

MDM New York 2009

December 1-2, 2009 | New York Hilton/ NYC

FOCUSED ON FINANCIAL SERVICES AND HEALTHCARE

Maximize your learning experience by registering for pre-conference workshops!

5 Reasons You Can't Afford to Miss The Only Master Data Management Event on America's East Coast!

1. Learn from the MDM pros
2. Perform due diligence on all the major components of a master data solution
3. Accelerate your time-to-ROI regarding MDM & Data Governance
4. Expand your IT professional network & increase your personal market value
5. Fill critically short-staffed MDM & Data Governance positions

Presented by:

information management **HealthData** Management

The MDM Institute
Independent. Authoritative. Relevant.



For additional information about sponsorship opportunities, please contact: Tony Carrini, Associate Publisher, 212.803.8547, anthony.carrini@sourcemedia.com.

www.mdm-summit.com
For registration, call
Arthur Glavas at 212.803.6063.

SourceMedia
CONFERENCES & EVENTS

MDM New York 2009

December 1-2, 2009 | New York Hilton/NYC



FOCUSED ON FINANCIAL SERVICES AND HEALTHCARE

Why MDM New York is the ONLY MUST ATTEND EVENT of the year:

1. The only event that boasts MDM practitioner Best Practice Panel & Case Studies
2. MDM New York is the only MDM & Data Governance show delving into Financial Services & Healthcare
3. MDM Summit Series boasts the best attendees and demographic profile. Check out our website to see exactly who attends MDM at www.mdm-summit.com
4. The best vendor showcasing of its kind. Perform you due diligence on all the major components of master data solutions

Who Should Attend:

- Directors of Data Governance
- 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
- And many more.

For a complete list, visit www.mdm-summit.com

We're Spreading The News... MDM is the Must-Attend Event of the Year!

"Definitely worth attending the pre-conference workshops. Direct carry-over from here to my client, thank you! Fabulous peers and attendees! Learned as much from them as the speakers!"

MELANIE MECCA, BOOZ ALLEN HAMILTON

"An excellent opportunity to learn information that is not available in the market!"

ADAM WHITE, GLOBAL DATA COMPETENCY

"I found Aaron's candor refreshing and invaluable. Makes me want to come back for more. Keep up the good work!"

GERRY PASTORES, BANK OF AMERICA

"Overall, very good speakers and very informative. Better than other conferences I have attended. Vendors did not make their sessions a sales pitch."

GARRETT RING, ACXION

"It was a very good opportunity to get/share information about the topics MDM, CDI and Data Governance. It was worthwhile attending the conference!"

ROLAND CHRISTEN, CREDIT SUISSE

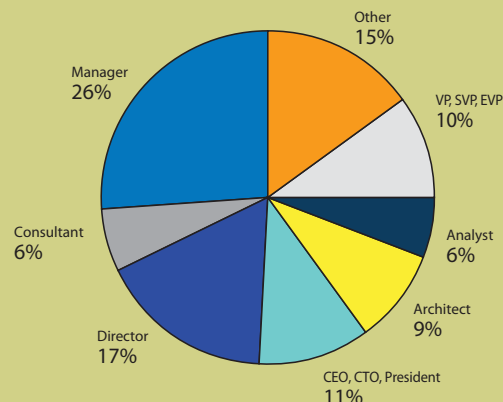
"Thanks for organizing a great conference. Looking forward to next year!"

KRISHNA KOMANDURI, SCHWAB

"I debated about attending, concerned about perceived value. The conference exceeded my expectations because it confirmed our direction and provided additional nuggets of information. I would recommend the MDM Summit to my peers."

LORI HALFACRE, FISERV

2008 Attendees:



www.mdm-summit.com
For registration, call Arthur Glavas at 212.803.6063.

SourceMedia
CONFERENCES & EVENTS

MDM New York 2009

December 1-2, 2009 | New York Hilton/NYC

FOCUSED ON FINANCIAL SERVICES AND HEALTHCARE



AGENDA

Tuesday, December 1, 2009

12:00 P.M. **Registration Opens**

12:00 P.M. – 5:30 P.M. **Exhibitor Set-Up**

1:00 P.M. – 3:00 P.M. **Workshops A***

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 New York 2009 experience. 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 three 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

Ed Allburn, *President*, DATADELTA

Adam White, *President*, GLOBAL DATA COMPETENCY

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

WORKSHOP 2: Extracting Business Value Through Quick Start MDM & Governance Solutions

Does establishing an enterprise MDM solution feel like climbing a mountain? Is it difficult to get everyone to agree? Having trouble reconciling local needs with corporate-wide requirements? In this session, Dileep Srinivasan will draw on Cognizant's extensive industry experience to demonstrate how implementing MDM as a 'shared corporate service' can make the path less rocky and lead to a successful conclusion.

