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# MDM2010 CANADA SUMMIT

June 13-14, 2010  
Hyatt Regency Toronto  
Toronto, Canada

THE BEST MDM & DATA GOVERNANCE EXPERT ADVICE AVAILABLE IN CANADA IN 2010!

- 
- ▶ **INVESTIGATE:** Why the relationship between MDM & data governance is vital to the success of each initiative
  - ▶ **DETERMINE:** Best practices from independent experts, seasoned practitioners, academic analysts and vendor product marketers
  - ▶ **ANALYZE:** Your business' plans by meeting real life, experienced users of all the major solutions
  - ▶ **DISCUSS:** Your MDM & data governance challenges with the world's leading solution providers
  - ▶ **LEARN:** From the challenges behind successful real-world implementations via personalized workshops, expert panels & case studies

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**information**  
management

The MDM Institute  
Independent. Authoritative. Disruptive.

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## Event Co-Chairs



**Aaron Zornes**  
Chief Research Officer  
The MDM Institute



**Jim Ericson**  
Editorial Director  
Information Management

## New to MDM 2010 Canada Summit.



Get ready for **MDM TV**. MDM TV is the next step in bringing MDM experts to YOU! This video cast will capture thought-provoking testimony from speakers, attendees and vendors at the event, and broadcast to our subscribers for the full conference experience. Stay Tuned!

## EXCLUSIVE ATTENDEE OFFER

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If you attend MDM 2010 Canada Summit and a colleague attends MDM The Americas, use Code: **MDMS for \$200 off each event!** That is a savings of \$400!

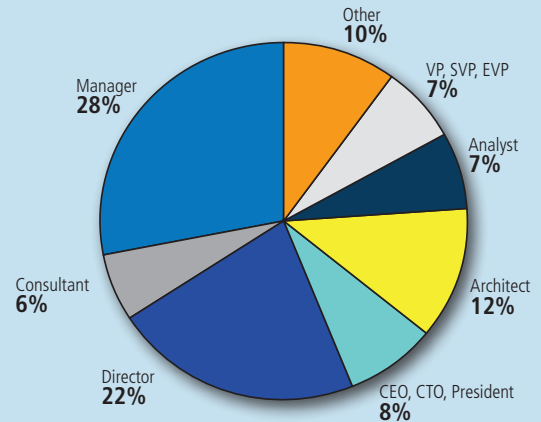


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### Who Attends MDM Global Summits?

#### Attendees By Title



### Who Should Attend?

- MDM -Enterprise, Solution & Data Architects
- CTOs & CIOs
- Senior Business Strategists, & LOB Managers
- Data Stewards, Data Quality Managers, & MDM or Data Governance Project & Program Managers
- And Many More!

Visit <http://www.information-management.com/conferences/mdmcanada10/2009attendees.html> for a comprehensive list of previous attendees' job titles!

## MDM2010 THE AMERICAS SUMMIT

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the mega Three-day  
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For registration, call Arthur Glavas at 212.803.6063.



## AGENDA

### Sunday, June 13, 2010

1:00 P.M. – 3:00 P.M.

#### Pre-Conference Workshop 1

##### > MDM Boot Camp

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 2010 experience in the following two days. Combining presentations, small group discussions, and case studies, the MDM Boot Camp'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 & weighting – architectures, data models, SOA, identity management, etc.
- Reviewing case studies as templates for "out of box" MDM strategizing

**Matt Siomra**, Director of MDM Planning & Implementation Services, MASSEY CRAWFORD GROUP | **Aaron Zornes**, Chief Research Officer, THE MDM INSTITUTE

### Monday, June 14, 2010

8:00 A.M. – 8:45 A.M.

#### Continental Breakfast | Exhibit Hall Grand Opening

9:00 A.M. – 10:00 A.M.

#### Welcome & Conference Chair Keynote:

##### MDM 2.0: The Convergence of MDM & Data Governance

MDM is particularly important in today's increasingly complex and harsh global business landscape – in part due to increasingly demanding suppliers, trading partners, customers ... as well as financial challenges and government regulations. Despite the current economic crisis, analyst firms have declared MDM to be "recession proof" as businesses strive to dramatically reduce costs, meet compliance reporting mandates, deliver increased sales and marketing effectiveness, and provide superior service to customers and suppliers. MDM and its variants – customer data integration (CDI), product information management (PIM), and data governance (DG) – all significantly contribute to these tactical business priorities.

Enterprise-level master DG that includes the entire master data lifecycle (creation, promotion, archiving, ...) is extremely difficult to execute for a number of reasons – organizationally and technically. Yet increasingly this is being mandated as a core deliverable of large-scale MDM projects. Through 2009-10, both major systems integrators and boutique consultancies will focus on productizing their DG frameworks / methodologies while MDM software providers struggle to link upstream DG processes with downstream MDM hubs. By 2011-12, all mega vendor MDM solutions will evolve from "passive aggressive DG" mode to "active DG" wherein they provide the capabilities to capture business rules which in turn are propagated into an MDM.

