performance Optimization Techniques for Large MOLAP Cubes](#)
- [Best Practices for BI Requirements](#)
- [Enterprise Business Intelligence from ERP Systems](#)
- [Twelve \*Smarter\* Steps to Business Requirements Gathering](#)
- [HandsOn-Evening: Monitoring Quality of Ongoing Data Feeds](#)
- [Managing to Fail—How Correct Business Decisions Lead to Business Intelligence Failure](#)
- [Model Driven Data Warehouse Generation](#)
- [Service-Oriented Business Intelligence—SOA's Impact on BI](#)

### Guru Sessions

Throughout the week in Orlando, attendees had the opportunity to schedule free, 30-minute, one-on-one consultations with a variety of course instructors. These “guru sessions” provided attendees with an opportunity to obtain expert insight into their specific issues and challenges.

## VII. Vendor Exhibit Hall-----

By Diane Foulz, Program Support Manager

At every TDWI World Conference, we invite leading hardware, software, and consulting vendors to share their latest technologies with attendees. The following vendors exhibited at our World Conference in Orlando, FL.

Ab Initio Software Corporation	<a href="http://www.abinitio.com">www.abinitio.com</a>
Actuate Corporation	<a href="http://www.actuate.com">www.actuate.com</a>
ASG	<a href="http://www.asg.com">www.asg.com</a>
BIReady	<a href="http://www.biready.com">www.biready.com</a>
Business Objects	<a href="http://www.BusinessObjects.com">www.BusinessObjects.com</a>
Cognizant	<a href="http://www.cognizant.com">www.cognizant.com</a>
Cognos Inc.	<a href="http://www.Cognos.com">www.Cognos.com</a>
Collaborative Consulting	<a href="http://www.collaborativeconsulting.com">www.collaborativeconsulting.com</a>
Composite Software, Inc.	<a href="http://www.composite.com">www.composite.com</a>
DataFlux	<a href="http://www.DataFlux.com">www.DataFlux.com</a>
DATAlegro	<a href="http://www.DATAlegro.com">www.DATAlegro.com</a>
DataMirror	<a href="http://www.DataMirror.com">www.DataMirror.com</a>
DataMentors, Inc.	<a href="http://www.datamentors.com">www.datamentors.com</a>
DecisionPath Consulting	<a href="http://www.decisionpath.com">www.decisionpath.com</a>
Embarcadero Technologies, Inc.	<a href="http://www.embarcadero.com">www.embarcadero.com</a>
ETI	<a href="http://www.eti.com">www.eti.com</a>
Fast Search & Transfer	<a href="http://www.fastsearch.com">www.fastsearch.com</a>
GoldenGate Software	<a href="http://www.goldengate.com">www.goldengate.com</a>
Group 1 Software, a Pitney Bowes Company	<a href="http://www.g1.com">www.g1.com</a>
Headstrong	<a href="http://www.headstrong.com">www.headstrong.com</a>
HP	<a href="http://www.hp.com">www.hp.com</a>
Hyperion	<a href="http://www.hyperion.com">www.hyperion.com</a>
IBM	<a href="http://www.ibm.com">www.ibm.com</a>
Identity Systems	<a href="http://www.identitysystems.com">www.identitysystems.com</a>
Infobright Inc.	<a href="http://www.infobright.com">www.infobright.com</a>
Informatica Corporation	<a href="http://www.informatica.com">www.informatica.com</a>
Information Builders	<a href="http://www.ibi.com">www.ibi.com</a>
Initiate Systems, Inc.	<a href="http://www.initiatesystems.com">www.initiatesystems.com</a>
Knightsbridge Solutions LLC	<a href="http://www.knightsbridge.com">www.knightsbridge.com</a>
LogiXML	<a href="http://www.logixml.com">www.logixml.com</a>
MicroStrategy	<a href="http://www.microstrategy.com">www.microstrategy.com</a>
Netezza Corporation	<a href="http://www.netezza.com">www.netezza.com</a>
Oracle	<a href="http://www.oracle.com">www.oracle.com</a>
Proxix Solutions, Inc.	<a href="http://www.proxix.com">www.proxix.com</a>
Relational Solutions, Inc.	<a href="http://www.relationalsolutions.com">www.relationalsolutions.com</a>
SAP America, Inc.	<a href="http://www.sap.com">www.sap.com</a>
SAS Institute Inc.	<a href="http://www.sas.com">www.sas.com</a>
SGI	<a href="http://www.sgi.com">www.sgi.com</a>
SilverTrain, Inc.	<a href="http://www.silvertraininc.com">www.silvertraininc.com</a>
Siperian Corporation	<a href="http://www.siperian.com">www.siperian.com</a>

Sun Microsystems	<a href="http://www.sun.com">www.sun.com</a>
Sunopsis	<a href="http://www.sunopsis.com">www.sunopsis.com</a>
Sybase	<a href="http://www.sybase.com">www.sybase.com</a>
Syncsort Incorporated	<a href="http://www.syncsort.com">www.syncsort.com</a>
Teksouth Corporation	<a href="http://www.teksouth.com">www.teksouth.com</a>
Teradata, a division of NCR	<a href="http://www.teradata.com">www.teradata.com</a>
Trillium Software, a division of Harte-Hanks	<a href="http://www.trilliumsoftware.com">www.trilliumsoftware.com</a>
XLcubed Ltd.	<a href="http://www.xlcubed.com">www.xlcubed.com</a>

## VIII. Hospitality Suites -----

Attendees had the chance to join the following solution providers for an evening of informative talks, fun, good food, and great conversation. Each vendor invited attendees to learn about business intelligence and data warehousing solutions and grab a bite to eat in a relaxed, interactive atmosphere.