MDM initiatives can be highly effective but first need to overcome perceptions of complexity and hesitation around cost and time to ROI. Aside from technology implications, successfully deploying an MDM solution requires that multiple business units and stake holders agree on the business value that will be realized. This is where a good quick-start data governance model can remove the complexities associated with data management and make the MDM ride much smoother. Following this theme, this session explores data governance-in-a-box and other proven MDM accelerators via these topics:

- Negotiating data ownership in a shared service environment
- Leveraging tools & techniques to increase user acceptance
- Promoting shared information management forums

Dileep Srinivasan, *AVP MDM*, COGNIZANT TECHNOLOGY SOLUTIONS



3:30 P.M. – 5:30 P.M.

Workshops B*

Workshop 3: IBM Data Governance Council Best Practices

Data governance is at a crossroads, creating the opportunity for change as data quality evolves into a key performance indicator for businesses worldwide. To move forward, organizations need data governance best practices organized by business, operations, and IT activities and require data governance best practices for mergers and acquisitions, sales and marketing, financial reporting, compliance and audit, security and privacy and MDM. This workshop will provide insights gathered from the most recent IBM Data Governance Council meetings as well as:

- Leveraging the IBM Data Governance Council Maturity Model to build a roadmap for effective data governance
- Acting on the five key information challenges that will reshape corporate behavior & businesses' ability to trust information
- Planning governance frameworks that will define standards & best practices

Steve Adler, *Director*, IBM DATA GOVERNANCE SOLUTIONS

Workshop 4: Strategies For Effective Business Engagement In Deploying MDM

Developing effective business strategies when deploying your MDM platform can be daunting. This workshop, with executives from EMC Consulting leading the way, will cover the following topics in building a business-led MDM roadmap and business case:

- Getting started: How to understand the current state of your data and the business pain that it is causing
- Gaining executive sponsorship & alignment
- Modeling effective business structures and processes for data governance and data stewardship

Joseph DosSantos, *Financial Services Master Data Management Practice Lead*, EMC CONSULTING

Neil Downing, *Solution Partner*, EMC CONSULTING

EMC® Consulting

* All workshops are an additional charge to attend.

www.mdm-summit.com
For registration, call Arthur Glavas at 212.803.6063.

SourceMedia
CONFERENCES & EVENTS

MDM New York 2009

December 1-2, 2009 | New York Hilton/NYC

FOCUSED ON FINANCIAL SERVICES AND HEALTHCARE



AGENDA

Wednesday, December 2, 2009

8:00 A.M. – 8:30 A.M.

Continental Breakfast in Exhibit Hall

8:30 A.M. – 8:45 A.M.

Conference Welcome & Chairman Introduction

Jim Ericson, Editorial Director, INFORMATION MANAGEMENT

8:45 A.M. – 9:30 A.M.

Conference Chairman Keynote:

MDM 2.0: The Convergence of MDM & Data Governance

Enterprise-level master data governance (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 hub.

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

- Provisioning a 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

9:30 A.M. – 10:15 A.M.

KEYNOTE 1:

MDM Then & Now: A Historical Journey through the MDM Evolution

Over the past several years, MDM has evolved from a pure software play - to a framework - to a methodology - to a business centric program. This entertaining keynote address will take you through the MDM journey starting with the “if you build it, they will come” approach and ultimately taking us through planning for the next three- to five-year roadmaps, “to infinity, and beyond!”

Chris Blotto, Principal Data Integration Architect, EMC CONSULTING

EMC® Consulting

10:15 A.M. – 10:45 A.M.

Networking Break in Exhibit Hall

10:45 A.M. – 11:30 A.M.

KEYNOTE 2:

EXPERTS PANEL: 360 Degree View of Member

During 2009-10, market-leading healthcare payers must add MDM capabilities to their list of “strategic IT investments.” Healthcare payer MDM solutions must support the customer lifecycle by including eligibility management, provider data management, claims management, identity management, as well as campaign management (marketing and wellness campaigns). The healthcare payer’s master customer data must be the most accurate, up-to-the-minute source of customer information and must feed downstream systems (e.g., claims processing) as well as external vendors.

