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Richard
Campbell

RunAs Radio is a weekly Internet Audio Talk Show for IT Professionals working with Microsoft products. The full range of IT topics is covered from a Microsoft-centric viewpoint.



Greg
Hughes

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Trey Johnson Helps Us Get Business Intelligence!
September 26, 2007



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Carl Franklin: From runasradio.com, you're listening to RunAs Radio, the weekly Internet audio talk show for IT professionals with Richard Campbell and Greg Hughes. This is Carl Franklin, introducing show #25, with guest Trey Johnson, recorded Thursday, September 13, 2007. RunAs Radio is produced each week by PWOP Productions, offering professional media and podcasting services online at pwop.com.

Richard Campbell: Hi! You're listening to Richard Campbell and this is RunAs Radio and with me as always, my co-host, Greg Hughes.

Greg Hughes: Hey, everybody.

Richard Campbell: Where are you up, in Seattle right now?

Greg Hughes: Yeah. Actually, on the day that we're recording this show, I actually came up to Seattle yesterday from Portland hanging out with my old boss and spent some time there and yesterday evening went over for a geek dinner or a nerd dinner, not even sure which one it is because there was a bunch of both. Scott Hanselman started his job this week.

Richard Campbell: Oh, right. Yeah. He's joined Microsoft.

Greg Hughes: Yeah. So, he got his blue badge and he started. So, I went to the dinner over there with Scott and hung out with him for the rest of the evening then I got up this morning and recording the show.

Richard Campbell: Right. Hey, I got an email for you and it's actually a panel request. Earlier show, we asked for ideas for the panels in Barcelona and I got a response from Jim Holmes who says...

Greg Hughes: I want you to do your best Ballmer act here while you read this.

Richard Campbell: I can't do this justice, but he just says, "Virtualization! Virtualization! Virtualization! Virtualization! Virtualization! Virtualization!" I think I get the point. "Seriously, you've done some very informative shows around virtualization and it's been

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immensely useful. I'd love to hear some real world discussion on *virtualizing* things like SharePoint, SQL Server, and other heavy lifting systems. It seems like there have been some pros and cons for those particular targets on your shows. Getting more feedback from panelists would be really helpful."

Greg Hughes: Yeah. It's not a bad idea. I think that I would divide SharePoint and SQL Server into two completely different kinds of systems in terms of heavy lifting. SQL Server virtualized is going to be tough; SharePoint? No problem.

Richard Campbell: Yeah. It's always an interesting debate and I think that is where you get into a panel of. Is SQL Server a product you should not virtualize?

Greg Hughes: Or if you, then how do you do it? It can certainly be done. I know I've done it quite a bit and successfully, but you do have to be careful about how you architect that virtualized infrastructure. I mean using virtual drives to run your databases can be pretty tough.

Richard Campbell: Yeah. You're really going to impair the behavior of SQL Server.

Greg Hughes: On the application side of things, you may be able to get away with it depending on how you're running it.

Richard Campbell: Anyway, I think it's a great idea Jim and of course Jim is talking about TechEd Barcelona IT Forum, the week of November 12th, and we're going to be there the whole week and we're still working with the organizers to put together these panels and high on my list is a panel on virtualization.

Greg Hughes: Well, it certainly is an often requested topic. It's interesting. Just five years ago when virtualization really started to build up as a big topic, it became pretty clear that it was going to continue to be a growth area for several years and that certainly played out.

Richard Campbell: You bet. Absolutely. And if you've got some other ideas for panels you'd like to see or other shows you'd like to see, feel free to send us an email, info@runasradio.com.



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Greg Hughes: Ideas are always welcome. I've been really impressed with the audience's questions and ideas and thoughts that we get in email. We certainly want to keep those coming. So, if you've sent email before, send some more; and if you haven't sent any, then especially fire up that email client and ship one off to us.

