

THE RULES OF BUSINESS ARE CONSTANTLY CHANGING



# CAN YOUR BUSINESS KEEP UP?



12th INTERNATIONAL  
**BUSINESS  
RULES  
FORUM**

NOVEMBER 1-5, 2009  
BELLAGIO ■ LAS VEGAS, NV

[www.businessrulesforum.com](http://www.businessrulesforum.com)

## Leading Experts:



Ronald G. Ross  
Co-Founder &  
Principal,  
Business Rule  
Solutions, LLC  
Executive Editor,  
Business Rules  
Journal



Roger Burlton  
Founder  
BPTrends  
Associates /  
Process Renewal  
Group



James Taylor  
CEO,  
Decision  
Management  
Solutions



David Luckham  
Emeritus Professor  
Stanford University



Jim Sinur  
Vice President  
Gartner



John Rymer  
Principal Analyst,  
Forrester Research



Stephen Hendrick  
Group Vice  
President,  
Application  
Development &  
Deployment  
Research  
IDC

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BUSINESS RULES ENTERPRISE DESIGN BUSINESS PROCESS COMPLIANCE DECISIONING

**Register before September 18 and save \$300!**



Your enterprise undergoes change all the time—and faster every day. Entering into new markets. Introducing new products. Complying with new regulations. Making new agreements with customers and suppliers. Changing business direction through mergers, acquisitions, alliances and divestitures. Are your systems and procedures keeping up?

Business Rules Forum 2009 delivers the strategy and insight necessary to create an agile organization, in control of the business rules necessary to drive growth and meet market and structural challenges.

## BUSINESS RULES FORUM 2009 KEY TOPICS

- The value proposition for business rules
- Moving beyond bottom-up Data Quality and Process Improvement strategies
- Operational Decision Management as competitive advantage
- Single-sourcing changes to decision logic across business, organizational and platform boundaries
- Implementing agile applications with the flexibility to change as fast as your business rules change
- Using business rules to address regulation—and deregulation—successfully
- Ensuring auditability

## DID YOU KNOW BUSINESS RULES AND DECISIONING WERE ABOUT ALL THIS TOO?

### AGILE

Traditional programming technology tends to be resistant to change and utterly obscure to the business – not what an Agile project needs. Agile projects can engage stakeholders more effectively by adopting business rules as an approach and business rules management systems as a technology.

### BUSINESS PROCESS MANAGEMENT (BPM)

Identifying, automating and managing the decisions within a process are critical next steps for greater efficiency and effectiveness in organizations today. For smarter, simpler and more agile processes, you need business rules and enterprise decisioning.

### SERVICE-ORIENTED ARCHITECTURE (SOA)

One of the drivers for SOA is increasing agility – making it easier to dynamically reconfigure systems and thus businesses to meet the challenge of continuous change. Using business rules to deliver agile decision services can deliver the full promise of SOA for your organization.

### DATA MINING/PREDICTIVE ANALYTICS

Experienced data miners know that getting to an analytic result is just the beginning – to get real value you must put your analytics to work in day to day operations. Business rules and EDM provide the ideal platform for operationaliz-

ing analytics, enhancing expert judgment with automated analytics and ensuring high-quality decisions.

### BUSINESS INTELLIGENCE

As organizations struggle with the challenges of pervasive BI and operational business intelligence, many are turning to business rules and decision management. Old-school BI is not going to get it done. Becoming more decision-centric is the way forward.

### COMPLIANCE

Governance, compliance, risks and internal controls are mounting concerns. Forward-thinking organizations are exploring new ways in which compliance can be built-in. Business rule management systems offer exciting new solutions.

### LEGACY MIGRATION

Legacy migration projects often focus almost exclusively on technology platforms, but that's only one part of the real problem. Learn how other organizations are harnessing business rules and related technologies to harvest decision logic and enable robust legacy modernization.

## FIND OUT WHAT BUSINESS RULES AND DECISIONING CAN DO FOR YOU IN THESE CRUCIAL AREAS.

THE WORLD'S LARGEST AND LONGEST RUNNING INTERNATIONAL CONFERENCE ON BUSINESS RULES, CHAIRED BY THE RECOGNIZED "FATHER" OF THE BUSINESS RULES



**Conference Chair**  
**RONALD G. ROSS**  
Principal,  
Business Rule  
Solutions, LLC  
Executive Editor,  
BRCommunity.com, home  
of the Business Rules Journal



*Organize and automate  
complex decision-making.*



**Chaired by:**  
**James Taylor**  
CEO  
Decision Management  
Solutions

## Business Alignment Symposium

*Achieving challenging business  
performance objectives in difficult  
business environments.*



**Chaired by:**  
**Roger Burlton**  
Founder  
BPTrends Associates /  
Process Renewal Group

## CHANGE IS THE ONLY CONSTANT

Your enterprise undergoes change all the time—and this change gets faster every day. Entering into new markets. Introducing new products. Complying with new regulations. Making new agreements with customers and suppliers. Changing business direction through mergers, acquisitions, alliances and divestitures. Are your systems and procedures keeping up? Are you getting ahead of the curve or just falling behind?

Business Rules, Decisioning and Related Technologies Can Help You Achieve...

- Business Agility
- Higher Customer Satisfaction
- Analytic Decision-Making
- Revenue Growth
- Robust Compliance
- Competitive Advantage

**FIND OUT HOW AT THE  
FORUM CONFERENCES!**

## CONFERENCE EVENT SCHEDULE AT A GLANCE

Event:	Sunday, Nov. 1	Monday, Nov. 2	Tuesday, Nov. 3	Wednesday, Nov. 4	Thursday, Nov. 5	Friday, Nov. 6	Saturday, Nov 7
Pre/Post-Conference Tutorials	2:30-5:30pm	9am-4:30pm				9am-12pm	
Business Alignment Symposium		9am-4:45pm					
Forum Conference Sessions & EDM Summit			8:45am-5:30pm	8am-5:30pm	8am-5:30pm		
Fun Labs		4:45pm-6:45pm	2:05-4:05pm 5:30-7:30pm	2-4pm 4:30-6:30pm			
RulesExpo			7:30-9am 10-10:25am 12:30-2:05pm 4:10-4:30pm 5:30-7:45pm	10-10:25am 12:30-2:05pm 4:05-4:30pm 5:30-6:30pm			
RuleML					9am-5:30pm	9am-5:30pm	9am-12pm



The Largest Rules and Decisioning Product Expo ever held. Want to see the latest technology solutions? Over 25 vendors showcase the latest product innovations under one roof!



Test-drive the Vendors' Tools. Try them out on laptops and facilitated case studies provided by the vendors. Demystify the technology! Get a feel for what the tools can do!



