MDM & DATA GOVERNANCE SUMMIT CANADA 2011

June 15-16, 2011
Fairmont Royal York
Toronto

More MDM programs get their successful start at MDM & Data Governance Summits than anywhere else.

MDM & Data Governance Summit Canada 2011 is the only event that equally focuses on MDM and Data Governance

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SUMMIT CHAIRPERSONS:

Jim Ericson
Editorial Director
Information Management

Aaron Zornes
Chief Research Officer
The MDM Institute

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"I found Aaron's candor refreshing and invaluable. Makes me want to come back for more. Keep up the good work!"
–Gerry Pastores, VP, Sr. Architect, Bank of America

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About the Summit

The MDM & Data Governance Summit delivers quick start workshops, best practice and case study presentations by the world's leading organizations, thought leadership keynotes by the most in-demand consultants and analysts, expert panel discussions and interactive break-out sessions, along with a lively, hands on solutions Exhibit Hall.

The Summit program is structured for enterprises at all stages of MDM and data governance initiatives – whether kick starting a shared services or service-oriented architecture to support universal customer views, or developing a comprehensive business strategy to share master data across all channels and partners in a 21st century information supply chain.

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1 Practitioner-based insight on the MDM and data governance topics IT execs care about most – getting started, creating a successful governance program, choosing the best MDM technologies, and compelling the business to take a leadership role

2 Case studies and panels focused on aligning and partnering with business execs – delivering measurable ROI, reducing costs and increasing efficiency, meeting regulatory and compliance reporting requirements, improving customer acquisition/retention, increasing cross-sell/up-sell, and readying the business to be M&A-ready

3 Tutorials and workshops for attendees at every stage of the MDM journey – ranging from quick start boot camps to advanced topics such as performance architectures and scalability.

Who Should Attend

- MDM Project Leadership
- MDM Program Managers
- Chief Technical Officers
- Chief Customer Officers
- Chief Information Officers
- Enterprise Architects
- Enterprise Data Architects
- Enterprise Data Modelers
- Enterprise Data Warehouse Architects
- Data Architects
- Corporate Data Stewards
- Business Unit Data Stewards
- VPs of Corporate Data Governance
- Enterprise Data Governance Leader
- Directors of Data Governance
- Directors of Data and Process Governance
- Data Governance Manager
- Data Governance Analyst
- Global Data Steward
- VPs and Directors of Sales/Marketing Analytics
- VPs for Customer Experience
- VPs for Customer Service
- VPs and Directors of Business Planning
- VPs and Directors of Service
- VPs for Business Intelligence
- Directors of Enterprise Information Management (EIM)
- EIM Systems Architects
- Data Management Specialist-EIM
- Customer Contact Center Directors/ Managers
- Channel Managers
- CRM Managers
- Directors of Customer Analysis
- Directors of Centers of Excellence for Application Integration
- Directors of Centers of Excellence for Master Data Management
- Directors of Centers of Excellence for Siebel
- Directors of Centers of Excellence for SAP
- Business Intelligence Program Managers
- Data Warehousing Program Managers
- Database Marketing Analysts
- Data Quality Analyst

Summit Chairpersons

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Information Management

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"Real world case studies were very informative with respect to challenges!"

–Valentine Jackson, Project Manager, BI, Fujitsu Canada

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Agenda

Wednesday, June 15, 2011

Maximize Your Learning Experience by Attending These Can't-Miss Pre-Conference Workshops!

10:00 A.M. – 12:30 P.M.

Pre-Conference Workshop 1: MDM Quick Start

Here's a rare chance to improve your success as an enterprise or data architect, CIO, CTO or other IT professional embarking upon your first MDM initiative. During your focused training, you'll learn the best practices every IT professional must know to fast-track success and minimize risk. This is your pre-conference opportunity to ask the questions and set your own personalized agenda to maximize your MDM Canada 2011 experience over the following two days. Combining presentations, small group discussions, and case studies, the MDM Quick Start's proven agenda is practical, personal, and uniquely tailored to the needs of the participants. Our seasoned veterans will share real world insights into:

- Establishing key MDM solution strategic planning assumptions in a rapidly churning market
- Determining MDM evaluation criteria and weighting – architectures, data models, SOA, identity management, etc.
- Reviewing case studies as templates for out-of-the-box MDM strategizing

Matt Siomra, *MDM Solutions Architect,* **IBM**

Aaron Zornes, *Chief Research Officer,* **THE MDM INSTITUTE**

12:45 P.M. – 3:15 P.M.

