

TECHNOLOGY TRANSFER PRESENTS

MIKE FERGUSON

**RIGHT-TIME
BUSINESS INTELLIGENCE
AND PERFORMANCE
MANAGEMENT**

NOVEMBER 10-11, 2008

**ENTERPRISE
DATA GOVERNANCE
AND MASTER DATA
MANAGEMENT**

NOVEMBER 12-13, 2008

RESIDENZA DI RIPETTA - VIA DI RIPETTA, 231
ROME (ITALY)



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ABOUT THIS SEMINAR

There is no doubt that Performance Management (PM) is fundamental to building, growing and managing a successful Business. Improvements in performance can be delivered if performance is measured in specific Business areas and related to strategic Business objectives and targets. Popular methodologies exist to manage performance at strategic levels e.g. Balanced Scorecard. However, while different Performance Management (PM) methodologies are used, many companies have not yet managed to achieve Enterprise-wide execution of Business their strategy or use BI optimise Business operations. To make this happen requires that Business Intelligence (BI) is integrated into processes in the context of the activity being performed by each and every user. If everyone in the Enterprise could contribute effectively to performance we could manage performance at both strategic *and operational* levels and move beyond Business Intelligence towards Right-Time Business optimisation. Some would argue that PM is a *Business Intelligence* (BI) problem and to date, much of the software aimed at supporting it has come from BI vendors. These so called corporate Performance Management' software products are however limited in that they are often standalone systems with their own database holding summary key performance metrics data and in some cases data on objectives and objective owners. Yet many executives have a vision of PM that is way beyond just a Scorecard product with integrated budgeting, planning and reporting built on top of a BI system. Their vision is that PM is a *Process Oriented* problem requiring a solution that helps and guides *everyone* in the company to all contribute towards Business Performance. Methodologies like Six Sigma are *Process Improvement* based and yet CPM tools on the market are not yet integrated with Business Process Management software. Performance Management requires a lot more than CPM. It is a holistic problem that requires every person and every system in the Enterprise to be able to leverage the right intelligence at the Right-Time in every process activity to guide them towards making their contribution to the overall performance of the Business. PM is therefore about going beyond strategic level Scorecards and Dashboards to *building an intelligent Business* by integrating BI right into operational Business processes to guide and drive decisions and actions in every day Business. A full intelligent Business implementation therefore includes:

- CPM Scorecards and Dashboards
- Enterprise budgeting and planning
- Processes and BI *both* integrated with CPM software (not just BI)
- In-line analytics for on-demand BI, reports and analyses available in operations
- BI Web Services to integrate BI into operational Business processes
- Business Activity Monitoring (BAM) and Complex Event Processing (CEP) of Business process events to detect exceptions and opportunities
- Enterprise Data Governance
- On-demand and event driven Data Integration to integrate historic and operational data for Real-Time analysis
- Developing and deploying scoring models for automatic analysis
- Reporting services for on-demand and event driven reporting
- Rules engines to make automatic decisions and take automatic actions
- Automated alerts
- Live recommendations
- Guided analytics
- Dynamically guided intelligent processes
- Activity based costing to monitor and measure the cost of operating

This new two-day seminar is intended for Business Sponsors, BI/DW Managers, IT Architects who have already built a BI system and now need to integrate it into operations to empower Employees, Business Partners, Suppliers and Customers to achieve full blown Business optimisation and "active" Performance Management.

It provides a roadmap and methodology to creating the *Right-Time Intelligent Enterprise* by using methodologies and new technologies to manage a Business at both strategic and operational levels. It looks at how operational performance monitoring technologies like BAM, CEP, predictive analytics, alerts, recommendations and actions can be integrated with operational Business processes and linked to corporate Performance Management technologies such as Scorecards and Dashboards as part of a top-to-bottom Enterprise Business Performance Management program. It also looks at Enterprise 2.0 technologies such as social networking to empower people to find, share and collaborate over performance at all levels of the Enterprise.