# WHAT PAST ATTENDEES HAVE TO SAY...

**"I found Gladys Lam's presentations to be the best of the Forum!"**

*- Manager, National Financial Service Corporation*

**"A watershed event!"**

*- MIS Consultant, Major Accounting Firm*

**"Good mix of theory and practice!"**

*- Engineer & Chief Technical Strategist, Multinational Technology Services Firm*

**"Very good Conference from many perspectives -- arrangement, content and atmosphere!"**

*- CEO, IT Research Corporation*

**"One of the best Conferences I've been to"**

*- Consultant, Multinational Consulting Firm*

**"I've learned a lot about business rules and processes, the industry as a whole and the business rule customer."**

*- Software Engineer, Professional Services Corporation*

**"I learned so much and gathered enough material to be able to apply practices to our current approach to a business rules project."**

*- Business Analyst, Major Retail Chain*

**"The Forum is the focal point for maturation of this exciting new community. Keep up the good work!"**

*- ITS Director, Canadian Financial Institution*

**"Came to Conference unsure and skeptical -- came away convinced this is the way to go!"**

*- Program Director, Major Financial Institution*

**"WOW! Great Forum, highly informative with direct value to any company's ability to delivering business solutions."**

*- Business Consultant, National Retailer*

**"Great Conference. A lot of valuable information."**

*- Sr. Applications Architect, Multinational Financial Corporation*

**"Conference was an eye-opener to all aspects of business rules."**

*- Programmer/Analyst, Financial Institution*

**"The Conference was great! Very well organized, good speakers and topics!"**

*- Program Manager, Consulting Organization*

**"The lack of speakers using their sessions as selling platforms for their services or tools was refreshing and different. I really enjoyed the openness."**

*- Vice President, International Financial Institution*

**"Focus was very good. The technology is growing and these gatherings will go a long way to evolving the Business Rule Technology."**

*- Manager, International Financial Institution*

**"The session speakers were very informative about their business experiences with business rules."**

*- VP Software Development, Financial Services Corporation*

**"The tutorial and keynotes were excellent!"**

*- Business Architecture, Telecommunications Corporation*



# AGENDA OVERVIEW

## Pre-Conference Tutorials Schedule • Sunday, November 1, 2009

1:00 pm- 6:00 pm	Registration Open		
10:30 am- 11:45 am	<b>Business Rules from A - Z: What You Need to Know</b> Ronald G. Ross , Co-Founder & Principal, Business Rule Solutions, LLC Executive Editor, Business Rules Journal	<b>Maximizing the ROI of a Business Rules Investment with Decision Management</b> James Taylor, Decision Management Solutions, CEO	<b>Smart Use of Rules in Process</b> Kathy Long, Innovative Process Consulting, Inc., President

## Pre-Conference Tutorials Schedule • Monday, November 2, 2009

8:00 am- 7:00 pm	Registration Open	
8:00am- 9:00am	Continental Breakfast	
9:00 am - 12:00 pm	<b>Capturing Business Rules - From Facilitated Sessions, From Great Big Book and From Application Code</b> Gladys S.W. Lam, Business Rule Solutions, LLC, Co-Founder & Principal; Publisher (www.BRCcommunity.com)	<b>Driving Decisions with Predictive Analytics: The Top Seven Business Applications</b> Eric Siegel , President (Prediction Impact) & Conference Chair (Predictive Analytics World)
12:00 pm - 1:30 pm	Lunch	
9:00 am - 12:00 pm	<b>Using Business Analysis to Achieve Organizational Goals</b> Kevin Brennan, IIBA, Vice President, Business Analysis - Body of Knowledge	<b>Event Processing 2010: Past, Present and Future</b> David Luckham, Stanford University, Emeritus Professor
4:45 pm - 6:45 pm	Fun Labs	

## Pre-Conference Tutorials Schedule • Monday, November 2, 2009

8:00 am- 7:00 pm	Registration Open	
8:00am- 9:00am	Continental Breakfast	
9:00 am - 9:30 am	<b>Introduction by Symposium Leader</b> - Roger Burlton, BPTrends Associates / Process Renewal Group, Founder	
9:30 am - 10:15 am	<b>Becoming Strategy-Driven: Smarter Decisions, Smarter Processes and Smarter Architectures</b> - Ronald G. Ross , Co-Founder & Principal, Business Rule Solutions, LLC, Executive Editor, Business Rules Journal	
10:15 am - 10:30 am	Break	
10:30 am - 11:15 am	<b>Business Process Architecture and Performance Management: Linking Strategy to Capability</b> - Paul Harmon, BPTrends, Executive Editor; Roger Burlton, BPTrends Associates / Process Renewal Group, Founder	
11:15 am - 12:00 pm	<b>Performance Management and Agility</b> - James Taylor, Decision Management Solutions, CEO	
12:00 am - 1:15 pm	Luncheon featuring roundtable discussions with speakers and your peers	

continued



**Pre-Conference Tutorials Schedule • Monday, November 2, 2009** continued

1:15 pm - 2:00 pm	<b>Enterprise Alignment through Enterprise Architecture and Governance</b> - George S. Paras, EAdirections / Architecture & Governance Magazine, Managing Director (EAdirections) & Editor-in-Chief (Architecture & Governance Magazine)
2:00 pm - 2:45 pm	<b>Business Alignment Symposium Presentation</b> - Session 6, Watch this Space, Coming Soon
2:45 pm - 3:00 pm	<b>Break</b>
3:00 pm - 3:45 pm	<b>Aligned Project Portfolio Management</b> - Michael McDermott, Inside Business Architecture
3:45 pm - 4:45 pm	<b>Panel: Pulling It All Together: Symposium Faculty Panel Discussion</b> - Moderator: Roger Burlton, BPTrends Associates / Process Renewal Group, Founder

**Conference Schedule (Day 1) • Tuesday, November 3, 2009**

7:00 am - 7:30 pm	<b>Registration Open</b>				
7:30 am - 8:45 am	<b>Continental Breakfast in Exhibit Hall</b>				
8:45 am - 9:00 am	<b>Conference Welcome / Opening Remarks</b> - Gladys S.W. Lam, Business Rule Solutions, LLC, Principal & Conference Executive Director				
9:00 am - 10:00 am	<b>Keynote Presentation</b> - Jim Sinur, Gartner, Vice President				
10:00 am - 10:25 am	<b>Break in Exhibit Hall</b>				
<b>Tracks</b>	<b>TRACK 1 Case Studies</b>	<b>TRACK 2 EDM</b>	<b>TRACK 3 How To</b>	<b>TRACK 4 BPM</b>	<b>TRACK 5 Chief Architect</b>
<b>Track Chair</b>	Ronald G. Ross, Conference Chair	James Taylor, Decision Management Solutions	Gladys S.W. Lam Conference Executive Director	Roger Burlton, BPTrends Associates Process Renewal Group	
10:25 am - 11:25 am	<b>Construction of a Vision using the Business Rules Approach - We Did It!</b> Mark Myers, Northern California Power Agency (NCPA), Miranda Shumaker, Northern California Power Agency (NCPA)	<b>Using Business Intelligence to Enhance Decision Management Systems</b> David Proctor, Experian	<b>Dynamic Business Vocabulary - What's Up with That?</b> Kevin Chase, ING	<b>BPM, Collaboration and Social Networking</b> Sandy Kemsley, Kemsley Design	<b>Chief Architect Presentation</b> Session 1, Watch this Space, Coming Soon
11:25 am - 11:30 am	<b>Room Change</b>				
11:30 am - 12:30 pm	<b>Case Studies Presentation</b> Session 2, Watch this Space, Coming Soon	<b>From Raw Data to Proactive Decisions: Using Business Rules for Conditions-Based Maintenance</b> David Wilson, John Deere	<b>Adopting Business Rules Successfully: Getting Your Ducks All Lined Up</b> Gladys S.W. Lam, Business Rule Solutions, LLC	<b>Using Process Models to Detangle, Validate and Automate Business Rules</b> Dan Hlavac, State Farm Insurance	<b>Externalized Business Rules Enhance the Agility of Business Process Applications</b> Dr. M. A. Ketabchi, Savvion, Inc., President, CEO & Founder