Pre-Conference Workshop 2: Solutions for Enterprise Customer Data Governance

Customer data lives squarely in the intersection of master data management and data governance in an interactive world. What does it actually mean to govern customer data for the enterprise? What are the solutions (jobs, outcomes and metrics) that customers (enterprise governance, operations, marketing, IT, your clients) desire of data governance? This real world workshop defines the focus of enterprise customer data governance including structure, process, roles, rules, control mechanisms, tools, metrics and measures of success. Understand the value of customer data and how it ties to business outcomes, mitigating risk and creating competitive advantage. Key topics include:

- Defining the core constituencies interested in enterprise customer data
- Provisioning a proven organizational and architectural framework for managing and governing enterprise customer data
- Identifying the critical solutions patterns and related metrics for enterprise customer data governance

Robert Rich, *VP, Business Development,* **INFOTRELLIS**

Thursday, June 16, 2011

8:00 A.M. – 8:45 A.M.

Continental Breakfast Exhibit Hall Grand Opening

9:00 A.M. – 10:00 A.M.

Welcome and Conference Chair Keynote: Go Early, Go Governance

Enterprise-level master data governance that spans the entire master data is extremely difficult to execute for both organizational and technical issues. Yet increasingly this is being mandated as a core deliverable of most large-scale MDM projects. Through 2011, both major systems integrators and boutique consultancies will focus on productizing their data governance frameworks / methodologies while MDM software providers struggle to link upstream data governance processes with downstream MDM hubs. By 2012, all mega vendor MDM solutions will evolve from "passive aggressive data governance" mode to "active data governance" wherein they provide the capabilities to capture business rules, which in turn are propagated into an MDM hub.

This keynote will focus on a set of strategic planning assumptions facing IT organizations during 2011-2012 and beyond by highlighting strategies for:

- Kick-starting master data governance as a prerequisite to phase one
- Partnering with service providers to get to the next level of data governance maturity
- Planning for the next generation of MDM and data governance capabilities to provide total party view – semantic databases, deep Web search, etc.

Aaron Zornes, *Chief Research Officer,* **THE MDM INSTITUTE**

10:00 A.M. – 10:45 A.M.

Platinum Keynote: Serving Many Masters through Sound Data Management

Presented by SAS THE POWER TO KNOW.

Increasingly organizations rely on insights from their data assets to make decisions that drive value for their stakeholders. At the same time, organizations struggle to effectively govern and manage the growing volumes of data and the voracious appetite for information and insights. Data managers must be able to satisfy the C's: CFO, CEO, CIO, COO, along with regulatory requirements as well. This session explores the challenges business face such as:

- Consolidating their master data to meet the needs of many stakeholders across the enterprise
- Learning how leading businesses today are meeting these diverse needs thorough well planned and executed data management strategies
- Discovering how end-user Intrawest has overcome these challenges and their next steps

Randy Cuff, *Director, Customer Relationship Marketing,* **INTRAWEST ULC**

Marc Smith, *Principal Solution Architect,* **SAS CANADA**

10:45 A.M. – 11:15 A.M.

Networking Break in Exhibit Hall

Agenda | CONTINUED

11:15 A.M. – 12:00 P.M.

Platinum Keynote: Delivering Business Value with IBM InfoSphere MDM & Master Data Governance

Presented by IBM

This joint IBM and customer presentation will focus on a major Canadian case study detailing the business drivers and business value that can be derived through MDM as well as the technology factors that go into a successful MDM project. As data governance is tightly linked to the success of any MDM project, learn about the key principles of master data governance—people, process and technology—and how IBM is working with its clients in these areas. The presentation will deliver the following:

- Organizing for results in taking an MDM project from idea to impact
- Leveraging the experience of hundreds of other MDM programs via implementation best practices to save time and avoid common mistakes
- Identifying the realistic business value to be derived from an MDM program and its time-to-value

David Corrigan, *Director, Product Marketing - InfoSphere,* **IBM SOFTWARE GROUP**

Joseph Likuski, *Lead Architect,* **ROYAL BANK OF CANADA**

12:15 P.M. – 1:15 P.M.

