

TDWI

San Diego, CA // August 7–12, 2011

WORLD CONFERENCE SERIES

# Evolving Your Agile BI Environment

## Developing the Intelligent Enterprise

### TRIP REPORT

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

We want your feedback! 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 write to Roxanne Cooke at [rcooke@tdwi.org](mailto:rcooke@tdwi.org).

**For a complete list and descriptions of all courses offered in San Diego, view the [conference agenda](#) or [download the conference brochure](#).**

### TABLE OF CONTENTS

Conference Overview

TDWI Technology Survey:  
The State of Metadata Management

Keynotes

TDWI BI Executive Summit

Vendor Exhibit Hall

Special Announcement // Vendor Workshop  
// Case Study Presentations

Guru Sessions

More Educational Opportunities

# TRIP REPORT

## CONFERENCE OVERVIEW

Since 1995, TDWI World Conferences have provided the leading forum for business and technology professionals looking to gain in-depth education on business intelligence and data warehousing. Each TDWI World Conference features a unique program of top-notch instructors, full- and half-day courses, one-on-one consulting, peer networking, and an exhibit hall packed with BI solutions.

The San Diego conference drew attendees from 38 states and 22 countries. This was truly a worldwide event!

**Some of our most popular courses included:**

- [Dimensional Design: Intermediate and Advanced Techniques](#)
- [Agile Data Warehousing 101: An Introduction to Accelerated BI/DW Development](#)
- [Mastering BI with Best-Practice Architectures and Data Models: From Hub and Spoke to Agile Development](#)

## Conference Videos



Check out these video highlights from the San Diego conference: [tdwi.org/SD2011/videos](http://tdwi.org/SD2011/videos)

## Featured Topics in San Diego

While TDWI conferences always cover the full spectrum of business intelligence and data warehousing, the conference in San Diego also included courses throughout the week that focused on the following areas:

### DEVELOPING AND EVOLVING THE AGILE BUSINESS INTELLIGENCE ENVIRONMENT

Remaining adaptable and agile as you grow your BI/DW environment is one of the keys to success and profitability. Agile development promotes a specific set of techniques using iterative development for rapid delivery of systems with a minimum of rework and risk. In fact, the agile concept applies to many facets of your BI/DW environment, such as team structure, project management, system design, development, and analytics techniques.

### BUSINESS ANALYTICS/PERFORMANCE MANAGEMENT

Courses in this topic were designed to take you from basic BI/DW concepts and principles to expanded essentials such as data modeling and metrics. These courses provided the building blocks that are key to understanding the rest of this dynamic field of information technology.

### BUSINESS ANALYTICS

In the field of BI, understanding how people perceive and process information is a must. This conference delivered a series of courses on analytics, dashboards, visualization, metrics, and predictive analytics.

### DATA ASSET MANAGEMENT (QUALITY, GOVERNANCE, MASTER DATA MANAGEMENT, INTEGRATION)

Complex business environments, increasing demand for high-quality data, and critical dependencies of regulatory compliance are among the reasons that MDM captures the attention of IT and business people alike. Your MDM strategy can achieve sought-after results if the initiative is under the umbrella of a true data governance program. Data governance encompasses enterprise management of availability, usability, integrity/quality, and security of data. High-quality data is needed to drive profitable business decisions. Dirty data has long been the Achilles' heel of data warehousing. Courses in this topic covered how to model, improve quality, integrate, store, and govern this most precious asset.

### DATA MODELING

Data that is organized and optimally stored in the warehouse needs thoughtful design to fulfill business needs. Business analysts who took these courses are better prepared to work with their technical counterparts, and developers who took these courses are able to ask the right questions to determine how to design and implement the best data structures. This conference offered an in-depth look at dimensional modeling.

# TRIP REPORT

## TDWI Technology Survey: The State of Metadata Management

By Philip Russom, Research Director for Data Management, TDWI Research

The Technology Survey that TDWI circulated at the recent World Conference in San Diego asked attendees to answer a few questions about metadata management as it is practiced in their organizations. TDWI ran the same survey in May 2010. Attendees' responses provide a glimpse into the state of metadata management and how it has changed over the last year.

**Metadata management serves many applications.** When asked which applications they manage metadata for, more than 80% of survey respondents pointed to business intelligence and data warehousing, far more than for any other application type (see Figure 1). This isn't surprising, given that the survey audience was attending a TDWI conference. Next in the pecking order come the data management disciplines data integration (44% / 38% in 2010 / 2011), data quality (32% in both 2010 and 2011), and data governance (29% / 21%).