continued



Conference Schedule (Day 1) • Tuesday, November 3, 2009 *continued*

12:30 pm - 2:05 pm	RulesExpo Exhibit Hall Open				
12:30 pm - 2:05 pm	Attendee Networking Lunch				
<b>Tracks</b>	<b>TRACK 1 Case Studies</b>	<b>TRACK 2 EDM</b>	<b>TRACK 3 How To</b>	<b>TRACK 4 BPM</b>	<b>TRACK 5 Chief Architect</b>
2:05 pm - 3:05 pm	<b>Top 10 Challenges in Adopting BRM</b> Marilee Lanhardt, State Farm Insurance	<b>Addressing the Challenges of Developing a Universal Decision Management Platform in an Emerging Company</b> Stephanie Alsbrooks, ThinkCash Financial, Kartheek Veeravalli, FICO	<b>Business Rules and Tables</b> Jan Vanthienen, K.U. Leuven	<b>Process Notations: A Picture is Worth a Thousand Words: But What Picture and What Language</b> Kathy Long, Innovative Process Consulting, Inc.	<b>Enabling Effective Business/IT Collaboration</b> Rik Gerrits, RuleArts, Colleen McClintock, IBM
3:05 pm - 3:10 pm	Room Change				
3:10 pm - 4:10 pm	<b>Improvements to the Operational Performance of a Data-collection Process with the Use of Business Intelligence and Business Rules</b> Johan Lammers, Statistics Netherlands	<b>Automating Commercial Underwriting Using Business Rules</b> Sundar Vallianayagam, Jarus Technologies	<b>Collecting, Connecting and Correcting the BPM Dots</b> Roger Burlton, BPTrends Associates / Process Renewal Group	<b>Business Rules and Business Events - Where CEP Helps Decisions</b> Paul Vincent, TIBCO	
4:10 pm - 4:30 pm	Break in Exhibit Hall				
4:30 pm - 5:30 pm	<b>Vendor Panel (In Exhibit Hall)</b> Moderator: Stephen D. Hendrick, IDC, Group Vice President, Application Development & Deployment Research	<b>A Practical Method of Developing Natural Language Rule Statements</b> Graham Witt, Ajilon, Lead Consultant	<b>WORKSHOP</b> <b>A Facilitated Peer-to-Peer Workshop: Turning Process and Models and Business Rules into Business System Requirements</b> Denise Owen, Business Rule Solutions, LLC, Kristen Seer, Business Rule Solutions, LLC	<b>Vendor Panel (In Exhibit Hall)</b> Moderator: Stephen D. Hendrick, IDC, Group Vice President, Application Development & Deployment Research	
5:30 pm - 7:45 pm	RulesExpo : Private Reception for Conference Attendees				

## Conference Schedule (Day 2) • Wednesday, November 4, 2009

8:00 am - 6:00 pm	Registration Open				
8:00 am - 9:00 am	Continental Breakfast in Exhibit Hall				
9:00 am - 10:00 am	<b>Keynote Presentation</b> - Stephen D. Hendrick, IDC, Group Vice President, Application Development & Deployment Research				
10:00 am - 10:25 am	Break in Exhibit Hall				
<b>Tracks</b>	<b>TRACK 1 Case Studies</b>	<b>TRACK 2 EDM</b>	<b>TRACK 3 How To</b>	<b>TRACK 4 BPM</b>	<b>TRACK 5 Chief Architect</b>
<b>Track Chair</b>	Ronald G. Ross, Conference Chair	James Taylor, Decision Management Solutions	Gladys S.W. Lam Conference Executive Director	Roger Burlton, BPTrends Associates Process Renewal Group	
10:25 am - 11:25 am	<b>It's a Wilder World - Introducing a Rules Methodology Part 2</b> Kathy Gorman, ICBC, Kristen Seer, Business Rule Solutions, LLC	<b>Maturing with Business Rules and Business Intelligence - The Combined Power</b> Sandeep Gupta, Equifax	<b>Rule Harvesting: How Externalization Produced A Manageable Crop</b> Bill Wright, The Hartford Kelly Johnson, The Hartford	<b>Business Rules and Business Processes: The Evolving Synthesis</b> Paul Harmon, BPTrends	<b>The Effects of Change on the Economy</b> Tom Debevoise, Innova- tions Software Technol- ogy Corporation, Troy Foster, Innovations Software Technology Corporation
11:25 am - 11:30 am	Room Change				
11:30 am - 12:30 pm	<b>West Bend Continues To Rule!</b> Jeff Wegner, West Bend Mutual Insurance Company	<b>EDM Presentation Session 7, Watch this Space, Coming Soon</b>	<b>Business Rules Governance and Management: A Case Study in the Public Sector</b> Eric Charpentier, Primatek Consulting, Inc.	<b>An Organizational Fitness Approach to Process Management</b> Michael McDermott, Enterprise Consultant	<b>Using Hard and Soft Rules to Define and Solve Optimiza- tion Problems</b> Dr. Barry O'Sullivan, Cork Constraint Compu- tation Centre, Dr. Jacob Feldman, OpenRules, Inc.
12:30 pm - 2:00 pm	Attendee Networking Lunch				
12:30 pm - 2:00 pm	RulesExpo Exhibit Hall Open				
11:30 am - 12:30 pm	<b>Enterprise Business Rules Repository that is Rule Engine Inde- pendent and its Ben- efits</b> Shikha Khan, Freddie Mac	<b>Decisioning; Counter- party Risk for Finan- cial Markets</b> Zachary Springborn, OneData, LLC	<b>First Hundred Days of a BPM</b> Jim Sinur, Gartner, Vice President		<b>Enhancing Customer Experience with En- terprise Decision Management: A Case Study</b> Mike Betzer, Convergys Corporation