Richard Campbell: You bet. All right, Greg. Let's introduce Trey Johnson. Trey Johnson is the Chief Business Intelligence Architect for Cizer, a CALIBRE Company. He's been doing Microsoft's Business Intelligence dating back to the earliest versions of SQL Server on OS/2 Warp with Visual Basic 3.0 and Crystal Reports. Boy, that's a stretch to call that Business Intelligence. He speaks at Code Camps, national and international conferences and was formerly a sixth term member of the Professional Association for SQL Server (PASS) Board of Directors. He's also a hand-selected member of Microsoft's 20-person Business Intelligence Partner Advisory Council and a geek on Microsoft BI and Technology. Welcome Trey.

Trey Johnson: Hey, thanks so much.

Richard Campbell: Now, I remember back to the VB 3.0 Crystal Reports days and I didn't feel like I was doing anything intelligent back then.

Trey Johnson: There was a lot of build and break happening back then, that's for sure.

Richard Campbell: You're talking about the early 1990s and that's when stuff like ArborEssbase and Hyperion. That's their era where Business Intelligence, the whole OLAP technology was a quarter million dollar entry-level product.

Trey Johnson: Right.

Richard Campbell: And up from there -- it was an expensive hobby, but boy it was powerful. I look at the stories told in those early days. This is where Wal-Mart came from. This is where hub-and-spoke airline travel came from. This is all about analyzing the data to get the most efficiency out of a business.

Trey Johnson: Absolutely. The cost justifications were higher back then because of that initial cost of investment and the lack of really a skilled pool of technology people to deliver those types.

Richard Campbell: You know; the term data warehousing seems to have just faded away. We just talked about Business Intelligence now really don't dig into the different layers of technology, but maybe I'm getting ahead of myself here. Maybe we should set some foundation for the folks that are listening in the IT community really haven't thought much about how Business Intelligence works at an IT level.

Greg Hughes: Might even be worthwhile just to talk about what is Business Intelligence. At least in my experience, I know there has been some disconnect in terms of like what a businessperson might be asking for when they come down and say, "Hey, I want you to start BI project," versus what the IT person thinks of when you use the same terminology.

Trey Johnson: Oh, sure. The Business Intelligence unit certainly does have different organizational definitions, but the way I kind of simply think about is consuming information from business processes that the organization is engaged in and surfacing them in a way that people can make decisions about either refining, eliminating, choosing to combine business processes, and basically introduce organization efficiency, as well as just generally track the trends of the organization. In doing that from an IT perspective, we're really talking about a couple of different things. One is certainly the platform side. So, building that underlying platform that sits on the data warehouse as a term or a data mart or even an operational data store is just basically a repository for the information from those business processes. There are multiple layers that can be applied on top of it if we can think of it in terms of maybe the Business Intelligence stack and that stack tends to align fairly well with a lot of other initiatives of the organization such as portals for collaboration, generally those reporting architectures that they might do in a transactional way of systems tends to align fairly well with the tactical or operational reporting off of the databases and data repositories that are built. The more sophisticated analytics there are probably the piece that less mature organizations don't really think about in terms of Business Intelligence as a whole and that typically involves the OS technologies, ability to consume large quantities of data, and forecast trends to analyze in a very ad hoc or unstructured way. That's a really key element for organizations not only understanding what they do



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day in and day out, but also understanding what they did this year relative to the prior year what they might be doing in the future leveraging other technologies. Microsoft really has an answer for all of that in the culmination of their SQL Server products that SQL 2005, soon to be 2008, and the Microsoft Office platform consisting of those Office 2007 products such as MOSS, Microsoft Office SharePoint Server, as well as the forthcoming product subset of the Office platform called PerformancePoint. The PerformancePoint technology coupled with the Microsoft Office technology and the SQL Server platform give a tremendous amount of insight to the organization. From a developer perspective, oftentimes there is a requirement to integrate within their custom application and that's where technologies like the technology that Cizer offers works very well in that scenario.

Richard Campbell: One of the challenges of making a Business Intelligence solution work is there is an awful lot of moving parts from the data store that you're deriving sources from and there may be several of those. You got to have some kind of aggregation point typically. I've thought Microsoft's often had a pretty good solution in that area, but the client side has always been the weak part. PerformancePoint is new to me, but it seems to be the real focus by Microsoft on building better analytical tools.