Industry Innovation Lunch Session: MDM - Building a Data Quality Competency That Feeds MDM and the Rest of the Enterprise

Sponsored by Pitney Bowes

Most progressive global organizations recognize the importance of building a data quality competency outside MDM to deliver accurate and rich insight that benefits the larger organization. An SOA approach to delivering data quality and enrichment services is in use at major organizations like FedEx, Mastercard, AT&T, AllState and Cigna Healthcare. This not only serves as a foundation for MDM, but also enables firms to optimize their existing business processes. An infrastructure which supports data accuracy and enrichment allows for improvement in most business processes this session will explore examples concerning fraud, risk, customer communications and customer on-boarding.

Navin Sharma, *Director of Global Product Strategy, Data Quality,* **PITNEY BOWES BUSINESS INSIGHT**

1:15 P.M. – 1:45 P.M.

Dessert in Exhibit Hall

1:45 P.M. – 2:30 P.M. **Concurrent Sessions**

MASTER DATA SERVICES TRACK

Sponsored By ADASTRA

TRACK KEYNOTE: Business-Driven MDM Technology Selection

Most organizations realize the value of a "single and complete version of the truth" for critical information entities such as customer or product, and an increasing number are taking steps towards enterprise MDM solutions. Several important factors are required for the success of these ventures including: support, funding and active engagement from the business, and the selection of a technology solution best aligned to the organization's needs. The lack of just one of these factors can be a major stumbling block or cause of failure. This case study will describe Canadian Tire's journey, the benefits and the lessons learned from taking this MDM program approach in a technology selection that was decidedly business driven:

- Bringing business and IT stakeholders together to give opportunities to speak the same language
- Translating key technology differentiators into business scenarios so that the business could make choices that they fully understood
- Engaging the business early on to ensure strong support for the MDM program

Krasen Paskalev, *VP, Data Quality and Master Data Management,* **ADASTRA CORPORATION**

Laura Sousa, *VP Loyalty Program Integration,* **CANADIAN TIRE CORPORATION**

DATA GOVERNANCE TRACK

Sponsored By BroadstreetData

TRACK KEYNOTE: Enabling the Transformation to Active Data Governance

The Treasury Board Secretariat of Canada is the central function which manages the allocation of cash to 110+ departments and agencies that make up the Government of Canada. As the administrative arm of the Treasury Board, the Secretariat has a dual mandate: to support the Treasury Board as a committee of ministers and to fulfill the statutory responsibilities of a central government agency. The Secretariat is tasked with providing advice and support to Treasury Board ministers in their role of ensuring value-for-money as well as providing oversight of the financial management functions in departments and agencies. The intensity of data-centric decisions combined with the requirement of more complex activity-based reporting and access to information requests has helped the organization advocate a move from passive data governance largely enabled through a common operating framework and supporting systems to active data governance based on an integrated accountability framework, data standards and common definitions of information. In this discussion, you will learn how leaders in this high matrix politically oriented and federated environment approached the transformation to active data governance.

- Positioning data standards as the central point for the enablement of cross departmental reporting
- Developing actionable management frameworks, policy and directives that are used to define the operational data governance model
- The importance of leading with business definitions to help information management team develop supporting policy

Deborah Henderson, *Practice Manager,* **BROADSTREET DATA**

Doug Lloyd, *Financial System Authority,* **GOVERNMENT OF CANADA**

Agenda | CONTINUED

2:35 P.M. – 3:05 P.M. Concurrent Sessions

MASTER DATA SERVICES TRACK

CASE STUDY: Communicating Business Value to Ensure MDM Success

Central to any financial institution's ability to effectively manage itself in the marketplace is its treatment of master data. In the capital markets, master data can be customer, product as it can be the security. For financial institutions, it is absolutely essential to have the security master data completely accurate at all times. Delivering accurate information to downstream systems and clients in a consistent, reliable and scalable manner is central to the operations and the company's competitive ability. Discussed in this session are the approaches and techniques to defining the master data management roadmap in the context of modernization demands, massive market pulls for real time information amid multiple operating theatres and multiple regulatory oversight layers.