The seminar takes an in-depth look at the technologies and methodologies needed to build the 'performance aware' intelligent Business and how BI integration via Operational BI can be applied in every day Business process operations.

LEARNING OBJECTIVES

Attendees will learn how to justify, architect, and integrate Business Intelligence into operational Business processes and applications as part of a coordinated Business Performance Management program. They will learn how to use automatic Real-Time closed loop processing to monitor operational events as they happen to detect problems, identify opportunities, and drive and guide Business operations. Attendees will also understand how to use Real-Time data integration, on-demand analysis servers, BI Web Services, XML queries, Real-Time decision engines, Enterprise alerting and Business process automation to put BI to work in driving every day Business operations. Finally they will learn how to maximise the use of personalised Business Intelligence across the Enterprise and beyond to continually optimise Business Performance.

WHO SHOULD ATTEND

This seminar is intended for Business and IT Professionals responsible for information delivery, Business integration, Business Performance Management and leveraging Business Intelligence in operational environments. It assumes that you have already built a BI system and are now looking to leverage it in everyday Business operations.

OUTLINE

1. Business Optimisation - Redefining Performance Management

This session introduces next generation Business Performance Management as a new approach to building an intelligent Enterprise whereby Business people everywhere in the Enterprise are guided by intelligence. It starts by looking at where we are today with BI and Performance Management and where Businesses want to get to in leveraging BI in core Business processes for Business optimisation. This session briefly discusses Performance Management methodologies and PM products from leading software suppliers. It then looks at why current PM products only solve some of the Performance Management problem and at why managing the Business at a strategic level is not enough. We then set the scene for what is needed – intelligent Business.

- What is involved in managing a Business – the need for strategic AND operational Performance Management
- What is performance Management?
- PM methodologies in brief – Balanced Scorecard, Six Sigma, TQM, Baldrige
 - Setting up Scorecards
 - Attaching metrics to Scorecard objectives
 - Options for integrating PM Scorecards with existing BI systems
 - The distinction between BI Dashboards and Scorecards
- Review of existing PM vendor solutions
- Problems with existing solutions – why they only solve half of the PM problem
- Next generation Performance Management – why two initiatives are needed for Business optimization
 - Business Intelligence
 - Business integration
- Requirements for Business optimization, multi-level strategy Management & operational BI

2. Introducing the Real-Time Intelligent Enterprise

This session introduces the Real-Time intelligent Enterprise and looks at why we need it and what is required to make it happen. Business integration – what’s happening in to simplify Business operations

- The five levels of Business integration
- The need to leverage Business Intelligence (BI) in Real-Time
- Limitations of existing BI systems
- Next Generation Business Optimization - What needs to happen to leverage BI?
- What is an intelligent Enterprise?
- Right-Time BI – on-demand BI when you need it, where you need it
- Why build the intelligent Enterprise? – the Business case
- Requirements for Real-Time intelligent Business – the active BI strategy
- Steps to implementation

3. Technologies and Tools for Building the Right-Time Intelligent Enterprise

This session looks at the technology components needed in an end-to-end Business optimization.

- Data Integration and Data Quality services for event driven and on-demand Real-Time Data Integration
- EII vs ETL vs Message Brokers
- Enterprise Metadata integration
- Business Intelligence platforms
- On-demand analytics via BI Web Services
- Embedding analytics in operational applications
- Leveraging analytics and aggregate functions in your database
- Business integration platforms
- Service Oriented Architecture (SOA)
- What is Business Process Management?
 - Business process modelling
 - Business process execution
 - Business processes monitoring

- Enterprise Portals for personalised information delivery
- Decision/rules engines
- Guided analysis to rapidly lead users to problem identification
- Social Networking and collaboration

4. Architecture Options and Methodologies for Right-Time BI

This session looks at the various architectures for integrating BI into Business processes when building the intelligent enterprise. It also looks at the pro’s and cons of these options.