Trey Johnson: One of the really interesting things, Richard, is and Microsoft's been quick to point this out that Excel is the most prominent Business Intelligence client for worldwide and that's mostly because of some capabilities that's embedded within the Excel product itself, but also because most of the Business Intelligence vendors have an add-in of sorts that works within Excel because most users particularly financially-minded users are familiar with working in Excel.

Richard Campbell: Well, nobody's ever been that far away from ledger paper, you know? It never seems to leave. What is Excel other than digital ledger paper?

Trey Johnson: That is true. The Office 2007 products or Excel 2007 really does give some very interesting out-of-the-box capabilities such as conditional formatting and highlighting of the top 10, the bottom 10, really, really very interesting and

compelling stuff that effectively is free provided you're licensed in Excel.

Richard Campbell: Business Intelligence to me seems like a broad enough term that it doesn't really matter what you have on the back-end. Everybody does this to some respect. There's almost no business I've ever encountered that didn't have some master spreadsheet somewhere that really manifests their intelligence about their business regardless of where they got the data from, but in looking at the product line of Business Intelligence from Microsoft, it starts at SQL Server, but that in itself is not necessarily a Business Intelligence product. When you get into Analysis Services and starting to drive those different data sources, I'm not sure where to go. There's so much to talk about. What do you focus on most of the time, Trey? What does Cizer really do in all of this?

Trey Johnson: Sure. Well, Cizer is a company that's kind of defined in two different ways. Cizer's origins were working with Microsoft as a joint development partner around the SQL Server 2000 Reporting Services and we brought forth a product and toolset that basically enables ad hoc and self-service reporting on top of any OLE DB-compliant relational data source. We basically do that in conjunction with reporting services as a rendering engine. Additionally, we have just rolled out a product called Cizer .NET Analytics basically in the same vein as our [Cizer.Net](#) Reporting; it's a thin client toolset that basically sits within the browser that supports not only the intranet Business Intelligence scenarios, but also extranets or Internet scenarios. That's kind of one-half of our organization and my role is to kind of support that kind of defining a lot of our product direction, but the other side of our business is certainly on the solution side where we're basically helping customers day in and day out figure out the right combination of the Microsoft technologies to not only exist in a homogenous Microsoft environment, but also typically those heterogeneous environments where they've got Oracle, they've got DB2, they have a variety of other databases and data stores. So, a lot of our day in and day out focus of understanding how to craft BI solutions on top of the volumes of data that they have.

Richard Campbell: And, I have to wonder if we're still in a state in the market where the correct way to build a serious Business Intelligence solution is to



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bring experts in. From the point of view of the average business is only going to build one of these, so why should they develop that talent internally?

Trey Johnson: Well, I think that there's a compelling motivation to at least bring some of those skill sets into your organization for the longer term because some maintenance and substantive side is something that's a very real dilemma for organizations. What I've seen in the past for organizations that have not made any investment to bring people internally is they end up in a scenario where their leadership changes, call it an IT director or vice president, that sort of thing, and all of a sudden that becomes redoing what they've already done in a new technology. So, an organization might know the way from a DB2 data warehouse in favor of a SQL Server data warehouse without realizing that there are some inner steps they could have done to invest and sustain that DB2 database infrastructure, but you reach OLAP cube on top of it, for example. It is a bit of a dilemma for organizations. One of the things that Cizer does and it's probably a little bit different than traditional consulting models is we're very focused on that kind of parliament within the organization. We're rolling out a program called BI in a Box. Effectively, the program is a combination of the right Microsoft software and technologies as well as some of the Cizer technologies I've mentioned, plus the availability of distance learning on the entire Microsoft Business Intelligence stack of a community portal for the BI in a Box members as well as a real-time available coaching staff to help the internal teams that are not necessarily deeply invested in an individual consultant helping them, but need that two hours of help, four hours of help to get past a particular problem via ETL or OLAP design or even report development for that matter, but we really feel like that the "times have changed" kind of come where there is a common toolset for people to work within and once they're familiar with Visual Studio, they can really take full advantage of a lot of the Microsoft products that are on BI.