This panel of MDM healthcare pioneers will provide best practices insights into EMPI, HL7, and other healthcare industry trends concerning the digitalization of health care in North America. Panelists will focus on the MDM goals of improving efficiency, quality and decision making – by sharing and integrating member information within the healthcare payer. Topics to be discussed include:

- Beating the competition by improving quality of service while concurrently reducing costs – both back-office & front-office
- Enhancing customer service by empowering purchasers & members – i.e., by reducing clerical errors while improving retention rates of both individual members & purchasers’ plans via improved benchmark results
- Increasing levels of regulatory compliance & financial transparency

MODERATOR:

Aaron Zornes, Chief Research Officer, THE MDM INSTITUTE

PANELISTS:

Ed McCalister, CIO, WELLPOINT

Additional Panelists to be Announced

www.mdm-summit.com

For registration, call Arthur Glavas at 212.803.6063.

SourceMedia
CONFERENCES & EVENTS

MDM New York 2009

December 1-2, 2009 | New York Hilton/NYC

FOCUSED ON FINANCIAL SERVICES AND HEALTHCARE



AGENDA

Wednesday, December 2, 2009 (Continued)

11:30 A.M. – 12:15 P.M.

KEYNOTE 3: Active & Passive Data Governance

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 take a detailed look at the benefits and uses of each. Come away with tips for leveraging these models to reduce the possibility of business process interruptions. This keynote will highlight such best practices in proactive data governance as:

- Creating a data governance organization that can effectively manage complex data-related relationships, roles & scenarios
- Understanding how passive data governance allows users to interact directly with source systems to monitor results & identify data issues
- Recognizing how active data governance differs from passive data governance by providing a guided process for the introduction & management of data into selected systems

Tom Kennedy, *Founder & CTO*, BACKOFFICE ASSOCIATES, LLC



12:30 P.M. – 1:15 P.M.

Industry Innovation Sessions (IIS)/Lunch

IIS Lunch 1:

EXPERTS PANEL: MDM Business & Technology Strategies for the IT Executive

Governance is one of the distinctive characteristics of 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 panel discussion, MDM program veterans discuss how to solve the unique governance challenges posed by 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
- Rationalizing the considerations when choosing an MDM solution for a multi-entity MDM strategy

MODERATOR:

Jim Ericson, *Editorial Director*, INFORMATION MANAGEMENT

PANELISTS:

Elaine Bradshaw, *Senior Vice President*, MARSH USA

Nachhiket Desi, *VP, Enterprise Architecture & BI*, 1-800-FLOWERS

Bill Hewitt, *President & CEO*, KALIDO

Sandeep Manchanda, *Head of Information & Technology Management*, General Insurance, ZURICH FINANCIAL SERVICES

IIS Lunch 2:

EXPERT TESTIMONY: Building the Business Case for Health Care Provider MDM in Life Sciences

These days it is more important than ever to have a solid business case in order to push an MDM agenda. Traditional methods that focus exclusively on ROI analysis and other methods to identify 'hard benefits' are often met with resistance and skepticism from executive leaders. Today, Life Sciences companies are using compliance risks as well as top and bottom line improvement opportunities as key drivers of their MDM business case. In this presentation, Deloitte Consulting LLP will highlight examples of ways Life Sciences companies go about getting executive support for their Customer and Organizational MDM solutions – known in the industry as Health Care Provider MDM.

Key discussion points:

- Determining approaches to secure executive support for MDM as part of HCP program
- Communicating the benefits of MDM
- Identifying areas beyond HCP where Life Sciences companies have seen incremental benefits from an MDM implementation

David Rosner, *Principal*, DELOITTE CONSULTING LLP

Deloitte.

1:15 P.M. – 1:45 P.M.

Dessert Break in Exhibit Hall

www.mdm-summit.com

For registration, call Arthur Glavas at 212.803.6063.

SourceMedia
CONFERENCES & EVENTS

MDM New York 2009

December 1-2, 2009 | New York Hilton/NYC

FOCUSED ON FINANCIAL SERVICES AND HEALTHCARE



AGENDA

Wednesday, December 2, 2009 (Continued)

