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As the premiere event in our successful series of BPM conferences, the BPM and Case Management Global Summit is the product of a journey of many years. This year's event, focuses on critical roles and capabilities needed for all BPM and Case Management team members. We spent a lot of time refining our attendee-centric approach which is represented in this event. In light of our focus on critical BPM capabilities, we believe that *attending as a team* will prove beneficial. Each track spans all 3 days and includes key notes, concurrent sessions and hands-on workshops. As a result of trends we noticed in the industry, we added a track focused exclusively on all aspects of enterprise and technology architecture, including interactive panel discussions.

By design, the BPM and Case Management Global Summit is the opposite of the traditional tradeshow – it is about community, networking, thought leadership, and ultimately making the best informed decisions about BPM and Case Management initiatives. Our format is unique – you will see actual solutions and tools, picked by our team, and presented by the actual key stakeholders and innovators most closely linked to their design, development and implementation. You will not see a sales pitch, but rather specifically developed capability demonstrations, representing what we believe to be the both the leading edge and most representative tools of BPM and Case Management.

The individuals involved are not only those most influential to BPM and Case Management, many have been my most trusted colleagues for the last two decades. We have worked together on some of the industry's largest and most complex projects, and in every case the focus of our work has been to help organizations make the most effective decisions about their technology investments, and how to best leverage those decisions for technology-led innovation. That has been focus of my own career, and it is the defining mission of this event.

We hope to see you in June!

"Nice place to start BPM initiatives – to review, research and bring in a whole new perspective that is agnostic and matches the industry standards."

- Manager, Supply Chain Process & Technology U.S. Postal Service

BPM & CASE MANAGEMENT
PROCESS ▶ RULES ▶ DATA

JUNE 22-24, 2015 **THE RITZ-CARLTON**, PENTAGON CITY

THE RITZ-CARLTON®

AGENDA-AT-A-GLANCE

MONDAY, JUNE 22ND

Time				
8:00 - 8:30	Networking Breakfast and Conference Check-in			
8:30 - 9:45	Event Opening and Welcome Keynotes: **Clay Richardson,** *Forrester Research,* **Dan Neason,** *Whitestein North America,* **Brian S. Flynn,** *Global CIO and EVP, Crawford & Company*			
10:00 - 10:45	**When Harry Met R2D2: Connecting Humans and Machines in the Flow of Work,** Larry Hawes, *Dow Brook*	**The Next Generation Work Coordination Platform,** Vijay Pandiarajan, *IBM*	**Making the Business Case for Case Management Systems,** James E. McMillan, *NCSC*	**Business Change and Process Architecture-** Frank Kowalkowski, *Knowledge Consultants, Inc.*
11:00 - 11:45	**Process Mining: Using Data Science to Discover the Truth about Your Processes,** Anne Rozinat, *Fluxicon*	**Using Business Architecture to Drive Service Portfolio Planning at the Department of Veterans Affairs,** John Butler, *Auxiliam Technology Group*	**Production Case Management Requirements Linking a Capability Taxonomy and Process Hierarchy,** John Matthias, *NSCC*	**The Design of Business: A Business Engineering Approach,** Brian Seitz, *Microsoft*
11:45 - 12:15	**Capability Demonstrations**			
12:15 - 1:30	Networking Lunch in Exhbits / Salon I&II			
1:30 - 2:15	**Practical Information and Semantic Foundations for BPM and Case Management,** David Webber, *NIEM*	**A Case Study on Effective Process Modeling: An Outcome-Based Approach to Delivering Business Value,** Amit Mayabhate, *FannieMae*	**Programming Requirement System (PRS) for the Dept of Veterans Affairs,** Michael O'Donnell & Stephen O'Donnell, *RF Logistics*	**The Value and Need for Architecture in Banking,** Michael G. Miller, *HSBC Global Finance*
2:30 - 3:00	**Capability Demonstrations**			
3:00 - 3:30	Afternoon Networking Break In Exhbits / Salon I&II			
3:30 - 4:15	**Wearable Workflow Meets The Internet of Things In Healthcare,** Dr. Charles Webster MD, *EHR Workflow, Inc*	**Interactive Panel: Solution Architects as a Key Ingredient to Increasing BPM Project Success-** Led by Patrick Lujan, Bennu Consulting, LLC with panelists, Anderson P.Bryan, *Keybank & Puleen Patel, Banking Institution.*	**Protecting Case Management Systems: Integrating EA and BPM for Government Agencies,** Christine Robinson, *Enterprise Architect*	**Achieving Business Flexibility Through Architecture,** Michael Poulin, *Clingstone Ltd*
4:15 - 6:00	Evening Networking Reception In Exhbits / Salon I&II			

TUESDAY, JUNE 23RD

Time				
8:00 - 8:30	Networking Breakfast and Conference Check-in			
8:30 - 9:45	Keynote Sessions: **Jim Sinur,** *Flueresque, Gartner Emeritus* & **Tom Debevoise,** *Noted Author, Process and Decision Modeling Guru*			
10:00 - 10:45	**Open Architectures in Support of Next Generation Informatics,** Keith Toussaint, *Mayo Clinic*	**What Prevents EA and BPM Technology Solutions from Being Successful--How Can We Reverse the Trend?,** Matthew Kern, *Technology Resource Group, Inc.*	**Case Management Solutions for Legal Matters,** Mike Prentice, *IBM*	**Architecture and Business Infrastructure,** Gil Laware, *Information by Design, LLC.*
11:00 - 11:45	**Practical Guide to Managing Rapidly Advancing Technology,** Roy Altman, *Memorial Sloan Kettering*	**BPM Graph: a Semantic Layer Bridging the Business/IT Divide,** Denis Gagne, *Trisotec*	**Delivering Adaptive Case Management Solutions in an Agile Environment,** Bruce McGregor, *AECOM*	**Insurance, Health Care and Architecture,** Mike Connor, *American Family Insurance*
11:45 - 12:15	**Capability Demonstrations**			
12:00 - 1:30	Networking Lunch In Exhbits / Salon I&II			
1:30 - 2:15	**The Enterprise Digital Genome--Operating System for a Self-aware, Quantifiable and Predictive Financial Services Enterprise,** Surendra Reddy, *Quantiply Corporation*	**Interactive Panel: Innovative Ways for IT, Marketing and Business Leaders to Collaborate and Deliver Solutions Quickly (panel with** Phil Cooke, *Telesis & Scott Rice, Sprint)*	**Adaptive Case Management for Healthcare: The Health and Hospital Network Perspective,** Aneel Advani, *Johns Hopkins University & Everis Group*	**Business Architecture: The Missing Link between Strategy & Execution,** William Ulrich, *Business Architecture Guild*
2:30 - 3:00	**Capability Demonstrations**			
3:00 - 3:30	Afternoon Networking Break In Exhbits / Salon I&II			
3:30 - 4:15	**Flexible-Reactive Business Process Modeling with Case-Based Learning Management Systems for Health Care,** John Dodd, *BDC Healthcare-IT*	**A Standards Driven Requirements Method: Say Goodbye to Analysis Paralysis,** Tim Price, *HP*	**Successfully Engaging Users in a Case Management/Workflow Deployment Initiative,** Frank Vega, *The Efficiency Group*	**The Value of Architecture in Government,** Dave Rice, *Enterprise Architect, EA Frameworks*
4:15 - 6:00	Evening Networking Reception In Exhbits / Salon I&II			
6:30 - 8:00	**5th Annual Global Excellence in Case Management Awards Ceremony Dinner**			

WEDNESDAY, JUNE 24TH

Time				
8:00 - 8:30	Networking Breakfast and Conference Check-in			
8:30 - 9:45	Keynote Sessions: **Dr. Aaron Drew,** *U.S. Department of Veterans Affairs & Business Architecture Leadership Panel*			
10:00 - 11:45	**AIIM Content Analytics Practitioner Course,** Jesse Wilkins, *Director of Professional Development, AIIM*	**Getting Your Organization Started With BPM: Where to Look First**	**Case Management 101: Where to Start and How to Succeed With Case Management Initiatives,** Lloyd Dugan, *Chief Architect and Instructor, BPM.com*	**Analyzing the Business Using Architectures,** Frank Kowalkowski, *President, Knowledge Consultants, Inc.*
12:00 - 1:00	Lunch Held in General Session Area			
1:00 - 2:45	**AIIM Content Analytics Practitioner Course,** Jesse Wilkins, Director of Professional Development, AIIM	**Getting Your Organization Started With BPM: Where to Look First**	**Case Management 101: Where to Start and How to Succeed With Case Management Initiatives,** Lloyd Dugan, *Chief Architect and Instructor, BPM.com*	**Analyzing the Business Using Architectures,** Frank Kowalkowski, *President, Knowledge Consultants, Inc.*
4:00 PM	Close of Event			

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JUNE 22-24, 2015 **THE RITZ-CARLTON**, PENTAGON CITY

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SUMMIT SPEAKERS *(partial list)*

Brian S. Flynn, Crawford & Company

Jim Sinur, Flueresque

Dan Neason, Whitestein North America

Clay Richardson, Forrester Research

Dr. Aaron Drew, Veterans Affairs

Tom Debevoise, Signavio

Lloyd Dugan, BPM.com

Larry Hawes, Dow Brook

Vijay Pandiarajan, IBM

Aneel Advani, John Hopkins University

Frank Kowalkowski, KCI

Anne Rozinat, Fluxicon

John Butler, Auxiliam Technology Group

Stephen O'Donnell

John Matthias, National Center for State Courts

Brian Seitz, Microsoft

David Webber, NIEM

Amit Mayabhate, Fannie Mae

Michael O'Donnell, RF Logistics, LLC

Michael G. Miller, HSBC Global Finance

Jesse Wilkins

Dr. Charles Webster M D, EHR Workflow

Patrick Lujan, Bennu Consulting

Anderson Bryan, Keybank

Puleen Patel, Banking Institution

Christine Robinson, Enterprise Architecture

Vijay Pandiarajan, IBM Michael Poulin, Clingstone Ltd

Keith Toussaint, Mayo Clinic

Matthew Kern, TRG

Gil Laware, Information by Design

Roy Altman, Memorial Sloan Kettering

Bruce McGregor, AECOM

Mike Connor, American Family Insurance

Surendra Reddy, Quantiply

Phil Cooke, Telesis

Scott Rice, Sprint

James E. McMillan, National Center for State Courts

William Ulrich, Business Architecture Guild

John Dodd, BDC Healthcare-IT

Tim Price, HP

Frank Vega, The Efficiency Group

David Rice

FEATURED KEYNOTES

EMERGING TECHNOLOGIES FOR DELIVERING CUSTOMER-CENTRIC BPM, *CLAY RICHARDSON, PRINCIPAL ANALYST, FORRESTER RESEARCH*

Clay Richardson serves Enterprise Architecture Professionals and is a leading expert on business process management (BPM) software, services, and methodologies. Clay delivers strategic guidance to professionals seeking to improve collaborative, operational, and customer-facing business processes. Clay specifically helps enterprises establish BPM strategies, governance standards, and BPM centers of excellence; identify rapid Agile and Lean methodologies best suited for BPM projects; and establish vendors and technologies that help automate and optimize mission-critical business processes.

