San Diego // September 21–26, 2014

Managing Agile BI for the Enterprise

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tdwi.org/SD2014

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. This report should provide a valuable way for you to summarize your educational experience for your manager and peers. If you would like to provide feedback, contact Roxanne Cooke, production manager, at rcooke@tdwi.org.

View Conference Agenda
Conference Brochure

TDWI WORLD CONFERENCE
Premier BI, DW, and Analytics Training in a Conference Setting

JOIN US IN ORLANDO!

Orlando, FL // December 7–12, 2014
tdwi.org/OR2014

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 (BI), data warehousing (DW), and analytics. 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 40 states and 29 countries.

Some of our most popular courses included:

- TDWI Predictive Analytics Fundamentals
- A New Generation of Agile Data Warehousing Architecture
- Rapid Business Analytics: The Four Pillars for Agility
- The Seven Metrics of Highly Successful EDW Programs

Featured Track

The featured track for the 2014 TDWI World Conference in San Diego was "Managing Agile BI for the Enterprise." In a rapidly changing market and economy, every business must make informed decisions fast. Being adaptable and agile as you grow your data warehouse and business intelligence environments is key to success and profitability in a competitive environment. As companies adopt agile methodologies, they are discovering new ways to make their businesses more nimble, intelligent, and ultimately, more profitable. In fact, enterprises today are finding that agile applies to everything, from agile organization, to agile DW architecture, to agile modeling. Review featured track courses

Conference Topics in San Diego

The field of BI logically segments into five core disciplines, and our courses are organized in a similar fashion. The five core disciplines are defined here:

BI ESSENTIALS

Strengthen your understanding of business intelligence and data warehousing. These courses are designed to take you from basic BI/DW concepts and principles to expanded essentials such as data modeling and metrics. Review courses in this discipline

BUSINESS ANALYTICS

Optimize business performance with the right analytics for your audience. In the field of business intelligence, 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. Bring this knowledge back with you and make analytics work for your organization. Review courses in this discipline

DATA ANALYSIS AND DESIGN

Data analysis and design provides the foundation for delivery of BI applications. Data that is organized and optimally stored in the warehouse needs thoughtful design in order to fulfill business needs. Business analysts taking these courses will be better prepared to work with their technical counterparts, and developers taking these courses will be 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. Review courses in this discipline

DATA ASSET MANAGEMENT

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. Learn how to model; improve quality; and integrate, store, and govern this most precious asset. Review courses in this discipline

LEADERSHIP AND MANAGEMENT

Leadership and management is a key success factor for BI programs and projects, with a strong focus on effectively integrating people, processes, and technology to deliver business value. It requires depth of process knowledge, including development methodology, program and project management, and a high-level technical understanding of BI applications and DW concepts. Review courses in this discipline

TRIP REPORT

TDWI Technology Survey: Managing Agile BI, Analytics, and Data Warehousing for the Enterprise

By David Stodder, Director for Business Intelligence, TDWI Research

Business intelligence, analytics, and data warehousing are critical to business agility as organizations seek to make data-driven decisions and challenge assumptions based on "the way we've always done it." The BI/DW community is responding to the need by improving project collaboration between business users and developers, particularly through adoption of agile methods. Organizations are also deploying tools and platforms that support easier BI and visual data discovery functionality, which enables both professionals and nontechnical users to analyze and report on data without as much IT intervention.

The San Diego conference featured track was "Managing Agile BI for the Enterprise." The Technology Survey circulated at the conference focused on questions about agility. With our thanks to all who participated, here is an analysis of the responses:

Alignment between business users and IT, BI, and the DW team is improving. Most survey participants regard their business-IT alignment as average (41%), but it is encouraging to report that nearly one-third declared it either "good" (27%) or "excellent" (4%). (See Figure 1). The results are slightly better this year compared to those for the same question asked in our San Diego Technology Survey last year. It shows that although there is room for improvement, business-IT collaboration in the TDWI community is strengthening. About one-quarter of research participants currently have a BI, analytics, or data warehousing center of excellence, which can be a helpful institution for improving collaboration and governance. One-third plan to institute one in the future.