1:45 P.M. – 5:20 P.M.	Concurrent Sessions	
	Master Data Services Track	Data Governance/Data Quality Track
1:45 P.M. – 2:30 P.M.	<p>TRACK KEYNOTE: Best Practices in Master Data Services</p> <p>This session will highlight the best practices and do's and don't's from seasoned experts who will review and reveal critical information and need-to-know nuggets from the "data trenches" in the fields of master data services including customer data integration, data mining and more.</p> <p>Speaker to be Announced</p>	<p>EXPERT TESTIMONY: Field Reports on the Top 15 MDM Solutions</p> <p>Master data is a critical asset that must be increasingly synchronized within and beyond the enterprise. During 2009-10, many large enterprises will focus on MDM by deploying a 3rd generation database-centric infrastructure to deliver a panoramic customer view across multiple channels, business lines, and heterogeneous IT environments.</p> <p>This session will focus on the "why" and "how" of MDM technical evaluations for both scenarios by providing insight into:</p> <ul style="list-style-type: none">Validating the pros and cons of the dominant architectural models & evaluation criteriaInventorying the vendor landscapeApplying a rigorous methodology to MDM product evaluations & implementations for both mega vendor solutions & pure play <p>Aaron Zornes, Chief Research Officer, THE MDM INSTITUTE</p>
2:35 P.M. – 3:20 P.M.	<p>BEST PRACTICES: THE PRACTICAL REALITY OF OPEN SOURCE MDM</p> <p>Open source MDM is entering the early adoption stages and readying for mainstream use. Now that the products are on the market, organizations must be ready to answer these questions when posed by management: What MDM user cases are appropriate for open source MDM? What obstacles arise when introducing open source into the IT organization? What does open source mean to my existing investments in MDM? Why are people adopting "open source" MDM and data governance and what are the business benefits they realize? How does one build the business case using actual results? This session will provide insight into the scenarios where open source MDM makes sense and offer early adopter advice on how to overcome the classical challenges to adopting open source. Topics to be discussed include:</p> <ul style="list-style-type: none">Determining the impact/relevance of open source in the MDM & data governance marketsIdentifying & overcoming the challenges encountered using open source in the typical IT organizationLeveraging open source BI & ETL solutions to complement or augment MDM software offerings <p>Thomas Darbois, CIO, BOLLORE AFRICA LOGISTICS</p>	<p>BEST PRACTICES: ROI & Justification for Enterprise MDM</p> <p>In the current economic climate, it is difficult to justify Enterprise wide MDM based on qualitative benefits alone. When developing a MDM business case, it is important to use a structured model to drive out measurable business benefits that can be communicated effectively to all levels of the organization. This session will outline a structured approach to establish qualitative and quantitative business benefits. Key topics to be discussed include:</p> <ul style="list-style-type: none">Formulating a critical foundation to support MDM & ROI while establishing a structured plan to drive out the ROI with the businessDetermining a funding model to support Enterprise MDMIncorporating qualitative benefits & lessons learned for continuous data governance <p>Richard White, VP/Director MDM, AXA EQUITABLE</p>
3:20 P.M. – 3:45 P.M.	Networking Break in Exhibit Hall	

MDM New York 2009

December 1-2, 2009 | New York Hilton/NYC

FOCUSED ON FINANCIAL SERVICES AND HEALTHCARE



AGENDA

Wednesday, December 2, 2009 (Continued)

3:20 P.M. – 3:45 P.M.

Networking Break in Exhibit Hall

3:45 P.M. – 4:30 P.M.

EXPERT TESTIMONY: Establishing an Enterprise Data Governance Program

There are many business drivers requiring enterprises to institutionalize data governance (DG). Clearly, a strong DG function is integral to delivering reliable and usable business information. Moreover, strong and consistent DG enables the execution of an organization's business goals and develops information as a corporate asset.

This presentation will highlight best practices used to successfully jump-start an enterprise DG program at Computer Associates. SAP MDM for customer master data is the specific technology deployed for an end-to-end lifecycle approach. Key learnings from this MDM journey will be highlighted such as:

- Leveraging the strengths of SAP's tools & infrastructure to provide a rigorous change management process to manage data quality at various integration points
- Implementing an MDM repository solution to unify SAP MDM, ECC & salesforce.com
- Providing a robust & user friendly portal-based search functionality to provide one view of data across the enterprise

Sameer Goyal, *Manager, Applications Development*, COMPUTER ASSOCIATES

EXPERTS PANEL: MDM & Data Governance in Financial Services

Market-leading financial services providers are adding MDM capabilities to their list of strategic IT initiatives to: increase customer satisfaction and retention, increase profitability, create operational efficiencies, and meet compliance directives – as well as provide the economies of scale promised by M&A. Moreover, many business drivers are now requiring organizations to institutionalize data governance as a prerequisite capability to MDM. Technical challenges abound – from increasingly complex B2B2C business models to demand for “near real-time” data lineage. Based on their cumulative experiences, this panel will share practical insights on:

- Transforming early “success stories” within the program to generate ongoing management & business stakeholder enthusiasm
- Integrating new customer access channels (e.g., Internet) which complicate matching & merging of operational customer data
- Knowing your business case – especially marketing cross-sell & regulatory/compliance (Basel II)

MODERATOR:

Jim Ericson, *Editorial Director*, INFORMATION MANAGEMENT

PANELISTS:

John Fleming, *Head of Strategy and Governance for Client Data*, MERRILL LYNCH

Garry Katz, *SVP, Information Architecture, Area Manager* SMITHBARNEY/CITIBANK

4:35 P.M. – 5:20 P.M.