USING ADAPTIVE CASE MANAGEMENT FRAMEWORK TO TRANSFORM CORE OPERATIONS, *DAN NEASON, WHITESTEIN NORTH AMERICA*

The notion of "intelligence" is now a dominating driver for BPM, as well as many associated areas. Incorporating intelligence into the software machine is echoing for business what we today experience as consumers with services such as Siri and Google, processing vast information to present coherent and relevant knowledge at the moment of demand. Yet too often the term is thrown into BPM discussions with too little substance behind it.

This session will present the *2014 Global Excellence in Case Management Award* winning case study about InComm and their leverage of adaptive case management framework to transform core operations. For more than 20 years, InComm has been the market leader in the prepaid and payments industry. They built and maintain a data infrastructure that supports global commerce and offers solutions that reach people all over the world. InComm implemented the *Living Systems Process Suite (LSPS)* to optimize critical areas of planning and delivery of the product to the end retail outlets. This includes decision support on what products to launch

and organization of a marketing launch and delivery. The *LSPS Goal Oriented BPM* structure has eliminated the straight though process model and replaced it with a signal driven, goal oriented model. Under the previous structure each items had to be reviewed to determine if work was necessary, now the LSPS 'Launch' goals activate and manage the work items. Each goal simultaneously evaluates the product data and determines under what condition (if and when) product actions much be taken (encompassed inside each goals plans). The 'Launch' is managed as a case, as are the individual product work items that move independently to the different departments within InComm. The transformative nature is that this signal driven execution provides exception based work assignment and parallel processing of activities. Dan Neason is an experienced executive in the BPM arena, working as a partner to many industry leaders, as well as overseeing some of the most successful and notable projects and deployments of BPM software. Today Dan is responsible for the North American deployment and distribution of LSPS, one of the most innovative approaches to delivering software intelligence with BPM, as recognized in leading industry rankings such as the *"Gartner Magic Quadrant for Intelligent Business Process Management Suites."*

MODERNIZING YOUR PROCESSES IN THE FACE OF CATASTROPHES, *BRIAN S. FLYNN, GLOBAL CIO AND EVP, CRAWFORD & COMPANY*

Brian Flynn will discuss how his company was able to impact multiple business processes simultaneously through BPM and Case Management Technology. The impact Crawford's business realized is improved quality, streamlined tasks, and more. These changes enabled Crawford to achieve faster response and resolution times and significantly fewer errors, returning millions of dollars to their bottom line. Brian is responsible for Crawford & Company's technology, including its strategic global systems roadmap, business intelligence and analytics, and worldwide innovation programs. Brian has proven success in developing and implementing technology and communications initiatives that have promoted operational efficiencies, improved quality of service, enhanced customer

experience, and advanced innovative solutions for clients. Brian has been repeatedly recognized as a prominent technologist, being named a Top 20 Breakaway Leader and *ComputerWorld*'s Premier 100 Technology Leader for delivering innovative global solutions. Under Brian's leadership, Crawford has been ranked among the *InformationWeek* 500, a recognition given to the top technology organizations for excellence in strategy, innovation and execution. In 2014, he led his team to *InformationWeek*'s Elite 100 award.

PROCESS AND DECISION MODELING IN BPMN AND DMN, TOM DEBEVOISE, CHIEF EVANGELIST BUSINESS DECISION MANAGEMENT, SIGNAVIO

Tom Debevoise is a visionary executive technologist with 20+ years of experience as a BPM/Business Rules Practitioner, leader, trainer Member Object Management Group (OMG) BPM Practice Group. He has specific business rules experience in the fields of Supply Chain Management, Petroleum, Pharmaceutical Clinical Trials, and Healthcare. Tom is the author of three books, *"The Data Warehouse Method," "Business Process Management with a Business Rules Approach"* (2006), and *"A Microguide to Process Modeling in BPMN"* (2008), a second edition of the Microguide has been released in 2011. He is a contributor to numerous technical and trade journal articles.

ALIGNING BPM AND BA PERSPECTIVES AT THE PROCESS MODEL LEVEL, LLOYD DUGAN, BPM.COM

Aligning BPM and BA disciplines within an organization confronts well-established practitioner communities in both spaces with complex conceptual problems that have far-reaching methodological implications. Attempts at resolving these problems more explicitly and directly have proven to be probative and/or provocative to many, particularly the question of what is a business process for modeling purposes. Attendees will have the opportunity to contribute to this and future conversations. Lloyd Dugan is a widely recognized thought leader in the development and use of leading modeling languages, methodologies, and tools, covering from the level of Enterprise and Business Architecture down through BPM, Adaptive Case Management, and Service-Oriented Architecture.

OPPORTUNITIES IN BPM AND CASE MANAGEMENT, JIM SINUR, CEO, FLUERESQUE

Every manager will need to articulate why or why not to adopt process related process methods, techniques and technologies. As more organizations deliver successful case studies, the rationale for or against BPM and Case Management will have to be given to the C suite. This session will enable attendees to explain the benefits, costs and skills necessary to implement these process approaches. Jim Sinur is an independent thought leader in applying business process management (BPM) to innovative and intelligent business operations (IBO). Mr. Sinur was critical in creating the first Hype Cycle and Maturity Model, which have become a hallmark of Gartner analysis, along with the Magic Quadrant. He has been active in the decision, agent, process, data and computing communities, helping shape direction based on practical experience. Mr. Sinur has vertical industry experience on the investment and operational sides of the insurance and financial services. Prior to joining Gartner, Mr. Sinur was a director of technologies with American Express, where he worked on a large, industrial-strength, model-driven implementation of a business-critical merchant management system.

TRANSFORMATIONAL TECHNOLOGY TO INCREASE VALUE TO OUR VETERANS AND PROVIDERS, DR. AARON DREW, OFFICE OF INFORMATION TECHNOLOGY (ASD), U.S. DEPARTMENT OF VETERANS AFFAIRS

Prior to beginning the design process for VistA 4, OI&T collaborated with VHA functional users to incorporate different points of view and unique needs, resulting in a holistic functional and technical approach. A 360-degree perspective for each patient - including the patient, caregivers, families, physicians, other clinicians and members of the healthcare delivery team--was a critical success factor. This approach led to the design and development of a solution architecture and tools that will be implemented over the next 5-7 years. Dr. Drew's presentation will cover the challenges and opportunities that OI&T considered when collaborating on requirements that span the VA, DoD and private sector.

In his role as a Senior Enterprise Solutions Architect, Dr. Drew is responsible for developing enterprise-wide strategies that address key Enterprise Information Technology Integration opportunities. To date, Dr. Drew has crafted an enterprise-wide approach to building/provisioning mobile applications and devices (government issued & Bring Your Own Device-BYOD) within the U.S. Department of Veterans Affairs (to include external facing mobile applications). He holds a Bachelor's degree in Applied Social Psychology from the University of Delaware, Masters' degrees in Human Resources Management and Management Information System from Marymount University and finally a Doctorate degree in Management Information Systems from the University of Maryland University College. He is currently serving as an Adjunct Associate Professor with the University of Maryland University College in their Graduate School of Management & Technology.

WHEN HARRY MET R2D2: CONNECTING HUMANS AND MACHINES IN THE FLOW OF WORK (1A), LARRY HAWES, PRINCIPAL, DOW BROOK

This session provides current examples of humans and machines working together, and imagines some additional ways that the two might collaborate using social-enabled BPM and Case Management principles and technologies. BPM and, especially, Case Management solutions are already beginning to connect humans and machines in the flow of work. Nearly every day in the technology press we are reminded that sensors, robots and software are taking jobs from low-skilled workers. However, the reality is that not all work can be automated and that machines will augment humans' capabilities as the Internet of Everything grows. As a result, how humans and machines will collaborate to get work done along with the requirement for social interoperability standards as a critical issue.

Larry Hawes is the Principal and founder of Dow Brook Advisory Services, where he advises enterprise software vendors on product roadmap, positioning and messaging, go-to-market, and merger and acquisition strategies. He is also an internationally-recognized expert on the application of information management technologies to drive high-value business outcomes and transformation.

Larry's research and presentations are focused on networked business – the nexus of communication, collaboration, social networking, content management and process/activity management within and between organizations. He blogs at Forbes and the Dow Brook blog. Larry's thought leadership has also been featured in The Wall Street Journal, The Financial Times, Wired and many other publications.