**The spreadsheet continues to be the most commonly used tool in managing metadata.** That's according to 30% of survey respondents in both 2010 and 2011 (see Figure 2). Even so, many organizations have availed themselves of software automation designed specifically for metadata management, as seen in custom solutions built in-house (23% / 13%) and dedicated metadata management tools (17% / 18%). Still others have turned to the metadata management facility within a broader data management tool (13% / 24%). For example, in data warehousing, some users rely on the metadata repository within a data integration tool.

**Metadata isn't just about the data's technical attributes anymore.** Traditionally, metadata has been literally "data about data," describing technical attributes such as data type, data structure, and data sources or dependencies. More and more, metadata practices have expanded to describe other attributes, some of them business oriented, such as business definitions and data usage rules. According to survey runs in both 2010 and 2011 (see Figure 3), roughly half of users surveyed follow the traditional approach of describing technical attributes, whereas the other half also includes business-related information in metadata. TDWI feels confident that the trend toward stretching metadata's uses will continue as organizations go deeper into governance, compliance, and master data management—which all benefit from a broad range of information embedded in metadata.

**Business people remain ignorant of metadata and its influence.** In both 2010 and 2011, survey respondents said that only 15% of their business colleagues know what metadata is and does. (This data is not charted.) That's an average; the median is much lower at about 8%. Likewise, only about 13% of business people (according to respondents) think that the quality of metadata influences their jobs. In a separate question, survey respondents identified barriers to metadata management, such as a "lack of clear business goals for metadata" (47% / 63% in 2010 / 2011) and an "ignorance of metadata concepts" (43% / 49%).

For what kinds of enterprise applications is your organization actively managing metadata? (Select all that apply.)

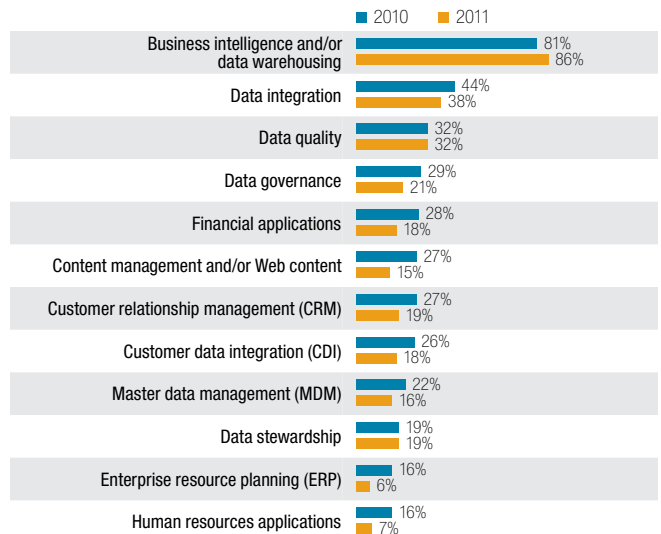


Figure 1. Based on 462 responses from 124 respondents in 2010, 284 responses from 95 respondents in 2011.

What type of tool is most often used to manage metadata in your organization?

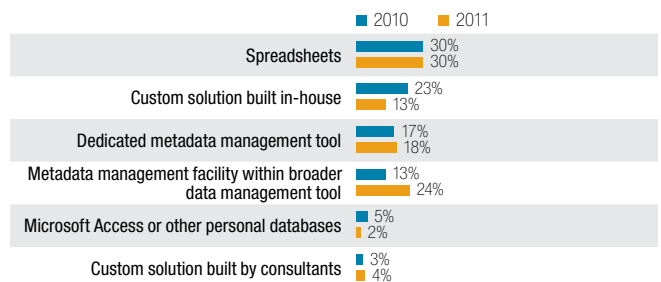


Figure 2. Based on 120 respondents in 2010, 91 in 2011.

Which of the following best describes the content of metadata in your organization?

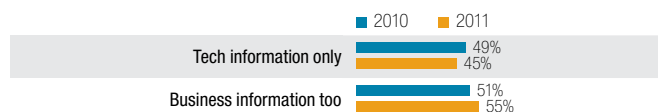


Figure 3. Based on 121 respondents in 2010, 93 in 2011.

## TRIP REPORT

## KEYNOTES

By Marie Gipson and Liz McNeil, Education Program Managers, TDWI

**MONDAY, AUGUST 8, 2011, 8:15-9:00 A.M.**

## Agile Pitfalls, Anti-patterns, and Gotchas



**Ken Collier, Ph.D.**  
Founder and President  
KWC Technologies

According to Ken Collier, the strength of agile development comes from the fact that it's a set of core principles, rather than a prescriptive methodology. But even though organizations will always need to customize the process, common pitfalls can afflict agile teams and threaten their success. Collier discussed several anti-patterns to avoid.