This keynote will focus on a set of strategic planning assumptions facing IT organizations during 2009-10 and beyond by highlighting:

- Provisioning substantive amount of "master data governance"
- Partnering with a faithful service provider
- Betting on an odds-on favorite MDM solution (brand/architecture)

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

10:00 A.M. – 10:45 A.M.

#### Platinum Keynote: MDM in 2010: Smarter, Easier, Adaptive

More than a decade's experience providing scalable and flexible MDM solutions to global customers provides the foundation for IBM's MDM vision for the next decade: Smarter, Easier, Adaptive. IBM is crossing a new threshold in its ability to master data. This presentation addresses how customers can use master data in more intelligence ways, how MDM projects get deployed faster and how customers can adapt their MDM solutions to meet the varying needs of the people who use it to deliver trusted, accurate and timely information to the right decision makers.

**David Corrigan**, Director, InfoSphere MDM Product Strategy, IBM SOFTWARE GROUP | **Chai Lam**, Senior Enterprise Architect, BANK OF MONTREAL



10:45 A.M. – 11:15 A.M.

#### Networking Break in Exhibit Hall

11:15 A.M. – 12:00 P.M.

#### Platinum Keynote: How to Create a Comprehensive Data Governance Strategy on a Global Scale

Creating a data governance organization that can effectively manage complex data-related relationships, roles, and scenarios can be a daunting task. Explore two methods of data governance, active and passive, and get a detailed look at the benefits and uses of each. Understand how passive data governance allows users to interact directly with source systems to monitor results and identify data issues. Find out how active data governance provides a guided process for the introduction and management of data into selected systems. Understand the four levels of data governance, from "no data governance" to "active data governance."

- Come away with tips for leveraging these models to reduce the possibility of business process interruptions due to omissions, duplication, consistency and content errors, or a lack of data standards
- Determine if there is a logical business process for master data governance and how to apply it
- Get tips on how to gain a better understanding of how to overcome the complexities of building an effective data governance organization

**Tom Kennedy**, Chief Technology Officer & Co-Founder, BACKOFFICE ASSOCIATES | **Co-Presenter to be Announced**



12:00 P.M. – 1:00 P.M.

#### Lunch

1:00 P.M. – 1:30 P.M.

#### Dessert in Exhibit Hall





**AGENDA**

**Monday, June 14, 2010 (Continued)**

1:30 P.M. – 5:05 P.M.

**Concurrent Sessions**

	Master Data Management Track Sponsored by  Pitney Bowes	Data Governance Track Sponsored by  KALIDO
1:30 P.M. – 2:15 P.M.	<p>➤ <b>TRACK KEYNOTE: Investigating the Need for Master Data Management</b></p> <p>Master Database Management is not an end in itself, the goal is an improved customer experience. The business stakeholders who are crucial in supporting the implementation of MDM need to understand how the investment will be of value to the business, be it reduced customer churn, improved customer interaction, real time reporting or improved workflow. This session will look at how to achieve an MDM implementation that helps you better understand, connect and grow your customers along with:</p> <ul style="list-style-type: none"> <li>• Designing a workflow and process to not only manage data but also to enrich it</li> <li>• Realizing that any implementation of MDM should have clearly defined and measurable goals to prove ROI</li> <li>• Ensuring that the system delivers real value such as improving customer onboarding, ensuring customer data is accurate, driving up-sell and x-sell opportunities through analytics and more</li> </ul> <p><b>Suresh Nair</b>, <i>Director of Strategy for Canada</i>, PITNEY BOWES</p>	<p>➤ <b>TRACK KEYNOTE: Targeting the Root Cause of Bad Data Using Data Governance</b></p> <p>Organizations today recognize that bad data systematically hurts performance. However, the approaches we've taken to date essentially amount to treating the symptoms through periodic cleaning exercises. This presentation discusses the root cause of bad data, and the strong links among business processes, organizational behavior and data quality. This session will look at how to solve bad data by targeting the root cause through:</p> <ul style="list-style-type: none"> <li>• Using a set of business processes to define, implement and monitor compliance for business-driven data policies</li> <li>• Linking data quality to business process metrics and financial metrics, thereby changing the way business process owners think about data</li> <li>• Putting responsibility for data quality in the hands of the business, rather than IT. We will also hear from one Kalido customer who has successfully implemented MDM in their organization</li> </ul> <p><b>Winston Chen</b>, <i>VP, Strategy and Business Development</i>, KALIDO</p>
2:20 P.M. – 3:05 P.M.	<p>➤ <b>POWER SESSION: Field Reports on the Top 10 MDM Solutions</b></p> <p>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:</p> <ul style="list-style-type: none"> <li>• Validating the dominant architectural models &amp; evaluation criteria – e.g., data models, use cases, reliability/availability/scalability, identity resolution management, etc.</li> <li>• Assessing the vendor landscape – e.g., registry, data hub, EAI/EI, portals, SOA-based web services, data service provider, etc.</li> <li>• Applying a proven methodology to MDM product evaluations for both mega vendor solutions (IBM, Informatica, Microsoft, Oracle, SAP) &amp; pure play (D&amp;B/Purisma, DataFlux, IBI MD Center, Progress, Talend, Tibco)</li> </ul> <p><b>Aaron Zornes</b>, <i>Chief Research Officer</i>, THE MDM INSTITUTE</p>	<p>➤ <b>EXPERT TESTIMONY: Data Quality: Where to Begin and How to Succeed?</b></p> <p>The ever increasing demand for real time information, increased regulatory oversight and the heightened sensitivity to possible reputational risk - combined these forces are driving organizations to find a practical approach to data quality governance. In particular, how to combine the need for a structured approach while ensuring a sustainable solution. In this session, participants will learn:</p> <ul style="list-style-type: none"> <li>• How to create a culture of quality</li> <li>• How to quantify key data quality indicators</li> <li>• Where to incorporate data quality into a balanced scorecard</li> <li>• What steps to follow for program success</li> </ul> <p><b>Jennifer Willis</b>, <i>AVP of IT Infrastructure</i>, MANULIFE FINANCIAL</p>