THE NEXT GENERATION WORK COORDINATION PLATFORM (1B), VIJAY PANDIARAJAN, IBM

As the volatility in the business cycle gets ever shorter while customer expectations continue to climb, companies must be at the top of their game to stay ahead. Operational innovation and excellence is an inimitable way to gain and maintain a sustainable business advantage. Join us for a practitioners view into business transformation with numerous customer case studies and future-looking use cases that you can use to reinvent your own business. Walk away with new ways to reinvent your business operations with the customer experience in mind and use operations to grow and retain your customer base.

Vijay Pandiarajan is a part of the Smarter Process product management team that brings IBM's business process and decision management capabilities to market. Vijay enjoys seeing technology improving people's lives and transforming organizations. As an advocate for removing the drudgery and making people more productive, he is passionate about BPM, business rules and decision automation systems and the impact they have on a customer's business operations. In a previous roles, Vijay worked in product development, leading global teams to build systems management portals and user interfaces at IBM. Designing elegant user interfaces and building effective teams are other areas that hold Vijay's interest. Vijay holds an MBA degree from the Kenan-Flagler Business School at UNC, Chapel Hill and a Master's degree in Electrical Engineering from the University of Alabama in Huntsville.

MAKING THE BUSINESS CASE FOR CASE MANAGEMENT SYSTEMS (1C), JAMES E. MCMILLAN, PRINCIPAL COURT MANAGEMENT CONSULTANT, NCSC

This session will discuss the business case and justification for case management systems, and report on the actual benefits realized by the courts and the citizens. Both USA state and international court systems will be discussed along with resulting evaluation reports. And a focus on the organizational and staff job descriptions realized by the Utah courts will be included.

James E. McMillan joined the National Center for State Courts in October, 1990. In November 2000, the TIES-CTL project received the State Justice Institute's (www.sji.gov) Howell Heflin outstanding project award. Internationally, McMillan has provided consulting expertise to courts in Abu Dhabi, Bosnia & Herzegovina, Bahamas, Canada, Costa Rica, Croatia, Egypt, Honduras, Indonesia, Jamaica, Kosovo, Mongolia, Nigeria, Trinidad & Tobago, Serbia, South Africa, Ukraine, Russia, the United Nations and the International Criminal Tribunal in The Hague. McMillan is co-author of A Guidebook for Electronic Court Filing and a contributing author to Caseflow Management: The Heart of Court Management in the New Millennium. He has been quoted by PC Week, The New York Times, American Lawyer, AmLaw Tech, Lawyer's Weekly, Government Technology and other magazines. He has also published articles in The National Law Journal, Court Manager, Trial, The Judges Journal and The Court Technology Bulletin.

BUSINESS CHANGE AND PROCESS ARCHITECTURE (1D), FRANK KOWALKOWSKI, PRESIDENT, KNOWLEDGE CONSULTANTS, INC.

Business strategic architecture spans 3 basic views of an organization, the external perspective of what influences the organization, the response that management proposes (the strategic plan) and the direction (change initiatives) management gives to the operation of the organization. A key part of the operation is the process architecture (structure) and the enablers that support the architecture. The linkages between these views are not always clear especially when looking at the process architecture. This presentation shows how the views are related, what quantitative and qualitative analytics are used to assess responses to the influences, and types of additional analytics that can be used to identify impacts on the operation of the business.

Frank Kowalkowski is President of Knowledge Consultants, Inc., and frequent conference speaker. His firm focuses on business performance, business/IT architecture and business analytical techniques. He has over 30 years of management and consulting experience in a wide variety of industries. He has been involved with many projects including business analysis, process management, business performance measurement, business and competitive intelligence and knowledge management. He is the author of a 1996 book on Enterprise Analysis (Prentice – Hall, ISBN 0-13-282-3365) and numerous papers. Frank is currently working on a both a BPM book for managers and a new edition of the enterprise analysis book. His most recent publication is a chapter on process analytics in the book Passports to Success in BPM published in 2014.

PROCESS MINING: USING DATA SCIENCE TO DISCOVER THE TRUTH ABOUT YOUR PROCESSES (2A), ANNE ROZINAT, CO-FOUNDER, FLUXICON

Imagine you could take the digital traces from the information systems and use them to automatically visualize the processes as they *actually* take place (rather than manually mapping out the processes that people *think* are happening). This is how process mining works. This session will review three examples (healthcare, government, and financial services) of data requirements for process mining--a business analytics technique that discovers the actual *processes* that are performed in an organization. In the context of more flexible case management systems, process mining can provide the necessary transparency to drive improvements and ensure compliance.

Anne Rozinat has more than ten years of experience with process mining and obtained her PhD cum laude in the process mining group of Prof. Wil van der Aalst at the Technical University in Eindhoven, the Netherlands. Currently, she is the co-founder of Fluxicon (http://www.fluxicon.com), a process mining software company.

USING BUSINESS ARCHITECTURE TO DRIVE SERVICE PORTFOLIO PLANNING AT THE DEPARTMENT OF VETERANS AFFAIRS (2B),
JOHN BUTLER, PRINCIPAL, AUXILIAM TECHNOLOGY GROUP

The Department of Veterans Affairs is moving forward aggressively toward a service oriented architecture (SOA) using a proactive, model driven planning approach based on The Open Group SOA Governance Framework and Reference Architecture. Cross functional teams use a proactive approach with well-defined heuristics for identifying services based on business capabilities, processes and information needs. This presentation discusses key aspects and lessons learned as this portfolio planning approach is rolled out.

As CEO and President of Auxilium Technology Group, John brings 30 years of experience across solution delivery and business architecture to clients. He provides senior consulting services in areas of Service Oriented Architecture (SOA), Business Modeling and Architecture, Application Modernization, and Model Driven Architecture (MDA). Prior to founding Auxilium, John was Chief Architect at Everware-CDBI North America, Inc., and Unisys Corp in their Public Sector Division. He served as Chair or member of numerous standards bodies and advisory councils including the Industry Advisory Council (IAC) and the Object Management Group (OMG) where he currently co-chairs the OMG Records Management Revision Task Force and has managed the adoption process for several industry/government standards. John has been the lead developer of multiple model-based frameworks for large-scale enterprise application delivery efforts and is the co-inventor of patented technology for using model-based frameworks in the Integrated Justice domain.

PCM REQUIREMENTS LINKING A CAPABILITY TAXONOMY AND PROCESS HIERARCHY (2C),
JOHN MATTHIAS, PRINCIPAL COURT MANAGEMENT CONSULTANT, NCSC

This session will focus on the value of a methodology to develop requirements which completely describe a complicated production case management (PCM) system. This methodology addresses the need for traceability of the interrelated requirements, incorporating a taxonomy of business capabilities (organization performance goals), with multiple layers of tasks and processes at each level in a hierarchy.

Mr. Matthias has provided business process improvement and use-of-technology expertise to courts in more than 35 states for 25 years. He is a leader in developing requirements for production case management system acquisition. Mr. Matthias holds B.A., M.A., and law degrees. He practiced law for ten years, and served as a city prosecutor for five years. He is a Fellow of the Court Executive Development Program (CEDP), and is a certified Project Management Professional (PMP).

THE DESIGN OF BUSINESS: A BUSINESS ENGINEERING APPROACH (2D), BRIAN SEITZ, PRINCIPAL ENTERPRISE ARCHITECT, MICROSOFT

This session will cover how business re-engineering when practiced well is more about optimization than innovation. Management Consulting's Strategic Planning has been unable to keep up with the rapid market changes. In light of this, what is left? This will focus on an approach that enables business leaders and IT professional to work on common group to "design" the business with common and popular methods such as Business Model Canvas, BPMN, and others. Participants will also learn how these methods yield models which visualize the needed attributes of a business that affect its capabilities and performance and the impact of this approach on the company's internal value stream.

Brian is a Principal Enterprise Architect specializing in IT Business Strategy, Design and Operations within Microsoft. His current focus is on R&D of the Next Generation of IT. This includes Business Model Design and Reengineering, IT Finance and Economics, IT Service Management, Business Continuity/Disaster Recovery, and Change Management. Brian has been in Architecture and Design fields for over four decades as a thought leader, initially starting in with residential design, migrating to mechanical and aerospace engineering and finally to Enterprise Architecture. To his credit he has established and deployed formal practices for major corporations around

the world in Strategy, Marketing Planning, Economic Justification, and Enterprise Architecture and provided guidance and oversight for various technology standards in use today.

PRACTICAL INFORMATION AND SEMANTIC FOUNDATIONS FOR BPM AND CASE MANAGEMENT (3A), DAVID WEBBER, NIEM

This session examines the challenges and lessons learned along with the tools and methodologies that exist including open source and open public standards resources. Specific approaches such as NIEM will be discussed and actual implementation examples presented. The core challenge is creating a robust and predictable information and semantic foundation which enables reliable and rapid business application delivery in the context of developing applications in increasingly shorter time frames. The goal is to develop a common understanding of precisely what "Information Interoperability" means today.

David Webber is an industry recognized practitioner and author on BPM and Information Integration. David manages an open source project for information exchange automation and works on a variety of open standards initiatives. He developed one of the first BPMN visual editors and David holds two US Software Patents for XML and EDI processing that are cited by over 35 industry patents. David is a Senior Member of the ACM since 2007, and is the DHS appointed industry representative to the NIEM Technical Architect Committee (NTAC). In 2014 PESC gave him a Distinguished Service Award for work on aligning information standards in Education. David holds a degree in Physics with Computing from the University of Kent at Canterbury. David works tirelessly on simplifying solution delivery tools to minimize the gap between business requirements and logical representations that are directly machine processable. http://en.wikipedia.org/wiki/David_Webber

A CASE STUDY ON EFFECTIVE PROCESS MODELING: AN OUTCOME-BASED APPROACH TO DELIVERING BUSINESS VALUE (3B), AMIT MAYABHATE, DIRECTOR, MULTIFAMILY CHIEF OPERATING OFFICE, FANNIE MAE

Process modeling is a means towards an end. Often, the technical details of enabling an effective process modeling practice can take focus away from the business decisions such a practice can (and should) support. The purpose of this case study is to highlight challenges encountered & solutions needed to create a practice that evolves with changing business priorities. Effective process modeling can enable Business Case creation, Project and Portfolio Prioritization, WBS creation and Solution Engineering. The case study will also provide some best practices for the evolving roles of Process Modelers, Business Owners, Business Architects, Data Modelers and Solution Engineers.

