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In my role of industry analyst / thought leader / author / speaker / practitioner / etc. I'm regularly briefed by the vendors on their current products and future plans. As a personal research project, I've been asking each of these Marketing directors and Vice Presidents, among others, the same question for the last couple of years: How big is this market?

After asking literally dozens of data warehousing vendors, analysts, press and various and sundry pundits and gurus I can state with complete confidence that the best minds in the industry have absolutely no idea how big this market is. I've heard estimates from 2,000 to 200,000 potential sites, and just about every other "dart at a wall" estimate in between.

Why should you care how big the market is? Because a sea change is taking place in the data warehouse market, one that will revolutionize our world. Up to now, data warehousing has been a rather insular market of thousands. In the near term, data warehousing will become a market of millions, and that changes all the rules.

For instance, whereas in the past you could count on your phone company, your credit card company and your favorite department store to have a data warehouse, in the next couple of years your dentist will be among the happy millions humming away on their very own low cost, easy to implement, self-managing, targeted, turn-key, data warehouse. Beyond allowing your dentist's staff to slice and dice your cavity count vs. your demographics, what impact will this have on you?

- Price Points

Imagine a world where the data warehousing infrastructure is essentially free, and easily extended and customized. Suddenly, anyone with a *Visual Basic for Dummies* book can put together a turn-key package that will suck the data from the "DentiSoft" OLTP package, load it into templated star schemas and pre-defined multi-dimensional structures and manifest the data in industry standard office automation tools. Suddenly you've got a turnkey Dentist Data Warehouse, and better yet, your dentist can download it from the Internet for \$149.95.

- Products

Next imagine a world filled with extremely low cost turnkey analysis, data mining, reporting, etc. non-architected data marts and data warehouses. Anyone with a business need and a signing authority over \$1,000 can buy one and have it running overnight. Each with its own semantic terms and business rules, these non-architected turnkey systems will multiply like mushrooms after a spring rain and quickly bring about infinite versions of the "truth" in your enterprise.

- Pressure

Now imagine a world with 30-second spots smack in the middle of prime time espousing the glories of data warehousing. Next imagine in depth interviews in Fortune, Forbes and Business Week detailing how full-on data warehouse/data mart systems were built and deployed for \$50-500,000 *at your competitors*. Finally, imagine the long, lonely walk to the executive wing to explain how you managed to burn through \$5 million on your data warehouse instead of the \$500,000 your competition spent.

This new world is being brought about by Microsoft and their introduction of SQL Server 7, with its imbedded and extendable DTS (Data Transformation Services) to provide ETL capability, its imbedded and extendable OLAP services (more commonly known by its code name Plato) and its OIM (Open Information Model) meta data repository. These core data warehouse infrastructure items are essentially "free" add-ins to the core database product that has also been updated to support data warehouse specific features. Microsoft's Office 2000 adds the capability to leverage this "free" data warehouse infrastructure using Excel, Access and the other common tools of the Office suite (which are considered "free" by the user community).

We are all about to be visited by the full force of the Microsoft marketing machine, as it is applied to our heretofore rather quiet, small and isolated market of thousands. Using their tried and true strategy of mass marketing the infrastructure and lowering price points by orders of magnitude Microsoft will quickly expand the data warehousing market to millions of new customers. How can you best prepare for this New World?

If you haven't already done so, get a copy of SQL Server 7 and wring it and its components out for all they are worth. It is essential that you be able to accurately address both the strengths and weaknesses of this platform. Very soon you will need to answer hard questions about price points, technology and vendor selection. You need to be prepared to specifically describe the relative performance, scalability, manageability, reliability, available third party resources, etc. of your system of choice compared to Microsoft's offering.

Conversely, if you have chosen Microsoft's platform for your system, you'd better be getting a jump on understanding its strengths and weaknesses. While we can rest assured that Microsoft will bolster their products over time, some of the elements of the current offering are not mature (DTS), while others are surprisingly well executed and relatively robust (OLAP Services). You need to come to understand exactly how scalable, reliable and manageable these elements are, as well as the core database engine and its current operating system, NT 4.0.

It's a brave new world fraught with challenges and charged with exciting new potential. Prepare yourself, and you can be both a survivor and a leader in the coming market of millions.

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