**AGENDA**

**Monday, June 14, 2010 (Continued)**

3:05 P.M. – 3:30 P.M.

**Networking Break in Exhibit Hall**

**Master Data Management Track**  
Sponsored by Pitney Bowes

**Data Governance Track**  
Sponsored by KALIDO

3:30 P.M. – 4:15 P.M.

➤ **CASE STUDY: Applying MDM to Public Sector as "One Client, One Record"**

This session will investigate Ontario's Ministry of Transportation role in applying master data management and how it effects the public sector.

**Peter Carayannakis**, *Manager, Data Management*,  
MINISTRY OF TRANSPORTATION, ONTARIO

➤ **EXPERT TESTIMONY: Vendor Cross Examinations on MDM and Data Governance**

This panel of expert vendors are available for your questions and comments on their current and future plans for their master data management and data governance platforms. Don't miss out on what is sure to be an exciting panel debate!

4:20 P.M. – 5:05 P.M.

➤ **EXPERTS PANEL: Optimizing the First Six Months**

For MDM novices, it is vital for your program (and your career) to get it right if you want to achieve success in your MDM program early on. MDM is a journey with many nuances and organizations in different industries will have different MDM needs. However, there are certain field-proven best practices that can help any organization mobilize its people, processes and technology for MDM. Even intermediate MDM professionals ready to navigate the next stage of their MDM journey benefit from revisiting tried-and-true basic steps highlighted by this panel. Our group of seasoned MDM pros will provide advice in preparing for your next stage by discussing:

- Managing the rapid selection of the various technology to comprise an MDM ecosystem
- Justifying governance programs as an concurrent approach to enterprise data integration
- Identifying and overcoming early stage, major obstacles

**Panelists:**

**Mike Lapenna**, *Data Architect, Investment Systems, Asset Management*,  
MFC GLOBAL INVESTMENT MANAGEMENT

**Jill Speirs**, *AVP, Customer Strategy*, SEARS CANADA

**Additional Panelists to be Announced**

➤ **EXPERTS PANEL: Best Practices in MDM and 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.

- 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 & processes via the institutionalization of data governance to integrate, measure & manage metrics within the context of the master data lifecycle

**Panelists:**

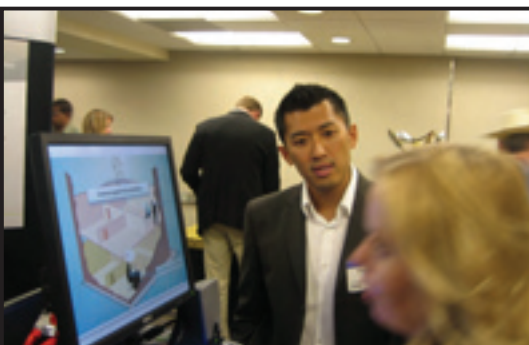
**Richard Livesley**, BANK OF MONTREAL

**Corey Prusko**, *Data Quality Analyst*, COLLEGE OF AMERICAN PATHOLOGISTS

**Irina Savchenko**, *Application Support Manager, Business Intelligence*,  
LABATT BREWING COMPANY

5:05 P.M. – 6:00 P.M.

**Networking Reception in Exhibit Hall**



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We reserve the right to change or replace speakers without notice.

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## Conference Pricing

### Registration Information

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