Most organizations are applying agile methods to a select number of projects. In San Diego, we saw both strong interest and a growing body of experience with applying agile methods to BI, analytics, and data warehousing projects. However, for most organizations, it is still early. Our research finds that few so far have expanded the number of agile projects into the double digits; just 15% have executed more than 12 to date and 5% have executed between 6 and 12 (see Figure 2).

Firms are adding functionality to their users' self-service BI and analytics deployments. Our research shows strong interest in enabling greater self-reliance with BI and analytics and reducing users' dependence on IT. In Figure 3, we can see a more fine-grain view of which types of functionality users at survey respondents' organizations are able to do primarily on their own. Interestingly, at the bottom of the list is accessing Hadoop files; only 7% said their users are currently doing this.

How would you rate the quality of alignment and collaboration between business users and your organization's IT, BI, and data warehouse developers, architects, and management?
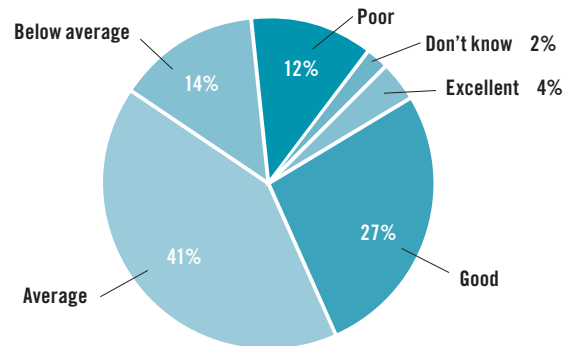

Figure 1. Based on 100 responses.

How many BI, analytics, and/or data warehousing projects has your organization executed using agile methods to date, including pilot efforts?
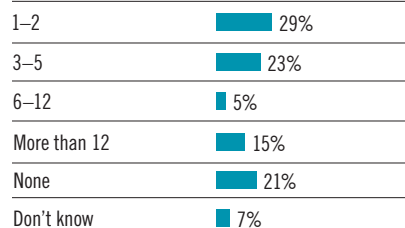

1–2	29%
3–5	23%
6–12	5%
More than 12	15%
None	21%
Don't know	7%

Figure 2. Based on 100 responses.

Which of the following BI and analytics activities are users currently performing on their own, without close IT support, and which ones are your organization planning to enable users to do in a more self-service fashion?

	Currently doing	Planning to enable	No plans to enable	Don't know or N/A
Drill down, slice and dice data	58%	26%	7%	9%
Compose queries	54%	19%	16%	11%
Integrate BI with spreadsheets	53%	23%	8%	16%
Perform data exploration and discovery	48%	32%	10%	10%
Access/import non-IT managed data	46%	11%	23%	20%
Select or create data visualizations	42%	32%	16%	10%
Personalize their dashboards	38%	38%	12%	12%
Develop data marts or OLAP cubes	33%	14%	42%	11%
Interact with BI and analytics from mobile devices	22%	40%	20%	18%
Perform predictive analytics	21%	55%	9%	15%
Customize search and text analytics	13%	32%	31%	24%
Access Hadoop files	7%	19%	34%	40%

Figure 3. Based on 100 responses. Participants could select one answer per row.

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KEYNOTES

By Marie Gipson, Production Editor, TDWI

MONDAY, SEPTEMBER 22, 2014, 8:00–8:45 A.M.

Building Effective Agile Data Organizations to Achieve Better Business Value and a More Aligned Technology Strategy

Kyle Forbes
Senior Manager, Data Platform
PayPal

People are fascinated by invention, especially in IT. But according to Kyle Forbes, working on a problem is what produces new solutions. "Nobody wakes up one day and invents something that just takes off," he said. He went on to encourage his Monday keynote audience to investigate the difference between value creation and solution creation.

Inventions throughout human history have always been attempts to solve particular problems. Agile methodologies are particularly suited to deliver value because they tend to keep teams focused on solving original problems. Forbes drew a contrast with traditional methods that require up-front planning and strict adherence to those plans, even without reassurance that the designed solution will yield value. Yet Forbes has seen this happen often.

