

MDM & DATA GOVERNANCE SUMMIT SAN FRANCISCO 2011

June 29-30, 2011
Hyatt Fisherman's Wharf
San Francisco, CA

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

MDM & Data Governance Summit
San Francisco 2011 is the only event that
equally focuses on MDM and data governance

**BACK BY
POPULAR DEMAND:**
Hear candid
field-based reviews
of MDM products

SUMMIT CHAIRPERSONS:



Jim Ericson
Editorial Director
Information Management



Aaron Zornes
Chief Research Officer
The MDM Institute

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information
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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.

MDM & data governance Summit San Francisco 2011 is the only event that equally focuses on MDM and data governance

- 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

Summit Chairpersons



Jim Ericson
Editorial Director
Information Management



Aaron Zornes
Chief Research Officer
The MDM Institute

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

Join us on **twitter**

Tweet your experiences, thoughts and ideas on Twitter with our official hashtag #MDMDG

“Conference was a good, fast-paced overview. Overall Summit was very good and provided useful information. Expert Testimony sessions were very good!” – David Bartholomew, Manager, Information Management Strategy, Southern California Edison

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Agenda

Wednesday, June 29, 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 Group A***
(Registration Requires Additional Fee)

Workshop One: 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 San Francisco 2011 experience in 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 & weighting – architectures, data models, SOA, identity management, etc.
- Reviewing case studies as templates for out-of-the-box MDM strategizing

Ed Allburn, *President, DATADELTA*

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

Workshop Two: 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) of the customer data governance desire? This real world workshop defines the jobs 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*

12:45 P.M. – 2:15 P.M. **Pre-Conference Workshop Group B***
(Registration Requires Additional Fee)

Workshop Three: MDM Reference Architectures Tutorial

Knowing the difference between MDM implementation styles and how they support your business is critical to the understanding what you need when you are looking for an MDM product to support your MDM endeavors. Understand the purpose of each MDM style and how to identify the MDM style that supports your needs. Know the critical path to MDM implementation. What are the main activities needed to support your MDM implementation and what activities are unnecessary. How important is SOA architecture to your MDM success. Know the functionality that needs to be in place to support MDM.

- MDM architecture explained in terms every one understands, including the Business
- Avoid pitfalls that cause MDM implementations to fail
- Understand the functionality that is supported by each MDM implementation style

Adam White, *President, GLOBAL DATA COMPETENCY*

Workshop Four: Sustainable Master Data Governance

Have you recognized the need for data governance to better manage an MDM or data warehousing project? You hear more about data governance as an enterprise initiative. Are you concerned that you will waste time and money by doing a tactical data governance project to meet the requirements of your technology project, when you know you will eventually need to do enterprise data governance? In this workshop, you will learn how to synchronize a "tactical" data governance project with a "strategic" data governance program to provide both short term and long term value to the organization. We will discuss those components of governance that are highly reusable across a project and a program, and which aspects may need more adjustment as you move from a tactical project to a strategic program.

Kelle O'Neal, *Managing Director, FIRST SAN FRANCISCO PARTNERS*

"I debated about attending, concerned about perceived value. The Conference exceeds my expectations because it confirmed our direction and provided additional nuggets of information. I would recommend the MDM Summit to my peers." –Lori Halfacre, Enterprise Architect, Fiservx

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Agenda | CONTINUED

Wednesday, June 29, 2011 | CONTINUED

2:30 P.M. – 4:05 P.M.

Birds-of-a-Feather Workgroups (Free to all attendees)

The toughest and most trying aspect of any new major IT investment decision is wading through the vendors and their references. Save time and money by meeting with seasoned veterans of all the leading MDM, CDI, PIM and data governance solutions.

We've brought together four "panels with the pros" comprised of 2-3 customers, 1-2 consultants, and a product marketing representative or two from each of the major MDM solutions providers. In just an afternoon, you will cycle through and have an opportunity to question (or listen to others' questions) from the below leading MDM solutions providers:

These are not scripted or staged "infomercials"... rather they are opportunities to meet with, and discuss implementation experiences and best practices from those who have begun their MDM journeys.

Whether you are evaluating one or more of these major MDM solutions, or are an existing customer of that solution, you will gain insight into how other major enterprises are managing their user of that product family for their MDM program(s).