### Monday, November 6

**Cognos Delivers KnowledgeStorm the Right Information**  
 Sponsored by Cognos Inc.

**vRoom—The DataFlux Version 8 Launch**  
 Sponsored by DataFlux

**Oracle and HP for Data Warehousing**  
 Sponsored by Oracle and HP

### Tuesday, November 7

**The Victory Lane Lounge**  
 Sponsored by SAS Institute Inc.

**Sun Microsystems, Informatica & Partners: Viva Las Vegas**  
 Sponsored by Sun Microsystems and Informatica Corporation

### Thursday, November 9

**BI Reference Architecture in the World of SOA**  
 Sponsored by RCG Information Technology

## IX. More Educational Opportunities -----

### TDWI Onsite

*Education on your timeline, in your environment, within your budget.*

TDWI Onsite brings superior content and skilled instructors to your organization with a commitment to delivering the highest quality business intelligence and data warehousing education available. We can tailor TDWI's courses to meet your company's unique challenges and issues, so everyone involved in a project shares a common knowledge base and learns in support of the same corporate objectives. For more information, contact Yvonne Baho at 978.582.7105 or [ybaho@tdwi.org](mailto:ybaho@tdwi.org), or visit [www.tdwi.org/onsite](http://www.tdwi.org/onsite).

### TDWI Seminar Series

*In-depth training in a small class setting.*

Whether you are embarking on a new data warehousing project or working in a mature business intelligence environment, TDWI Seminars offer courses to meet your specific needs and advance your project goals. From the fundamentals of business intelligence to advanced techniques for data modelers, you will learn concepts and techniques to accelerate your professional development. TDWI Seminars are offered throughout the United States and Canada, so you can get the training you need when and where your schedule allows.

#### 2007 Dates and Locations:

<b>Chicago, IL</b>	<b>March 5–9</b>
<b>Denver, CO</b>	<b>March 26–29</b>
<b>Vancouver, BC</b>	<b>April 16–19</b>
<b>Los Angeles, CA</b>	<b>June 4–7</b>
<b>Washington, DC</b>	<b>June 18–22</b>
<b>Minneapolis, MN</b>	<b>July 9–12</b>
<b>Toronto, ON</b>	<b>July 23–26</b>
<b>Portland, OR</b>	<b>September 24–28</b>
<b>Boston, MA</b>	<b>October 15–19</b>

For more information on the TDWI Seminar Series, please visit [www.tdwi.org/seminars](http://www.tdwi.org/seminars).

### Upcoming TDWI World Conferences

#### Las Vegas, NV

February 18–23, 2007

[www.tdwi.org/lasvegas2007](http://www.tdwi.org/lasvegas2007)

#### Boston, MA

May 13–18, 2007

**San Diego, CA**  
August 19–24, 2007

**Orlando, FL**  
October 28–November 2, 2007

## Recent TDWI Publications and Research

- *What Works: Best Practices in Business Intelligence and Data Warehousing* (Volume 22), a compendium of industry case studies and lessons from the experts. [www.tdwi.org/Publications/WhatWorks](http://www.tdwi.org/Publications/WhatWorks)
- *Master Data Management: Consensus-Driven Data Definitions for Cross-Application Consistency*, the latest report from TDWI Research, with findings based on interviews with industry experts, leading-edge customers, and survey data. [www.tdwi.org/Research/ReportSeries](http://www.tdwi.org/Research/ReportSeries)
- *Business Intelligence Journal* (Volume 11, Number 3) contains articles, research, book reviews, case studies, and expert perspectives from leading industry and academia gurus furthering the practice of BI and DW. A Members-only publication. [www.tdwi.org/Publications/BIJournal](http://www.tdwi.org/Publications/BIJournal)
- *Ten Mistakes to Avoid When Planning Your CDI/MDM Project* (Q3, 2006). This series examines 10 common mistakes to avoid in your BI/DW project. A Members-only publication. [www.tdwi.org/Publications/TenMistake](http://www.tdwi.org/Publications/TenMistake)
- *Symbiotic Cycles of Data Profiling, Integration, and Quality*, TDWI's annual poster depicting a BI or DW process or lifecycle. [www.tdwi.org/Poster](http://www.tdwi.org/Poster)

## DID YOU KNOW?

TDWI Members receive all of the publications and research listed above, along with many other benefits, including *TDWI FlashPoint*, a biweekly e-newsletter; quarterly best practices reports and technology market reports; annual benchmark reports on salaries and organizations; access to our Members-only archives of exclusive content; and discounts on TDWI education, including conferences, seminars, and CBIP exams.

To learn more about TDWI Membership, visit [www.tdwi.org/Membership](http://www.tdwi.org/Membership).