



The Business Transformation Conference

# Transformation and Innovation 2007

Featuring Over 50 Sessions, Including  
Case Studies on BPM, SOA and Business  
Transformation From:

## BPM Focus

Center of Excellence in  
Business Process Innovation

Cisco

Fidelity Investments

Geniant

Guardian Life Insurance Co.

IBM Global Services

Level 3 Communications

National Institutes of Health

Old Mutual South Africa

OMG BPMI

Optaros

Oracle

Perot Systems Corp

PMC Corp

SOA and Web Services Center  
of Excellence

Stevens Institute of Technology

Tetra Tech (AMTI)

Texas HHS

The Hartford

U.S. Department of Defense

U.S. Department of Commerce

U.S. Department of Health  
and Human Services

Workflow Management

Coalition

ZapThink

May 21-24, 2007 • Washington Dulles Hilton

## Keynotes:



### David Caruso

Leading Expert on Business Value of IT  
Former Chief Analyst and Senior VP at AMR Research



### Dr. Jonathan Mack

BPM and SOA Transformation Expert  
Senior Technical Architect, Guardian Life Insurance Co.



### The Honorable Dale W. Meyerrose

Associate Director of National Intelligence and Chief  
Information Officer



### Jon Pyke

Chairman of Workflow Management Coalition  
Author of *Mastering Your Organization's Processes:  
A Plain Guide to BPM*



### Paul Strassmann

George Mason University Distinguished Professor of  
Information Sciences, Former Chief Information Officer  
of Xerox, Kraft, NASA



### W. Hord Tipton

Former Chief Information Officer,  
U.S. Department of the Interior



### Dennis Wisnosky

Chief Technology Officer,  
Department of Defense  
Named "One of Seven Heroes of Manufacturing" by  
*Fortune* magazine



### Ronald Schmelzer

Senior Analyst and Founder, ZapThink  
Author of the book: *Service Orient or Be Doomed!  
How Service Orientation Will Change Your Business*



From the desk of  
**Nathaniel Palmer**  
**Transformation+Innovation**

Produced By:

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Join us **May 21-24, 2007**  
at the **Hilton Washington Dulles**,  
DC's leading executive venue, for this  
much anticipated event!

### **What's Inside:**

#### **Four Pre-conference Executive Tutorials**

**May 21, 2007**

Four intensive workshops covering  
advanced topics on Business Process  
Management, Enterprise Architecture and  
Business Transformation (see page 6).

#### **Transformation and Innovation 2007**

**May 22-24, 2007**

Conference-At-A-Glance: see page 3  
Keynotes: see page 4-5  
Session Descriptions: see page 8-9  
Registration: see back page 10

# “Transformation and innovation are the cornerstones of your success.”

– *Gartner Group, 2007*

As confirmed by *Gartner Group*, the world's leading market research firm on enterprise IT, business transformation and innovation are the cornerstones of your success. *Transformation and Innovation 2006* brought together over 50 thought leaders and practitioners with nearly 300 participants from across all industries and several government agencies. With ***Transformation and Innovation 2007*** we are raising the bar again, featuring the best of the best among reality-based, real-world case studies, thought leadership sessions from the industry's most experienced practitioners, hands-on sessions from the key authors of business process standards, as well as a host of keynotes presented by the most senior leaders of industry and government.

At ***Transformation and Innovation 2007*** attendees will receive actionable information that goes beyond the buzzwords and gets to the heart of transformation initiatives succeed or fail. We have spent the last year examining case studies, searching for best practices, as well as talking with the organization leaders most deeply engaged in Business Transformation initiatives and related work around ***Enterprise Architecture, Business Process Management*** and ***Service-Oriented Architecture***. This conference is the culmination of that work, and with it we have assembled what we believe to be the most comprehensive set of experts and expert sessions ever brought together in one place.

#### **Highlights of the Transformation and Innovation 2007 program include:**

- Dozens of Case Study Sessions on BPM, SOA and Business Transformation
- Full-Day Session on How to Create an Effective Program Management Office (PMO)
- Comprehensive Coverage of the Leading BPM Standards Directly from their Authors
- Hands-on Instruction Covering Business Process Modeling, BPMN and Maturity Models
- More than a Dozen Case Studies and Leadership Sessions Specifically on SOA
- Dedicated Mini-Tracks Focused on Financial Services, Insurance and Healthcare
- Direct Access to the Authors of the Leading Book on Workflow and BPM
- Leading-Edge Sessions on Leveraging Open Source-based Software and Processes
- Advanced Sessions on Business Process Simulation and Process Optimization
- Numerous Networking Opportunities for Industry and Interest Groups
- Instruction on Understanding ITIL and How to Run IT as a Business
- Innovative Presentations on Leverage Social Technologies, AJAX and Web 2.0
- Advanced Sessions on Governance and Operational Risk Management

***Transformation and Innovation 2007*** will also feature a number of opportunities for seeing the latest products and innovations from software vendors and solution providers of BPM and SOA. There is no doubt it will be a ground-breaking conference, that you will not soon forget.

*I look forward to seeing you there!*

Nathaniel G. Palmer  
*President, Transformation+Innovation*  
*Executive Director, WfMC*

# Conference At A Glance

## Four, Full-Day Pre-conference Workshops

## Monday, May 21, 2007

9:00am - 10:00am	<b>REGISTRATION/Continental Breakfast (Note: Noon to 1:00pm lunch will be provided)</b>			
10:00am - 4:30pm	<b>Workshop 1</b> (see page 7) <b>How to Create an Effective Program Management Office (PMO) That Delivers Real Value.</b> <i>Presented by David Caruso, Founder and Principal, David Caruso &amp; Associates</i>	<b>Workshop 2</b> (see page 8) <b>Enterprise Architecture and Organizational Transformation.</b> <i>Presented by Ted Lewis, Founder and President, Enterprise Transformation Group, Ltd.</i>	<b>Workshop 3</b> (see page 9) <b>BPM in Practice: Understanding and Implementing Workflow and Business Process Management.</b> <i>Presented by the WfMC's Technical Committee Leadership</i>	<b>Workshop 4</b> (see page 10) <b>Ensuring BPM Project Success.</b> <i>Presented by Derek Miers, CEO, BPM Focus</i>

## Tuesday, May 22, 2007

8:00am - 9:00am	<b>REGISTRATION/Continental Breakfast</b>			
9:00am - 10:45am	<b>Welcome and Morning Keynote Address:</b> <i>Jon Pyke, Noted Author and Chairman of the WfMC; Jonathan Mack, Senior Architect at Guardian Life</i>			
10:45am - 11:15am	<i>Break and Networking Session</i>			
11:15am - 12:15pm	<i>Operational Risk Management and BPM, Dr. Michael zur Muehlen, Stevens Institute of Technology</i>	<i>Enterprise Architecture Governance: A Framework for Successful Business, Greg Sparks, Level 3 Communications</i>	<i>Enabling the Service-Oriented Enterprise, Dr. Setrag Khoshafian, WfMC and Vice President of BPM Technology, Pegasystems</i>	<i>A Model for Process and Transformation, Chris Lawrence, Old Mutual South Africa</i>
12:15pm - 1:45pm	<b>Lunch Reception (open to all attendees)</b>			
1:45pm - 2:30pm	<i>Data Mining and Analytics, Robert M. Shapiro, WfMC Working Group One; Global 360</i>	<i>Defining a Business Architecture: Lessons in Leadership, Tom Fogarty, Fidelity</i>	<i>Keys to Successful Governance with SOA, Dr. Mohamad Afshar, Oracle and Ben Moreland, The Hartford</i>	<i>Use of SOA and Web Services Technologies for EA Migration – Lessons Learned on How To Sort It All Out, Lloyd Dugan, IES</i>
2:30pm - 2:45pm	<i>Break / Switch Sessions</i>			
2:45pm - 3:30pm	<i>Improving Businesses Performance: Demystifying Simulation and Optimization, Ed Stephan, CACI, Inc.</i>	<i>Transformation Case Study: Chester County Hospital, Ray Hess, Chester County Hospital</i>	<i>Leveraging Web 2.0 for "Always-On Management" at PCM Corp., Scott Allen, On Behalf of PCM Corp.</i>	<i>The Fundamentals of BPM Innovation in Telecommunications, Robert Cain, WfMC and Handysoft</i>
3:30pm - 4:00pm	<i>Break and Networking Session</i>			
4:00pm - 5:00pm	<b>Afternoon Keynote Address:</b> <i>Paul Strassmann, Distinguished Professor of Information Science, George Mason University</i>			
5:00pm - 6:00pm	<b>Evening Reception</b>			