2:30 P.M. – 3:15 P.M. Workgroup Set One (Please select one)	3:20 P.M. – 4:05 P.M. Workgroup Set Two (Please select one)
IBM Workgroup PANELISTS: Catherine Pedersen, ADOBE Additional Panelists to be Announced SAP Workgroup PANELISTS: William Giard, INTEL Additional Panelists to be Announced	Oracle Workgroup PANELISTS: Yuri Hirohashi, EDM Program Manager, Strategic Planning & Operations, AUTODESK Jay Kinzel, Account Intelligence Manager, SYMANTEC Additional Panelists to be Announced Informatica Workgroup Panelists to be Announced

4:15 P.M. – 5:30 P.M.

Pre-Conference Workshop (Free to all attendees)

Workshop Five: Product Evaluation Criteria and Field Reports for Top 15 MDM Solutions

Back by Popular Demand

MDM is now accepted by most enterprises as a key enabling and competitive technology – as well as a vital business strategy. 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
- Assessing the vendor landscape
- Applying a proven methodology to MDM product evaluations for both mega vendor solutions and pure play

Aaron Zornes, Chief Research Officer, THE MDM INSTITUTE

"Thanks for organizing a great conference.
Looking forward to next year!"
— Krishnam Kumandui, Director, Schwab

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Agenda | CONTINUED

Thursday, June 30, 2011

7:45 A.M. – 8:30 A.M.

Continental Breakfast: Exhibit Hall Grand Opening

8:30 A.M. – 9:30 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. In 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

9:30 A.M. – 10:15 A.M.

Platinum Keynote: Delivering Business Value with IBM MDM and Information Governance Presented by 

This joint IBM and customer presentation will focus on a major North American manufacturer, detailing the business value derived while utilizing MDM, as well as the technology and other choices involved in successfully delivering MDM to the business. As information 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 clients are realizing ROI by leveraging those principles. The presentation will answer these topics:

- Organizing for results in taking an MDM project from idea to impact
- Leveraging the experience of hundreds of other MDM programs to prioritize for best advantage and avoid common mistakes
- Quantifying business value derived from an MDM program, based on examples of actual customer benefits received

Ian Stahl, Product Marketing & Strategy, MDM, IBM SOFTWARE GROUP, INFORMATION MANAGEMENT/NK2A

10:15 A.M. – 10:45 A.M.

Networking Break in Exhibit Hall

10:45 A.M. – 11:30 A.M.

Analyst Keynote: Avoid Process Data Headaches: Align Data Management and Business Process Initiatives

Data management professionals drive master data management, data quality and data warehousing strategies to ensure delivery of a single, trusted enterprise view of data to the business, but they struggle with the business case and engagement with business stakeholders to support and participate in traditionally IT-driven efforts. Business process management professionals, on the other hand, understand the need for data but often only pay it lip service, doing little to take responsibility for ensuring quality data within their processes.

Data and process are inextricably linked — you need to trust your data to ensure the effective adoption and implementation of defined business processes and insights. Yet most process and data governance efforts are siloed and disconnected. In this keynote, discover Forrester's Process Data Management approach with best practices to achieve business process and data governance alignment and receive recommendations on how to develop the necessary roles and responsibilities to support this.

Rob Karel, Principal Analyst, FORRESTER RESEARCH

11:30 A.M. – 12:15 P.M.

Platinum Keynote: Master Data Management for the Business – Global Visibility Now Presented by 

You may be in the midst of an MDM project right now but what are the chances for success? Is MDM the same as data governance? Choosing the right data governance model depends on many factors. We'll discuss those factors and provide guidelines for getting your MDM/data governance initiative heading in the right direction. Many believe a successful MDM implementation will take months and sometimes years of custom development, but should it have to? With global visibility and access, you will monitor, measure, and produce metrics and global data standards leading to a high level of quality and consistency in your global data, no matter the system.

Tom Kennedy, Founder, BACKOFFICE ASSOCIATES

12:30 P.M. – 1:30 P.M.

Industry Innovation Lunches

IIS 1: Introducing 'Customer-on-the-Cloud' – An Effective Way to Manage Your Data on the Cloud Sponsored by  Cognizant

Economics, simplicity and the ability to address core business concerns have made the cloud revolution an effective strategy for modern enterprises. Master data management initiatives have not had the tools to leverage these advantages until now. Today, Cognizant introduces three such cloud enabled master data solutions and through this session you will gain a perspective on:

- The considerations for utilizing 'Customer-on-the-Cloud' for your enterprise master data needs
- Framework and ROI analysis that allows you to decide whether the cloud solution is right for you organization
- Details on the multiple cloud enabled master data solutions that Cognizant has to offer

Sriraj Rajaram, Senior Master Data Management Strategist, COGNIZANT

Dileep Srinivasan, AVP MDM, COGNIZANT

1:30 P.M. – 2:00 P.M.