Amit Mayabhate is passionate about solving complex problems. He has a proven track record of leading organizations through meaningful, measurable change on large transformational projects for over ten years. He currently leads a business planning team for Fannie Mae focused on Business Architecture, Requirements & Modeling. He draws on the complementary disciplines of business process modeling, business architecture, project management, operations research and process improvement to create a holistic, outcome-based approach.

PROGRAMMING REQUIREMENT SYSTEM (PRS) FOR THE DEPT OF VETERANS AFFAIRS (3C), MICHAEL O'DONNELL, VP, PROGRAMS AND DEVELOPMENT, STEPHEN O'DONNELL, RF LOGISTICS, LLC

RF Logistics and the Department of Veterans Affairs (VA) Office of Policy and Planning, Office of Corporate Analysis and Evaluation (CAE) partnered to develop a COTS-based, automated workflow application and database in a vendor-provided Cloud for the agency's planning, programming, budgeting, and execution process. The first phase of this project addresses CAE's Programming Service that leads and guides the development and validation of integrated mission requirements and recommends resource allocation options

that provide the capabilities required to achieve VA strategic priorities. The goal of Programming is to produce a multi-year program that provides the most effective mix of capabilities for the Department. RF Logistics, LLC will share stories on how this project is progressing.

Mike O'Donnell is a Senior Business Analyst for RF Logistics, LLC where he develops, implements, and sustains software applications including the Department of Veterans Affairs Programming Requirement System (PRS) and the Navy Special Warfare Information FastTracker (SWIFT), an award-winning BPM project he co-developed. He performs process analysis, requirements analysis, and solutions development. In addition, he has developed several management dashboards providing stakeholders with insights on current performance and operations. Previously, as an analyst for Network Solutions, LLC, he developed and maintained reporting and analytic packages to inform and assist leadership decision-making. He is a graduate of the University of Mary Washington.

Steve has successfully fulfilled executive management responsibilities for over 20 years in the positions of Plant Controller, Director of Finance, Chief Financial Officer, Chief Operating Officer, President and Chief Executive Officer. He has experience in both the for-profit and non-profit sectors. Steve holds a Bachelor of Science in Business Administration as well as a Masters in Business Administration and is a member of the Institute of Management Accountants (IMA)

THE VALUE AND NEED FOR ARCHITECTURE IN BANKING (3D), MICHAEL G. MILLER, HSBC GLOBAL FINANCE INFORMATION ARCHITECT, HSBC GLOBAL FINANCE

There is a perceived market perspective that independent architecture (i.e., business process, data architecture, or solution) can bring timely and responsive business solutions. The reality is that these need to be concurrently produced, related and integrated, options assessed and evaluated over time. The architecture of the business and the digital architecture are intimately related especially as regards governance, risk

and compliance. The alternatives to good management of these architectures is large compliance fines and possible criminal penalties.

This presentation demonstrates how a business architecture and information architecture come into existence concurrently; explains a way to assure business and IT alignment, synchronization both architectures, and how to maintain them over time using information audits. The approaches highlight ways to assure both accuracy and completeness in both architectures.

Michael G. Miller is a member of the HSBC Global Finance IT Architecture team acting as a Global Information Architect. He has responsibilities for architecture guidance of Global Finance projects. Mr. Miller has over 35 years of IT experience in banking, securities and insurance starting in his career computer operations, programming and systems design, and then moving on to consulting roles in enterprise architecture and business intelligence. Michael's previous consulting roles include National Director of Enterprise Architecture and Business Intelligence, Executive Consultant CRM COE, and Principal - Management Consultant. He also teaches a class in Strategic Business Intelligence Implementation for George Washington University in Dubai, UAE. He holds a BBA and four master degrees (MBA, MPM, MTM, & MISM) and has done over two years of doctoral work in Knowledge Management. He is a board member of the Data Management Association – Chicago Chapter, a Certified LEAN Six Sigma Yellow Belt (ISCEA), a Certified Business Process Management Professional (ABPMP) and a Certified TOGAF Enterprise Architect.

WEARABLE WORKFLOW MEETS THE INTERNET OF THINGS IN HEALTHCARE (4A), DR. CHARLES WEBSTER MD, EHR WORKFLOW, INC

Wearable technology and the Internet of Things have incredible potential for improving healthcare workflow. From the original calculator watch to today's smart glasses and smart clothing accessories, wearable technology seeks to weave (sometimes literally!) information and communication technology into everyday life and work, making it pervasive, intimate, and, metaphori-

cally, friction free. Especially promising are applications in healthcare. These, for example, include patient monitors for the well and unwell and wearable user interfaces to health information systems. However, wearable tech will not succeed unless we get the workflow right. Getting the workflow right means understanding the relationship of wearable tech to the Internet of Things, driving workflow at the point-of-care, and analyzing and optimizing this workflow. This presentation is based on the Dr. Webster's recent 2015 keynote at the Society for Health Systems, Institute of Industrial Engineering Healthcare Systems Process Improvement Conference.

Dr. Chuck Webster has degrees in accountancy, industrial engineering, intelligent systems and medicine. He earned his medical degree from the University of Chicago. Dr. Webster designed the first undergraduate program in medical informatics, was a software architect in a hospital MIS department, and chief medical informatics officer for an EHR vendor for over a decade. He helped three healthcare organizations win the HIMSS Davies Award, the top industry award for electronic health records excellence in use, and is a judge for the annual Workflow Management Coalition Awards for Excellence in BPM and Workflow and Awards for Case Management. Webster is a ceaseless evangelist for process-aware technologies in healthcare, including workflow management systems, business process management and dynamic and adaptive case management. Webster tweets from@wareFLO and maintains numerous websites including EHR Workflow Management Systems, Healthcare Business Process Management and People and Organizations Improving Healthcare with Health Information Technology.

SOLUTION ARCHITECTS AS A KEY INGREDIENT TO INCREASING BPM PROJECT SUCCESS (4B),
LED BY PATRICK LUJAN, BENNU CONSULTING, LLC WITH PANELISTS ANDERSON P. BRYAN, KEYBANK AND PULEEN PATEL, BANKING INSTITUTION

Recurring problems, budget overruns and pitfalls for BPM and Case Management Initiatives often trace back to knowledge, skills and abilities that exist in the Solution Architect Roles. When the critical capabilities are missing, roles and responsibilities are unclear, goals are ambiguous, and projects are re-worked, re-scoped and frequently incomplete. When the right capabilities are in place project goals, roles and respon-

sibilities are clear, technology solutions stand the test of time, and the timelines allow for the plan to be executed and completed within months weeks or months. What expertise is critical to the role of Solution Architect as a trusted advisor in both internal and client-facing roles? During this "fireside chat", Patrick Lujan along with experts from financial services and other industries will address the tough questions in addition to responding to questions from the group.

Patrick Lujan is an enterprise architect with nearly 30 years IT experience, including the management, analysis, design, development, testing and implementation of Business Process Management and Enterprise Content Management solutions from the departmental, collaborative level to enterprise-wide, large-scale systems. He is the Managing Member of Bennu Consulting, LLC, a technology services company specializing in Business Process Management, Enterprise Content Management and Records Management solutions. Bennu's Fortune 500 clients come from the Finance, Insurance, Government, Energy and Telecom sectors.

Anderson P. Bryan is a Senior Application Systems Consultant, Business Process Content Management Competency Center at Key Bank. For over 17 years with Key Bank, he has delivered solutions with highly successful outcomes throughout the enterprise, leveraging content management and business process technology. Anderson has close to 30 years experience in systems and application development with accomplishments in architecture, design, analysis, engineering and support in financial services, insurance and consulting.

Puleen Patel is an accomplished Enterprise and Solution Architect with several strategic and transformational BPM and ECM implementations under his built. Most recently Puleen was responsible in developing a product roadmap and strategy to solve the "document problem" for a major Canadian Financial Institution. Previously, he was engaged in several key initiatives involving Cheque Image automation, as well as BPM transformation initiatives across several Canadian financial institutions.

PROTECTING CASE MANAGEMENT SYSTEMS: INTEGRATING EA AND BPM FOR GOVERNMENT AGENCIES (4C), CHRISTINE ROBINSON, ENTERPRISE ARCHITECTURE, BUSINESS PROCESS MANAGEMENT, AND SECURITY STRATEGIES FOR HUMAN SERVICES, FINANCE AND LAW ENFORCEMENT AGENCIES

Christine will discuss how to overcome the key shortcomings that often expose agencies to security breaches similar to those as Home Depot, Neiman Marcus, Anthem, Sony, government agencies, and others. Christine's stories and lessons learned are based on years of experience implementing enterprise, business architecture, and security for government agencies in finance, human services, law enforcement, and others using case management to support their agency missions. She brought their BPM strategy through paper-based environments and stove-piped systems to process-driven case management systems. Her efforts led agencies to clarify processes, business rules, data governance, record-keeping, and security amid stove-piped systems and paper-based environments.

Christine's career accomplishments and her recognition as an author have led many to consider her an expert in the fields of business and technology transformation. Dubbed a "futurist" by some, her published works focus on business and technology modernization, cyber security, emergency preparedness, social evolution, and environmental sustainability. She co-produced and created programs for a television show on which she interviewed with domestic and internationally recognized experts in their respective fields. Her works both authored individually and teamed with domestic and internationally experts in their respective fields appear in magazines and books offered world-wide. With her leadership, government agencies in finance, law enforcement, nation-wide health and human services, and other areas have begun modernizing case management systems. Her current engagement focuses on modernizing agency and case management for Federal Government independent validation and verification.