## Wednesday, May 23, 2007

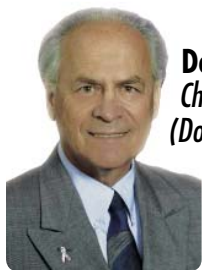
8:00am - 9:00am	<b>REGISTRATION/Continental Breakfast</b>			
9:00am - 10:45am	<b>Welcome and Morning Keynote Address:</b> <i>Dennis Wisnosky, Business Mission Area, CTO of the Department of Defense; Dale Meyerrose, Associate Director of National Intelligence and CIO of the U.S. Intelligence Community</i>			
10:45am - 11:15am	<i>Break and Networking Session</i>			
11:15am - 12:15pm	<i>Ensuring Success with BPM Projects, Derek Miers, BPM Focus</i>	<i>Leveraging Open Source for Managing Complex Business Processes, Jacob Taylor, SugarCRM</i>	<i>The Business of IT: Understanding ITIL and How to Run IT as a Business, Loy Allen, Perot Systems Corp.</i>	<i>How a Business Process Vision May Boost Innovative Ideas, Salvatore Latronico and Francesco Battista, WfMC and openWork</i>
12:15pm - 1:45pm	<b>Lunch Reception (open to all attendees)</b>			
1:45pm - 2:30pm	<i>Business Process Modeling Notation: A Foundation for Process Transformation, Phil Gilbert, OMG</i>	<i>Guaranteed Success in Legacy Modernization</i>	<i>Business Transformation at the Texas Health and Human Services Agency, Dr. Raj Ramesh, TopSigma Consulting</i>	<i>The Matrix: Remixed. BPM+SOA = Results-Oriented Architecture, Linus Chow &amp; Charles Medley, BEA Systems and Clay Richardson, PPC</i>
2:30pm - 2:45pm	<i>Break / Switch Sessions</i>			
2:45pm - 3:30pm	<i>Measuring Process Maturity: The Business Process Maturity Model, John Alden and Bill Curtis, OMG</i>	<i>Using Capability Modeling to Facilitate SOA Adoption, Chip Wilson, Geniant</i>	<i>Strategies for Leveraging BAM and B2B, Pranav Shahi, Cisco Systems</i>	<i>Authenticated Document/Data Exchange, Mohammed Shaikh, Image X</i>
3:30pm - 4:00pm	<i>Break and Networking Session</i>			
4:00pm - 5:00pm	<b>Afternoon Keynote:</b> <i>David Caruso, Founder and Principal, David Caruso &amp; Associates</i>			

## Thursday, May 24, 2007

8:00am - 9:00am	<b>REGISTRATION/Continental Breakfast</b>			
9:00am - 10:30am	<b>Welcome and Morning Keynote Address:</b> <i>W. Hord Tipton, Former CIO, U.S. Department of the Interior; Ronald Schmelzer, ZapThink</i>			
10:30am - 11:00am	<i>Break and Networking Session</i>			
11:00am - Noon	<i>Workflow and BPM in the New Enterprise Architecture, Keith Swenson, WfMC</i>	<i>Services Industry Case Study: A Practical Approach to Process Automation, David Holliday, AMTI</i>	<p align="center"><b>BPM Process Modeling Fundamentals</b>  <b>May 24-25, 2007</b>  <i>Special On-Site Program, An Intensive Two-Day Seminar</i>                      10:00am - 5:00pm Thursday, May 24                      9:00am - 3:00pm Friday, May 25                      See Page 11 For Details</p>	
Noon - 1:15pm	<b>Lunch Reception (open to all attendees)</b>			
1:15pm - 2:00pm	<i>Leveraging XPD L for Dynamic, Model-Driven, Open Architecture BPM, Workflow Management Coalition</i>	<i>An SOA Call to Arms: An Open Letter to the SOA Community Using Capability Modeling to Facilitate SOA Adoption, Adam Michelson, Optaros</i>		
2:00pm - 2:15pm	<i>Break / Switch Sessions</i>			
2:15pm - 3:30pm	<i>Delivering a Service-Oriented Enterprise and an Adaptable Business Architecture</i>	<i>Innovation in Healthcare: Transforming Paper to an eSubmissions SOA, David Webber, National Institutes of Health (NIH)</i>		
3:30pm	<i>Close of Conference</i>			

**For complete session details, visit [www.transformationandinnovation.com](http://www.transformationandinnovation.com)**

## T&I 2007 Conference Keynote Speakers also continued next page



**Dennis E. Wisnosky**  
*Chief Technical Officer of the Department of Defense (DoD) Business Mission Area*

Mr. Dennis E. Wisnosky is Chief Technical Officer (CTO) of the Department of Defense (DoD) Business Mission Area within the office of the Deputy Under Secretary of Defense for Business Transformation.

Mr. Wisnosky is responsible for providing expert guidance and oversight in the design, development, and modification of the federated architectures supporting the Department's Business Mission Area. This role incorporates oversight of the DoD Business Enterprise Architecture (BEA) — the systems, processes, and data standards that are common across the DoD, in addition to the business architectures of the services and defense agencies.

Mr. Wisnosky ensures that the federated architectures of the BMA fully support the Department's vision, mission, strategy and priorities for Business Transformation, and that each tier of the overall architecture is clearly defined with appropriate focused accountability aligned to the management structure of the DoD. He verifies that the BEA and component architectures remain consistent and compliant with the Federal Enterprise Architecture.

Mr. Wisnosky also serves as an advisor on the development of requirements and extension of DoD net-centric enterprise services in collaboration with the office of the DoD Chief Information Officer. Mr. Wisnosky has over 25 years of experience in IT consulting and training, including extensive experience in business process reengineering and enterprise architecture efforts. His specialty is deriving solutions to effectively move organizations from their *as-is* state of inefficiency to their *to-be* state of achieving strategic and tactical objectives. Mr. Wisnosky is recognized as a creator of the Integrated Definition (IDEFs) language, the standard for modeling and analysis in management and business improvement efforts.



**David Caruso**  
*Founder and Principal, David Caruso & Associates*

David Caruso is one the leading experts on realizing optimal business value from IT. As founder and Principal of David Caruso & Associates, David brings over 30 years of industry experience to the topics of IT benchmarking, manufacturing transformation, supply chain, and technology strategies.

Previously as Senior Vice President & Director of Research at AMR Research, David led a staff of 100 IT researchers in all aspects of manufacturing and supply chain technology research. He has also held positions ranging from Manufacturing Operations Manager to Vice President of Product Development, and has participated in many large-scale ERP implementations at firms including Johnson & Johnson, Sun Microsystems, and Rolls-Royce Motor Cars. Today, David sits on the executive advisory boards of several software firms and is a frequently requested keynote speaker at industry events. David maintains an industry profile with columns, quotes, and by-lined articles in magazines such as *Manufacturing Business Technology*, *Managing Automation*, *Chief Supply Chain Officer*, *Fortune*, and *Business Week*.

In addition, he has hosted a DVD video series on supply chain trends, appeared on several television and radio shows and also sits on numerous boards and councils such as the annual Progressive Manufacturer award, and Infosys' Leaders of Change executive advisory board.



**Paul Strassmann**  
*Distinguished Professor of Information Science, George Mason University*

Paul A. Strassmann's career includes 28 years as a chief information systems executive and was named to the CIO Hall of Fame by *CIO Magazine* as one of the 12 Most Influential CIOs of the 1990s. He was appointed

in 1991 to a newly created position of Director of Defense Information, and was responsible for organizing and managing the corporate information management (CIM) program across the DoD which included a \$35 billion cost reduction and business reengineering program of the defense information infrastructure.

In 1993 he received the Defense Department's highest civilian recognition — *the Defense Medal for Distinguished Public Service*. In 2002 he was tapped to be the acting CIO of NASA, with direct responsibility and accountability for the NASA computing and telecommunication information infrastructure. In 2003 he retired from government service after receiving the *NASA Exceptional Service Medal* for improving the IT architecture, security, and services.

He is author of over 250 articles and his 1985 book *Information Payoff: The Transformation of Work in the Electronic Age* is now in its 10th printing. His 1990 book, *The Business Value of Computers* shows result of his research on the relation between information technology and profitability of firms. His 1997 book, *The Squandered Computer* was Amazon.com's #1 best selling book on information management in 1998. He was recipient of the *1992 Award for Achievement* by the *Association for Federal Information Resource Management*, received the *1992 International Industry Award for advancing the adoption of Open Systems*, and the *1996 Excellence Award for Business Engineering*.



**W. Hord Tipton**  
*Former Chief Information Officer, U.S. Department of the Interior*

Mr. Tipton led the development of Interior's first Enterprise Architecture, now recognized by the E-Gov Institute, GAO, and OMB for the second consecutive year as the best practice in government. As Chief Information

Officer he institutionalized the first IT Capital Planning and Investment Control (CPIC) program for Interior. Under his leadership, Interior has established sound IT Security policy and guidelines.