He asked, "If I told you the thing you're building will function, but it won't achieve your goal, would you build it?" In answer, he asserted that 90% of people would do just that, despite having given the obvious negative answer.

So Forbes encouraged his audience to fundamentally change every single one of their business conversations to ask, "What's the problem?" It's a common-sense question, he asserted, that will keep goals in sight and help avoid getting locked into rigid plans that fail when they inevitably encounter the devil in the details.

Forbes concluded by reminding attendees that everyone is capable of greatness—under the right circumstances. Rather than wasting time on mundane tasks, he encouraged them to harness the problem-solving machines of their brains, and to align them against really challenging problems.

Download presentation slides from Monday's keynote

Watch on YouTube

THURSDAY, SEPTEMBER 25, 2014, 8:00–8:45 A.M.

Advanced Agile Best Practices Applied

Laura E. Everson
Analyst—Analytics Services, Enterprise Analytics
Mayo Clinic

Laura Everson warned her audience at Thursday's keynote that she would not be presenting Agile 101, and she heard no complaints.

For any attendees who might be unfamiliar, she analogized agile methods with a process for baking cookies in which the baker lets the customer taste the dough, bakes a test cookie to be tasted, then bakes a batch of cookies, each time responding to the customer's feedback. It's iterative delivery that builds in quality.

She then delved into a methodical description of many of the tricks and tenets that have proven so successful for her and her teams at the Mayo Clinic. She offered specific advice on writing user stories and managing backlogs. She explained how to build credibility with accurate estimates. She described the tangible benefits of co-located teams. From pre-planning through product demonstrations, retrospectives, and practical documentation, her presentation included spreadsheets and photos from real projects that attendees could use in their own projects and share with others.

Although Everson warned that the transition to agile requires real commitment and investment from all levels in an organization, the benefits accrue quickly in delivered value, customer confidence, and morale.

Download presentation slides from Thursday's keynote

Watch on YouTube

TDWI EXECUTIVE FORUM

FOCUS ON:

Master Data, Quality, and Governance

By Philip Russom, Director for Data Management, TDWI Research

The TDWI Executive Forum was a two-day event co-located with the TDWI World Conference in San Diego. I moderated the Forum, along with David Loshin, President, Knowledge Integrity, Inc. It was interactive, with dozens of great questions from the audience, two lively panel discussions, and peer networking during lunch and an evening reception. The Forum featured expert speakers—mostly users and consultants—presenting tips and techniques for the three themes, namely master data management (MDM), data quality (DQ), and data governance (DG).

For example, in the first day of the Forum, Rich Murnane described how his team at iJET applies MDM and DQ techniques to tracking clients' assets and employees worldwide. John Poonen of Community Care of North Carolina presented an architecture for unifying MDM, DQ, and DG. Jeff Monica shared lessons learned by the U.S. Federal Reserve on its journey to enterprise DG. Insights from representatives of the vendor community were presented in two short talks and a panel. Popular consultant and TDWI faculty member William McKnight concluded the day with a detailed plan for MDM programs and similar initiatives.

David Loshin kicked off the second day of the Forum with a keynote about accurately recognizing in data the identity of individuals and organizations, plus how social media poses both challenges and opportunities in this realm. Next came William Wise, who described the comprehensive approach to MDM developed by him and his

colleagues at NCR. Luuk van den Berg explained Cisco's innovative data certification program, which marks data and reports as complying with DG policies and DQ standards. The morning concluded with Scott Skellenger (CIO of RainTree Oncology) explaining how MDM and business analytics can improve patient outcomes, reduce healthcare costs, and advance cancer research.

After lunch, William Brooks (chief data architect at Mercer Inc.) presented a framework for successful homegrown MDM solutions, plus tips for build-versus-buy decisions. Next, representatives from four software firms talked about how new user requirements are driving future functionality in tools for MDM, DQ, DG, and other data management disciplines. Krish Krishnan (Sixth Sense Advisors)—another popular TDWI faculty member—concluded the Forum with a thought-provoking view of how DG should adapt to new forms of big data.