Dessert in Exhibit Hall

New for
2011

"Fabulous Peers!!! Learned as much from them as from speakers!"

—Melanie Mecca, Enterprise Architecture Consultant,
Booz Allen Hamilton

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Agenda | CONTINUED

2:00 P.M. – 2:45 P.M. Concurrent Sessions

MASTER DATA SERVICES TRACK

TRACK KEYNOTE: To Be Announced

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DATA GOVERNANCE TRACK

TRACK KEYNOTE: To Be Announced

2:50 P.M. – 3:20 P.M. Concurrent Sessions

MASTER DATA SERVICES TRACK

CASE STUDY: Running the Business via Enterprise MDM

Our legacy customer master was implemented in 2003 when NetApp was a much smaller company when it was designed to meet specific needs of the Sales organization. NetApp's new Company Master enables multiple company roles (Prospect, Partner, Customer, etc.) while maintaining backward compatibility with currently integrated systems. This Company Master is designed as the foundation for both transactional and analytical applications. Mix in a data quality firewall, data governance, and enterprise hierarchy management, and you have true "enterprise MDM". This is the story of how we got here and where we're going, the visionary work that took place, the battles with the business, the strategy and execution to make it happen, and the vision for the future. Topics include:

- Kick starting data governance processes in a high growth environment
- Planning for the integration of CRM and data warehouse with MDM
- Evolving from single-domain MDM to multi-domain MDM in three years

Mike Deussen, Director, Enterprise Master Data Management, NETAPP

DATA GOVERNANCE TRACK

CASE STUDY: Successfully Selling an Enterprise MDM Program to the Executive Team

Are your business users complaining about wasting time searching for, managing and reconciling inconsistent customer data from multiple sources? Are you struggling to build and sell a business-focused financial case to the executive team for an MDM program to help solve these business challenges?

This case study highlights AutoTrader.com's successful approach to building and selling a compelling business case for MDM to address enterprise customer operational and analytical needs. The presentation will be given by the two individuals who created the vision, approach and implementation plan to sell a large infrastructure initiative with very significant business return within the first 18 months. Specific topics to be addressed include:

- Building a compelling business-focused approach to convince the executive team to begin an MDM program
- Making MDM "real" to the executive team to gain financial and operational support
- Projecting expected business capabilities delivered from a successful MDM program

John Head, Program/Solution Leader, AUTOTRADER.COM

Scott Salter, Senior Director of Enterprise Data & Shared Services, AUTOTRADER.COM

3:25 P.M. – 3:55 P.M. Networking Break in Exhibit Hall

3:55 P.M. – 4:25 P.M. Concurrent Sessions

MASTER DATA SERVICES TRACK

CHAIRMAN'S SESSION: Avoiding the SI Money Pit

The market for MDM and data governance services reached \$600 million during 2009 and will exceed \$950 million by 2012. Moreover, systems integrators (SIs) are essential to success of majority of MDM projects, yet previously incumbent SIs usually are no longer so. In a recent MDM Institute survey of more than 75 such programs, SIs have been seen as essential to the success of the majority of MDM projects, yet previously incumbent SIs are becoming less dominant. data governance assistance from SIs will remain especially critical to the success of MDM programs during 2011 as organizations deal with a shortage of tools, experience, and tool expertise.

Given the substantial investment businesses undertake with SI partners, the selection of the appropriate partner(s) must be given considerable scrutiny - not only to contain costs, but to insure success of these vital corporate MDM initiatives. This session provides a balanced view of:

- Understanding why SIs are essential to the success of your MDM and data governance projects
- Structuring how an enterprise should evaluate the capabilities of "new" potential SI partners
- Orienteering the SI landscape for both the traditional leaders as well as the new "dark horses"

Aaron Zornes, Chief Research Officer, THE MDM INSTITUTE

DATA GOVERNANCE TRACK

CASE STUDY: Implementing Data Governance at McGraw-Hill

In 2011, MDM and data governance are more about understanding how to engage your business processes successfully and who within your business is responsible. The specific focus on streamlining data can put pressure on your company to compete in today's marketplace unless you have a detailed data plan in mind. At McGraw-Hill, the implementation for data governance was a necessary one. This session will focus on the ins and outs of their implementation, as well as best practices in selecting a platform, getting all executives on-board, as well as defining a team to manage the process. Some take-aways include:

- Defining your data governance goals and developing an action plan on how to meet those goals
- Reiterating the importance of data governance and how to get everyone on board with the processes
- Designating a team to manage the process and determining next steps to maintain the momentum

Corri Russell, Director Customer Data Intelligence, MCGRAW-HILL

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Agenda | CONTINUED

4:30 P.M. – 5:00 P.M.

