TECHNOLOGY TRANSFER PRESENTS

MIKE FERGUSON

ENTERPRISE BUSINESS INTEGRATION

MARCH 22-23, 2010

USING BUSINESS INTELLIGENCE, BAM AND EVENT PROCESSING FOR BUSINESS OPTIMIZATION

MARCH 24-25, 2010

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

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ABOUT THIS SEMINAR

In today's Business climate, many companies are trying to widen margins by reducing operational costs while at the same time becoming more agile and intelligent in Business operations. In addition they want to become more responsive to Business events and more flexible in their ability to quickly change in response to competitive pressures. To do this requires that companies improve the efficiency and automation of their operational Business processes through enterprise Business Integration and on-demand intelligence. Enterprise Integration will also help to reduce the complexity and total cost of ownership of IT infrastructure and to get more value out of existing systems. Enterprise Business Integration involves the creation of an Enterprise Architecture as well as an integration strategy to help achieve specific strategic Business objectives. Five levels of integration are needed to create the agile process centric intelligent Business. These are user interface integration, Business process integration, application integration and on-demand data integration.

This in-depth two-day seminar discusses the Business benefits that can be obtained from Business Integration and then focuses on the architecture options, the technologies and a methodology on how to integrate Business operations and also leverage Business Intelligence on-demand in operations to create the intelligent Business.

LEARNING OBJECTIVES

Attendees will learn how to justify the Business benefits of Enterprise Integration, create an Enterprise Architecture and then bring the architecture to life using common integration infrastructure technologies to join up Business operations. They will learn about the components of Business Integration including standardising integration interfaces using Web Services, using Metadata integration technologies to create a shared Business vocabulary, on-demand data integration using Enterprise Information Integration (EII) technologies, Business Process Management technologies, Business Activity Monitoring (BAM), on-demand Business Intelligence and Enterprise Portal technologies. They will also learn about using Business Integration technologies to integrate processes across the Enterprise and beyond to trading partners and customers. In addition attendees will learn what technologies to use, how to select and how to integrate these products into an end-to-end integration technology framework based on integrated shared Metadata.

WHO SHOULD ATTEND

This seminar is intended for Business and IT Professionals involved in the Management, implementation and deployment of Enterprise Integration technologies.

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 analytics to optimise Business operations. To make this happen requires that analytics are 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 process 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 everyone in the company contributes towards Business performance. Everyone "rows in the same direction" executing a common Business strategy. Methodologies like Six Sigma are *process improvement* based and yet PM tools on the market are not yet integrated with Business Process Management software. Performance Management requires a lot more than PM. 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:

- PM Scorecards and Dashboards
- Enterprise budgeting and planning
- Processes and BI both integrated with PM software (not just BI)
- In-line analytics for on-demand intelligence 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 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 *RightTime 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. Developing A Business Plan For Enterprise Business Integration

This session looks at the Business Case for Enterprise Business Integration and why it is necessary to create agile Enterprise. In particular it looks at why Business Integration has to relate to Business strategy so that Business Integration projects are done in unison to achieve common strategic objectives that yield major Business benefit.

- What is Enterprise Integration?
- Why do it – what are the Business and technical benefits?
- Relating Enterprise Integration to Business strategy
- Identifying return on investment
  - Following your operational Business processes
  - The benefits of Business on-demand
- What needs to be done to integrate the Enterprise?
- The five levels of Enterprise Integration – user interface, people, Business process, applications and data
- Creating the process centric Enterprise
- BI meets BI – the need for Business Integration and Business Intelligence
- Contents of a Business plan for Enterprise Business Integration

2. Creating An Enterprise Architecture

This session looks at what is involved in the creation of an Enterprise Architecture that will act as a technical blueprint for Enterprise Integration. It explores the components of an Enterprise Architecture and looks at the strengths and weaknesses of different integration technologies. It also looks at the strategic choice of using best-of-breed technologies versus an Enterprise Integration platform consisting of a suite of integration technologies from a single vendor.