ACHIEVING BUSINESS FLEXIBILITY THROUGH ARCHITECTURE (4D), MICHAEL POULIN, HEAD OF ENTERPRISE ARCHITECTURE, CLINGSTONE LTD

The dynamics of the market raises new requirements to the corporate business that were not identified, observed and addressed before. Businesses today lack the flexibility to respond in an advantageous manner to change in their environment. The success of a business organization with fast changing markets and a volatile economic environment depends on matching the pace of change with business change. This session explains, with real examples, how Business Architecture works to integrate the ideas we use today of goals, rights, responsibilities and principles of ownership in an architecture framework that provides the insight management needs to choose an appropriate course of action.

Dr Michael Poulin is a co-founder and Head of Enterprise Architecture at Clingstone Ltd. – a firm focused on business change management, enterprise and solutions architecture, and consulting in both Europe and United States. He focuses on bridging the gap between business architecture and modern technology including methods of BPM and ACM. During his career, Michael worked with technology and financial companies such as Novell, IBM, J.P. Morgan, and in the UK such as Lloyds TSB, QBE, Smyth Superstore and HAVAS Media. Michael is involved in BAWG of WfMC and contributes into OASIS SOA RM and RAF standards. Michael writes in ebizQ BPM, authored such analytical works as "Purpose Case Management" and "Transition of the Mindset: Business Processes Meet Business Services". He is the author of three books - "Ladder to SOE", "Architects Know What Managers Don't: Business Architecture for Dynamic Market" and "Business Capability for Dynamic Market".

OPEN ARCHITECTURES IN SUPPORT OF NEXT GENERATION INFORMATICS (5A), KEITH TOUSSAINT, EXECUTIVE DIRECTOR COLLABORATIVE DEVELOPMENT, MAYO CLINIC

This session will describe how a team at Mayo Clinic used open architectures, open interfaces and open source to develop interoperable, ontology-based knowledge expression that lead to improved results, enabling interoperable data and knowledge.

Line of business software offerings are usually are designed as monolithic silos of storage and end-user experience that use proprietary methods for authoring and executing knowledge. As such, data and knowledge interoperability suffers. As the need to accelerate innovation and provide deeper domain-specific computing services rise simultaneously, an emerging market opportunity is arising: real-time informatics--the intersection between computer science and any specific domain of expertise.

As Executive Director of Collaborations at Mayo Clinic, Keith Toussaint evaluates and develops global strategic alliances to support product development and distribution to patients, providers and consumers. Prior to joining Mayo Clinic, he was a Principal Business Development Manager for Amazon Web Services. Keith also spent 12 years at Microsoft Corporation, where he led internal teams as a leader in Microsoft's Health Solutions Group. He participated in the development of Microsoft HealthVault and engaged with more than 50 health care institutions to integrate HealthVault with their EMRs and disease management systems. With a degree in electrical engineering and extensive software development experience, Keith is an author on eight patents related to digital media, data storage and health information systems.

WHAT PREVENTS EA AND BPM TECHNOLOGY SOLUTIONS FROM BEING SUCCESSFUL: HOW CAN WE REVERSE THE TREND? (5B), MATTHEW KERN, CHIEF ARCHITECT, TECHNOLOGY RESOURCE GROUP, INC.

Enterprise Architecture (EA) is a discipline that transforms organizations for increased performance. It does so by merging business architecture (process engineer-

ing) with technology. BPM (Business Process Management) is the perfect technology to support enterprise architecture, and its predecessor (workflow automation) was used in a large percentage of integration activities. Workflow and BPM are incorporated into ESB and EAI products today, yet popularity and success rates are down. BPM products should be at the core of all or nearly all enterprise transformation efforts. What happened? The author offers observations on where we went wrong, as well as opinions on how to span the gap between EA and BPM and reverse the trend. Example cases are drawn from DHS and other customers.

Mr. Kern holds a Master of Science in Engineering Management specializing in Enterprise Architecture from National University, two post-baccalaureate certificates in enterprise architecture from Cal State, a Bachelor of Science in Electrical Engineering from Penn State, and an electronics certificate from CCAF. He holds certifications in enterprise architecture, security architecture, information security and project management. He participated in many large integration efforts in the 1980's and 1990s, and more recently performs EA at DHS.

CASE MANAGEMENT SOLUTIONS FOR LEGAL MATTERS (5C), MIKE PRENTICE, ACM\BPM\ECM ARCHITECT, IBM

This session will review a case solution around Legal Matter Management, including how to effectively use a tool to achieve a successful end solution. It will cover the business goals and how those goals were realized within the case. It will cover the requirements derived from the business goals and how to understand and approach the differences around tasks and workflows and effective display of case data. The session will then tie these concepts into the end solution, via screen shots, to show the end solution and how it is being used.

Mike has been implementing BPM, ECM and then Case solutions for the past 15 years. He has worked as a lead architect on a number of projects across numerous industries, but mostly in financial and government spaces. His passion for this field has lead him into IBM to work assisting business partners development and deliver these solutions. He has also been a part of the IBM Redbooks on the topics of Case and ECM solutions.

ARCHITECTURE AND BUSINESS INFRASTRUCTURE (5D), GIL LAWARE, PRESIDENT, INFORMATION BY DESIGN, LLC

Management has to convert directional decision-making into implemented actions to achieve desired business goals and results. Will architecture(s) become the means to adapt to the external forces affecting the organization's operations? Since each architecture has a "current" representation and a future/targeted implementation to the desired environment, does this necessitate a transformational architectural perspective to enable change? This session will discuss how significant transformations require an architecture perspective that will impact the enterprise not just some of the pieces!

Gil Laware is President of Information By Design (IBD), Inc. a professional services firm founded in 2005 with practice areas in business performance management, business intelligence, business and enterprise architectures; application and systems development implementations. IBD also provides educational and training services for various companies. Gil's experience covers a variety of leadership and functional roles with Fortune 50 companies across multiple industries. Positions included: Associate Director for Fujitsu Consulting, Manager of Data Services for Whirlpool Corporation, Vice President of Information Services for Franklin Savings Bank, and held various managerial and consultative roles with the IBM Corporation. . Previously, Gil was an Associate Professor of Computer and Information Technology in the College of Technology at Purdue University. Gil has authored over 40 papers including a NIST chapter discussing the gaps that exist in the software development process that support manufacturing systems. He has served on the Board of Directors of DAMA International and the DAMA Education and Research Foundation.

PRACTICAL GUIDE TO MANAGING RAPIDLY ADVANCING TECHNOLOGY (6A), ROY ALTMAN, MANAGER OF ANALYTICS & ARCHITECTURE, MEMORIAL SLOAN KETTERING

Big Data has quickly become the basis of our business decisions--enabling us to move from rear-view descriptive reporting to forward-looking predictive and prescriptive analytics. Many of us recognize the profound impact Big Data Analytics and Artificial Intelligence have on health care, government, business and our personal lives, the next step, is to impact predictability. The result of this is that decision making is moving from "I think" to "I know", to "I know why." Since we know the general direction and pace of technological advancement, it makes sense to have a plan that enables us to manage the powerful software of the near future.This presentation will envision several plausible scenarios of the next couple of decades, seek to ask the right questions about the implications for the workforce and society, and offer a practical strategy for managing rapidly advancing technologies in the context of BPM and Case Management.

Roy Altman is responsible for HR Analytics and Application Architecture at Memorial Sloan-Kettering Cancer Center. Previously, Roy was founder/CEO of Peopleserv, a software/services company. Over a multifaceted career, Roy has a history of delivering ROI to Fortune 1000 companies in several industry sectors. Altman is the architect of multiple commercial software products. He has published extensively and co-authored five books on BPM. Altman frequently presents at national and global HR and BPM academic and industry conferences, and on webinars.

BPM GRAPH: A SEMANTIC LAYER BRIDGING THE BUSINESS/IT DIVIDE (6B), DENIS GAGNE, TRISOTEC

The explores the notion of the BPM Graph, which creates a semantic layer that allows the mapping of the expressed desired results (Ends) of an organization and the course of actions (Means) expressed in the organization's business processes. This semantic layer is proposed as the missing link between the Business and IT divide to ensure a better Business and IT alignment, providing an extensible context for Process Discovery, Modeling, Analysis and Execution. This semantic layer makes use of Ontologies to enable a mapping between (sometime more loosely defined) business views and their more structured and model driven counterparts from the world of IT. The BPM Graph lays down the foundations for the future of intelligent, goal oriented, agent based or semantic BPM.

M. Denis Gagné is an active contributor to many of the current international BPM standards. He is a member of the Workflow

Management Coalition (WfMC) Steering Committee, chair of the Business Process Simulation Working Group (BPSWG), and the co-Editor of the XPDL 2.2 process definition standard. For the Object Management group (OMG), M. Gagné is the Chair of the BPMN Interchange Working Group (BPMN MIWG), and a member of the Business process Model and Notation (BPMN) and the Case Management Model and Notation (CMMN) team.

DELIVERING ADAPTIVE CASE MANAGEMENT SOLUTIONS IN AN AGILE ENVIRONMENT (6C), BRUCE MCGREGOR, AECOM

Adaptive Case Management (ACM) is successfully replacing traditional sequential systems delivery models that often made achieving business goals elusive. When both business and technical requirements are simultaneously addressed, this results in a higher user adoption, accelerated delivery and lower risk and costs. Applying Agile methods successfully within the context of an integrated ACM approach greatly improves overall delivery success and helps to achieve business goals. This session discusses the unique challenges of implementing ACM solutions and the benefits of an integrated business and technical approach. It also explores strategies for leveraging Agile as a delivery vehicle for an integrated ACM approach for greater success.