- Why integrate BI into operational systems and processes?
- A methodology for Business optimization and the intelligent Business
- BI integration – why a single approach is not enough
- Understanding user communities, roles and the applications they use
- Understanding Business processes and process events
- Right-Time operational BI requirements - Who needs what BI and when?
- Integration options for internal and external exploitation of Right-Time BI
- Integrating BI with Portals and Office for personalised BI, personalised objectives and personalised Dashboards
- Delivering Right-Time BIU using Web syndication
- Integration of BI and PM with Real-Time collaboration and social networking
- Using on-demand BI services in a Service Oriented Architecture (SOA)
- Integrating BI with Process Management
- Automatic decision services
- The implications of Right-Time operational BI on existing BI systems
- Pros and cons of options for Right-Time BI and Performance Management

- Identifying the best architecture option for Business optimization of each role
- Customer Case Studies

5. Integrating BI Into Business Processes

This session looks at Business Process Management and why process integration is becoming mission critical to reducing costs and improving efficiency. It then focuses on how to use BPM and BI technologies for Right-Time BI and also how to monitor cost and efficiency of Business processes.

- Integrating BI into operational Business processes using on-demand BI services
- Monitoring operational Business processes
 - What is Business Activity Monitoring (BAM) and Complex Event Processing (CEP)?
 - Using event-driven Data Integration and in-memory data
 - Using predictive models for automated event analysis, scoring and Pattern detection
 - Using rules engines for automated decisions
 - BAM and CEP technologies – Actimize, IBM, Progress, Oracle, SeeWhy, SL, ThinkAnalytics, Tibco
 - Achieving optimised operational processes using BAM
 - Modelling and monitoring Business process cost using Activity based costing
- Re-optimising operational processes using guided analytics and recommendations

6. Right-Time BI and PM in CRM and Supply Chain Operations

This session looks at how to create intelligent front-office and back office Business operations. It discusses how Right-Time BI can be leveraged across all customer touch-points for targeted and personalized customer marketing, sales and service and for improv-

ing customer retention and satisfaction. It also looks at how to optimise Supply Chain operations using operational BI for alerting and automated actions

- Building a 'current state' single view of the customer
- The customer intelligent front office - using BI to improve marketing, sales and service
- Right-Time analytics in front-office marketing, sales and customer service
- Leveraging automated analysis for alerting and recommendations in front-office operations
- Integrating BI with multi-channel campaign Management systems
- Deploying Right-Time BI to a mobile sales force
- Continuous monitoring of Supply Chain performance and operational cost
- Automating Supply Chain optimisation using demand intelligence
- Right-Time alerting in Supply Chain operations
- Front office and back office BI personalisation for role-based precision

7. BI Communities – Empowering People through Socially Networked Performance Management

This session looks at the need for manual action taking whereby groups of people may need to collaborate over BI before making a joint decision.

- Collaborative tools for sharing BI,
- Collaborative BI options
 - Integrating BI with stand alone collaboration tools
 - Integrating BI with Enterprise Portal based collaboration tools
 - BI applications with embedded collaboration
 - Pros and cons of each approach
- Using collaborative tools with BI
 - Finding experts to help understand intelligence
 - Sharing BI content in a net meeting

- Collaborative viewing of active intelligence and office formatted BI content e.g. spreadsheets
- Attaching threaded discussions to BI content
- Voting and polling for joint decision making
- Operational BI alerts using instant messaging

8. The Final Step - Active Performance Management

This final session shows how the use of Business Intelligence and Business integration can be integrated with corporate Performance Management software to manage Business Performance at strategic and operational levels.

- Achieving active PM via integration with Business Activity Monitoring (BAM) and live alerting
- Creating active Scorecards and Dashboards with KPIs, live alerts, and operational performance monitoring
- Taking action to solve Business problems

ABOUT THIS SEMINAR

This two-day seminar is intended for compliance Managers, data Architects, database Administrators, data integration Developers and Master Data Management Professionals, who are responsible for Management and Governance of Enterprise data.