- What is an Enterprise Architecture?
- Components of the end-to-end Enterprise Architecture
- Integration options and the strengths and weaknesses of each
- Quick start integration mechanisms using Enterprise Portals
- Best of breed Vs integration platforms – which is best?
- The technology marketplace
  - Portal vendors, process management vendors, ESB vendors and data integration vendors
  - Integration platform vendors (IBM, Oracle, Microsoft, Progress, SAP, Software AG, Tibco etc.)
- Packaged application vendors and Enterprise Integration – SAP and Oracle
- The role of virtualisation
- The emerging trend of In-memory data

3. Enterprise Integration Planning And Implementation

This session looks at what kind of skills are needed in and Enterprise Integration project and also at ownership of specific implementation tasks. It also presents an iterative methodology for Enterprise Integration so that implementation plans can be built to manage an Enterprise Integration project and a team can be formed to iteratively carry out integration while delivering Business benefit along the way.
In particular the implementation plan should allow multiple levels of integration to be done in unison to achieve a common Business objective. The key steps to implementation should also align with the Enterprise Architecture so that everyone is clear about the Business objective of the project and also how all the components come together in a technical blueprint

- Implementation options for Enterprise Business Integration
- The project team – skill sets and organisational structure
- Ownership – a Business and IT partnership
- Assessing your existing environment
- Using the Enterprise Architecture as a guide
- Following Business processes end-to-end
- Defining the implementation plan - a methodology and steps involved in Enterprise Integration
- Patterns for implementing Enterprise Integration
- Deployment options – On-premise Vs Cloud Computing
- Cloud computing considerations

4. Creating A Shared Business Vocabulary Using Metadata Integration

This session looks at how integrating Metadata that describes disparate data can be used to identify data inconsistencies and help create a shared Business vocabulary for use in Enterprise Integration by mapping these disparate definitions to common ones. It also shows how a shared Business vocabulary for Business Intelligence and user access to common definitions of Business metrics can lead to real trust in the information used for Decision-Making.

- Metadata integration – why do it?
- Metadata integration – the role of the shared Business vocabulary
- Approaches Metadata integration
- Using data integration technologies to integrate Metadata?
- Metadata integration standards and technologies
- Metadata discovery and data discovery Mapping disparate definitions to a shared Business vocabulary
- Putting a shared Business vocabulary to work
  - Sharing a common Business vocabulary across Business Integration technologies e.g. EII on-demand data integration, Business Process Management and Enterprise Portals
  - Sharing a common Business vocabulary in BI systems

- Trusted metrics – the key to transparent, auditable corporate governance
- Implications – how a shared Business vocabulary simplifies rules and rule-driven closed loop systems

5. Data Integration For The Real Time Enterprise

This session looks at how advances in database and data integration technology are facilitating real-time data integration by bringing data together from multiple data sources to create Real-Tme integrated data stores for use in analytic and operational applications.

- Why data integration? – challenges of on-demand computing and disparate data sources
- Approaches to data integration - consolidating data Vs integrated access to distributed sources
- Technology options for data and Metadata integration
  - The role of Web Services and XML in data integration
  - Web Services in the database – a look at how IBM, Oracle and Microsoft DBMSs leverage and offer Web Services
  - On-demand data federation technologies – e.g. Composite, Denodo, IBM InfoSphere Federation Server, Informatica 9, Oracle Data Integration Services, XAware
  - Event-driven data integration - Pros and Cons of different technology options
- When to use what where – application uses of data integration
  - Using data integration as a Web Service
  - New 'composite' applications requiring data from multiple sources
  - Integrating current and historical data for Real-Time analytics and Complex Event Processing
  - Customer data integration – strengthening customer relationship management
  - Operational reporting across multiple data sources
  - Leveraging data integration in Portals

6. Application Integration And Business Process Management

This session first looks at the use of Web Services and the importance of a Service Oriented Achitecture (SOA) for integration whereby Web Services can be used as a standard mechanism for integration at multiple different levels. It then looks at Business Process Management and Business Orocess Modelling as means of guiding where integration needs to occur. Also we investigate what needs to be done to existing applications to bring them up to a level so that they can be integrated using Web Services and the tools to help do this. Finally we look at Business process execution, process monitoring using Business Activity Monitoring (BAM) and CEP and process re-engineering to optimise performance and costs.