*continued*



Conference Schedule (Day 2) • Wednesday, November 4, 2009 *continued*

3:00 pm - 3:05 pm	Room Change				
<b>Tracks</b>	<b>TRACK 1 Case Studies</b>	<b>TRACK 2 EDM</b>	<b>TRACK 3 How To</b>	<b>TRACK 4 BPM</b>	<b>TRACK 5 Chief Architect</b>
3:05 pm - 4:05 pm	<b>Special Practitioner's Panel (in Exhibit Hall)</b> Moderator: Gladys S.W. Lam, Business Rule Solutions, LLC	<b>Five Ways to Lower Costs with Predictive Analytics</b> Eric Siegel, Prediction Impact & Predictive Analytics World	<b>Special Practitioner's Panel (in Exhibit Hall)</b> Moderator: Gladys S.W. Lam, Business Rule Solutions, LLC, Principal & Conference Executive Director		<b>Business Rules in the Integration Tier: The System of Record</b> David Read, Blue Slate Solutions
4:05 pm - 4:30 pm	Break in Exhibit Hall				
4:30 pm - 5:30 pm	<b>A Methodology for Evaluating Business Rule Management Software (BRMS) in Large Organizations</b> David Goldstein, RuleAgents, Inc. Ming Su, US Patent and Trademark Office	<b>Integrating Predictive Analytics and Business Rules Management to Enhance Insurance Marketing Strategies</b> Mo Masud, Deloitte Consulting Laura Ward, Deloitte Consulting	<b>Questions =&gt; Discover How They Can Lead Us to Rules</b> Cindy Scullion, Business Rule Solutions	<b>WORKSHOP</b> <b>A Facilitated Peer-to-Peer Workshop: BPM as a Service: Product, Challenges and Issues</b> Sandy Kemsley, Kemsley Design	<b>WORKSHOP</b> <b>A Facilitated Peer-to-Peer Workshop: Semantic Processes, Services and Events</b> Paul Haley, Automata, Inc.

Conference Schedule (Day 3) • Thursday, November 5, 2009

8:00 am - 4:00 pm	Registration Open				
8:00 am - 9:00 am	Continental Breakfast in Exhibit Hall				
9:00 am - 10:00 am	Smarter Systems for Uncertain Times - James Taylor, Decision Management Solutions				
10:00 am - 10:25 am	Room Change				
<b>Tracks</b>	<b>TRACK 1 Case Studies</b>	<b>TRACK 2 EDM</b>	<b>TRACK 3 How To</b>	<b>TRACK 4 BPM</b>	<b>TRACK 5 Chief Architect</b>
<b>Track Chair</b>	Ronald G. Ross, Conference Chair	James Taylor, Decision Management Solutions	Gladys S.W. Lam, Conference Executive Director	Roger Burlton, BPTrends Associates, Process Renewal Group	
10:25 am - 11:25 am	<b>Case Studies Presentation</b> Session 12, Watch this Space, Coming Soon	<b>Verbish Models</b> Ronald G. Ross, Co-Founder & Principal, Business Rule Solutions, LLC Executive Editor, Business Rules Journal		<b>Business Event Driven Enterprises Rule!</b> Brian Dickinson, Logical Conclusions, Inc.	<b>The Business Rule - Business Analyst Connection</b> Kathleen Barrett, IIBA

*continued*

## Conference Schedule (Day 3) • Thursday, November 5, 2009 continued

11:05 am - 11:20 am	Break				
<b>Tracks</b>	<b>TRACK 1 Case Studies</b>	<b>TRACK 2 EDM</b>	<b>TRACK 3 How To</b>	<b>TRACK 4 BPM</b>	<b>TRACK 5 Chief Architect</b>
11:20 am - 12:20 am	<b>SBVR Distilled: Essence of Business Rules</b> Keri Anderson Healy, BRCommunity.com	<b>Taking a Decision Focused Approach to Business Rules Analysis</b> Lee Lambert, New Wisdom Software Marcy L. Perks, P.A.H.M., Independence Blue Cross	<b>How To / BPM Presentation</b> Session 12, Watch this Space, Coming Soon		<b>Standards for Business Rules</b> John Hall, Model Systems
12:20 am - 1:40 p	<b>Attendee Boxed Lunch &amp; Panel Discussion — "Rules on the Web"</b> <b>Co-Presented by the Business Rules Forum and RuleML - Moderator: John Hall, Model Systems</b>				
1:40 pm - 2:40 pm	<b>SBVR Distilled: Essence of Business Rules</b> Keri Anderson Healy, BR-Community.com, Editor	<b>Consolidated Customer View - Integrating Rules with Data to Drive Consistency</b> Alex Raul Pascua, Toyota Canada Inc.	<b>The Exception that Confirms the Rule</b> Silvie Spreuwenberg, LibRT	<b>How Business Rules and Processes Fit Together</b> Jan Vanthienen, K.U. Leuven	<b>Unique Design of Enterprise Wide Business Rules Engine for Fortune 20 Pharmaceutical Company</b> Dale Danilewitz, AmerisourceBergen Specialty Group Steve Widom, Chordial Solutions Inc.
2:40 pm - 2:45 pm	Room Change				
2:45 pm - 3:45 pm	<b>Emerging Trends &amp; Decision Panel - Moderator: Kristen Seer, Business Rule Solutions, LLC</b>				

## Post-Conference Tutorials Schedule • Friday, November 6, 2009

9:00 am - 12:00 pm Break 10:30 am - 10:45 am	<b>Business Process Innovation: Beyond Continuous Improvement</b> Roger Burlton, BPTrends Associates / Process Renewal Group, Founder
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## PRE-CONFERENCE TUTORIALS

Sunday | 2:30 pm - 5:30 pm

### Business Rules from A - Z: What You Need to Know



**Ronald G. Ross**  
*Co-Founder & Principal, Business Rule Solutions, LLC*  
*Executive Editor, Business Rules Journal*

What are business rules, and how can you apply them effectively in your organization? What pitfalls have other organizations encountered, and how can you avoid them? How can you get up to speed about the very latest in the field?

This tutorial tells you what you need to know to get into the express lane for business rules. It provides clear, authoritative insight into the essential concepts, techniques and tools. Find out what you need to know to be successful in your organization on a point-by-point basis, amplified by far-ranging professional experience.

Cut through the hype about technology, methodology and standards. Learn about the key areas of practical importance to your company. If you are looking for a way to get the latest and best scoop on what's happening, this tutorial is for you. Come prepared with questions you want answered! What You Will Learn:

- What business rules are and why they matter
- How business rules will help you achieve true agility
- How to capture and manage business rules
- Fitting business rules into requirements process ... and into your organization
- Pitfalls, lessons learned and best practices
- The latest trends and emerging standards

Sunday | 2:30 PM - 5:30 PM

### Maximizing the ROI of a Business Rules Investment with Decision Management



**James Taylor**  
*CEO*  
*Decision Management Solutions*

Those who want to get the most out of their adoption of business rules technology must adopt a business discipline focused on business decision making. They must understand the kinds of decisions they have, how these fit into

their operational environment and how business rules can be used to manage those decisions. This class will cover the principles of Decision Management, its application to critical business processes and decisions and the appropriate use of available technology. It will show you how to identify and prioritize the operational decisions that drive your organization's success, introduce business rules as a foundation to automate these decisions, link these decisions to data mining and predictive analytics and discuss how to ensure continuous improvement and competitive advantage using adaptive control. The class will cover:

- Introduction to Decision Management
- Decision Discovery
- Decision Services
- Decision Analysis
- Decisions in Processes, Events and Systems
- Getting Started – First Steps

Sunday | 2:30 PM - 5:30 PM

### Smart Use of Rules in Process



**Kathy Long**  
*President*  
*Innovative Process Consulting, Inc.*

Do you have volumes of paper with pictures of processes that no one ever uses?