Bruce McGregor is an experienced information technology project manager, leader and consultant with a proven track record in delivering innovative Adaptive Case Management (ACM) solutions. For over 20 years, Bruce has worked with both Federal and commercial clients to create innovative IT solutions to improve business operations and enhance decision-making, while improving efficiency and effectiveness. Combining technical experience in multiple business and technical disciplines, including Agile Development, Enterprise Content Management (ECM), Business Process Management (BPM), Data Architecture and Business Intelligence (BI), Bruce architects and delivers ACM solutions that leverage current and emerging commercial-off-the-shelf (COTS) technologies and utilize implementation best-practices to maximize Return-on-Investment (ROI) and minimize the Total-Cost-of-Ownership (TCO).

INSURANCE, HEALTH CARE AND ARCHITECTURE (6D), MIKE CONNOR, DATA ARCHITECT, AMERICAN FAMILY INSURANCE

Health care today is a major and growing force in the economy. The architecture perspective of the affordable care act is at best daunting as shown by the influence diagram depicting the health care relationships that were originally proposed and eventually made into law. Within the overall healthcare picture, you have the key players of insurance companies, government rules, medical professionals and patients. Most insurance companies providing healthcare insurance sit in the middle of this whirlpool of interests. How can architecture help sort all this out?

Michael Connor is manager of Data Governance and Quality at American Family Insurance, headquartered in Madison, WI. He has over 30 years of management and consulting experience spanning several industries such as insurance, banking and healthcare. Mr. Connor's expertise includes major categories such as data management, application development, process re-engineering, sales/pre-sales and technical education.

THE ENTERPRISE DIGITAL GENOME-- OPERATING SYSTEM FOR A SELF-AWARE, QUANTIFIABLE AND PREDICTIVE FINANCIAL SERVICES ENTERPRISE (7A), SURENDRA REDDY, CEO, QUANTIPLY CORPORATION

This session will highlight the success story of a financial services institution who successfully implemented, Enterprise Digital Genome (EDGE), in their goal to achieve the creation of a self-aware, quantifiable, and predictive enterprise. The EDGE is a value-driven approach and has the potential to give enterprises unprecedented insights into the entire organization as a biological system, allowing them to make data-driven decisions faster and more effectively than the competition. This approach provides organizations the opportunity to see, in real time, through a new lens, continuously sense and see the facts, trends, and patterns in a different way; and shift focus towards bias for action – anticipatory thinking.

Surendra Reddy is the founder and CEO of Quantiply Corporation, an emerging predictive business process intelligence

company, being incubated at PARC. Prior to Quantiply, Surendra was the CTO of PARC Cloud and Big Data futures where he was responsible for the applied technology research, business strategy and strategic partnerships for cloud, high performance analytics and big data futures. Surendra also served as the General Manager and CTO for SIOS Technology group companies, where he was responsible for defining global cloud strategy and guiding the 200+ strong engineering organization with the technology direction and innovation programs. He recently founded the Big Data Foundry, a open innovation platform in collaboration with Cisco, Hitachi, and PARC. Surendra received MBA from the Kellogg School of Management at Northwestern University and Bachelor of Technology in Electronics and Communication Engineering from Jawaharlal Nehru Technological University, India.

INTERACTIVE PANEL: INNOVATIVE WAYS FOR IT, MARKETING AND BUSINESS LEADERS TO COLLABORATE AND DELIVER SOLUTIONS QUICKLY (7B), PHIL COOKE, TELESIS & SCOTT RICE, SPRINT

This executive panel will discuss the importance of BPM with initiatives that require times frames of weeks vs. months. Phil Cooke will discuss the Enterprise/Business Architect Perspective, and Scott Rice will discuss how IT worked with the business to implement non-traditional solutions for various market groups.

Phil Cooke brings more than thirty-five years of executive level, business and organization effectiveness experience in varied, rapidly changing, fast-paced industries including computers, financial services, telecommunications, and software in companies such as Xerox, Citi, Sprint, and Nextel. As a CIO advisor, Phil helped design and develop a new strategy to completely reinvent IT at a large, cable and wireless services provider, which significantly improved IT. This included defining, with the senior IT team, a new organization and resource alignment for 2,000+ FTEs. Through a Government- Industry Advisory Council, Phil actively engaged in developing a vision and strategy for establishing an open and transparent government, with healthcare IT as a target for implementation. As an entrepreneur, general manager, business partner and leader, Phil founded three enterprises and redefined a num-

ber of business entities of all sizes and structures to improve results and stakeholder value.

Scott Rice, vice president IT-Care & Billing Services, has management responsibility for the customer management and billing platform functions. This includes the operation of network facing Online Charging Systems (OCS) capabilities as well as the balance and top up management for the Boost Mobile, Virgin Mobile, Assurance Wireless and Sprint Prepaid brands. He is also responsible for the call center network, routing infrastructure and Integrated Voice Response (IVR) capabilities supporting internal and outsourced locations worldwide. Scott has more than 32 years of experience in the telecommunications billing and customer management systems space, including leadership in software development, operational management, and partnership management. Scott has extensive experience in oversight of managed service partnerships supporting BSS/OSS functions. Prior to joining Sprint Nextel in 2000, Mr. Rice consulted with multiple major U.S. and European carriers. Prior to that period he was with AT&T in various capacities from large business billing to supplier process management.

ADAPTIVE CASE MANAGEMENT FOR HEALTHCARE: THE HEALTH AND HOSPITAL NETWORK PERSPECTIVE (7C), ANEEL ADVANI, SENIOR VICE-PRESIDENT, HEALTHCARE, EVERIS GROUP, AND ADJUNCT PROFESSOR, JOHN HOPKINS UNIVERSITY

The Veteran's Access, Choice, and Accountable Act enables Veterans to receive care from private sector providers. This session will outline the care coordination use for business process modeling and adaptive case management in the context of these new regulations. This session will highlight particularly innovative pilot projects and mainstream EHR development around case management, care coordination, and interoperability between academic medical centers, hospital networks and the VHA. Participants will also learn about this team's work on the architecture and design of a business process model and case management layer with the Veteran's Health Administration's (VHA) new SOA-based VistA Evolution EHR refresh.

Dr. Aneel Advani is a physician informaticist and a leader in applying health information technology to improve the health of communities and populations and advance public health and population medicine. Dr. Advani is currently Senior Vice-President for Healthcare at Everis Group, a multinational management and information technology consultancy which develops and manages several open source EHR, PHR, and interoperable medical record systems covering more than 37 million patients. Dr. Advani also serves as an adjunct professor of Health Policy and Management and teaches at the Carey School of Business at Johns Hopkins University. Dr. Advani has served in various leadership capacities in federal service, and in leadership roles on several federal-wide steering and advisory committees, including the senior steering group on Health IT R&D under the White House Office of Science and Technology Policy.

BUSINESS ARCHITECTURE: THE MISSING LINK BETWEEN STRATEGY & EXECUTION (7D), WILLIAM ULRICH, BUSINESS ARCHITECTURE GUILD

Business architecture remains a mystery to many business professionals, but in reality it is a robust discipline with a standardized industry framework, professional certification program and body of knowledge called the BIZBOK® Guide. Business architecture improves customer value delivery, stakeholder engagement and cross-business unit capabilities; enables traceability from business strategy through solution deployment; and delivers cross-business unit solutions, cutting across vertical and horizontal silos. Business architecture enables an organization to refocus its lens into planning, portfolio management, business design and solution deployment.

Business architecture was originally initiated by managers who required greater business transparency to effectively deploy strategic business solutions. This session will explain the basics and benefits of business architecture, with a focus on practical deployment options and industry success stories. The discussion will leverage the Business Architecture Guild's, Business Architecture Framework™ as a key part of this discussion.

William Ulrich is President of TSG, Inc. and President of the Business Architecture Guild. A business architecture thought leader, Mr. Ulrich is an original contributor to "A Guide to the

Business Architecture Body of Knowledge™" (BIZBOK® Guide), author of "Business Architecture: The Art and Practice of Business Transformation" and key player behind the "Certified Business Architect (CBA)®" certification program. He serves as mentor, advisor and workshop leader to corporations and government agencies in a number of industries.

FLEXIBLE-REACTIVE BUSINESS PROCESS MODELING WITH CASE-BASED LEARNING MANAGEMENT SYSTEMS FOR HEALTH CARE (8A), JOHN DODD, LEAD CONSULTANT, BDC HEALTHCARE-IT

BPM and Case Management need to support the Bi-Directional interaction from patient to providers and to be able to handle the dynamic health events for those with chronic or rare conditions. The healthcare transformation efforts have far too frequently tried to invent their own solutions instead of adapting and extending the BPM families of technology. To close these gaps a set of value-based delivery networks and a "Care and Cure Value Network" reference model are proposed. This model will show how and where BPM/DM/Events/Adaptive Cases with Analytics Fit into the future of healthcare transformation. The use of the technologies for diseases such as Cystic Fibrosis or Multiple Sclerosis will be presented and how this can be used for National or local Accountable Care Organizations.

As a Health Services Enterprise Architect and Solution Leader Mr. Dodd has broad knowledge of the government and industry practices in e-government and enterprise architecture. Mr. Dodd has over 40 years of development, integration and consulting experience with all the large complex system from the Apollo Systems, to Air Traffic Control, Intelligence to the many Health Information Systems that are involved in healthcare transformation, Brooks and Dodd Consulting (BDC) Health IT is a disabled veteran owned small business focused on the integration, interoperability and analytics of the next wave of healthcare transformation. His approach and vision are defined in a new book: Healthcare Transformation Wave 2: Integration, Interoperability and Analytics projected to be released in early 2015. Mr. Dodd is actively involved in standards, industry advisory associations, and working with the UMBC Health IT program. Completed Wave 2 Healthcare Transformation: Integration-Interoperability-Analytics and working on Wave 3: Systems Medicine and Value-Based Networking.