Mr. Tipton previously served in a number of business areas including the Bureau of Land Management as Assistant Directors for Information Resource Management (Chief Information Officer), Energy and Minerals, and Resource Use and Protection. Mr. Tipton has served as State Director for the Bureau of Land Management, Director for Offshore Minerals and International Affairs for the Minerals Management Service, and as Acting Director of the Office of Surface Mining Reclamation and Enforcement. In addition, Mr. Tipton has 13 years engineering experience with Union Carbide and Swift Chemical Corporations. He is a Certified Information System Security Information Professional (CISSP), an Information System Security Engineering Professional (ISSEP), a Certification and Accreditation Professional (CAP), and a Certified Information Systems Auditor (CISA). He is also certified in Systems Administration through the Committee of National Security Systems (CNSS). Mr. Tipton is a member of the Board of Directors of (ISC)2 and the American Management Association (AMA).

For complete session details, visit [www.transformationandinnovation.com](http://www.transformationandinnovation.com)

## T&I 2007 Conference Keynote Speakers



### Dr. Jonathan Mack

**Senior Technical Architect, Guardian Life Insurance Co.**

Guardian Life Insurance's Senior Technical Architect, Jonathan Mack guides the insurance giant's massive re-engineering project to implement state-of-the-art SOA and BPM practices across its largest business area.

One of last year's highest rated speakers, Jonathan offers a unique mix of wit and wisdom as he shares insights from many years spent re-architecting *Fortune 500*<sup>®</sup> industry leaders, including *Guardian Life*, the 4th largest life insurance firm in the U.S., billion-dollar e-commerce leader *1-800-Flowers*, and *Adecco Corporation*, the nation's largest employment firm. Through his long career on the cutting edge of technological change, he has gained valuable insight into the opportunities and risks of transforming enterprises from silo'ed, legacy environments to agile service-oriented architectures.



### The Honorable Dale W. Meyerrose

**Associate Director of National Intelligence and Chief Information Officer**

President George W. Bush appointed Dale W. Meyerrose the first Associate Director of National Intelligence and Chief Information Officer on December 21, 2005, with the advice and consent of the United States Senate. Mr. Meyerrose serves

as the Chief Information Officer for the United States Intelligence Community and the Intelligence Community Information Sharing Executive.

Mr. Meyerrose manages activities relating to the information technology infrastructure and enterprise requirements of the Intelligence Community. He has procurement approval authority over all information technology items related to the enterprise architectures of all Intelligence Community components. Mr. Meyerrose directs and manages all information technology-related procurement for the Intelligence Community and ensures that all expenditures for information technology and research and development activities are consistent with the Intelligence Community enterprise architecture.

Mr. Meyerrose came to this position after over thirty years of military service, culminating with his retirement from the United States Air Force as a Major General in November 2005. Born in Indianapolis, Indiana, he entered the United States Air Force in 1975 after graduating from the U.S. Air Force Academy with a Bachelor of Science degree in Economics. His career highlights include service as a director and Chief Information Officer in three Air Force major air commands and three unified combatant commands, a deployed Joint Task Force Director of Communications in Southwest Asia, and a commander of two major Air Force communications units. Mr. Meyerrose, a master parachutist, earned the Distinguished Service Medal, Defense Superior Service Medal, two Legions of Merit, two Defense Meritorious Service Medals, and six Meritorious Service Medals. Mr. Meyerrose received a Master of Business Administration degree, from the University of Utah in 1978. He graduated from the National War College, Fort Lesley J. McNair, Washington D.C. in 1992. He attended the Senior Information Warfare Applications and Joint Flag Officer Warfighting Courses, Maxwell AFB, Alabama. He also attended the Program for National and International Security, John F. Kennedy School of Government, Harvard University, Cambridge, Massachusetts, and the U.S. Navy Executive Business Course, Haas School of Business, University of California — Berkeley, at the Naval Post Graduate School, Monterey, California.



### Jon Pyke

**Noted Author and Chairman of the Workflow Management Coalition**

Jon Pyke is Chairman of the Workflow Management Coalition, and author of several articles and books on business process management including *Mastering Your Organization's Processes: A Plain Guide to BPM*.

Previously, he was Chief Technology Officer of Staffware Plc, which has been deemed by many as the archetype BPM and workflow management system (now TIBCO — a publicly traded global software organization).

Over his 30-year career in the technology industry, Jon has worked for a number of software and hardware companies as well as user organizations, is a frequent speaker at international events and he regularly quoted in the National and Industry press. Jon co-founded and is the Chair of the Workflow Management Coalition. He is an AIIM Laureate for Workflow — and was awarded the Marvin Manheim award for Excellence in workflow in 2003.

Jon also acts as a non-executive director for a number of public and private UK based software companies. A significant amount of Jon's time is spent giving high level presentations to the boards of potential customers (both business and technical) as well as business and technical partners.

Jon is recognized as an excellent public speaker. A recent article concluded: "*Jon Pyke, is one of the most influential figures in the Business Process Management (BPM) sector*" and that "*he was personally responsible for defining many of the key software metaphors that enable BPM to work.*"



### Ronald Schmelzer

**Senior Analyst and Founder, ZapThink**

Ronald Schmelzer, senior analyst and founder, is a well-known expert in the field of Service-Oriented Architecture (SOA), Web Services, and XML-based standards. Ron has been featured in and has written for periodicals, and has spoken at numerous industry conferences and in front of some of the largest businesses in the world.

Ron Schmelzer was the lead author of *XML And Web Services Unleashed* (SAMS 2002) as well as co-author of *Service-Oriented or Be Doomed* (Wiley 2006) with Jason Bloomberg. Ron has served as the chair of the RosettaNet Cluster 1 Workgroup, working group member of CPExchange, member of the UDDI advisory group, and was a member of the CompTIA Electronic Commerce Standards Board (ECSB). Prior to ZapThink, Ron was founder, CTO, and "ePostle of Partners" of ChannelWave Software, as well as founder and President of VirtuFlex Software, and founder and CEO of VirtuMall, one of the first online eCommerce sites in 1994.

Ron was named "*Geek of the Week*" in *Internet Magazine* and was listed in *Boston Magazine's* Internet Top 40. Ron received a B.S. degree in Computer Science and Engineering from the Massachusetts Institute of Technology (MIT).



For complete session details, visit [www.transformationandinnovation.com](http://www.transformationandinnovation.com)

## Who Should Attend

- Transformation and Innovation is designed for Chief Architects and CIOs.
- Business Process Owners, Operations Managers, Enterprise Architects, Business Analysts, IT Strategists, and Business Consultants.
- Last year's participants are split between government, defense, as well as Fortune 500® companies, consultants and systems integrators, standards bodies, press, industry analysts, and a limited number of software vendors.
- Participants will be involved in managing business operations, defining enterprise architecture, managing IT infrastructure and engineering teams, systems integration, internal consulting and shared services, as well as standards definitions, policy making and business process management.

## Why Should You Attend

- Expand your expert network through peer-to-peer collaboration with a community of leaders, experienced practitioners, plus users and adopters from within your own industry.
- Learn the most up-to-date strategies, techniques, and technologies for building a Service-Oriented Architecture (SOA), leveraging Open Source Software, and implementing Business Process Management (BPM)
- Gain first-hand knowledge of the current transformation initiatives underway within Fortune 500® and Global 2000 firms, the Pentagon and the U.S. government.
- Find new opportunities and partners for succeeding with business transformation initiatives.
- Capture actionable information for enabling continuous process improvement and on-going business transformation.