Many organizations are involved in "Process Improvement" efforts and create process models that become meaningless due to the time and resources required to keep them current. What You Will Learn:

How to avoid process models that are created and referenced once then never used again How the documentation of Business Rules as part of the process influences the elements of reuse, adaptability and flexibility in the models themselves Through hands on experience in simple workshops, how to document business processes with techniques that will enable an organization to keep their models current well beyond their initial creation



## PRE-CONFERENCE TUTORIALS continued

Monday | 9:00 AM - 12:00 PM

### Capturing Business Rules - From Facilitated Sessions, From Great Big Book and From Application Code



**Gladys S.W. Lam**  
*Co-Founder & Principal; Publisher (www.BR-Community.com)*  
*Business Rule Solutions, LLC*

Business Rules should come from the business. However, you cannot simply ask business people to come together and then multiply rules.

In this session, Ms. Lam will present a comprehensive approach for gathering business rules from business experts using facilitated sessions. Ms. Lam will also discuss the steps required to harvest rules from great big source documents and share her experience on reverse engineering business rules from application code. This session discusses:

- How to coordinate facilitated sessions to collect business rules, including preparation, objectives, agenda and documentation for each session
- The four primary business model deliverables – Policy Charter, Workflow, Fact Model, and Business Rules
- Techniques for capturing, presenting and documenting the deliverables
- A pragmatic way of harvesting rules from great big source documents
- The steps for reverse engineering rules from application code
- The differences between process rules and decisioning rules
- Lessons learned and pitfalls to avoid

Monday | 9:00 AM - 12:00 PM

### Driving Decisions with Predictive Analytics: The Top Seven Business Applications



**Eric Siegel**  
*President (Prediction Impact) & Conference Chair (Predictive Analytics World)*

The value proposition is straight-forward and proven: Predictive analytics produces business rules that deliver. The customer predictions generated by predictive analytics' business rules deliver more relevant content to each cus-

tomers, improving response rates, click rates, buying behavior, retention and overall profit.

Harnessing value with predictive analytics depends on some careful choices: What kind of customer behavior you predict and which operational decisions you automate with it. This workshop will guide you in making these choices, and cover a healthy dose of the core technology along the way – in a “user-friendly” manner that makes the concepts intuitive, illustrating with detailed case studies. What you will learn:

- How predictive analytics automatically derives rules for decision automation by learning from experience
- The top seven business applications of analytically optimized rules
- What business rules produced by predictive analytics look like and how they work

Monday | 1:30 PM - 4:30 PM

### Using Business Analysis to Achieve Organizational Goals



**Kevin Brennan**  
*Vice President, Business Analysis - Body of Knowledge*  
*IIBA*

Business analysis involves understanding how organizations function to accomplish their purposes and defining the capabilities an organization requires to provide products and services to external stakeholders. It includes the definition of organizational goals, understanding how those goals connect to specific objectives, determining the courses of action that an organization has to undertake to achieve those goals and objectives, and defining how the various organizational units and stakeholders within and outside of that organization interact. Over the last five years, IIBA has worked to understand and define the increasingly critical role of the business analyst. This session will summarize the results of that research, help you understand what business analysts do, and how they can help organizations be successful. What you will learn:

- What does a business analyst do?
- What are the most important skills a business analyst needs to have?
- How can business analysts become more effective in their role?
- What are the factors that have driven the growth of the

## PRE-CONFERENCE TUTORIALS continued

- Business Analysis profession?
- What do you need to consider if you are a Business Analyst – or want to be one – both today and tomorrow?

Monday | 1:30 PM - 4:30 PM

### Event Processing 2010: Past, Present and Future



**David Luckham**  
*Emeritus Professor  
Stanford University*

This tutorial on Complex Event Processing (CEP) will cover six topics.

- **Developing markets for event processing** — a short survey of the growth of CEP in enterprise management applications and Business Activity Monitoring.
- **History** — Event processing 1950-2000.

- **Adopting event processing** — how to analyze your event processing requirements and plan a solution.
- **A survey** of basic CEP concepts and their applications.
- **Crossing the Chasms** — the four stages in the development of event processing from 2000 to 2050. The need to improve the CEP technology in commercial tools and applications.
- **The age of ubiquitous CEP** — event processing goes global and disappears under the hood. Scenarios of current and future applications.

What you will learn:

- What Complex Event Processing is
- How to apply CEP to solve business problems and improve your BI operations
- How CEP enhances Service Oriented Architectures, Business Process Management, and Business Rules systems

## BUSINESS ALIGNMENT SYMPOSIUM

Monday | 9:00 AM - 9:30 AM

### Introduction by Symposium Leader



**Roger Burlton**  
*Founder  
BPTrends Associates / Process Renewal Group*

Welcome to the Business Alignment Symposium

Monday | 9:30 AM - 10:15 AM

### Becoming Strategy-Driven: Smarter Decisions, Smarter Processes and Smarter Architectures



**Ronald G. Ross**  
*Co-Founder & Principal, Business Rule  
Solutions, LLC  
Executive Editor, Business Rules Journal*

If you want your business processes and HR and IT architectures to become smarter, it is logical that your approach must be business strategy-driven. Citing illustrations from real-life enterprises, Ron Ross will show how being strategy-driven means having consistent criteria to judge what to do in a timely fashion regardless of the

circumstances. This session will set the criteria for evaluating everything that is done in the enterprise and the determination of what to change to sustain performance.

- The elements of strategy – drivers, ends, means and assessments
- Dealing with constant change and massive complexity
- How to achieve measurable alignment
- Continuously smarter business processes, capabilities and decisions

Monday | 10:30 AM - 11:15 AM

### Business Process Architecture and Performance Management: Linking Strategy to Capability



**Paul Harmon**  
*Executive Editor  
BPTrends*



**Roger Burlton**  
*Founder  
BPTrends Associates / Process Renewal Group*

This session will explore the benefits of a well-defined Business Process Architecture based on corporate strategy and stakeholder analysis. Successful organizations have



## BUSINESS ALIGNMENT SYMPOSIUM

*continued*

learned the value of having a traceable process hierarchy and an enhanced balanced scorecard enabling senior executives to monitor, manage and modify their processes in response to rapidly changing market conditions. This session will show you how to establish a process architecture and performance management system that works.