Poorly defined requirements specifications are often identified as a root cause of failure for large scale IT implementation projects. Are requirements in fact a root cause or are they merely a symptom of a failed analysis method? This talk will demonstrate that MOF based standards (BPMN and UML) and a few simple guidelines applied to requirements analysis results in specifications that are streamlined, unambiguous, maintainable and complete.

Mr. Price is a Master Consultant with HP Enterprise Services Business Transformation Enablement consulting group. In addition to serving clients he leads the HP Enterprise and Industry Frameworks Initiative that is developing business architecture frameworks for each industry that HP serves. Over a 30+ year IT career he has served a diverse set of clients in DoD, US civilian public sector, health insurance, life sciences and telecommunications. Mr. Price specializes in the application of structured languages including BPMN, UML and ArchiMate to define, solve and automate business problems. He is a Certified Business Process Management Professional (CBPMPSM).

SUCCESSFULLY ENGAGING USERS IN A CASE MANAGEMENT/WORKFLOW DEPLOYMENT INITIATIVE (8C), FRANK VEGA, THE EFFICIENCY GROUP

Most technology deployments give limited attention to helping the breadth of users prepare for a new tool and its related processes/functionality. Certainly users are needed for requirements elicitation and testing, but getting them to be advocates for the new capability and excited by its deployment can be difficult. Given that all new technology has to actually be used – and used properly – to successfully support the enterprise, getting broad-based support for a new tool deployment can be critical; both to the organization deploying the tool and the vendor who promised the CIO a great success. This session will provide a case study of how to interact with a group of users to develop improved workflows for deployment within a new tool, and have them become supporters of the tool at the same time. Emphasis will be on

how to define workflows outside of a tool for acceptance and understanding by the users prior to their being deployed within the tool for execution.

Frank Vega is a Lean / Six Sigma Black Belt at The Efficiency Group, a leading provider of Lean Six Sigma services to government clients in support of process automation, workflow development, process streamlining and standardization, etc. He has personally led process improvement initiatives at multiple agencies, including the National Heart, Lung and Blood Institute of NIH and the Worldwide Refugee Admissions Process System at the Department of State. Many of his initiatives have focused on the development of improved workflows for deployment within a case management/workflow tool.

THE VALUE OF ARCHITECTURE IN GOVERNMENT, DAVE RICE, ENTERPRISE ARCHITECT, EA FRAMEWORKS (8D)

Architecture efforts in government differ from those in the commercial spaces in that there are no profit-based motives and much longer lead times to see the results of any architecture based decisions. How then does one develop and maintain a value proposition for architecture efforts in government? What is the "right size" of the effort for the goals to be achieved? This session will cover real-world examples of how a combination of a federated architecture perspective and an appropriate suite of tools can be used to support ongoing architecture efforts to demonstrate value today, while planning for future budget needs.

Mr. Rice has over 24 years of experience in Data Architecture, Business Process Engineering, Enterprise Architecture and related consulting, training, mentoring and software product development. Mr. Rice has utilized all commercial modeling methods across a range of tools to aid his clients in the areas of Enterprise Architecture, Business Process Reengineering, Data Architecture, Organizational Redesign and the development of large-scale systems for Decision Support. As an accomplished software engineer, Mr. Rice has also managed product development of several commercial modeling tools implementing the Zachman Enterprise Architecture Framework, the DoD Architecture Framework (DoDAF) and the Federal Architecture Framework (FEAF).

DAY 3 WORKSHOPS

On the third day of the BPM and Case Management Global Summit are a series of parallel workshops taught by industry experts. Program highlights are below but see website for complete details.

AIIM Content Analytics Practitioner Course

Workshop Leader: Jesse Wilkins, Director of Professional Development, AIIM

This new training course was developed by AIIM in partnership with Professor Denise Bedford from Kent State and industry experts from IBM, SAS, Smart Logic, Expert Systems, Nuix, Concept Search, Content Analyst, and OpenText. Attendees of this workshop will have access to the CA exam and materials for 6 months and upon completion of the exam will receive the Content Analytics Practitioner designation. The attendees simply need to take and pass the exam with a minimum 70% score.

Topics Covered and Exercises

- **Section 1: Getting started with content analytics** - Understanding the steps needed to develop a business case for content analytics

- **Section 2: Choosing the Right Content Analytics Solution** - Recognizing similarities and differences, Comparing requirements to various solutions, How to decide on the right solution for your organization

- **Section 3: Improving analytics with ontologies and taxonomies** - Understanding the importance of ontologies and taxonomies in order to improve integrity and interoperability, How to use analytics to extract metadata for information management applications, Improving information governance

- **Section 4: Using analytics to gather business insights** - Using analytics to improve customer and employee insights, Improve findability, Improve eDiscovery, and get rid of digital landfills

Case Management 101: Where to Start and How to Succeed With Case Management Initiatives

Workshop Leader, Lloyd Dugan, Chief Architect and Instructor, BPM.com

This half-day (4 hour) workshop will provide attendees with actionable knowledge and understanding about case management, and about how to approach case management automation projects. Though presented via an instructor-led format, this workshop incorporates interactive moments to facilitate the sharing of experiences and class exercises to deepen attendee comprehension. (Exercises will include the use of on-line modeling tools.)

Topics Covered and Exercises

- **Section 1: BPM and Case Management** - Understanding the discipline and relationship between BPM and Case Management

- **Section 2: Case Management Concepts and Problem Spaces** - Understanding Case Management Design, Recognizing the relationship between Case Management and Business Architecture

- **Section 3: Case Management Modeling (CMMN vs. BPMN)** - Components of a Case Management Analysis, Comparing differences between Case Management and Process Mining

- **Section 4: Case Management and Process Improvement** - Reviewing examples of case Management Solutions, Case Management Solution Characteristics and Considerations, Case Management Solution Market Overview

Analyzing the Business Using Architectures

Workshop Leader, Frank Kowalkowski, President, Knowledge Consultants, Inc.

This full day (6 hour) workshop covers a description of each type of process architecture and their linkages. It includes several analysis techniques that use the components of the architecture to assess impact of change. A laptop is that permits loading software is recommended for this workshop. This workshop is for business analysts and architects, planners, process analysts, operational analysts and managers that are involved with business transformation.

Topics Covered and Exercises

- **Section 1: Introduction to the 4 Architecture Approach Topics**

- Analytics and architectures, External perspective (XA), Analyzing the business environment, Outcomes and deliverables from the external architecture. ***Includes an exercise on framing the external environment.***

- **Section 2: Strategic Business Architecture (SBA) Topics**

- Elements of the Strategic Business Architecture, Analytics, How to get the outputs of the SBA, Assessing the results and Setting business direction. ***Hands-on exercise: Linking the external and strategic business architectures.***

- **Section 3: Business Architecture (BA) Topics:**

- Key components of the architecture, How to analyze the architecture itself, How to identify outputs of the BA, and Using the impact analysis technique. ***Includes an exercise on linking strategic business and business architectures.***

- **Section 4: Enterprise Architecture (EA) Topics:** Enterprise architecture vs. the IT part of the business, Integrating BPM into the IT view and common issues, Expected outputs. ***Discussion – Linking Business and Enterprise Architectures***

WHY YOU SHOULD ATTEND

- Develop a clear understanding of BPM and Case Management technologies and implementation
- Gain ideas and perspectives that will assist you in defining process architecture and implementation tactics
- Participate in collaborative networking sessions to engage with peers and other industry players
- Evaluate the leading BPM and Case Management products in a forum designed to speed decision-making
- Benefit from the expert-designed BPM and Case Management Assessment Framework, providing comprehensive guidance on which technologies and products are most relevant to your specific requirements
- Engage with vendors directly on a level playing field
- Discuss important issues with the key BPM and Case Management analysts and practitioners

LEARN FROM THE EXPERTS

You will learn from the leading analysts and practitioners on ensuring BPM and Case Management project success, understanding BPM and Case Management software, effective process modeling, and have the opportunity to engage in meaningful conversations about BPM and Case Management product assessment and selection, away from the chaos and confusion of a noisy tradeshow.

PROGRAM HIGHLIGHTS

- Industry leading education on BPM and Case Management readiness and requirements development
- Analyst briefings on market parameters and areas of differentiation
- BPM and Case Management Assessment Framework developed by leading BPM and Case Management analysts, enabling informed decisions on product selection
- Updates from executives and managers from multiple industries and government agencies
- Capability Demonstrations featuring analyst-reviewed presentations by leading BPM and Case Management vendors on specific product capabilities and orientation
- Proven format for facilitating meaningful discussions and expedited evaluations
- Multiple hands-on workshops presented by industry leaders and backed *by career-building certification programs*

"… brings the BPM Vendors together with consultants and users in an open, networking environment that encourages collaboration, relationships and partnerships."

- M.B., JPMorgan Chase

"…the show was a very eye-opening, educational program. I derived a great deal of value from industry experts and analysts."

- S.M., North Highland

"The workshops were very helpful.They provided a good level of understanding of the methodologies of BPM. The Vendor Profiles were extremely helpful to provide a high level idea of what is offered and if they fit our needs."

- A.B., Lexis Nexis

"A true Meeting of the BPM Minds… a lot of BPM knowledge, expertise, and fresh perspectives at the conference."

- Jason Hairston, ArchiTECH Solutions

WHO SHOULD ATTEND?