- What are Web Services?
- WSDL, SOAP, UDDI, REST
- Using Web Services at different levels of integration
- Business Process Management – towards the Process Centric Enterprise
- A methodology for Business Process Management
- Business process planning
- Modelling a Business process
- Identifying integration points in existing systems
- Application modernisation– how to make existing applications 'integration ready'
- Mapping processes to underlying systems
- Executing a Business process – process engines and application integration platforms
- Executing processing in an on-premise and Cloud Computing environment
- Monitoring a Business process – the role of Business Activity Monitoring (BAM) and Complex Event Processing
- Re-engineering a Business process
- Enterprise integration – Process driven Portals
- Conclusions and recommendations

7. Intelligent Business – Integrating Rule-Driven Analytics Into Business Processes

This session looks at integration of analytics into Business processes. In particular we look at event driven on-demand data integration, automatic analysis, automated decisions using rules engines, and workflow as the components needed to leverage BI and automated recommendations. Also it looks at automatic alerting and application action messages to guide operations in contributing towards strategic Business objectives.

- What is intelligent Business?
- The problem with existing BI systems
- Pre-requisites to integrating BI into Business processes
- A methodology for role and process activity-based Business Intelligence integration
- Technology components for rule-driven closed-loop intelligent Business
- Event driven data integration and automated analysis
- Rules engines – Fair Isaac, PegaSystems, IBM iLog
- Enterprise alerting, on-demand predictive analysis, on-demand recommendations and action messages
- Guided actions and action management

8. Integrating And Personalising User Interfaces Using Enterprise Portals

This session looks at the role of Enterprise Portals in helping to create a single process-driven Web-based

personalised user interface to integrate data, applications and collaboration tools for use in Business processes.

- What are Enterprise Portals?
- Why use Enterprise Portals – the move to role based personalised workplaces
- Integrating applications, data and collaboration tools using portal technology
- The role of Web Services in integrating data and applications into Portals
- Collaboration tools and Portals
- BI Web Service technology examples
  - Cubes, reports, predictive analytic models,
  - BI tools and applications with Web Services interfaces
- Approaches to integrating applications, unstructured content, BI and data into a Portal
  - Portlets for multiple BI tools, Content Management systems and applications
  - Leveraging on demand Web Services using Web Services for remote Portals (WSRP)
  - Leveraging federated query engines in a portal for Real-Time analytics and Business Activity Monitoring
  - Unstructured content in a Portal
  - Integrating BI Portals and Enterprise Portals
- Achieving role based workplaces via Portal personalisation
- Mash-ups

Mike Ferguson is the Managing Director of Intelligent Business Strategies Ltd. As an analyst and consultant he specialises in Commerce Chain Management (CRM, ERM, SCM), Enterprise Business Intelligence, Enterprise Portals and Business Integration. With over 29 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 DCI's PortalsCommunity.com and an iBond Partner. Prior to co-founding Intelligent Business Strategies, he spent three years as a member of NCR's worldwide product strategy and architecture team as a Chief Architect of Database Technologies working on the Teradata DBMS. He also worked for four years as a principal and founder of Codd & Date Europe Limited – the inventors of the Relational Model - specialising in IBM's DB2 product.

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, Baldridge
  - 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 optimisation.

- 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 BI 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 rRght-tTme 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 – Aleri, Corel 8, IBM, Progress, Oracle, SaP, 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 touchpoints for targeted and personalized customer marketing, sales and service and for improving 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), Complex Event Processing (CEP) and live alerting
- Creating active Scorecards and Dashboards with KPIs, live alerts, and operational performance monitoring
- Taking action to solve Business problems

INFORMATION

PARTICIPATION FEE

Enterprise Business Integration
€ 1200

Using BI, BAM and Event Processing for Business Optimization
€ 1200

Special price for the delegates who attend both seminars
€ 2250

The fee includes all seminar documentation, luncheon and coffee breaks.

VENUE

Residenza di Ripetta
Via di Ripetta, 231
Rome (Italy)

SEMINAR TIMETABLE

9.30 am - 1.00 pm
2.00 pm - 5.00 pm

HOW TO REGISTER

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

within
March 8, 2010

PAYMENT

Wire transfer to:
Technology Transfer S.r.l.
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GENERAL CONDITIONS

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.

EARLY REGISTRATION

The participants who will register 30 days before the seminar are entitled to a 5% discount.

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.

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.

MIKE FERGUSON

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☐ **BOTH SEMINARS**

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

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

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