The seminar takes an in-depth look at the Business problems caused by poorly managed data, and defines the requirements that need to be met for a company to confidently define, manage and share master, transactional, analytic and unstructured data across operational and analytic applications and processes.

In order to achieve Enterprise Data Governance, a company needs to invest in people, processes and a suite of technologies that support end-to-end Data Governance activities. These include:

- Enterprise Metadata Management
- Data Modelling
- Data Profiling
- Data Cleaning
- Data Integration (Batch, on-demand and event-driven)
- Data Synchronisation
- Master Data Management
- Enterprise Content Management

During the two days we take an in-depth look at the technologies needed in each of these areas as well as best practice methodologies and processes for data Governance and Master Data Management.

LEARNING OBJECTIVES

Attendees will learn how to set up an Enterprise Data Governance program and to determine what technologies they need for Enterprise Data Governance, Data Integration and Master Data Management (MDM). In addition they will learn when to use certain technologies over others and methodologies to use for Metadata Management, Data Integration, and designing and implementing Data Governance and MDM solutions.

WHO SHOULD ATTEND

This seminar is intended for Business and IT Professionals responsible for Enterprise Data including Metadata Management, Data Integration, Data Quality, Master Data Management and Enterprise Content Management. It assumes that you have an understanding of basic data Management principles as well as at least a high level of understanding of the concepts of data migration, data replication, Metadata, Data Warehousing, Data Modelling, Data Cleansing etc.

OUTLINE

1. An Introduction To Enterprise Data Governance

This session introduces Enterprise Data Governance and looks at the reasons why companies now need to invest in Data Integration and Data Management.

- An introduction to Enterprise Data Governance
- The impact of unmanaged data on Business Performance
- Is your data out of control?
- Key requirements for Enterprise Data Governance (EDG)
- Establishing a data architecture and competency centre for the Enterprise
- Establishing a strategy for Data Governance
- Getting the organisation right – data stewards and data owners
- Formalising EDG processes
- The emergence of EDG platforms

2. Enterprise Metadata Management

This session looks in detail at the need for Enterprise Metadata Management as the foundation for any Data Governance project. Metadata Management includes the need for data stewards, data owners, common data definitions, discovery of existing disparate data definitions and data relationships, and the mapping of disparate definitions to a common shared data vocabulary.

- What is Enterprise Metadata Management?
- Component technologies for Enterprise Metadata Management
- Common Metadata - data standardisation using a shared Business vocabulary
- Shared Business vocabulary vs Taxonomy
- IBM WebSphere Business Glossary vs Microsoft Business data Catalog
- Disparate Metadata discovery, Metadata mapping and Metadata integration

- Metadata discovery tools – SAP/Business Objects, DataFlux, IBM Rational Data Architect, Informatica, Sypherlink
- Generating Data Integration services from common Metadata
- Integration of common Metadata with Data Modelling and Data Integration tools

3. Enterprise Data Quality

This session looks at a number of emerging Business problems that require increased use Data Quality and data profiling software and why these new problems have transitioned Data Quality Management from 'nice to have' software into an essential part of Enterprise Data Management infrastructure. It looks at what has changed in these tools that has made them so desirable today.

- Enterprise compliance – Mandating the need for rock solid data
- Processes required for Enterprise Data Quality
- The Enterprise Data Quality problem
 - Data Quality at the keyboard
 - Data Quality on inbound and outbound messaging
 - Data Quality integration with Data Warehousing
 - Data Quality and Master Data Management
- Metadata Quality – Why this also matters
- What's new in Data Quality tools
- Integrating Data Quality into the Enterprise – On-demand Data Quality Services
- Creating an Enterprise Data Quality firewall
- Monitoring Data Quality using Dashboards

4. Enterprise Data Integration

This session looks at the key approaches to Data Integration and provides an in-depth guide to each main type of integration technology. It includes coverage of structured and unstructured Data Integration.