- CIOs, Business Process Owners, Operations Managers, Enterprise Architects and IT strategists involved in Managing Business Operations, Enterprise Architecture, Managing IT Infrastructure, Standards and Policy Making, and Business Process Management

- Program Leaders Involved with BPM, Case Management, Analytics, Business Architecture or Similar Initiatives

- Practitioners and Consultants Involved in BPM, Case Management, Information Security or Analytics

- Subject Matter Experts Engaged in Dynamic Business Processes and Data-driven Knowledge Work

- Researchers and Educators Involved With Business Process Issues, Architecture and Modeling, Collaboration and Knowledge Worker Effectiveness, Standards Development, Information Interoperability or Related Field

## PARTIAL LIST OF PAST PARTICIPATING COMPANIES

20th Century Fox	CVS Caremark	Inspector General	SAIC
3M	DC Lottery	Intel	Sallie Mae
ABN AMRO	Defense Logistics Agency	IntelliDyne	SBLI USA
adidas	Defense Travel System	Joint Secretariat	Schneider Electric
AIG	Department of Homeland Security	JPMorganChase	Scotiabank
Alcatel-Lucent	Dept of Defense	KPMG	SEC
American Cancer Society	Dept of Education	L.L. Bean	Serono
American Express	Dept of Energy	Level 3 Communications	Shell Oil Company
American Red Cross	Dept of Homeland	Lexis Nexis	Siemens
AMSCO	Dept of Labor	Liberty Mutual Insurance Co	Sprint Nextel
Amway	Dept of Navy	Lockheed Martin	State Farm Bank
Argonne National Laboratory	Dept of the Interior	Maersk Line	State of Wisconsin
Astra Zeneca	Dept. of Health and Human Services	Marriott International	State Street Capital
AT&T	Dow Chemical	MAXIMUS	T-Systems
Auto Club of Southern California	Erie Insurance	Mayo Clinic	TATA Steel
AVIVA	Extend Health	McKinsey & Company	The Hartford
Bank of America	FAA	Medtronic	The Hertz Corporation
Battelle	Fannie Mae	Missile Defense Agency	The MITRE Corp
Baxter Healthcare	FBI	Moore-Handley	Thomson Scientific
Bayer	FDA	Morgan Franklin	TI Automotive
Belfius Bank	Fidelity Investments	Mutual & Federal	TIAA-CREF
BlackRock Inc	Firestone	National Eye Institute	TN Holdings
Boeing	First Data	National Institutes of Health	Toronto Transit Commission
Bosch	First Merchants Corp	National Science Foundation	TSA
Business Transformation Agency	Freddie Mac	Naval Facilities Engineering	U.S. Army
Cabela's	GAO	New Enterprise Stone & Lime	U.S. Customs and Border Protection
CACI	General Dynamics	Nokia Siemens Networks	U.S. Department of State
Canadian National	General Motors	North Highland	U.S. Dept of Commerce
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CBRE	GSA	Office of Secretary of Defense	U.S. Marine Corps
CIBC FirstCaribbean Intl Bank	Guardian Life Insurance Company	Petrobras	U.S. Postal Service
Cisco Systems, Inc.	Hannover Fairs Australia	Physicians Mutual	UnitedHealth Group
Citi	Hartford Financial Services Group	PNC Bank	USAF
City of Calgary	Health Care Service Corp Hewlett-Packard	PREMARKS	USDA
City of Norfolk	Huawei	Premera Blue Cross	Verizon
City Of Philadelphia	Human Resources Command	Principal Financial Group	Veterans of Foreign Wars
Coca Cola Bottling Co.	Humana, Inc.	Prudential	Visa
Commonwealth of PA	Huntington National Bank	PwC	Vivacom
Comptroller of the Currency	Husky Energy	Ralph Lauren	Volvo IT
Contract Management Agency	Hydro-Québec	Raytheon	WellPoint
Covidien	IEEE	RBS Citizens	Wells Fargo
CSAA Insurance Group	Infosys	Robert Half International	
CSC	ING	Sagicor Life Insurance Company	

ABOUT THE VENUE

The *Ritz-Carlton, Pentagon City* is the ideal place to discover all the history, culture and excitement our nation's capital has to offer. Located on the banks of The Potomac River in Arlington, Virginia, adjacent to Washington, D.C., the hotel is defined by elegance and service. Business travelers and meeting attendees will discover an unforgettable retreat with an attentive staff, doorstep access to the Metro and a convenient address, just two Metro stops from downtown Washington, D.C. and the Ronald Reagan National Airport.
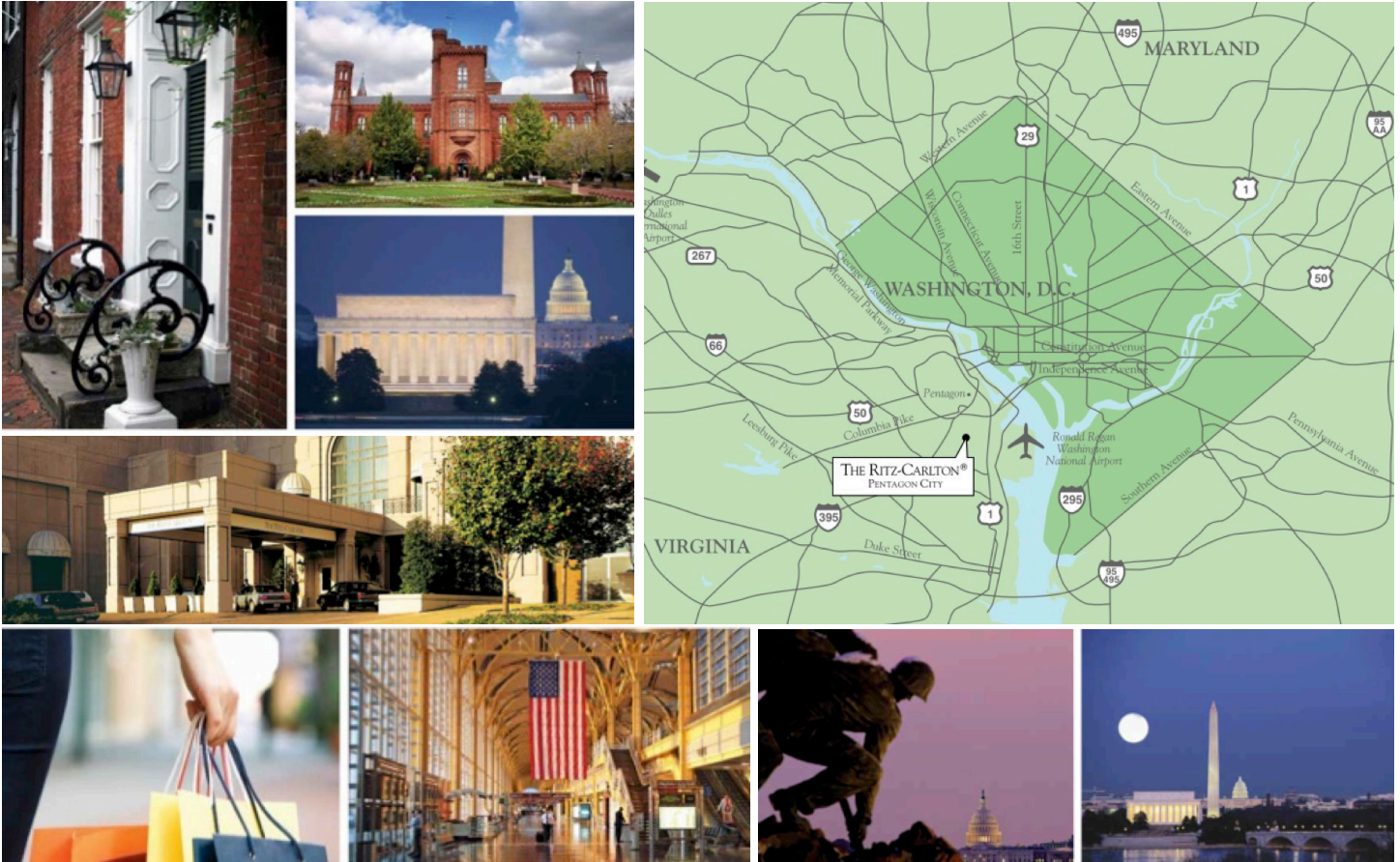
ABOUT THE GLOBAL EXCELLENCE IN CASE MANAGEMENT AWARD

The BPM and Case Management **Global Summit also hosts the** *5th Annual Global Awards for Excellence in Case Management.* The gala awards dinner and ceremony will be held onsite at the Ritz-Carlton, recognizing innovation and excellence in case management, across industries including banking, insurance, government, healthcare, and transportation – based on solutions built by *Appian, Whitestein, IBM, EMC, OpenText, Pegasystems* and other leading Case Management platform providers.

	Standard Conference Fee	Government Employee Rate
Standard Price	$1,495	$495
Late Price (after May 30th)	$1,795	$695

Multi-Attendee Team Discounts		
2 Attendees	3-5 Attendees	More than 5
10% off	25% off	40% off

Multi-attendee discounts and arrangements can be made when registering online, or by phone by calling +1-781-214-6240

HOTEL RESERVATIONS

The Ritz-Carlton, Pentagon City
1250 South Hayes Street,
Arlington, Virginia, 22202
United States
+1 (703) 415-5000
www.ritzcarlton.com/PentagonCity

CANCELLATIONS

In the event of a cancellation of the event for any reason, the organizer's liability is limited to the return of the registration fee. Written cancellation notice provided on or before May 30, 2015 are subject to a 20% processing fee. Cancellations after 5/30/15 and registrants who do not attend the event are liabel for the full registration fee. Subtitutions are allowed any time prior to the event.

Register online by clicking HERE or by visiting **www.BPMandCaseManagement.com or fax the form below to: 781-735-0491 or scan and email to heather@bpm.com**

NAME: _____ TITLE: _____

COMPANY: _____

ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____

TELEPHONE: _____ FAX: _____

E-MAIL: _____

Priority Code (if applicable): _____ Total Registration Fee $ _____

☐ My check for $ _____ USD is enclosed. ☐ Charge my (circle one): AMEX / MC / VISA / DISCOVER

Credit Card Account No. _____ Exp _____

Full Name on Card (please print) _____

Authorized $ Amount _____ Signature _____