Greg Hughes: I think it's a great idea having done similar types of projects. There's knowledge, which you can build, but wisdom is something that comes along with having done it many, many times and so organizations like yours quite often I found can really impart some valuable information, but from a technology standpoint, that's one thing. It seems to me there's one thing that you have to have before you

can implement the technology and that is you have to actually have something other than garbage to work with. What are some of the things that organizations need to be thinking about in terms of just the information they're going to be leveraging in order to do Business Intelligence well? Is that something that really needs to be thought about before you can start implementing technology?

Trey Johnson: I think it does, but I think that at least one of the areas that we tend to start quite often building out BI efforts is what are they doing today in terms of reporting and bring forth the information. If an organization sees that there are multiple human kind of manual intervention points that happen before information can be presented to decision makers, that typically is a fairly significant red flag because it basically means that there are a lot of correction that's happening in the data to get from the point of the transaction occurring to the point of a decision being made. Unfortunately it is a little bit of brute force of trying to get in and understand what some of the anomalies are, what's the data, but once that is done and provided people are working in a fairly methodical way, but particularly following something like Ralph Kimball's methodology for building out data warehouses, they can make those investments, which seem initially fairly steep, but have a lot of longer term return because they're going to reuse the various dimensions within the architecture. It's going to be easier to assemble these transactional groups called facts tables that basically allow them to support decision-making and the building of additional BI solutions a bit more rapidly.

Richard Campbell: I got to think that this is really the key to being successful in the full-bore sense of Business Intelligence is really getting down to the instrumentation of the business. What is it we measure that tells us how successful or not successful we're being? What are the red flags for our business? They're pretty specific to any given business.

Trey Johnson: Absolutely. There's a lot of specificity of metrics in the organization because the business models are reasonably specific, but kind of abstracted and taken up a layer, human resource type metrics are pretty standardized.

Richard Campbell: Right.



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Trey Johnson: Financial metrics are reasonably standardized. It's more, you know, as it relates to kind of the operational day in and day out, for instance, in a supply chain, they may be very interested in the certain elements of how they fulfill the order and the various workplace steps that occur within that, there's another organization who might not be concerned with that.

Richard Campbell: There's got to be almost a political element to it. Where are we sensitive today? Where are people watching? If you're in a business that's had a serious supply chain failure where you were missing deliveries because certain vendors didn't come through for you, you're really sensitive to the way your supply chain behaves.

Trey Johnson: I think a big part of it for the organizations that are truly very successful with BI is basically how they manage or measure the performance of their employees because there are a lot of organizations that for lack of a better way to put it, tend to put a lot of their employees on autopilot and then try and explain their organization's behavior once or twice a year. The toolset that Microsoft's providing such as scorecards and dashboards within PerformancePoint, that gives you that ability to have those kind of fine grain scorecards that are down at the level of an individual employee's performance and so as a manager I can take action a lot more readily than trying to sift through the 38-page report that I get at the end of every month that tries to define what everybody did for the last month.

Richard Campbell: And I guess if you don't have an organized organization, you're going to have a tough time getting organization onto that data.

Trey Johnson: Absolutely. There is still a lot of relevance for what is typically called operational Business Intelligence, which is not much more than the reporting on the day to day or the dashboard for the day to day, but somewhere in the organization is an organization who really fully take advantage of BI. There has to be the strategic decision-making. There has to be the strategic adherence to a plan that maybe goes beyond the current fiscal year and maybe looks at a three-year plan or a five-year plan and what are we trying to manage and improve over the course of that time.

Richard Campbell: That's more of a strategic analysis than a tactical analysis.

Trey Johnson: Absolutely. The data that you achieve in that process or acquire in that process can be used to serve both purposes, but it's a matter of having the experience, the maturity in an organization that is clearly lacking from a strategic standpoint to at least make that available as an option so that people particularly in executive leadership start thinking that way.