- Key approaches to Data Integration – Data federation, data consolidation and data synchronisation
- Enterprise Data Integration - EII, ETL, ESB data synchronisation and data replication
- The Data Integration technology marketplace – Composite, DataFlux, Denodo, IBM, Informatica, Information Builders, Ipedo, Microsoft, Oracle, Red-Hat, SAP (Business Objects)
- An in-depth guide to data federation using Enterprise Information Integration (EII)
- ETL technologies and uses – Data Warehousing, data migration, Data Integration services
- Unstructured Data Integration and Enterprise Content Management
- Using Data Integration technologies for event-driven and on-demand Data Integration, data migration, data consolidation, data synchronisation and Master Data Management

5. An Introduction to Master Data Management

This session introduces Master Data Management and looks at why Businesses are serious about introducing it. It also looks at the components of an MDM system and how to assess what components you need and the right implementation option for your Business.

- What is Master Data Management (MDM)?
- Business benefits – Why is MDM needed?
- Components of a MDM solution
- How does MDM fit into an Enterprise Service Oriented Architecture?
- MDM architecture – Does MDM mean yet another data store?
- MDM examples – Customer Data Integration, Product Information Management, Financial Data Management
- Assessing your need for an MDM system
- Implementation options – Deciding on Build vs Buy

6. Designing A MDM System

This session looks at what is involved in designing an MDM system. It looks at the system scope, identifying candidate Business entities, design approaches, identity Management, Master Data integration and Business process redesign.

- Deciding the scope of an MDM system
 - Master data, Master Metadata vocabulary, Master Data access services, Master Data Business processes
 - Data considerations - Operational data vs Business Intelligence vs unstructured content
- MDM Architecture options
- Master Data Management approaches and their differences – Virtual Approach vs Master Data Synchronisation vs Master Data Integration vs Enterprise MDM
- Identifying candidate Business entities for MDM processing - Product Data, Customer Data, Employee Data, Financial Data
- Master Data identity Management – The need for Global IDs and Global Foreign keys
- Introducing a shared Business vocabulary and Master Data integrity rules
- The importance of Hierarchy Management
- Approaches to integrating Master Data – The pros and cons of data federation, data consolidation or data synchronisation
- Understanding maintenance of Master Data – Data Entry Systems vs Systems of Record
- Identifying and re-designing Business processes associated with Master Data

7. MDM - The Build Option

This session looks at how you build a MDM system. It includes what you have to do to define Master Data, source Master Data in data entry systems and how to map disparate source data to the Master Data entities. It also looks at

what you need to do to integrate Master Data to create a Master Data Hub and how to synchronise data across existing systems.

- Defining Master Data attributes using common Metadata
- Data entry system identification and data relationship discovery
- Mapping source data to the Master Data vocabulary
- Data profiling and rule creation for cleanup and matching
- Create a master hub using Data Integration
- Implementing Master Data synchronisation

8. MDM - The Buy Option

This session looks at the buy option for MDM by exploring the MDM technology marketplace. It looks at the different technologies available and the pros and cons of each type of solution. It also looks at the scope of each product in terms of entities supported, and whether or not you can integrate them with existing technologies in your Enterprise.

- The MDM technology marketplace – D&B Purisma, DataFlux, I2, IBM, Initiate, Kalido, Microsoft, ObjectRiver, Oracle, SAP, Siperian, Teradata
- Rule-based synchronisation products
- Virtual Master Data products
- Single and multiple entity hub products
- Enterprise MDM products
- Data Quality and Data Integration products for MDM
- External Master Data providers
- Pros and Cons of each type of solution – What can they do, what can't they do?
- Evaluating and combining MDM products
- Integration of MDM solutions with existing Data Integration technologies
- Implementing a purchased MDM solution
- Development work that is still needed

9. Transitioning to Enterprise MDM – The Change Management Process

This session looks at the most difficult job of all – The Change Management process that is needed to get to Enterprise Master Data Management. It looks at the difficulties involved, what really needs to happen and the process of making it happen.

