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June 2-3, 2010
Hyatt Regency San Francisco
San Francisco, CA

FOCUSED ON THE CONVERGENCE OF MDM AND DATA GOVERNANCE

- ▶ **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 marketeers
- ▶ **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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Event Co-Chairs



Aaron Zornes
Chief Research Officer
The MDM Institute



Jim Ericson
Editorial Director
Information Management

New to MDM San Francisco Summit 2010.



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

If you attend BOTH MDM San Francisco and MDM The Americas, use Code: **SF2 for \$300 off each event!** That is a savings of \$600 total!

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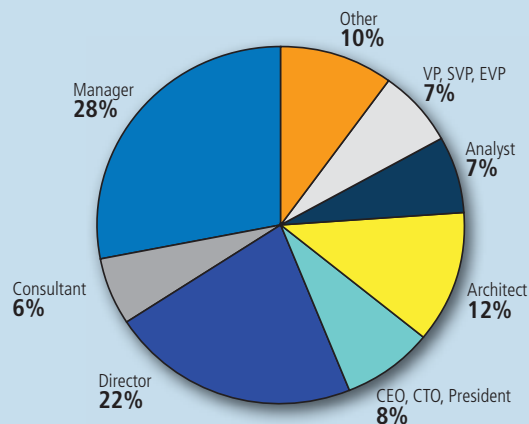


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Who Attends MDM Global Summits?

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

Visit <http://www.information-management.com/conferences/mdmsanfrancisco10/2009attendees.html> for a comprehensive list of previous attendee's job titles!

MDM2010 THE AMERICAS SUMMIT

Save The Date for the mega Three-day MDM Summit in New York City. Announcing

MDM The Americas, taking place October 3-5, 2010, at the Crowne Plaza Times Square, New York, NY.

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AGENDA

Wednesday, June 2, 2010

9:00 A.M. – 11:00 A.M.

Pre-Conference Workshop Set 1* * Pre-Conference Workshops are an additional fee

► 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 San Francisco 2010 experience in the following day. 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

Ed Allburn, *President*, DATADELTA

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

► Best Practices from IBM Data Governance Council

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 and businesses' ability to trust information
- Planning for the arrival of data governance frameworks that will define standards and best practices

Steve Adler, *CIPP, Director*, IBM DATA GOVERNANCE SOLUTIONS

11:15 A.M. – 1:15 P.M.

Pre-Conference Workshop Set 2* * Pre-Conference Workshops are an additional fee

► MDM Reference Architectures Tutorial (Registry, Transactional, Analytical)

Knowing the difference between MDM implementation styles and how they support your business is critical 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

► Leveraging a Tactical Data Governance Project into a Strategic Data Governance Program

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 Partner*, FIRST SAN FRANCISCO PARTNERS

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AGENDA

Thursday, June 3, 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 2010-15: The Convergence of MDM & Data Governance**

MDM remains particularly important in today's 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 ongoing 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 2010-11, 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. By 2013, MDM and data governance will reduce costs associated with data redundancy by 50% or more for most large enterprises.

This keynote will focus on a key set of strategic planning assumptions facing IT organizations during 2010-15:

- Understanding the current state of MDM & what the key trends & hot spots will be
- Identifying the best MDM software & services partners to reinforce industry best practices & game-change scenarios
- Forecasting how MDM will evolve in the next five years, & which vendors will dominate

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

10:00 A.M. – 10:45 A.M.



KEYNOTE: MDM IN 2010-2011: 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 intelligent 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..

IBM Speaker to be Announced

10:45 A.M. – 11:15 A.M.

Networking Break in Exhibit Hall

11:15 A.M. – 12:00 P.M.



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



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Thursday, June 3, 2010 (Continued)

1:30 P.M. – 5:05 P.M.	Concurrent Sessions	
	Master Data Management Track Sponsored by 	Data Governance Track Sponsored by 
1:30 P.M. – 2:15 P.M.	<p>➤ TRACK KEYNOTE: Extracting Business Value Through Quick Start Mdm & Data Governance Solutions</p> <p>Master Data Management is a powerful instrument when implemented effectively. MDM can harness the enterprise data assets to deliver agility, efficiency and competitive difference. This session describes how a quick start approach delivers successful solutions by focusing on three critical success factors:</p> <ul style="list-style-type: none"> • Delivering business value and ROI through process improvements • Realizing practical data governance programs through templates and tools • Adopting the best of breed execution style for scale and quick realization of benefits <p>Dileep Srinivasan, <i>AVP of MDM</i>, COGNIZANT TECHNOLOGY SOLUTIONS</p>	<p>➤ TRACK KEYNOTE: Best Practices in Data-Driven Data Governance</p> <p>Conventional data governance initiatives can often lose focus and effectiveness as scope wavers and expands. This is so because organizations understand that data quality is important, but have not clarified which data and which data metrics will drive the most significant business impact. This session will outline approaches to align data governance to critical business initiatives, thereby gaining business buy-in, focusing scope, and maximizing effectiveness of data governance initiatives. The session will cover the following:</p> <ul style="list-style-type: none"> • Leveraging the connection between key data elements & business needs to provide effective profiling & mapping • Creating data metric quality targets & keys to effective measurement • Establishing a data-oriented data governance organization <p>Joseph DosSantos, <i>Financial Services MDM Practice Lead</i>, EMC CONSULTING</p>
2:20 P.M. – 3:05 P.M.	<p>➤ POWER SESSION: Field Reports on the Top 10 MDM Solutions</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"> • Validating the dominant architectural models & 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 (IBM, Informatica, Microsoft, Oracle, SAP) & pure play (D&B/Purisma, DataFlux, IBI MD Center, Progress, Talend, Tibco) <p>Aaron Zornes, <i>Chief Research Officer</i>, THE MDM INSTITUTE</p>	<p>➤ EXPERT TESTIMONY: The Future of MDM Vendor Panel</p> <p>This session will bring the best and brightest vendors in the marketplace together for you, the audience, to probe candidly into their companies’ philosophies, along with possible plans for the future. Some of the hot topics on their radar that will be discussed include:</p> <ul style="list-style-type: none"> • Investigating SaaS, i.e. hosted MDM • Determining the importance of Semantic MDM, Mashups, text-mining, highly scalable MDM • Exploring Open-source MDM <p>Panelists to be Announced</p>