## Partial List of Previous Attendees

1800FLOWERS.COM	EnterpriseDB Corp	McKinsey & Company
Accenture	EpitomiOne	Navy Supply Information Systems Activity
American Express	Erie Insurance Group	New Enterprise Stone & Lime
Army Materiel Command	Fannie Mae	Northrop Grumman Corporation
Avorcor, Inc.	First Data	Office of the Inspector General
Battelle	Forrester	Open Source Software Inst
BEA Systems, Inc.	Hewlett-Packard	Optaras, Inc.
Bearing Point	Huntington National Bank	Oracle
Binary Consulting	IBM	OSD AS&C
Bristol Technology	IBM Global Services	Pentelar
Business Integration Journal	IIC	PricewaterhouseCoopers
Business Transformation Agency	iJET International, Inc.	SAP
BusinessEdge Solutions, Inc.	Improvisive Technologies	SAS Institute
CACI	Information Technology, City of Norfolk	Schneider Electric
Cignex Technologies	International Systems Group ISG, Inc.	Secretary Joint Staff
City of Norfolk, Virginia	Jacada JackBe	Serono International S.A.
Clinical Information Technology Program Office	Joint Secretariat	Sprint Nextel
CN (Canadian National)	Jornata	State Farm Bank
Coca Cola Bottling Co.	KPO Services, Inc.	State of WI
CollabNet	L.L. Bean, Inc	Symantec Corp
Commonwealth of PA	LAISO	Telelogic
CSC Consulting	Laszlo Systems	The Hartford
Defense Logistics Agency	Lenovo International	The MITRE Corp
Defense Logistics Information Service	Levanta	Unisys Corp
Defense Travel System	Level 3 Communications	University of Northwestern Ohio
Deloitte & Touche	Liberty Mutual Insurance Co.	USDA
Department of Homeland Security	Lockheed Martin	Uversa, Inc
EDS	ManTech System Engineering	Virtuas Solutions
ENIAC	Marriott International	Xerox
	McKendrick Research	

### Partial Listing

## Workshop 1

While every company or agency takes on IT projects to improve operations and profitability, few realize the true business value potential of their efforts. Today, most IT organizations see the world through the lens of technology project management – not the transformation of the business they serve. To achieve credibility in the eyes of the business leadership, IT managers must transition from project focus to business benefit delivery. A proven enabler for delivering transformed business capabilities is the Program Management Office. The next generation PMO has the tools, processes, and metrics to ensure true business transformation and ROI achievement for these projects. This full-day workshop is designed to help CIOs, IT Directors and project managers design and establish a Program Management function that goes beyond project completion and will improve business alignment and deliver on the promise of transformative IT investment.

### Who Should Attend:

- Business & Government Executives, Directors and Managers
- Chief Information Officers (current and aspiring)
- Operations Managers and COOs
- Leaders of Engineering Teams or Other Service Operations
- IT Services Consultants and Project Leads
- Project Managers and Program Directors
- Anyone Tasked With Realizing Greater Yield From Existing Resources

# How to Setup a Successful Program Management Office (PMO) That Delivers Real Value

## *Transforming IT Operations From Project-centric to Business-focused: Leveraging In-house Expertise to Drive Higher Benefit Realization*



**David Caruso**

### *This intensive one-day workshop covers:*

- The strategy, scope, and approach options for PMOs
- Facilitate the transition from measuring IT efficiency to achieving effective deployment
- Organization design for effective PMOs
- Critical operating methodologies and processes
- Portfolio and architectural standards implications
- Measuring and evaluating program performance
- Establishing effective communication programs

### *About the Instructor:*

*David Caruso is one the leading experts on realizing optimal business value from IT. As founder and Principal of David Caruso & Associates, David brings over 30 years of industry experience to the topics of IT benchmarking, manufacturing transformation, supply chain, and technology strategies. Previously as Senior Vice President & Director of Research at AMR Research, David led a staff of 100 IT researchers in all aspects of manufacturing and supply chain technology research.*

*David has also held positions ranging from Manufacturing Operations Manager to Vice President of Product Development, and has participated in many large-scale ERP implementations at firms including Johnson & Johnson, Sun Microsystems, and Rolls-Royce Motor Cars. Today, David sits on the executive advisory boards of several software firms and is a frequently requested keynote speaker at industry events. David maintains an industry profile with columns, quotes, and by-lined articles in magazines such as Manufacturing Business Technology, Managing Automation, Chief Supply Chain Officer, Fortune, and Business Week. In addition, he has hosted a DVD video series on supply chain trends, appeared on several television and radio shows and also sits on numerous boards and councils such as the annual Progressive Manufacturer award, and Infosys' Leaders of Change executive advisory board.*

Today, savvy executives recognize that succeeding at global competition will be based on information systems that can speed innovation, customer service and fulfillment, and provide global visibility for effective decision making. As a result, awareness among business leaders that IT can be the engine of the business performance has skyrocketed. Yet the performance of delivery of these essential projects has been dismal.

Unfortunately, the issue of companies struggling with their IT projects is well known and the statistics are daunting: 51% of the companies of a recent survey viewed their ERP implementation as unsuccessful. More importantly among IT projects reviewed more than three quarters blew their schedules by 30% or more; more than half exceeded their budgets by a substantial margin.

Program management differs from project management in that projects management manages task completion while program management delivers the business benefits targeted by IT investment. Effective Program Management brings together all the elements of successful business transformation – the executives, the business process owners, IT staffs, and meaningful measurement.

Attendees will discover the correlations between business process performance and profitability. It will focus on the development of a Program Management Office that will support the strategies, technologies, and business methods for business transformation and value creation through IT investment. The workshop covers:

### *Detailed Agenda*

#### **Defining the Program Management Office (PMO)**

- Objectives
- Philosophies
- Results

#### **Organizing to Succeed**

- Staffing strategy and metrics
- Leadership
- Roles and responsibilities

#### **PMO Strategies**

- Priorities
- Business alignment

#### **Critical Processes**

- Day-to-day operations

#### **Project Management**

- The differences between PMO and project management
- The skills required

#### **Meetings**

- Structure and agenda
- Documentation and minutes

#### **Metrics and Reporting**

- How to measure project performance and business benefit derived

## Workshop 2

# Enterprise Architecture and Organizational Transformation

Participants will gain valuable insights into Enterprise Architecture concepts and principles; various approaches and methodologies for the development Enterprise Architecture, and the value of the Enterprise Architecture as an important integrative tool to be used by both business and IT managers.



**Edward G. Lewis**

### Who Should Attend:

Involved and informed executives, managers and employees in the private and public sectors, including:

- Business & Government Executives, Directors and Managers
- Chief Executive Officers and Chief Operating Officers
- Chief Information Officers and Chief Technology Officers
- Chief Government & Transformation Change Agents
- Chief Architects & Enterprise Architects
- Enterprise and Government-Wide Portfolio and Program Managers
- Strategic Planners and Government Analysts

### The objectives for this intensive workshop include:

- Understanding the dynamic *change* environment – critical events driving major business transformation
- Understanding the organization's Global Value Chain and strategic coupling with EA
- Learning the concepts, principles and rationale for the Enterprise Architecture
- Learning approaches, techniques, tools and methodologies used for the planning, organizing, designing, developing, implementing the EA
- Learning the EA in addressing key business process, information, data and IT issues both inside and outside the organization
- Understanding how a dynamic EA provides the effective strategic decision-making framework for organizations in the context of its strategic environment
- Identifying the critical success factors for the effective use of an EA

### About the Instructor:

*Edward G. Lewis is an international consultant, educator, and public speaker. He has been actively involved in strategic management and technology issues for over 39 years, including thirty-four years in information technology and twenty-nine years in strategic planning. Mr. Lewis is the founder and president of Enterprise Transformation Group, Ltd. Mr. Lewis currently is a full-time lecturer at the University of Denver, teaching graduate and undergraduate courses in global value chain management, enterprise architecture, E-Business, change management, business process management & reengineering, knowledge management, supply chain management, customer relationship management, strategic planning, information technology policy, general management and information technology.*

*In 2001, Mr. Lewis was appointed by President George W. Bush to a four-year term on the Board of Directors for the National Veterans Business Development Corporation. This Corporation is responsible for developing and implementing information and resource programs to assist veterans in their entrepreneurial and small business activities. Mr. Lewis served as Chairman of the Board for over two and half years. In 1989, Mr. Lewis was appointed by then President George H. W. Bush to the sub-cabinet position of Assistant Secretary for Information Resource Management, becoming the very first Chief Information Officer in the U.S. Federal Government. As CIO, he was responsible for overseeing a large IT environment, including over 4,300 IT employees, a \$600 million annual IT budget, four data processing centers, and all major IT projects.*

### Objectives Include

- Focus on Three (3) Critical Environments – Must Have to be Competitive
- Identify Three (3) Absolute Key Elements for Enterprise Architecture – Must Have to Succeed
- Evaluate the Ten (10) Most Important Critical Success Factors – Building Blocks for a Successful Enterprise Architecture
- Compare Five (5) Different Approaches for Enterprise Architecture – What Are the Positives and Negatives
- Assess Seventeen (17) Component Architectures – What Makes an Effective, Complete Enterprise Architecture
- Trace an Actionable, Step-by-Step, Task-by-Task Enterprise Architecture Framework – Plan for Effective Development and Implementation
- Learn Best Practices – Lead by Example

### Detailed Agenda

#### Today's Environment and Future Requirements

- Security Professionals
- Major strategic management challenges
- New strategies, activities and governance issues
- Visionary approaches: Strategic Thinking and Strategic Planning
- Strategic environment: Global Value Chain
- Strategic decision-making framework: Enterprise Architecture
- Dynamic change management

#### The Strategic Decision-Making Framework – The Enterprise Architecture

- Enterprise Architecture - key issues
- Basic architectural concepts and principles
- Current architectural focus and enterprise goal
- Critical success factors
- Component architectures and models
- Integrating change programs

#### Business and Information Systems Architectures

- Defining the processes, process components and process enablers
- Process visioning and future business processes: macro versus micro processes
- Strategic information and data environments: architectures
- Information and data life cycle management
- Information technology strategies and value proposition
- Future organizational and inter-organizational information systems: architectures

#### Enterprise Architecture Methodologies

- Information Resources Management Framework
- Technical Architecture Framework for Information Management
- Spewak's Enterprise Architecture Planning Framework
- Boar's Range, Reach and Maneuverability Framework To Achieve Strategic Alignment
- The Open Group Architectural Framework (TOGAF)
- Zachman Framework For Enterprise Architecture

# Workshop 3

## BPM in Practice: Understanding and Implementing Workflow and Business Process Management

Leaders of the Workflow Management Coalition (WfMC) present a one-day intensive workshop on understanding and implementing the core BPM, covering both the benefits and business impact of BPM, as well as the relevant industry standards including Wf-XML, XPDL, BPMN and BPEL. The topics range from general overview of the BPM market, to specific detailed presentations on standards. The course is designed for both beginners and those who are already familiar with BPM and need to know more about the leading BPM standards and their impact on software design and implementation.