- Starting a MDM Change Management program
- Changing data entry system data stores
- Changing application logic to use shared MDM services
- Changing user interfaces
- Leveraging Portal technology for user interface re-design
- Leveraging a Service Oriented Architecture to access MDM shared services
- Changing ETL jobs to leverage Master Data
- Hierarchy Change Management in MDM and BI systems
- Transitioning from multiple data entry systems to one data entry system
- Transitioning change to existing Business processes to take advantage of MDM
- Planning for incremental Change Management

10. Integrating MDM Into The Enterprise

- Integrating MDM with Enterprise Portals
- Integrating MDM into a Service Oriented Architecture (SOA)
 - Sharing access to Master Data via Master Data services
- Leveraging Master Data Integration services in a SOA
- Leveraging SOA for data synchronisation
- Integrating MDM with operational applications and process workflows
 - How do you integrate an MDM system with batch applications
 - How do you integrate an MDM system with green screen applications

- How do you integrate an MDM system with client server applications
- Integrating MDM with Business Intelligence
 - Why is MDM different from Data Warehousing systems?
 - How do you integrate an MDM system with BI systems
 - The impact of MDM on ETL processing
 - Version control on dimensional data
 - Hierarchy Change Management across multiple Data Marts
- Integrating MDM with Enterprise Content Management Systems

<p>PARTICIPATION FEE</p> <p>Right-Time Business Intelligence and Performance Management € 1200</p> <p>Enterprise Data Governance and Master Data Management € 1200</p> <p>Special price for the delegates who attend both seminars € 2250</p> <p>The fee includes all seminar documentation, luncheon and coffee breaks.</p> <p>VENUE</p> <p>Residenza di Ripetta Via di Ripetta, 231 Rome (Italy)</p>	<p>SEMINAR TIMETABLE</p> <p>9.30 am - 1.00 pm 2.00 pm - 5.00 pm</p> <p>HOW TO REGISTER</p> <p>You must send the registration form with the receipt of the payment to: TECHNOLOGY TRANSFER S.r.l. Piazza Cavour, 3 - 00193 Rome (Italy) Fax +39-06-6871102</p> <p>within October 27, 2008</p> <p>PAYMENT</p> <p>Wire transfer to: Technology Transfer S.r.l. Banca Intesa Sanpaolo S.p.A. Agenzia 6787 di Roma Iban Code: IT 34 Y 03069 05039 048890270110</p>	<p>GENERAL CONDITIONS</p> <p>GROUP DISCOUNT If a company registers 5 participants to the same seminar, it will pay only for 4. Those who benefit of this discount are not entitled to other discounts for the same seminar.</p> <p>EARLY REGISTRATION The participants who will register 30 days before the seminar are entitled to a 5% discount.</p> <p>CANCELLATION POLICY A full refund is given for any cancellation received more than 15 days before the seminar starts. Cancellations less than 15 days prior the event are liable for 50% of the fee. Cancellations less than one week prior to the event date will be liable for the full fee.</p> <p>CANCELLATION LIABILITY In the case of cancellation of an event for any reason, Technology Transfer's liability is limited to the return of the registration fee only.</p>
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BOTH SEMINARS

Special price for the delegates who attend both seminars: € 2250

If anyone registered is unable to attend, or in case of cancellation of the seminar, the general conditions mentioned before are applicable.

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Mike Ferguson is the Managing Director of Intelligent Business Strategies Ltd. As an independent analyst and consultant he specialises in Business Intelligence, Enterprise Business Integration and Enterprise Data Management. With over 27 years of IT experience, Mr. Ferguson has consulted for dozens of companies, spoken at events all over the world and written numerous articles. He is also an expert on the B-EYE-Network. Prior to founding Intelligent Business Strategies, was a member of NCR's worldwide product strategy and architecture team as a Chief Architect working on the Teradata DBMS. He spent four years as a principal and co-founder of Codd and Date Europe Limited – the inventors of the Relational Model – specialising in IBM's DB2 product and was a partner and European Managing Director at DataBase Associates.