- What are the Benefits of a Business Process Architecture
- What are the Criteria for an Effective Business Process Architecture
- Techniques and Tools for the Development and Enhancement of an Effective Business Process Architecture
- How to Manage and Measure Business Process Architecture
- Relationship Between a Business Process Architecture and an Enterprise Architecture

Monday | 11:15 AM - 12:00 PM

### Performance Management and Agility



**James Taylor**  
CEO

*Decision Management Solutions*

Significant investments have been made in performance management systems that purport to enable organizations to manage better day to day but also to govern change. These management systems are useful since they identify opportunities and threats. Many of these decision making and change management processes, however, react too slowly for today's pace. Are companies focusing on instrumentation to the detriment of agility? How much more value could you realize if you could more rapidly and accurately change your systems to exploit these opportunities or address these threats? What if you could look at your dashboard and respond to what you learned by directly changing the way your systems, and thus your company, behave? This session will discuss:

- The need to balance performance monitoring and decision management to maximize both awareness and agility.
- How Decision Management transforms your investment in instrumentation into an investment in agility.
- How Agility translates to direct impact on your key business priorities-cost competitiveness, differentiation, customer retention and growth.

- How Agile systems make your whole enterprise more responsive to change.

Monday | 1:15 PM - 2:00 PM

### Enterprise Alignment through Enterprise Architecture and Governance



**George S. Paras**

*Managing Director (EAdirections) & Editor-in-Chief (Architecture & Governance Magazine) EAdirections / Architecture & Governance Magazine*

Achieving ambitious, large scale enterprise transformation demands unique competencies and perspectives, different from those required for day-to-day project execution and operations. It requires an enterprise view of alignment, bridging big-picture strategy consistently into hundreds of smaller scale implementation and operational decisions. Enterprise Architecture (EA) and effective Governance are two of those critical competencies. This session will explore the techniques and approaches that leading organizations use to institutionalize these core management disciplines, reaching beyond the IT department to create a true partnership with business leadership.

- How to sort out competing Business, IT and EA priorities
- Perspectives: Strategic vs. Tactical, Enterprise vs. Project, Process vs. Content
- The Enterprise View – Capabilities, Portfolios and Roadmaps
- Alignment deliverables for the executive and models for EA consumer
- The human challenge – Culture, People, Persuasion, Roles, Responsibilities

Monday | 3:00 PM - 3:45 PM

### Aligned Project Portfolio Management



**Michael McDermott**

*Consultant  
Inside Business Architecture*

Most business enterprises have significantly more requests for resources than can be provided. These resource requirements can be operational requests to run the business and they can be requests to fund change in capability to run the business for better performance. One of the toughest challenges today, as always, is allocating the right resources to the right work at the right time all the time. Strategic intent, business process architecture,



## BUSINESS ALIGNMENT SYMPOSIUM

*continued*

enterprise architecture and a governance mechanism should be able to guide an aligned portfolio of work that could be done to change capability. Effective management of the portfolio of all business changes considered together and not just in their own domains is needed to make the right resource allocation decisions. Matching demand with the supply of the financial and human resources required to deliver the results and reconciling internal political pressures is the tough part of the juggling act.

- Business Strategy, Process Architecture & Enterprise Architecture as the foundation for a portfolio of work
- Managing a portfolio to identify and grow profitable engagements
- Identifying the current change portfolio and resource

- commitments
- Balancing unanticipated requirements with current commitments
- Juggling the portfolio in real time

Monday | 3:45 PM - 4:45 PM

### Panel: Pulling It All Together: Symposium Faculty Panel Discussion



**Moderator: Roger Burlton**  
*Founder*  
*BPTrends Associates /*  
*Process Renewal Group*

Panel Discussion featuring **Roger T. Burlton, Ronald G. Ross, Paul Harmon, James Taylor, Geroge S. Paras, Clay Richardson and Michael McDermott.**

## FORUM CONFERENCE SESSIONS

Tuesday | 9:00 AM - 10:00 AM

### Keynote Presentation



**Jim Sinur**  
*Vice President*  
*Gartner*

Keynote presentation

Tuesday | 10:25 AM - 11:25 AM | Case Studies Track

### Construction of a Vision using the Business Rules Approach - We Did It!



**Mark Myers**  
*Enterprise Analyst*  
*Northern California Power Agency (NCPA)*



**Miranda Shumaker**  
*Business Analyst*  
*Northern California Power Agency (NCPA)*

In the beginning, there was a Vision. That Vision was supported by a foundation of Business Rules. During inspection others who lacked the same foundation discovered their framing to be weak and unstable; while those with the Vision, with the Foundation, passed inspection and

moved on to complete their construction project without losing one night's sleep. What you will learn:

- How to build a strong foundation of Business Rules
- How to construct Business Alignment with a strong framework
- How to achieve Business Agility with the Business Rules Approach

Tuesday | 10:25 AM - 11:25 AM | EDM Track

### Using Business Intelligence to Enhance Decision Management Systems



**David Proctor**  
*Director Product Management*  
*Experian*

Using business intelligence and customer analytics, decision management systems are more powerful and effective. This session will focus on a case study where business intelligence was used as a key input to creating new business rules. The session will also discuss best practice for implementing decision management systems and services based on a variety of different business needs.

## FORUM CONFERENCE SESSIONS

*continued*

Tuesday | 10:25 AM - 11:25 AM | How To Track

### **Dynamic Business Vocabulary - What's Up with That?**



**Kevin Chase**  
*Senior Vice President, Group Implementation  
Services*  
ING

Not all business vocabulary is static, and doesn't fit neatly into the vendors' demos. ING provides outsourced pension administration services to a variety of companies. A static business vocabulary doesn't meet the needs of multiple clients, and the ever changing regulatory landscape. See how ING learned to dynamically introduce new business vocabulary in order to keep up with the rapid pace of change in the pension world. What you will Learn:

- What is "dynamic" business vocabulary.
- How to extend the concept of "user defined fields" into your business rules. Applications have done it for years, why not rules?
- How to work with your IT group to build a flexible business object model, and combine that with the underlying data model.

Tuesday | 10:25 AM - 11:25 AM | BPM Track

### **BPM, Collaboration and Social Networking**



**Sandy Kemsley**  
*BPM Analyst and System Architect*  
Kemsley Design

Collaboration and social networking are starting to impact our business process and our business rules. Business processes are being defined collaboratively by multiple process designers across an organization, and users can now interact more collaboratively while executing a task within a process if that helps them to complete the task. Not only does this change how processes are designed and executed, but it has an impact on the tacit business rules that emerge during the course of that collaboration. What You Will Learn:

- How social software, or "Enterprise 2.0", is impacting BPM — culturally, technologically and economically
- Barriers to adoption
- Expectations for future innovations and impacts

Tuesday | 11:30 AM - 12:30 PM | EDM Track

### **From Raw Data to Proactive Decisions: Using Business Rules for Conditions-Based Maintenance**



**David Wilson**  
*Service Marketing Project Manager*  
John Deere Construction & Forestry Division

The machine maintenance environment today is flooded with data. The challenge for the industry is to not only understand what the data is telling us, but also how to interpret it in such a way that decisions can be made to proactively manage machine health. What You Will Learn:

Best practices for leveraging expert knowledge to turn raw data from multiple sources into useful information. How to use this information to make proactive decisions. How to use these decisions to control long-term asset costs.