Participants will gain a detailed understanding of how to approach BPM initiatives, as well as the role of Business Process Modeling Notation (BPMN) and XML Process Definition Language (XPDL) and Business Process Execution Language (BPEL). All participants will receive an XPDL Implementer's Kit with details and preparation for XPDL certification.

### Who Should Attend:

- Process Architects Evaluating or Already Engaged in BPM
- Application Architects Looking to Leverage the Work of the Collective Business Process Standards Community
- Consultants and Integrators Seeking Strategies for Risk Management and Competitive Advantage



The **2007 BPM and Workflow Handbook** will be launched T&I 2007 on May 22nd, 2007. As part of the official launch, a

series of presentations will be made by the authors themselves on thought-provoking issues selected from their papers and case studies. Participants in this workshop will receive a free copy of the 2007 Handbook on-site.

Workflow Management Coalition



Process  
Thought  
Leadership™

### Topics include:

- Exploring round-trip modeling and process definition using BPMN and XPDL
- Understanding swimlanes, pooling, nodes and activities
- How to distribute tasks based on roles and skill sets
- Differentiating process management and automation
- Differentiating people-processes from system-processes
- Understanding the scope and details of the constructs and core elements of BPMN and XPDL
- Leveraging XPDL extended attributes and elements
- BPEL introduction, status and roadmap
- Distinguishing executable from model-driven architecture
- Demonstration of XPDL 2.0 and BPMN tools

### About the Presenters:

*This session will be presented by the WfMC's leadership, including the lead architects and authors of the XPDL and other leading business process standards and software specifications.*



#### Keith Swenson

WfMC Technical Committee Chairman,  
Vice President of R&D, Fujitsu Software

#### Ken Mei

Long-time member of the WfMC,  
Technology and Information Director,  
Global 360



#### Justin Brunt

WfMC Vice Chair (Europe),  
Senior Product Manager, TIBCO

#### Robert Shapiro

Senior Vice President of Global 360,  
Chair of the WfMC Interface 1 Committee



#### Dr. Michael zur Muehlen

Director, Center of Excellence in  
Business Process Innovation

### Topics Include:

- BPM 101: Enterprise Strategy and Process Management
- Exploring round-trip modeling and process definition using BPMN and XPDL
- Understanding swimlanes, pooling, nodes and activities
- Leveraging data mining and analytics
- How to distribute tasks based on roles and skill sets
- Differentiating process management and automation
- Differentiating people-processes from system-processes
- Understanding the scope and details of the constructs and core elements of BPMN and XPDL
- Leveraging XPDL extended attributes and elements
- BPEL introduction, status and roadmap
- Distinguishing executable from model-driven architecture

### Detailed Agenda

#### BPM 101: Enterprise Strategy and Process Management

- What is Business Process Management?
- What are the key questions BPM is answering?
- How does BPM relate to Enterprise Strategy?
- Top-down and Bottom-up approaches to BPM
- Who owns my processes?

#### Exploring Workflow and BPM Within a Model-Driven, Service-Oriented Architecture

- How to Enable Adaptable Processes and Architectures
- How to Distribute Tasks Based on Roles and Skill Sets
- Standards Needed to Ensure Flexibility and Interoperability

#### Human BPM vs. EAI BPM: From Workflow to SOA

- Differentiating People-Processes From System-Processes
- Understanding Human BPM
- Taking Advantage of Workflow Automation

#### Leveraging Data Mining and Analytics

- Business Activity Monitoring and Analytics-based Continuous Process improvement.
- Employing Data Mining and Simulation
- Process Discovery Capabilities for Process Re-Design
- Statistical Techniques Used in Data Mining

#### BPMN & XPDL Overview

- Understanding the Workflow Reference Model and Origins of Process Interchange
- Market Adoption of BPMN and XPDL
- Exploring Round-Trip Modeling and Process
- Understanding Swimlanes, Pooling, Nodes and Activities
- Understanding the Scope and Limitations of BPMN and XPDL

#### XPDL vs. BPEL

- BPEL Introduction, Status and Roadmap
- Distinguishing Executable from Model-Driven
- Differentiating Process Management and Automation
- Leveraging Design Interchange

#### Roundup and Feedback Featuring All Presenters

- Next Steps and Getting Started
- Resources to Keep You Going

## Workshop 4

# Ensuring BPM Project Success

This intensive one-day workshop is designed to help organizations ensure the success of BPM projects. Topics covered include securing organizational buy-in, setting up, planning and managing a BPM initiative within the organization. Participants will receive an actionable plan, a set of tools and a framework within which to apply them, and a range of best practices to observe and pitfalls to avoid on the journey.

### What You Will Learn

Within an intimate workshop setting you will learn best practices in BPM, the likely pitfalls, the methods to ensure your organization's success, and the technology trends that will influence your decisions. Working with others from a cross-section of industries, and taught by one of the most experienced practitioners in the field, you will gain the strategy and design ideas of other organizations who are facing similar business process challenges.

### Comments from Recent Attendees of Derek's Workshop:

*"Very thought provoking!"*

*"Awesome!"*

*"This gave me a strategy for leading the component agencies to a better understanding of IT in DoD modernization beyond the process flows."*

*"Very good overview of process modeling and BPM practices. Derek shared very interesting stories from his long list of clients."*



**Derek Miers**

### Areas covered include:

- Process Perspectives: introduction to key principles of successful BPM projects
- BPMS design principles
- Relationship with SOA and business performance
- Assessing organizational readiness and moving up the ladder of business process maturity
- BPM Project Methodology: an extensible methodology from selecting the initial project, gaining executive buy-in and building the BPM team

### About the Instructor:

*Derek Miers is CEO of BPM Focus, and one of the leading experts on BPM. As Co-Chairman of BPMI.org, he helped merge the organization with the OMG and recently completed the most comprehensive review of BPM environments (the BPM Suites Report is published through BP Trends). Over the years, he has carried out a wide range of consulting roles including running hundreds of training courses (in business and process modeling techniques), undertaking detailed technology selection assessments and project risk assessment studies. Other engagements have involved the provision of strategic consulting advice – from facilitating board level conversations around BPM initiatives, through establishing effective BPM Project and Expertise Centers, to helping clients develop new business models that leverage business process strategies. Clients have included many of the world's largest and well-known financial services companies (banks, building societies and insurers), pharmaceutical companies, telecom providers, commercial businesses, product vendors and governmental organizations.*



### About the BPM Workshop

*The Workshop comprises two modules:*

1. The first module focuses on achieving success in the first set of BPM projects, with the core objective of securing organizational buy-in. This module is most relevant to those setting up, planning or managing a BPM initiative within the organization.
2. The second module is designed to help those involved in managing the ongoing delivery of BPM projects. It complements some of the concepts in the first module, but takes them much further, while exploring the implications for roll-out across the business as success is achieved. It focuses on supporting the iterative nature of BPM projects and the issues encountered as the entire organization looks to benefit from the approach.

Between them, these two modules provide the organization with an actionable plan, a set of tools and a framework within which to apply them. It also includes a range of best practices to observe and pitfalls to avoid on the journey.