Arguments that Collier covered included: (1) traditional corporate structures and/or lack of trust can inhibit agile culture, (2) fear of collaboration leads to keeping the customer out of the loop, and (3) a manager's natural aversion to transparency can send all stakeholders back into old patterns, such as measuring things that don't add value.

Maintaining appropriate levels of oversight is critical, and pitfalls exist on both sides of this issue. Agile leaders must manage constraints and help maintain focus and clarity. They must make it OK to fail. At the same time, abdicating ownership will never produce wins. Failures must be shared, as well as successes.

Other fatal mistakes include deferring quality assurance to the end of a sprint, failing to automate testing, and being too rigid on changing requirements.

Even success has its pitfalls. Collier said development teams can get into a boring rhythm of delivery that can make them lose focus. Wise managers should be vigilant even when things are running smoothly.

"Agile is not a guarantee of making everything better," said Collier. "Agile is like a mirror" that reflects the strengths and weaknesses of teams and organizations.

[Download presentation slides from Monday's keynote.](#)



**THURSDAY, AUGUST 11, 2011, 8:00-8:45 A.M.**

## Scaling Agile Data Warehousing for the Enterprise



**Ralph Hughes**  
Chief Systems Architect  
Ceregenics, Inc.

The failure of traditional, big-design enterprise data modeling projects, and those that require big investments up front, has paved the way for large organizations to turn to agile data mart projects. These organizations can reap the benefits of increased productivity, quality, and customer satisfaction that agile data warehousing has to offer.

Ralph Hughes disagrees with clients who believe agile has no place in data warehousing, but addressed the need to customize the agile approach when taking on enterprise-level program engagements. Although there are a number of issues, Hughes focused on solutions for multiple teams, organizational distribution, and corporate data integration.

Hughes detailed four solutions that address the need for analyst-driven governance and prototyping, a support-oriented enterprise architecture group, architecture reductions, and leveraging shadow IT. His proposed solutions demonstrate an opportunity for IT professionals to save valuable developer time and client money by identifying infrastructure gaps prior to going into development.

Old ways of data warehousing are burdensome and require too much time and money to produce results. When the program is managed strategically, and with the support of new vendor products, the enterprise data warehouse will emerge from the compilation of many agile data mart projects.

[Download presentation slides from Thursday's keynote.](#)



# TRIP REPORT

## TDWI BI Executive Summit

By David Stodder, Research Director for Business Intelligence, TDWI

“Achieving Greater Agility with BI and Analytics” was the theme of the BI Executive Summit, held jointly with the San Diego conference. The Summit covered how organizations can deliver value sooner with BI and analytics applications by employing new methods, technologies, and best practices. It offered practical guidance through case study presentations, expert sessions, workshops, panels, and peer networking opportunities.

Mary Gendron, senior vice president and CIO at Celestica, opened the Summit with an excellent discussion about how her organization was able to shift BI and analytics into a higher gear to match the “adaptive and agile” capabilities that the firm strives to bring to its electronics design, manufacturing, and supply chain services.

Case-study sessions from Boeing, Land O’Lakes, Kaleida Health, RBC Wealth Management, and GUESS? offered real-world guidance for using cloud BI services, mobile dashboards, self-service BI, and search technologies to improve agility. Ralph Hughes, Len Silverston, Boris Evelson, and other speakers offered attendees different perspectives of where and when to use agile methods for BI and analytics applications to achieve satisfactory results.

## Vendor Exhibit Hall

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 San Diego:

[Bodhtree](#)

[Domo Technologies](#)

[Dell Services](#)

[Denodo Technologies](#)

[EMC](#)

[Endeca](#)

[ESRI](#)

[IBM](#)

[Informatica Corporation](#)

[Information Builders](#)

[iOLAP Inc.](#)

[Jaspersoft](#)

[Kalido](#)

[Metric Insights](#)

[Microsoft](#)

[MicroStrategy](#)

[Netezza Corporation](#)

[Oracle](#)

[ParAccel](#)

[Pentaho](#)

[Phasic Systems Inc.](#)

[Quest Software](#)

[Quiterian](#)

[Roambi](#)

[SAP](#)

[SAS](#)

[Syncsort](#)

[Tableau Software](#)

[Talend](#)

[Teradata Corporation](#)

[TIBCO Spotfire](#)

[Vertica, An HP Company](#)

[WhereScape](#)