If you missed the TDWI Executive Forum on Master Data, Quality, and Governance in San Diego, don't despair. A similar event—the TDWI Executive Summit—is coming up in Las Vegas in February 2015.

tdwi.org/SD2014/FORUM

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TDWI LIVE

TDWI sought to enrich the experience of attendees and non-attendees alike with its TDWI LIVE site. TDWI LIVE captured the essence of the conference by providing users with access to photos, videos, tweets, and more.

Highlights of the conference were posted daily using Storify, which pulls out the most interesting photos, videos, and tweets into a format that allows them to be seen side by side. This blended social media experience provides users with key moments from the conference without having to sift through dozens of postings to multiple sites.

In addition to the daily updates provided by TDWI staff to the site, you can watch the full Monday and Thursday keynote presentations via TDWI LIVE.

Whether you were at the event or just attending virtually, TDWI LIVE served as a valuable source of information and commentary around the TDWI World Conference in San Diego.


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 or visit tdwi.org/cbip.
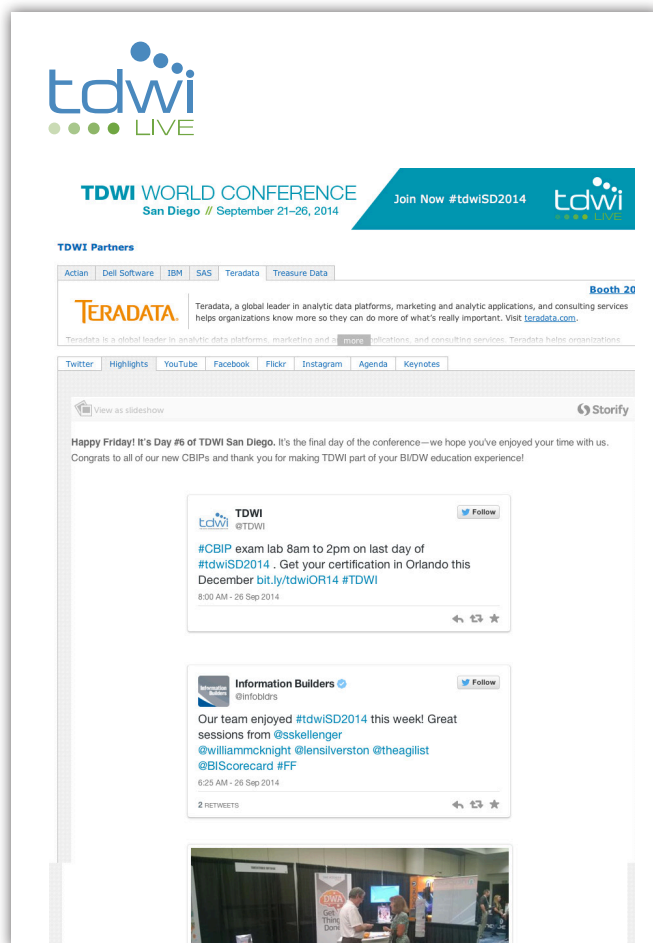
"The courses on dashboards and scorecards, as well as data modeling, enhanced my understanding about techniques to use for the software development life cycle to finish a phase of my company's data warehouse atomic and presentation layers."

Derrick Hill, Accountable Care Associates

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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.

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:

Dell Software	Qlik
Esri	Rocket Software
GoodData Corporation	SAP
Halo Business Intelligence	Splunk Inc.
IBM	Tableau Software
Information Builders	Talend
iOLAP Inc.	Teradata Corporation
Kalido by Magnitude Software	TimeXtender
L&T Infotech Ltd.	Treasure Data
MarkLogic	WebAction, Inc.
MicroStrategy	WhereScape
Neudesic	Yellowfin

Sponsored Events

Attendees had the chance to join the following solution provider 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.