### Detailed Agenda

#### Process Perspectives

- Security Professionals
- High level introduction to some of the key principles of successful BPM projects

#### BPMS Design Principles

- A quick introduction to the BPMS and where it adds value
- Relationship with SOA and business performance

#### Assessing Organizational Readiness

- Moving up the ladder of business process maturity

#### BPM Project Methodology

- Role and formation of steering group
- Selling BPM to executive management
- BPM team formation – roles and responsibilities
- Understanding processes – overview of process modeling techniques

#### Identifying Improvement Opportunities

- Overview of improvement domains and related identification techniques

#### Designing Appropriate Process Architectures

- Balancing efficiency with adaptability and innovation

#### BPMS Development Issues

- Understanding the core components of a BPMS and how to work with them
- An iterative development approach to implementation
- Building in appropriate monitoring and optimization practices

#### Managing the Organizational Change

- Developing A Repeatable BPM Implementation Methodology

#### Establishing the BPM Center of Excellence/Project Office

- Evaluate and select methodologies and tools
- Developing a corporate process architecture
- Global vs. Local guidelines
- Rationalize the metrics
- Train and develop specialists

#### The Role of IT

- Assessing BPM Tools – Suites and Modeling
- Develop Library of Integration Components
- Considering BPM Standards

#### Summary

- Next Steps Development

**Thursday, May 24th  
& Friday, May 25th**

**Special On-Site  
Program,  
An Intensive  
Two-Day Seminar**

**Who Should Attend:**

- Process Architects Evaluating or Already Engaged in BPM
- Business Process Modelers involved in BPM exercises
- Business Analysts and Process Architects
- BPM Project Managers
- IT Systems Analysts, Enterprise Architects
- User Representatives who want to build rigorous models of their processes

**Comments from Recent Attendees  
of Derek's Workshop:**

*"Very detailed and interesting. Knows how to keep the audience engaged and interested."*

*"Great presenter!"*

*"Fabulous! I paid attention the entire time!"*

*"Mr. Miers is very passionate and knowledgeable of BPM best practices."*

# BPM Process Modeling Fundamentals

An intensive two-day course delivering an A to Z education on the most important tools and methods in business process modeling, including Business Process Modeling Notation (BPMN) as well as Role Activity Diagrams (RADs) and Business Capability Modeling.

Designed for Business Analysts and Process Architects, participants will receive a set of tools and methods needed to truly understand business processes, empowering them to compare and contrast different perspectives and to step outside the box and see the process from the customer's point of view.

The workshop was developed in conjunction with the best in the business, including the original author of the BPMN specification. Participants will come away with a thorough understanding of BPMN and how to model using the technique. Moreover, they will also learn a set of complementary modeling techniques that will help them in organizational change initiatives.

This course provides delegates with detailed training on modeling business process. The course is based around the needs of organizations trying to understand their processes. It focuses on BPMN but also includes introductions on other techniques that help people step outside the box and see things differently.

Participants will learn not only the technical aspects of these techniques, but also the methodology they should follow in using them.



**Derek Miers**

**About the Instructor:**

*Derek Miers is CEO of BPM Focus, and one of the leading experts on BPM. As Co-Chairman of BPMI.org, he helped merge the organization with the OMG and recently completed the most comprehensive review of BPM environments (the BPM Suites Report is published through BP Trends). Over the years, he has carried out a wide range of consulting roles including running hundreds of training courses (in business and process modeling techniques), undertaking detailed technology selection assessments and project risk assessment studies. Other engagements have involved the provision of strategic consulting advice – from facilitating board level conversations around BPM initiatives, through establishing effective BPM Project and Expertise Centers, to helping clients develop new business models that leverage business process strategies. Clients have included many of the world's largest and well-known financial services companies (banks, building societies and insurers), pharmaceutical companies, telecoms providers, commercial businesses, product vendors and governmental organizations.*

**Detailed Agenda:**

**Introductory Segments**

- Differentiating People-Processes From System-Processes
- Process Perspectives
- Setting the context for process modeling
- Cameo introductions
- BPMN, RADs and Capability Modeling and how they all relate to BPDM

**Introduction to BPMN**

- Drivers for its Development Modeling Requirements
- Different use cases for process modeling

**BPMN Elements**

- Simple overview of the structure and elements of BPMN

**General Approach**

- How the core elements combine to enable models that reflect reality

**Detailed Examination of Each Element Type**

- Activities
- Events
- Gateways
- Connectors
- Pools-Lanes
- Artifacts
- Sub-processes

**Combining all the Elements and Flow**

- Different types of Flow

**Development Methodologies and Approaches  
Overview**

- Best Practices in Modeling using BPMN

Orchestration vs Choreography

- Private – Public – Global – Collaboration

**Role Activity Diagrams**

- Concepts \_ Key Elements
  - Roles
  - States
  - Goals
  - Actions

- Decisions and Case Refinement

- Interactions and Triggers

- Handling Concurrency \_Combining all the elements and examples

**Using the RIVA Method**

**Summary, Next Steps & References**





**Business Transformation at the Texas Health and Human Services Agency**

**Dr. Raj Ramesh, TopSigma Consulting**

This session presents a case study of business transformation at the *Health and Human Services Agency for the State of Texas*, where a large number of *silos* applications were integrated through the induction of BPM and the strategic use of a *governance portal*. Learn how the governance portal exposed various sets of existing functionality through services interfaces, which were then tied together to create a higher-level composite application that leveraged BPM technologies by creating a process around the services of these two applications. See how the portal was leveraged as a vehicle to communicate the benefits of BPM, enabling greater traction and faster adoption than otherwise would have been possible. The presenter, Dr. Ramesh of TopSigma Consulting has worked with many Fortune 1000 companies, leading the implementation of their BPM initiatives to success.



**Data Mining and Analytics**

**Robert M. Shapiro, Chairman, WfM Working Group One, Senior Vice President, Global 360**

This advanced topics session data mining and analytics, making understandable and actionable the latest methods, techniques and technologies for harvesting business and process intelligence. Taught by one of the industry's most respected authorities, the session will be present an impartial and vendor-neutral perspective how to get started in your own organization. Topics include how an Event Stream is generated by executing processes provides the data needed for Business Activity Monitoring in real time and Analytics-based continuous process improvement. Examined will be how to employ Data Mining and Simulation tool kits, deriving from the analytics data a stream of recommendations for improving the business operations, including: Redeployment of Resources; Process Changes; and Optimization of Business Rules. Also examined will be how to leverage the data generated by typical computer-based business processes, using process intelligence as the lens through which to view the data. Explained will be how the process view is critical in developing a mining structure and mining models that expose correlations between Key Performance Indicators (KPIs) and other factors such as work item attributes (UDF's), resource schedules, arrival patterns and other external business factors.



**Leveraging Open Source for Managing Complex Business Processes**

**Jacob Taylor, SugarCRM, Chief Technology Officer**

The growing *buzz* around open source software is no longer limited to software developers alone, but is increasingly is driven by end user adopters who are using the unique benefits of open source implementations to improve and streamline their business processes. In this session by Jacob Taylor, the co-founder and Chief Technology Officer for what is widely considered the most successful example of open source as a packaged application: *SugarCRM*. Jacob will explain the main differences between proprietary and commercial open source business models.

Taking a case study approach, Taylor will illustrate through a series of specific customer examples how the process of developing open source applications and a commitment to open standards ultimately benefit customers. He will give concrete examples of how commercial open source implementations that includes:

- Helping the *State of Oregon's Office of Medical Assistance Programs (OMAP)* standardize its methods of tracking cases for its client base of over one million citizens while also complying with federal regulations for electronic healthcare transactions
- Allowing Sterling PCU to avoid hidden costs for data management while going beyond the capabilities of its previous proprietary CRM system to provide enhanced CRM functionalities
- Increasing *athenahealth's* control over internal systems so that it could continue to grow its business effectively while reducing time to achieve ROI goals and implementation costs



**Innovation in Healthcare: Transforming Paper to an eSubmissions SOA**

**David Webber, Lead Analyst, National Institutes of Health (NIH)**

This presentation will describe the challenges of the U.S. government's migration from paper-based processes to complete SOA solution integrated across agencies and external partners – a transformation awarded the *Best Organization SOA Application* by the Federal CIO Council's Service-Oriented Architectures Community of Practice. Critical to success was the use of open source and open standard technologies. Included in this is rule-based document handling as well as extended rule directed business processes. Converting backend manual review processes to an automated workflow dashboard with knowledge driven document intelligence to assist the staff and researchers. This system is now successfully deployed with ability to handle thousands of application submissions a week, resulting in up to 10 gigabytes of data flows weekly. The lessons learned in managing open source and open technology as well as aligning and leveraging both batch and real-time online tools with desktop applications will be highlighted. Knowing how to exploit the power of XML integration technologies is also crucial. Culture shift for the in-house staff also has to be managed – and the experience of providing help desk support to external partners.

David Webber is an authority in the field of SOA and business transformation, having been one of the originators of the XML paradigm shift and architect for the acclaimed OASIS Business-Centric Methodology specification. A thought leader in the application of XML and SOA to business applications and transformation of enterprise processes. He was team lead on the open source project from XML transformation toolset – *iCAM*, co-author of *New Riders* book *ebXML: The New Global Standard* and is widely published on the topics of XML and web services.