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Thursday, June 3, 2010 (Continued)

3:05 P.M. – 3:30 P.M.

Networking Break in Exhibit Hall

Master Data Management Track

Sponsored by  Cognizant

Data Governance Track

Sponsored by  EMC Consulting

3:30 P.M. – 4:15 P.M.

► CASE STUDY: Business Synchronization Benefits of PIM

This session will contrast old and new modes of Item Management by providing multiple case studies. Additionally, a benefit analysis of new features of Product Information Management (PIM) will be presented. Specifically, a case study on US wireless provider Cricket Communications will highlight how the firm implemented Oracle's Hyperion Data Relationship Manager for Retail Location master data in addition to Oracle's Product Hub for their catalog (rate plans, bolt-on features, handsets, accessories, fees, discounts). Lastly, the speakers will tie in another similar case study from Symantec where both Product and Customer information were concurrently "mastered" using the Oracle product set. Topics to be discussed include:

- Applying MDM to the PIM life cycle – from conception through go-to-market, & from ordering to end-of-life
- Rationalizing & architecting the intersection of Customer & Product domains to provide hierarchy management of product/service renewals
- Embedding quality throughout the PIM lifecycle processes

Colin Wilson, *Technical Integration Manager*, CRICKET WIRELESS
Joseph Raj, SYNCHRONIZ

► EXPERT TESTIMONY PANEL: Leveraging MDM & Data Governance First 6 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 master data governance programs as an concurrent approach to enterprise data integration
- Identifying and overcoming early stage, major obstacles

MODERATOR:

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

PANELISTS:

Grace Loisseau, SAFEWAY

ADDITIONAL PANELISTS TO BE ANNOUNCED

4:20 P.M. – 5:05 P.M.

► CASE STUDY: MDM Strategy & Roadmap in Fast Moving, Highly Regulated Industries

Actelion is a Swiss pharmaceutical company with operations in 32 countries, and \$2B revenues with US operations headquartered in the Bay area. The firm started on its MDM path in 2008 with the development of a custom solution for Prescriber profile data. As Actelion's market expanded and the complexity of the industry's regulatory landscape grew, it became apparent that a comprehensive MDM strategy had to be defined and implemented. In 18 months, Actelion has already made significant progress in implementing MDM subjects, party relationships, and hierarchies for compliance-driven applications such as Risk Mitigation and Aggregate Spend Management. Concurrently, MDM has also been integrated with existing decision support systems as the company ramps up its investments in DataFlux MDM solutions. This session will cover topics such as:

- Setting business objectives for an MDM initiative via program that demonstrates measurable results
- Determining a starting point by establishing what data to master first and why
- Leveraging insight into practical data stewardship and governance models

John Zacharakis, *Data Manager*, ACTELION PHARMACEUTICALS, US

► EXPERT TESTIMONY PANEL: Delivering Effective Master 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

MODERATOR:

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

PANELISTS:

Kira Chuchom, *Enterprise Data Governance*, CISCO SYSTEMS

Angie Couron, *Director of Data Governance*, VMWARE

Aaron Frank, *Manager, BI Competency Center & Enterprise Data Governance*, AUTODESK

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

5:05 P.M. – 6:30 P.M.

Networking Reception in Exhibit Hall

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Welcome to Hyatt Regency San Francisco!

Luxury and location converge in perfect balance at Hyatt Regency San Francisco. The only Four-Diamond downtown San Francisco hotel situated right on the Embarcadero waterfront, our guests will enjoy immediate access to both the Financial District and the city's most famous attractions. You'll find the historic Ferry Building on one side of our expansive San Francisco California hotel, the ferry to Alcatraz and the Bay on the other, and stunning views all around. With so many options, you may choose to wander through Chinatown to Fisherman's Wharf, shop in Union Square or board the cable cars for a riding tour of the city.

Guest Accommodations

Equally impressive are our extensive in-house amenities, with venues created to host any number of group events, tempting dining choices and, of course, the impeccable service that is the hallmark of our hotel in downtown San Francisco.

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Conference Pricing

Registration Information

Attendee Type	Early Bird 1	Standard
Expiration Date	04/30/10	
Premium Conference Package (Conference and Pre-Conference Workshops)	\$695	\$895
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