Greg Hughes: So, if I'm the IT guy and the VP of support for my company or somebody from a higher level business standpoint comes down and says, "I want to initiate a Business Intelligence project," and is using very general terms like that, what are the things that the IT people need to be thinking about and what are the questions that they should be asking in order to make sure that you don't end up going down a path where there's no good way to return? What's that low-hanging fruit? What's that critical stuff that the resource that's being asked to help out with this really needs to be thinking about?

Trey Johnson: Yeah. Greg, I would say that, really, the right place to start particularly when we are approached in that is a very general way that we want to make BI work for our company or we'd like to do a BI project, really, the first question is what are you looking to affect and is it something you're looking to affect in the near term or is it something you're looking to affect as part of a larger strategy?

Greg Hughes: Okay.

Trey Johnson: Having basically that foundation, that really kind of sets the architectural wheels in motion as to whether or not you're really approaching things in more of a reporting fashion or you're going to have to do things that are slightly more deep from an analytics perspective?

Greg Hughes: My experience has been that if you don't address the process issues and make sure that you have some strong process to do your Business Intelligence technology to run it against that you can end up spending a lot of money and not really get what you expected out of it.

Trey Johnson: Absolutely. That's why one of the key elements of this BI in a Box offering that Cizer



is bringing about in our distance learning program is specifically a BI methodology course.

Greg Hughes: Right.

Trey Johnson: Essentially, over the course of five days, we're walking people through not only the things that you do to engage the decision makers than having conversations about what they achieve, but also providing people with templates so that they can adequately capture the information, adhere in a rigorous way to an approach that we know has provided very satisfactory results time and again.

Richard Campbell: All right.

Greg Hughes: You mentioned earlier that there's new stuff coming from Microsoft that you guys are working with that. I'm really kind of curious what it is, how do you view that. Maybe you can dive down a little bit in terms of what it really is and some of the details and what does that really mean for the future?

Trey Johnson: Sure. Microsoft has really established a very good foundation in terms of the SQL Server platform. By that platform, I mean integration services from an ETL standpoint, reporting services from a reporting standpoint, and analysis services from an OLAP cube standpoint on top of the relational database engines as part of their product offering. What Microsoft has done over the course of the last couple of years is they've made significant investments and not only the Office system, Office 2007, but also in building up a very strong BI presentation layer or client layer on the PerformancePoint platform. Today, Microsoft has in market the Microsoft Office SharePoint Server, which is a portal environment that supports a lot of the diverse needs of an organization for collaboration and communication and added to that they've put in some BI capabilities; so you can look at things like Key Performance Indicators, you can integrate reporting services directly within SharePoint, and you can do some basic foundational Business Intelligence really without having to invest in anything additionally.

Greg Hughes: Okay.

Trey Johnson: And then if you're an organization wants to do things that are more significant like dashboards, scorecards, anything planning, which is really tied to the forecasting side of

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things, there's the PerformancePoint product. PerformancePoint is I believe due to ship here in the next several weeks and PerformancePoint is a product that gives you not only the validity to kind of monitor the business from its scorecard perspective, how the organization is performing, good or bad versus goals and targets, but you also have the ability to do deeper analysis and that's afforded in part because Microsoft I think it was, about a year-and-a-half ago acquired a company called ProClarity.

Greg Hughes: Right.

Richard Campbell: Oh, right. Yeah.

Trey Johnson: Yeah. The ProClarity has really been focused a lot on the analysis piece of PerformancePoint. So, there is rich analytic grids and analytic views that can be reports that sit within the dashboard and it gives the user the very dynamic experience of saying, "I'm looking at September of 2007, but I'd like to look actually at the last six months and do that in a very uninhibited way and a way that doesn't require any involvement from IT because IT has already built the foundation on Analysis Services products."