**Services Industry Case Study: A Practical Approach to Process Automation**

**David Holliday, Chief Technology Officer, AMTI – A Tetra Tech Company**

This session will present an overview of the automation approach for a large services firm (exceeding \$1 billion in revenue) and provide guidance to BPM practitioners that will enable them to more effectively apply the technology. Examined will be how AMTI addressed the need to improve its internal processes in order to support growth without increasing administrative staff, by using BPM to automate processes to reduce the administrative burden on staff and improve productivity. Since that successful effort AMTI has continued to use and to refine its application of BPM to support ongoing process improvement initiatives. In his role as Chief Technology Officer for Advanced Management Technology, Inc. (AMTI) David Holliday is responsible for ongoing automation efforts and for leading the effort to improve the way in which technology is applied to support the business.

David Holliday is Chief Technology Officer for Advanced Management Technology, Inc. (AMTI). His responsibilities include leading the process automation team, working with senior management to apply technology to support business goals and objectives, and identifying and evaluating new technology. With over 24 years of experience in IT and business Mr. Holliday brings a unique perspective to the areas of Business and IT Management, Process Automation and Application Development.

**Learn how to employ data mining and simulation tool kits.**  
**Tuesday, 1:45pm**



**Adaptable Business Architecture Through Context-Aware SOA**

**Ali Arsanjani, PhD, Chief Architect, IGS SOA and Web Services Center of Excellence**

What if your business could adapt to competitive threat by recombining pre-built services into new configurations? What if you could set policies at the business level and have a language to program your business that IT could emulate? This session examines the practical reality of these concepts and other important competitive issues that can be realized. Presented by Ali Arsanjani, PhD, Chief Architect for the SOA and Web Services Center of Excellence within IBM Global Services, this session explores how agile and adaptive enterprises are enabled by leveraging service-oriented architecture, domain-specific languages and context-aware services. Dr Arsanjani specializes in harvesting and developing best-practices for the modeling, analysis, design and implementation of SOA and Web Services, and leads the internal IBM worldwide SOA & Web Services Community of Practice (5000+ members). He is the principal author of the Service-oriented Modeling and Architecture (SOMA) method for SOA.



**The Business of IT: Understanding ITIL and How to Run IT as a Business**

**Loy Allen, Perot Systems Corp**

If IT is to be successful at running as a business and demonstrating value, IT must move from a functional view, or in the case of the enlightened, a process view, to a services view. This is a transformational journey for most organizations, one that requires leadership, sponsorship, structure and discipline to achieve. But it is a journey worth the effort and ultimately necessary for survival. This session shows how this journey is built on the concepts of the current and evolving ITIL framework. Examined will be why an ITIL and services approach has been undertaken by some but completed by few. This session introduces the central concepts involved in managing IT as a services business, and explains the impact running IT as a business on both the service consumers and creators. You will explore the need to successfully build upon your understanding of ITIL and the evolving ITIL environment. Emphasized will be practical experiences and lessons learned from both external and internal IT service providers. With 36 years experience in the IT industry, Loy Allen is a Director of Perot Systems' Consulting and Application Services group.

**For complete session details, visit [www.transformationandinnovation.com](http://www.transformationandinnovation.com)**





**Improving Business Performance:  
Demystifying Simulation and Optimization**  
*Ed Stephan, CACI, Inc.*

This session provides an overview of how to use simulation and optimization techniques and technologies to support business performance improvement. Both of these technologies have been accused of being difficult to apply from a practical sense. This session will help to simplify how to use these powerful toolsets to significantly improve business processes and organizational performance through their application to front-end analysis phases of projects as well as operational monitoring and management activities. Explored will be the types of business problems that can benefit from the use of simulation and optimization including manage risk and uncertainty in implementing BPM and a BPMS, a simplified definition of simulation and optimization techniques, as well as a real-world example of how these technologies are used for design, process monitoring and continual improvement strategies. Mr. Stephan has many years experience in the application of modeling and simulation techniques to process and workflow improvement issues. These include diverse application areas ranging from manpower planning to insurance application processing to engineering to municipal court processes. His recent focus is on the inclusion of optimization and predictive analytics.



**Operational Risk Management and BPM**  
*Dr. Michael zur Muehlen, Director, Center of Excellence in Business Process Innovation, Stevens Institute of Technology*

Business Process Managers are faced with two different tasks: Improve organizational performance by streamlining and automating workflows while ensuring compliance with regulatory and audit requirements. Both tasks involve the notion of process risk, and introduce a series of questions: Does the risk exposure of a given process match the risk appetite of the enterprise? Are there better ways to mitigate certain risk factors by redesigning our processes? And how can we measure the level of compliance during the execution of a given process? Contemporary process modeling languages offer little help in identifying and mapping process risk. This session addresses a multi-perspective approach to capturing and understanding process risk, and illustrates ways to use this newfound information to create innovative process designs that address risk factors in a cost effective way.

Dr. Michael zur Muehlen is Assistant Professor of Information Systems at Howe School of Technology Management, Stevens Institute of Technology, Hoboken, NJ, where he directs the SAP/IDS Scheer Center of Excellence in Business Process Innovation. His research interests center around the organizational aspect of BPM technology, risk-aware process management, and process support for managerial decision making.

should put together a SOA Roadmap. Also discussed is how organizations need to govern the execution of the SOA Roadmap to ensure delivery of all SOA and business objectives.

Dr. Mohamad Afshar is a recognized authority and well-respected thought leader on the design and governance IT architectures. His co-presenter, Benjamin Moreland, is presently employed at The Hartford as the Director, Foundation Services within the EA group, which is responsible for the realization of The Hartford's P&C SOA direction. He is a recognized leader in the SOA space, having developed The Hartford's SOA Maturity Model, led the design and implementation of 60 course grained services, deployed a UDDI registry, WSM engine, service bus, BPEL engine and helped set the SOA standards for The Hartford.



**Leveraging Web 2.0 for "Always-On Management" at PCM Corp**  
*Scott Allen, Noted Author and Leading Web 2.0 Expert*

This case study session details how the technologies of Web 2.0 have enabled a virtual enterprise to succeed within the highly-regulated and hyper-competitive industry of financial services. PCMC is a publicly-traded corporation itself, that provides SME's with education, consulting and a model to create shareholder value via successful entry and sustained participation in capital markets. But PCMC has no traditional offices and only a handful of employees. The organization is actually a geographically distributed team of 35 professionals working from various locations. Despite it's virtual structure, the organization is able to negotiate the heavily-regulated, difficult waters of the securities industry for both the company and its clients. Operating virtually for over five years, the company has evolved from simple e-mail and voice conferencing to a highly refined blend of collaborative technologies. This session will explore how PCMC is pioneering in Always-On Management™, a strategy and best practices for geographically distributed teams to utilize technology to increase productivity and performance. Examined will be how PCMC has been able to leverage Web 2.0 technologies including Skype, Web Conferencing, Unyte real-time document collaboration, Intranets.com, Naturally Speaking and Private FTP. Scott is a leading expert on Web 2.0 and online collaboration and coauthor of *The Virtual Handshake: Opening Doors and Closing Deals Online*.

**Learn a multi-perspective approach to capturing and understanding process risk.**  
**Tuesday, 11:15am**



**An SOA Call to Arms: An Open Letter to the SOA Community Using Capability Modeling to Facilitate SOA Adoption**  
*Adam Michelson, Optaros*

Is SOA still emerging or do people just not care? SOA seems to have been around for a while, yet are we impressed with what we have seen so far? There seems to be plenty of talk about SOA, but it's just working its way into the mainstream. Is SOA still catching on or does it confound organizations? The business community does not seem to care about SOA, but does the IT community really care? We seem to be stuck in an education, hype and proof-of-concept phase. The SOA community is certainly active and passionate. We talk to each other with wide-eyed possibilities of loosely-coupled services dancing, or orchestrating, in our heads. We care, but the rest don't seem to. So what do we do? How do we make SOA relevant? Here is an open letter to the SOA community with some suggestions for how each of us can help the SOA cause.



**Ensuring Success with BPM Projects**  
*Derek Miers, President, BPM Focus*

This workshop session will provide delegates with an actionable framework to ensure ongoing BPM project success. It is most relevant to those setting up, planning or managing BPM initiatives within the organization. The focus is on ensuring early BPM project success, setting out a robust, yet adaptive methodology for BPM project support.

The session will then include quick introductions to:

- Reliable methods for developing appropriate enterprise-wide process architectures.
- Engaging the business and building a suitable roadmap.
- Project selection methodology and related scoping methods.
- BPM project management techniques.
- Developing the skills of individual specialists (shared across a range of projects).
- How to embed the BPM change ethic in the business itself.