Wednesday, September 24

Case Study Presentations

Big Data News Cases…What in the World are People Doing with Hadoop?
Sponsored by IBM

Take a More Refined Approach to Big Data and Analytics
Sponsored by IBM

New Get Answers You Need in the Moment: Adopting In-Memory Technology without Disruption
Sponsored by IBM

From Insight to Foresight with Business Intelligence and Predictive Analytics
Sponsored by IBM

"Learning more about change management principles in the workplace will significantly help me lead our team toward the many changes coming our way in the future, and to help us identify how our data warehouse can add value, especially by the utilization of champions and sponsors."

Sara Lockhart, Boeing

TRIP REPORT
MORE EDUCATIONAL OPPORTUNITIES

TDWI Onsite Education

TDWI Onsite Education delivers the highest quality BI/DW education directly to your office so each member of your team learns the same best practices, methodology, and strategy directly from the industry gurus. For more information, visit tdwi.org/onsite.

TDWI Seminars and Symposiums

TDWI Seminars and Symposiums offer a broad range of courses designed to provide you with the practical skills and techniques you need to make your project successful and add valuable insight to your organization. For more information, visit tdwi.org/seminars.

UPCOMING SEMINARS AND SYMPOSIUMS

Advanced Analytics	San Francisco, CA	November 10–13, 2014

Other Upcoming TDWI Events

TDWI CONFERENCES

Orlando, FL	December 7–12, 2014
Las Vegas, NV	February 22–27, 2015
Chicago, IL	May 3–8, 2015
Boston, MA	July 26–31, 2015
San Diego, CA	September 20–25, 2015
Orlando, FL	December 6–11, 2015

TDWI SOLUTION SUMMITS

Big Data Analytics for Customer Insight and Engagement	Scottsdale, AZ	November 2–4, 2014

TDWI Premium Membership

If this was your first TDWI World Conference, we'd like to welcome you to TDWI Premium Membership! For the next year, you will receive exclusive TDWI publications, research, and education discounts that are available only to Premium Members.

To use your benefits, log in to tdwi.org. Your username is your e-mail address. Visit this page to retrieve your password. Now you're ready to enjoy your benefits! Access the archives by hovering over the green navigation tab on tdwi.org marked "Premium Members," then choose one of the "Current Benefits" options. Please let us know your feedback: membership@tdwi.org. To learn more, visit tdwi.org/premium-membership.

TRIP REPORT

TDWI PUBLICATIONS AND RESEARCH

Real-Time Data, BI, and Analytics (Q4 2014), 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

TDWI Checklist Report: Modernizing a Data Warehouse for Business Advantage. TDWI Checklist Reports provide an overview of success factors for specific projects in BI/DW or a related data management discipline. tdwi.org/checklists

TDWI E-Book: Data Quality Challenges and Priorities. TDWI E-Books feature hard-hitting articles as well as perspectives and Q&A from top industry solution providers on trends, challenges, benefits, misconceptions, and best practices. tdwi.org/ebooks

TDWI BI Benchmark Report: Organizational and Performance Metrics for Business Intelligence Teams (2013) enables BI teams to compare themselves to their peers on a series of organizational and performance metrics. tdwi.org/benchmark

Business Intelligence Journal (Volume 19, 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 Premium Member publication. tdwi.org/bijournal

Ten Mistakes to Avoid When Building a Sustainable Agile BI Practice (Q3 2014). This series examines 10 common mistakes to avoid in your BI/DW projects. A Premium Member publication. tdwi.org/tenmistakes

What Works in Big Data (Volume 37), a compendium of industry case studies and lessons from the experts. tdwi.org/what_works

Infographic: Business-Driven Business Intelligence and Analytics. TDWI Infographics provide illustrated snapshots of the latest pertinent findings and vital statistics from TDWI Research. tdwi.org/infographics
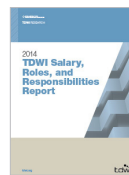
The *TDWI Salary, Roles, and Responsibilities Report* (2014) provides an overview of compensation, roles, responsibilities, skills, and more of industry professionals. tdwi.org/salary

TDWI's Best of Business Intelligence (Volume 11), a selection of TDWI's best BI articles, columns, and research from 2013. tdwi.org/bestofbi

tdwi.org/publications