Concurrent Sessions

MASTER DATA SERVICES TRACK

CASE STUDY: Building a Business-Driven Enterprise Data Governance Program

SAP is a large, fast growing, global company. With more than 100,000 customers, 2,400 certified business partners, more than 53,000 employees, and two large acquisitions in the last five years, customer and product master data management and data quality are critical to our success. At SAP, enterprise data governance is a key business priority, driven by the business, aligned to our business strategy and enabled by enterprise information technology. But this was not always the case. Currently, we have a very successful enterprise data management organization reporting into the Line-of-business COO function, a key factor to our success. We also have business data leaders driving strategic data initiatives across other business units yet coordinated through a ONE-SAP data strategy. In this session, we will take you through our journey and highlight our best practices by discussing:

- Creating a compelling business case for enterprise data governance
- Organizing for enterprise data governance – from one project to many
- Achieving and maintaining business commitment and buy-in

Maria C. Villar, *Global Vice President, Data Management, SAP AG*

DATA GOVERNANCE TRACK

CASE STUDY: Enabling Business Agility through MDM & Data Governance of the Global Item

This session will discuss how Electronic Arts approached the challenge and successfully implemented a global MDM program spanning all Labels and all Item Types (digital and packaged). The organization defined a strategic vision spanning all Items, and related data (metadata, master data), including data quality management, and has implemented a global MDM program. This is now giving the company access to the correct Item and metadata definitions and has established a reliable data management process so that it can make better business decisions and run its business more effectively. Insights to be gained from this session include:

- Establishing a working global Master Data Organization (MDO)
- Creating a standard model for master data syndication to include ETL and EAI as appropriate
- Standardizing Item master across the global organization to enable both digital supply chain and packaged goods supply chain

Andy Georg, *Director of Operations & Global Data Steward, ELECTRONIC ARTS*
Mojapela Makau, *Sr. Engagement Manager, TATA CONSULTANCY SERVICES*

5:05 P.M. – 5:50 P.M.

Concurrent Sessions

MASTER DATA SERVICES TRACK

EXPERT PANEL: Best Practices in MDM for Product Master Data

Enterprises continue to expand the scope and discover new complexities as they seek a “single view” of product data. What starts out as an organization’s master product data soon becomes a complex PIM (product information management) program spanning other domains and use cases (such as enterprise architecture, analytical MDM, and NPI or PLM). Additionally, many organizations are continue to struggle with how MDM of product data relates to ERP, CRM, data warehouse, and other master data initiatives. The end result is that MDM of product data quickly becomes more complex and challenging for even type “A” IT organizations. This panel of experts has already navigated these certain of these journeys and will share their experience in:

- Rationalizing between PIM-flavored MDM or MDM-flavored PIM
- Preparing for Web-specific content, digital assets and records management as MDM converges across governance of product customer and location data
- Evolving from MDM of product data to multi-domain MDM

PANELISTS: Subhash Nair, *Enterprise Data Architect, SYMANTEC*

Additional Panelists to be Announced

DATA GOVERNANCE TRACK

EXPERT PANEL: Best Practices in 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 and 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: Mano Bashyam, *Chief Architect, YAHOO!*

Aaron Frank, *Data Governance Program Manager, SP&O Enterprise Data Management, AUTODESK, INC.*

Corri Russell, *Director Customer Data Intelligence, MCGRAW-HILL*

John Zacharakis, *Data Manager, ACTELION PHARMACEUTICALS*

5:50 P.M. – 7:00 P.M.

Networking Reception

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

Registration Information

Attendee Type	Early Bird 1	Standard
Premium Conference Package (includes workshops)	\$695	\$895
Conference Only	\$595	\$795
Conference Workshops	\$199	\$199
<i>Expiration Date</i>	<i>05/27/11</i>	