This workshop is a subset of the *BPM Focus Learning Framework* designed to ensure organizational success on the BPM Journey.



**Enabling the Service-Oriented Enterprise**  
*Dr. Setrag Khoshafian, WfMC and Vice President of BPM Technology, Pegasystems*

This session examines how global collaboration and emerging corporate cultures are creating a new type of innovative enterprise: one that is based on services. Discussed will be why this new service-focused approach to business considers not only the service culture, but the technology as well. Each party or participant in service orientation sees themselves as service provider as well as a service consumer, in an increasingly well-connected global economy. This session focuses on both the cultural service dimension, as well as the emerging architecture of service orientation. This session delves deep into the components of the enabling technologies of service-orientation, as well as the cultural aspects of services orientation, where enterprises reach and serve various target communities: their customers, yes, but also their trading partners, employees, and shareholders. Taught by one of BPM's early pioneers, Dr. Setrag Khoshafian, this session is intended for both business managers and IT, covering Web Services architectures, service oriented maturity models, ESBs, BPM suites, standards for quality of service, and servant leadership.



**Keys to Successful Governance with SOA**  
*Dr. Mohamad Afshar, Senior Director of Product Management, Oracle and Ben Moreland, The Hartford*

It is difficult to overstate the importance of governance to SOA initiatives, whether in the context of service governance (i.e. governing the lifecycle of services from creation through deployment) or the broader issues of IT governance (i.e. governing the lifecycle of services from creation through deployment) or the broader issues of IT governance (commonly defined as *specifying the decision rights and accountability framework to encourage desirable behavior in the use of IT*). This session presents a holistic discussion of governance with SOA. It outlines the key policies that organizations should consider with regards to finance, portfolios, operations, architecture, technology, projects and people. It will also outline six successful steps to governance with SOA, as part of the decisions, processes and policies that contribute to successful business and SOA objectives. The presenters will address, how as part of the execution of an SOA strategy, organizations

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**Transformation Case Study: Chester County Hospital**  
*Ray Hess, Vice President, Information Management, Chester County Hospital*

Utilizing BPM within an acute healthcare setting is an exciting new frontier that offers many opportunities and unique challenges. This presentation will review the acute healthcare setting from a BPM perspective and then present two BPM projects that have resulted in successful automations at The Chester County Hospital. The first example reviews the automation of the bed cleaning process from a clinical care management perspective. The second example shows how BPM was utilized to monitor all patients for an infectious disease state which requires isolation to protect other patients and the hospital staff. These two projects resulted in the hospital winning the 2006 North America Global Excellence in Business Process Management (BPM) and Workflow Gold Award. This session will help the participant understand the healthcare environment and how BPM can successfully be utilized with clinical care processes.

**See examples of the BPM implementation that won the 2006 North America Global Excellence in Business Process Management and Workflow Gold Award.**  
**Tuesday, 2:45pm**



**Enterprise Architecture Governance: A Framework for Successful Business**  
*Greg Sparks, Level 3 Communications*

Enterprise Architectures play an important role supporting business transformation initiatives. Enterprise Architecture Governance (EAG) provides a structure for defining relevant strategies and compliance processes. This Level 3 Communications case study presents a detailed framework composed of three essential components of EAG:

- 1) Organizational Accountability must be clearly defined for all EAG aspects, and executive sponsorship is essential. Level 3 formed an executive steering committee with broad representation, preventing EAG from becoming an IT-only initiative.
- 2) Strategy Definition provides the roadmap for business transformation initiatives. Architectural guiding principles define values and offer input into strategies, *end states* define where the company is going, and roadmaps document how to get there from.
- 3) Compliance Processes ensure that development initiatives are in alignment with the strategic direction. Level 3 has created a framework that gives each development initiative an architecture rating that indicates its compliance level.

Greg Sparks has held technical and leadership IT positions at Accenture, Sprint, and Level 3. As a director of development, he has broad experience in many areas of telecommunications Operational Support Systems and business intelligence. He has served in various technical and functional architecture roles, and currently leads the IT Strategy and Architecture group.



**Using Capability Modeling to Facilitate SOA Adoption**  
*Chip Wilson, Geniant*

The promises of Service Oriented Enterprise Architecture include greater business agility, improved application integration at reduced cost, and the holy grail of aligning IT initiatives with business objectives. Achieving these goals requires organizations to approach SOA from an Enterprise Architecture perspective. Although existing EA processes and tools can be adapted to facilitate SOA, a new approach is gaining wider acceptance as being especially suited to this task. Capability Modeling focuses on the things that business units can do instead of how they do them. There is a direct corollary to the best practices of service design, where the focus of analysis is on what a service does instead of how it is implemented. Business Capabilities can be described in terms that the business is familiar with, and then mapped directly to services implemented by systems supported by the IT organization. This presentation covers the basics of Capability Modeling and how this important technique can be used by Enterprise Architects to facilitate an SOA adoption program.



**How a Business Process Vision May Boost Innovative Ideas**  
*Salvatore Latronico, openwork*

Even before fascinating promises about orchestrating organizations, BPM directly supports different and previously unexplored points of view. While traditional/transactional systems were designed and developed to vertically support departmental needs, BPM suites take care of creating bridges to link those functional islands together, in order to map and manage the evolution of companies cross activity paths. But beyond this relevant and valuable horizontal perspective, there are very significant organizational implications strictly related to the maturity of those BPM tools in terms of level of abstraction and business approach they propose. Starting from WHAT can be managed by BPM suites, this session will focus on HOW they allow to proceed involving users and managers totally, when adopting an implementing-analysis approach, with unpredictable benefits and amazing new ideas.



**The Matrix: Remixed. BPM+SOA=Results-Oriented Architecture**  
*Linus Chow and Charles Medley, BEA Systems and Clay Richardson, PPC*

Government and Commercial organizations are facing constant challenges to increase agility, efficiency and effectiveness. Focused on results, IT and mission managers are struggling to bridge historical differences when building solutions to solve their problems. With BPM and SOA, technologies and methodologies have finally evolved to enable a successful results-oriented architecture to bridge this gap. This collaborative presentation walks through Best Practices that overcome the normal struggle between IT and mission, including examples from both government and commercial implementations.



**Authenticated Document/Data Exchange**  
*Mohammed Shaikh, Image X*

Exchange of documents and data in commercial organizations is normally accomplished using traditional workflow methodologies. Successful implementation of workflow in these organizations is encouraging agencies that did not look at these workflow methodologies favorably because data and documents exchanged were considered confidential and restricted and for use only by authorized users. The workflow in these organizations requires that user be authenticated before accessing the document/data as well as obtain their signatures at each step due to legal requirements associated with these processes. In addition retaining the confidentiality of the document/data based on user authentication is of utmost concern. Recent advances in digital signature technology and its use in replacing traditional signature have opened the possibility of creating a successful document/data exchange workflow for authenticated documents and data. Further this approach could be extended to authenticate each user and their role to meet confidentiality and security requirement. Some of the processes that can be identified for authenticated document/data exchange are: "Document/data exchange associated with healthcare document requiring HIPAA compliance." Judicial transactions like TRO's (Temporary Restraining Order) etc.



**Strategies for Leveraging BAM and B2B**  
*Pranav Shahi, IT Architect, Cisco*

This session presents how B2B domain is undergoing transformations with the XML based protocols. Examined will be how not all key protocols like RosettaNet 1-action PIP's enable any functional acknowledgments, and hence there is a void in regards to visibility and data states across the two trading partners. BAM devised as a solution originally for monitoring business processes can play a key role in monitoring the discretely choreographed processes across trading partner boundaries and help gain the real-time visibility and alerts. Discuss will be the findings of a recent Gartner study which predicted increased usage of BAM in B2B technology domain, and have laid out key guidelines for organizational assessment for this assessment. The session will look into the above areas and discuss the maturity of BAM products and solutions to aid in the void as predicted by Gartner. Presented by an industry expert in the area of supply chain visibility: Pranav Shahi has spent two years at Cisco and has worked with HP, Agilent, LSI Logic, Applied Materials, Network Appliance, Palm and Dotcast.



**A Model for Process and Transformation**  
*Chris Lawrence, Old Mutual South Africa*

This session introduces some of the principles behind a proposed Business Process Management (BPM) reference model, equivalent to the Workflow Management Coalition (WfMC) Workflow Reference Model. There is significant holistic advantage in deriving the BPM reference model not from workflow or BPM technology, but from logical and architectural analysis of what it is to be a business process. The same model can then support technology, operational process management and business transformation. The principles address fundamental questions like: What is a business process? Where does it start and stop? What are its logical components? How can one process control structure cover both manual and automated functionality? Where do rules fit in? How to ensure process models align with data models? Does process thinking mean rethinking requirements analysis, solution design and IT engagement and delivery models?

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**May 21-24, 2007**

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