EXPERTS PANEL: Optimizing the First Six Months of Your MDM Program

This panel of experts will reveal their MDM programs from Day One -- researching vendors and how the decision was made on the best platform for their company -- to their Present Day data triumphs, failures & compromises.

MODERATOR:

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

PANELISTS:

Kris Linn, *Enterprise Architect Advisor*, HESS CORPORATION

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

CASE STUDY: The How & Why Of MDM & Data Governance

As you initiate the MDM program you will also recognize an inseparable bond between active data governance program and success of your MDM to deliver value. Most data governance groups have been passive (non-invasive) and engaged data stewards for subject matter expertise not for active ownership of data. Whether you are undertaking CDI or enterprise multi-domain MDM the need for active data governance across the master data management life cycle is must have. Challenges facing most MDM initiatives are:

- Understanding the virtues of single vendor software stack vs. multiple/best-of-breed MDM hubs to product-specific MDM solutions to integrate master data processes party master data (customers, suppliers, employees) & product master data
- Providing for business process management (BPM) workflows which are critical to achieve value from MDM by ensuring actual orchestration across both business units & master data hubs
- Integrating people & processes via the institutionalization of data governance to integrate, measure & manage metrics within the context of the master data lifecycle

Sravan Kasarla, *Head, Enterprise Information Architecture Practice*, MASSMUTUAL INSURANCE

5:20 P.M. – 7:00 P.M.

Networking Reception in Exhibit Hall

www.mdm-summit.com

For registration, call Arthur Glavas at 212.803.6063.

SourceMedia
CONFERENCES & EVENTS

MDM New York 2009

December 1-2, 2009 | New York Hilton/NYC

FOCUSED ON FINANCIAL SERVICES AND HEALTHCARE



Interested in sponsoring or exhibiting at the event? Time and space are running out, so please contact Tony Carrini, 212.803.8547 or anthony.carrini@sourcemedia.com for remaining opportunities!

Platinum Sponsors



EMC® Consulting

Supporting Sponsors



Deloitte.



Travel & Venue

Hilton New York

1335 Avenue of the Americas
New York, New York, 10019
<http://www1.hilton.com>

Room Rate: \$299 plus tax/night

Phone: 212.586.7000

Fax: 212.315.1374

Attire: Business Casual

SourceMedia has secured a block of rooms at a special discounted rate. Be sure to mention that you are a SourceMedia event participant. Rooms will be available on a first come first serve basis. Please make your reservations by November 13, 2009.

Welcome to Hilton New York!

Conveniently located at Radio City Music Hall & Rockefeller Center, the Hilton New York has the perfect location in the heart of midtown. The hotel is walking distance to Broadway theaters and Times Square, one block from Fifth Avenue shopping, and steps from legendary attractions such as MoMA, Central Park and Carnegie Hall. New enhancements include: an expanded lobby, a full-service Fitness Club and Spa, two lounges and two restaurants - including Etrusca and New York Marketplace, which is open for breakfast, lunch and dinner. Spacious guest rooms offer stylishly contemporary décor featuring wall-to-wall windows with views of the city skyline and high speed Internet access, while the upgraded accommodations in the Executive Level offer private check-in, complimentary Continental breakfast and a "hotel-within-a-hotel" experience. The Hilton New York is Midtown's premiere destination - designed for both the business and pleasure traveler alike.

Guest Accommodations

Indulge in first-class amenities and a spacious layout in our distinctive guest rooms. Choose from several different room types of restful New York City accommodations. Enjoy added features such as in-room thermostat control, 27 inch television, on-demand entertainment including video games, refreshment center, large work space, coffeemaker, and two telephones with voicemail and dataport.

4 Easy Ways to Register

Web: Visit us at www.mdm-summit.com

Mail: Mail registration form and payment to:
SourceMedia Inc., C & E
PO Box 71911
Chicago, IL 60694-1911

Fax: Fax your completed registration to
800.250.1811 or 212.803.8515

Phone: Phone in your registration to
Arthur Glavas at 212.803.606

Conference Pricing

Registration Information

Attendee Packages

Conference Only	\$795
Pre-Conference Workshops	\$199

www.mdm-summit.com

For registration, call Arthur Glavas at 212.803.6063.