- Exposing the true cost of data management as a key component of the business case
- Leveraging internal and sunk cost assets amid a changing landscape
- Positioning technology as the delivery of master data but not the owner

Paul Childerhose, *Associate Director, Global Reference Data,* **RBC CAPITAL MARKETS OPERATIONS**

Mark Cowan, *Managing Partner,* **BROADSTREET DATA**

DATA GOVERNANCE TRACK

CASE STUDY: Data Governance as a Catalyst for Successful Business Transformation

Establishing a data governance function/office is more than just addressing data quality issues across the enterprise. It can also act as a catalyst for successful business transformation, especially in respect to optimizing the balance between risk and strategic outcomes. ICBC is early into its multi-phased transformation journey to move its business from a proprietary business model/processes and supporting applications to one that is industry standards-based (IAA) and COTS driven.

In this time, ICBC has addressed the requirements of achieving a comprehensive historical record of the business, transitioning from a proprietary vocabulary to a standards-based one and embedding the cultural belief that information is an asset, and all have a role in managing and optimizing these assets.

In this presentation, ICBC and Deloitte will discuss the approach and methodology, key strategic drivers, and results to date.

- Selling the notion of data governance as a formalized decision-making framework for addressing business-driven decisions
- Making "information is an asset"—it's an interesting notion but difficult concept to make real
- Implementing a "light-touch" data governance model

Farzin Ismail, *Senior Manager, Risk Management Practice,* **DELOITTE**

Richard R. Lee, *Director, Business Information Transformation Project (INFO) and Data Governance Office (DGO),* **INSURANCE CORPORATION OF BRITISH COLUMBIA**

3:05 P.M. – 3:30 P.M. Networking Break in Exhibit Hall

3:30 P.M. – 4:00 P.M. Concurrent Sessions

MASTER DATA SERVICES TRACK

BEST PRACTICES: Top 15 Solutions Field Reports, Part One

MDM is now accepted by most enterprises as a key enabling and competitive technology – as well as a vital business strategy (know your customer, e-pedigree, etc.). As the market consolidates, other dimensions further complicate the product selection process – open source, multi-entity MDM, and integrated data governance to name a few. Moreover, the application vendors are increasingly interweaving core MDM capabilities within the application stack while infrastructure vendors further integrate their MDM ecosystems to better leverage all – hence, "stack wars". This session will focus on the "why" and "how" of MDM technical evaluations for key use case and industry-specific scenarios by providing guidance for:

- Validating the dominant architectural models and evaluation criteria – e.g., data models, use cases, reliability/availability/scalability, identity resolution management, etc.
- Assessing the vendor landscape – e.g., registry, data hub, EAI/EII, portals, SOA-based web services, data service provider, etc.
- Applying a proven methodology to MDM product evaluations for both mega vendor solutions and pure play

Aaron Zornes, *Chief Research Officer,* **THE MDM INSTITUTE**

DATA GOVERNANCE TRACK

CASE STUDY: Multi-Domain MDM for Risk Compliance and Business Intelligence

National Bank of Canada selected multi-domain master data management (MDM) as a platform for applying data management to their globally-shared reference data. The first project they launched was designed to deliver reference data management for risk compliance under Basel II. An additional requirement was to provide a highly-detailed audit trail for Sarbanes Oxley (SOX) compliance. After its successful completion, National Bank of Canada made the decision to extend MDM use to improve their business intelligence (BI) foundation using hierarchy management for managing corporate dimensions and KPIs. During this presentation, you will learn how National Bank of Canada is using MDM for risk compliance and as a foundation for business intelligence. Specific topics to be addressed include:

- Delivering proactive data management to business users
- Defining complex data validation rules and integrity controls
- Enabling strong collaborative workflow for business users

Raphael Colsenet, *Manager, BI Data Modeling and Master Data Management,* **NATIONAL BANK FINANCIAL GROUP**

Agenda | CONTINUED

4:05 P.M. – 4:35 P.M. Concurrent Sessions

MASTER DATA SERVICES TRACK

BEST PRACTICES: Top 15 Solutions Field Reports, Part Two

This session is a continuation of the previous session, please see session description for Top 15 Solutions Field Reports, 3:30 P.M. – 4:00 P.M.