Richard Campbell: As I recall, ProClarity's strength was a client side analysis tool and it didn't surprise that Microsoft bought it because I always thought that was Microsoft's weakness. I mean Excel is fine, but these real advanced analytical tools were far better products for that sort of thing, so it's interesting to see ProClarity surfacing in the Microsoft landscape 18 months later. I'm still wrestling with exactly where PerformancePoint fits into this as opposed to MOSS.

Trey Johnson: Probably the piece that kind of glues it all together is PerformancePoint, the dashboard and the scorecards live within the MOSS environment. So, MOSS is kind of the host. It hosts the various WebParts that PerformancePoint predicts and those WebParts are then linked back in to various dashboard views, report views that support kind of part-to-part interaction. So, if you're familiar with SharePoint, you might expect a selection of a year filter to then propagate through the rest of the parts in that page and change and dynamically refresh the data within various charts and grids and the scorecards themselves.



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Greg Hughes: So, this PerformancePoint, is it all new technology that's being released? Is this some repackaging as happens from time to time kind of giving things a new name? Is it a little bit of both? What are we looking at here? It sounds like we're using SharePoint Server as the platform and then this PerformancePoint package is something that can be used to build on top of that, but how much of it is new?

Trey Johnson: It's predominantly new or re-thought in a lot of ways. The scorecard piece is actually kind of like a version 2.0 or version 3.0 because Microsoft currently has in the market Microsoft Office 2007 Business Scorecard Manager 2005 or something like that.

Richard Campbell: Yeah, it was the Business Scorecard product.

Trey Johnson: Right.

Richard Campbell: That was really KPI-focused and I'm looking at the language on the Microsoft site around PerformancePoint and seeing a lot of that similar language. So, to me it sounds that they took that product and moved it up.

Trey Johnson: Yes. They moved it up and they made it just that more easy to deploy. As we talk, we're in the CTP4 phase with the PerformancePoint product. We already have about a half-a-dozen customers that are active with PerformancePoint that were customers where we have rolled out Business Scorecard Manager 2005 to and they're tremendously satisfied because the user experience is better, the build and management experience is tremendously better. You can tell they learned a lot of lesson from Business Scorecard Manager 2005 and have implemented them quite well in the 2007 product.

Richard Campbell: And I noticed they have added the word "server" and have come to realize in Microsoft language if it is a service it's free, if it's a server you have to buy it. The early scorecard products were giveaways. You just download them off the website. I guess it's finally grown enough now they want to charge for it.

Trey Johnson: Yeah. So, v1.0 or v1.5 was the Office Business Scorecard Accelerator and the next

iteration was the Microsoft Office Business Scorecard Manager and then now kind of the next generation is PerformancePoint product that's inclusive of score carding, but the dashboard piece is probably even one of the more compelling elements because I can leverage my investments in existing reporting services reports. I can bring other Cizer object in there as well. I can do quite a bit with the technology and provide a really compelling what I call morning paper interface or decision-making, so they can literally look at all kind of the top stories, if you will, and then choose which ones they need and score further as opposed to having to sit through a dozen emails that all have 30- to 50-page attachments on a daily basis.

Richard Campbell: All right. We're coming up to the end here. Any last thoughts?

Trey Johnson: Yeah. I think that the main is as you look at Microsoft Business Intelligence, in Microsoft's continuing kind of infinite wisdom, there's no right or wrong way to deploy Business Intelligence using their technologies, but there's not a hardcore formula that says you must use this technology in order to affect positive decisions. There are a lot of choices and that would certainly be something I would want to reinforce.

Richard Campbell: Excellent! Trey, thanks for your time. We really appreciate this look into where Business Intelligence is going with Microsoft.

Greg Hughes: Yeah. Thanks. It was very interesting.

Trey Johnson: Oh, absolutely and if anybody wants to learn more about Business Intelligence or particular what Cizer has to offer, I'll have a whole series of links that are available on my blog, which is sqlserverbi.com.

Richard Campbell: Excellent!

Greg Hughes: Sounds great.

Richard Campbell: And we'll talk to you next week on RunAs Radio.