## Special Announcement // Vendor Workshop // Case Study Presentations

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

### MONDAY, AUGUST 8

#### Special Announcement

#### Microsoft “Hot off the Press” Data Warehouse Announcement

Sponsored by Microsoft

#### Case Study Presentations

#### Real-World Data Warehouse and Business Intelligence at Stein Mart, Inc.

Sponsored by Microsoft

#### Early Wins: Using New Data Modeling Technologies and Agile BI for Initial Business and BI Success

Sponsored by Endeca

#### Data Virtualization Enables Agile BI and Data Services:

#### A Beachbody, LLC Case Study

Sponsored by Denodo Technologies

### WEDNESDAY, AUGUST 10

#### Vendor Workshop

#### Data Integration for Next-Generation Data Warehousing and Real-Time BI

Sponsored by Oracle

#### Case Study Presentations

#### Teradata vs. Exadata: A Competitive Comparison

Sponsored by Teradata

#### Retail Analytics—Why the Data Warehouse Is Key

Sponsored by IBM

#### IBM Cognos 10: Intelligence Unleashed

Sponsored by IBM

#### Accessing and Leveraging Predictive Analytics

Sponsored by IBM

#### Optimizing Your Business through Visual Applications

Sponsored by Domo Technologies

## Guru Sessions

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

## TRIP REPORT

## MORE EDUCATIONAL OPPORTUNITIES

## TDWI Onsite Education

TDWI Onsite Education is practical, high-quality, vendor-neutral BI and DW education that can be put to use immediately. With TDWI Onsite Education, you maximize your training budget as your team learns practical skills they can apply to current projects—with onsite training tailored to their specific needs.

For more information, contact Yvonne Baho at 978.582.7105 or [ybaho@tdwi.org](mailto:ybaho@tdwi.org) or visit [tdwi.org/onsite](http://tdwi.org/onsite).

## TDWI Seminar Series

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.

### UPCOMING 2011 SEMINARS

<b>DIMENSIONAL MODELING</b>	Toronto, ON	August 29–September 1, 2011
<b>DATA ASSET MANAGEMENT</b>	Minneapolis, MN	September 12–15, 2011
<b>DATA ASSET MANAGEMENT</b>	Denver, CO	October 17–20, 2011

For more information, visit [tdwi.org/seminars](http://tdwi.org/seminars).

## Upcoming TDWI World Conferences, BI Executive Summits, and Forums

### TDWI WORLD CONFERENCES

Orlando, FL	October 30–November 4, 2011
Las Vegas, NV	February 12–17, 2012
Chicago, IL	May 6–11, 2012
San Diego, CA	July 29–August 3, 2012
Boston, MA	September 16–21, 2012
Orlando, FL	October 21–26, 2012

### TDWI BI EXECUTIVE SUMMITS

Las Vegas, NV	February 13–15, 2012
San Diego, CA	July 30–August 1, 2012

### A TDWI FORUM: BIG DATA ANALYTICS FOR BUSINESS INSIGHT

Orlando, FL	October 31–November 1, 2011
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## Certification Program

TDWI continued the industry's leading certification program at the San Diego conference, offering exam prep courses 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 four specialties: Leadership and Management, Business Analytics, Data Analysis and Design, and Data Integration.

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

## Recent TDWI Publications and Research

- **Self-Service Business Intelligence: Empowering Users to Generate Insights**, the latest Best Practices Report from TDWI Research, with findings based on interviews with industry experts, leading-edge customers, and survey data. [tdwi.org/bpreports](http://tdwi.org/bpreports)
- **What Works in Healthcare** (Summer 2011 Special Issue), a compendium of industry case studies and lessons from the experts. [tdwi.org/what\\_works](http://tdwi.org/what_works)
- **Business Intelligence Journal** (Volume 16, Number 2) contains articles, research, book reviews, case studies, and expert perspectives from leading industry and academia gurus furthering the practice of BI and DW. A Premium Member publication. [tdwi.org/bijournal](http://tdwi.org/bijournal)
- **Ten Mistakes to Avoid When Transforming Your BI/DW Department to Agile Methods** (Q2 2011). This series examines 10 common mistakes to avoid in your BI/DW projects. A Premium Member publication. [tdwi.org/tenmistakes](http://tdwi.org/tenmistakes)
- **TDWI's Best of Business Intelligence** (Volume 8), a selection of TDWI's best BI articles, columns, and research from 2010. [tdwi.org/bestofbi](http://tdwi.org/bestofbi)

## TDWI Premium Membership

TDWI Premium Members receive all of the publications and research listed above, along with many other benefits, including *TDWI FlashPoint*, a monthly e-newsletter; access to archives of Premium Member content; and discounts on TDWI education, including conferences, seminars, and CBIP exams.

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