Aaron Zornes, *Chief Research Officer,* **THE MDM INSTITUTE**

DATA GOVERNANCE TRACK

CASE STUDY: The Long and Winding Road of Data Quality at TD Bank

TD Bank has been on a long and committed road to ensure data quality for its customers for years. As a full service bank, an integrated customer data strategy is driving the bank's MDM initiatives to help enable a 360 degree view of customers – across lines-of-business, geographies and more than 19 customer information files. Working across all lines of business, with a complex set of international regulations, this program's goal is to ensure proper visibility to the right information at the right time. Moreover, as a federated bank, there are many challenges to meet the different business and project priorities without compromising the overall vision. This presentation will cover the following:

- Understanding and overcoming the challenge of a central approach in a federated bank
- Formalizing the 360 degree view of customer as a business program and not technology refresh
- Executing the action plan to keep focused on the long term goal yet with flexibility along the way

Bert Buchanan, *Head of Corporate Architecture and Corporate Segment Technology Solutions Architecture,* **TD TECHNOLOGY SOLUTIONS—TD BANK FINANCIAL GROUP**

4:40 P.M. – 5:10 P.M. Concurrent Sessions

MASTER DATA SERVICES TRACK

BEST PRACTICES: Managing Reference Data as Enterprise Master Data

During 2011, corporate MDM platform evaluation teams will assume (and often insist) that all enterprise-level MDM software platforms fully support both party and product entity types. By 2012, large enterprises will also mandate that reference data management (RDM) be part of the MDM platform native entity types. RDM is often used in a read-only manner by operational, analytical and definitional systems. It can be defined internally, or specified externally by standards bodies groups and can have a taxonomy. Unfortunately, such reference data is often isolated in silos, yet each system has a different subset, format and internal representation – and often no agreed upon internal standard for specific reference data. In this session, a seasoned MDM veteran will explain how to prepare a RDM strategy for your enterprise by discussing:

- Providing governance, process, security, audit control around reference data mastering
- Managing the complex mappings between different reference data representations across the enterprise
- Arbitrating the use of external reference data standards within the enterprise

Joseph Likuski, *Lead Architect, Enterprise Applications,* **ROYAL BANK OF CANADA**

DATA GOVERNANCE TRACK

EXPERTS PANEL: Best Practices in Kick-Starting Data Governance

Governance is one of the distinctive characteristics of "enterprise MDM" when contrasted against traditional data integration programs. Improving the degree of business stakeholder cooperation is critical - especially in terms of stewardship, data quality and decision rights. In this session, seasoned MDM professionals will share how to solve the unique data governance challenges posed by enterprise MDM projects. Topics to be discussed include:

- Overcoming the governance barriers typically found in MDM programs
- Building a strong business case to ensure initial data governance funding & successful program execution
- Integrating people and processes via the institutionalization of data governance to integrate, measure and manage metrics within the context of the master data lifecycle

PANELISTS: **Alexis Grassie,** *Director, Policy & Compliance - Wholesale Banking,* **Canadian Imperial Bank Of Commerce (CIBC)**

Saad Chafki, *Head, MDM & Data Governance Programs,* **STANDARDLIFE INSURANCE COMPANY**

ADDITIONAL PANELISTS TO BE ANNOUNCED

5:10 P.M. – 6:30 P.M. Networking Reception in Exhibit Hall

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For more information about sponsorship opportunities, please contact:

Tony Carrini, 212-803-8547, anthony.carrini@sourcemedia.com or Mike McCaffery at 646-271-9687, michael.mccaffery@sourcemedia.com.

Registration Information

Attendee Type	Early Bird 1	Standard	On-site
Full Conference	$695 CAD	$995 CAD	$1095 CAD
Expiration Date	*05/20/11*		