Tuesday | 11:30 AM - 12:30 PM | How To Track

### **Adopting Business Rules Successfully: Getting Your Ducks All Lined Up**



**Gladys S.W. Lam**  
*Principal & Conference Executive Director*  
Business Rule Solutions, LLC

A journey of a thousand miles begins with a single step. Where do you begin with business rules adoption? What do you need? What is your organization's vision? This presentation focuses on business-side adoption. It covers all the topics you need to know about — from sponsorship to tools, from skill sets to personality profiles, and from proofs of concept to centers of excellence.

This presentation will discuss ...

- Objectives, scope, sponsorship level, techniques, and tools
- How to decide which path you want to go down
- Real-life examples of business rule projects and how they turned out
- How to assess where your organization stands
- The Proteus Business Rule Maturity Model

## FORUM CONFERENCE SESSIONS

*continued*

Tuesday | 11:30 AM - 12:30 PM | BPM Track

### Using Process Models to Detangle, Validate and Automate Business Rules



**Dan Hlavac**  
*Business Analyst/Architect*  
*State Farm Insurance*

Our project started with a seemingly easy question: How do we know if a member of our sales force is eligible to sell one of our products? Using process modeling techniques, we detangled complex business rules stemming from differing state regulations and company policies. What you will learn:

Leverage process modeling techniques to gain business partner trust and move toward automation  
Tackle the big elephant in the room by having a solid plan and connecting the right dots with the right people  
Overcome sacred corporate dogmas

Tuesday | 11:30 AM - 12:30 PM | Chief Architect Track

### Externalized Business Rules Enhance the Agility of Business Process Applications



**Dr. M. A. Ketabchi**  
*President, CEO & Founder*  
*Savvion, Inc.*

Defining a business process for building process applications often requires you to define business rules that determine process routings and compute critical parameters. These could be simple process routings and calculations, or governed by a set of complex rules base. This rules base may be owned by a unit of enterprise different than who owns the process and it may be shared among multiple processes. Such a rule base should be externalized and defined in a way that it can be changed without needing to change the process application. Externalizing rules makes business process models more comprehensible and enhances the agility of the application. What You Will Learn:

- What are different types of business rules?
- How business rules are incorporated in process?
- How to ensure agility of your rules based process applications?

Tuesday | 2:05 PM - 3:05 PM | Case Studies Track

### Top 10 Challenges in Adopting BRM



**Marilee Lanhardt**  
*Business Analyst*  
*State Farm*

BRM concepts and rule technologies have been around for years. So, why are organizations so slow to adopt Business Rules Management and rules-related technologies? In this session we'll share the Top 10 Challenges in Adopting Business Rules Management within an organization – from both a Business and IT perspective. What you will learn:

- What the Challenges are
- Why they exist
- What you can do to tackle these challenges

Tuesday | 2:05 PM - 3:05 PM | EDM Track

### Addressing the Challenges of Developing a Universal Decision Management Platform in an Emerging Company



**Stephanie Alsbrooks**  
*Director*  
*ThinkCash Financial*



**Kartheek Veeravalli**  
*Consultant*  
*FICO*

This case study presents the approach and solutions for the numerous challenges faced during designing and developing a Decision Management System in an emerging company requiring new rules and strategies. A right combination of internal business logic control and outsourcing of non core business systems enabled the team to build a flexible and scaleable system for the business in addition to controlling CAPEX and OPEX. Learn how predictive analytics, decision simulation and optimization can help make connected decisions and implement improved business strategies. What You Will Learn:

- Challenges and approach
- Internal development vs. outsourcing
- How to improve business strategies

## FORUM CONFERENCE SESSIONS

*continued*

Tuesday | 2:05 PM - 3:05 PM | How To Track

### Business Rules and Tables



**Jan Vanthienen**  
*Professor in Business Information Systems  
K.U. Leuven*

When modeling and managing complex business logic in real business situations, we want to ensure the quality of the set of business rules from the start. Decision tables have proven a useful aid in modeling and maintaining complex business situations in a simple manner, thereby avoiding common anomalies, such as: redundant, conflicting, subsumed or missing rules. What you will learn:

- Concept, objectives and application areas of rule tables
- The decision table and alternative representations: trees, rules, spreadsheets
- Verification and validation by construction
- Experiences with the modeling and representation of business rules by business experts in real business situations

Tuesday | 2:05 PM - 3:05 PM | BPM Track

### Process Notations: A Picture is Worth a Thousand Words: But What Picture and What Language



**Kathy Long**  
*President  
Innovative Process Consulting, Inc.*

Confused about which notation to use? Which method or which tools? Well, join the crowd. Most people are confused and frustrated with the graphical aspect of process and clearly fail to understand how powerful the "right" picture can be to an analyst. What You will Learn:

What the real differences are between the various approaches, why the distinction is important. Why you need to care about what the picture looks like and what notations will allow you to create the "right" picture.

How to create a graphical representation that is maintainable and clearly indicates the major opportunities in the process.

Tuesday | 2:05 PM - 3:05 PM | Chief Architect Track

### Enabling Effective Business/IT Collaboration



**Rik Gerrits**  
*Chief Architect, CTO  
RuleArts*



**Colleen McClintock**  
*Product Manager  
IBM*

The business rule approach and its supporting technologies enable a new level of business/IT synergy. Business rules can be expressed, organized, and managed from a business perspective, and traceability can be maintained between the business rules and their implementation in automated business decisions. In this presentation we will demonstrate how business and IT can more effectively collaborate to achieve shared organizational objectives. What you will learn:

- Where the boundary is between the rules of the business and those of IT
- What information about rules should be exchanged between business and IT
- How IBM and RuleArts have provided an integrated approach and what's next

Tuesday | 3:10 PM - 4:10 PM | Case Studies Track

### Improvements to the Operational Performance of a Datacollection Process with the Use of Business Intelligence and Business Rules



**Johan Lammers**  
*Project Manager  
Statistics Netherlands*

The data collection process within Statistics Netherlands is redesigned. The core of this redesign is Contact and Relations Management (CRM). CRM is crucial in aligning various channels to collect information from persons, households and enterprises. Efficiency and effectiveness depends on the appropriate use of channels and questionnaires. Combining information from CRM, ERP, HRM and previously collected data delivers the arguments to reach optimal decisions. Furthermore this solution will generate information to monitor the processes. Both parts require business ruling. What You Will Learn:

## FORUM CONFERENCE SESSIONS

*continued*

- How information is integrated and reported
- How business decisions are supported by rules
- How rules are applied to use the information

Tuesday | 3:10 PM - 4:10 PM | EDM Track

### Automating Commercial Underwriting Using Business Rules



**Sundar Vallianayagam**  
CEO  
*Jarus Technologies*

One of the key challenges facing the Insurance industry is the cost and time for Commercial Insurance underwriting. Automating commercial underwriting is faced with many challenges: frequent changes to underwriting criteria, complex pricing and risk selection. In this session we will present an award winning solution that combines business rules and predictive analytics for risk selection and to get accurate pricing. What You Will Learn:

- How a large Insurer has automated underwriting, enabling agents to quote and bind in a single session
- Incorporating predictive analytics model into real-time underwriting process
- How business analysts are able to maintain and test rules using advanced frameworks

Tuesday | 3:10 PM - 4:10 PM | BPM Track

### Collecting, Connecting and Correcting the BPM Dots



**Roger Burlton**  
Founder  
*BPTrends Associates / Process Renewal Group*

A classic challenge in process work is affectionately called 'connecting the dots'. But in order to connect them you have to 'collect' them first. Once these have been discovered and assembled they can be analyzed and 'corrected' using a variety of techniques appropriate for the problem at hand. Repeatable patterns of collecting, connecting and correcting can be found at all levels of BPM including Enterprise BPM, BP analysis and design, and also implementation of aligned technology and human solutions. This session will delve into the opportunities for re-use of BPM techniques at all levels.

- Information gathering (Collecting)
- Modeling (Connecting)
- Analysis and Design (Correcting)

Tuesday | 3:10 PM - 4:10 PM | Chief Architect Track

### Business Rules and Business Events - Where CEP Helps Decisions



**Paul Vincent**  
CTO, Business Rules and CEP  
*TIBCO*

Decision services are well-established as enforcers of decision rules in managed business applications. However, businesses can now use generic, event-driven decision services, both to identify important business events and to make the necessary required decisions. The techniques and tools to provide this are often classified as "Complex Event Processing" or CEP.

CEP is subsequently being used increasingly in financial services, logistics, healthcare, telecommunications, energy, and defense applications. We look at the close relationship between events and business rules, using appropriate case studies. What You Will Learn:

- How managed decisions are as relevant to event-driven systems as they are to batch-oriented or people-oriented systems
- Where events fit in the realm of business rules
- How businesses are event-driven, and how event-driven decisions match many business problems

Tuesday | 4:30 PM - 5:30 PM | Panel Track

### Vendor Panel (In Exhibit Hall)



**Moderator: Stephen D. Hendrick**  
Group Vice President,  
Application Development  
& Deployment Research  
*IDC*

Mr. Hendrick has published research over the last 13 years in each of these areas as well as leading research efforts in adaptive systems, IDC's Worldwide Professional Developer Model, and IDC's Worldwide Software Developer Collaborative. Mr. Hendrick is responsible for advising clients on market and technology directions as well as directing supply and demand-side primary research to size, forecast, and segment the application development tools market.

## FORUM CONFERENCE SESSIONS

*continued*

Tuesday | 4:30 PM - 5:30 PM | How To Track

### A Practical Method of Developing Natural Language Rule Statements



**Graham Witt**  
*Lead Consultant*  
*Ajilon*

This presentation describes a practical method of developing rule statements that are in natural language (thus able to verified by stakeholders) and unambiguous (thus able to be implemented consistently within the organisation and the parties with which it deals). The author has developed this method for a large Australian government agency that has selected the Business Rules Approach and the Object Management Group's Semantics of Business Vocabulary and Business Rules (SBVR)[1] as representative of best rules practice. It involves:

- a detailed taxonomy of rules
- the use of templates and subtemplates to generate well-formed rule statements

Tuesday | 4:30 PM - 5:30 PM | BPM Track

### WORKSHOP

### A Facilitated Peer-to-Peer Workshop: Turning Process and Models and Business Rules into Business System Requirements



**Denise Owen**  
*Associate Consultant*  
*Business Rule Solutions, LLC*



**Kristen Seer**  
*Senior Consultant*  
*Business Rule Solutions, LLC*

Wednesday | 9:00 AM - 10:00 AM

### Keynote



**Stephen D. Hendrick**  
*Group Vice President, Application*  
*Development & Deployment Research*  
*IDC*

Wednesday | 10:25 AM - 11:25 AM | Case Studies Track

### It's a Wilder World - Introducing a Rules Methodology Part 2



**Kathy Gorman**  
*Manager, Business Transformation Services*  
*ICBC*



**Kristen Seer**  
*Senior Consultant*  
*Business Rule Solutions, LLC*

Last year, you heard about the challenges faced by the Insurance Corporation of BC in implementing a business rules methodology in conjunction with a complete overhaul of the business analysis function. What has happened in the intervening year? Did they find a practice manager? Are the business analysts using the methodology? Were the pilot projects successful? What was the reaction of the business partners to the changes? The presentation will reveal all this and more. It will cover:

- Establishing a Competency Center
- Pilot projects vs. mandated use
- Keeping the momentum going
- The importance of mentoring

Wednesday | 10:25 AM - 11:25 AM | EDM Track

### Maturing with Business Rules and Business Intelligence - The Combined Power



**Sandeep Gupta**  
*VP, R&D*  
*Equifax*

This session will delve into the advanced concept of how to harness the strengths of Business Rules and Business Intelligence to provide strategic value for business decisions. Each tool independently provides significant business values, however, application of business rules to aggregated data observations from business intelligence tools produces results which otherwise can only be produced by experts of the field. What you will learn:

- Most typical problems solved by BRMS and BI tools in financial industry space
- Options of combining BRMS and BI tools
- What can you expect and challenges?
- Where does the industry stand today?



## FORUM CONFERENCE SESSIONS

*continued*

Wednesday | 10:25 AM - 11:25 AM | How To Track  
**Rule Harvesting: How Externalization Produced  
A Manageable Crop**



**Bill Wright**  
*Business Rules Architect  
The Hartford*



**Kelly Johnson**  
*Senior Business Analyst  
The Hartford*

A case study of the methodology used to externalize rules within 13 COBOL modules responsible for The Hartford's execution of the Safe Driver Insurance Plan. The SDIP contains rules for application of policy surcharges associated to a driver's risk history. This effort reduced 1000+ hard-coded rules to a manageable set of 150 reusable, template-structured rules. What You Will Learn:

- Our approach to SEPARATE rules from the programming
- How TRACEABILITY to rule origin was documented and utilized EXTERNALIZING the harvested rules to a non-technical expression
- How our rules now POSITION us for change

Wednesday | 10:25 AM - 11:25 AM | BPM Track  
**Business Rules and Business Processes:  
The Evolving Synthesis**



**Paul Harmon**  
*Executive Editor  
BPTrends*

This talk will look at the recent evolution of business rules and business process technologies and practices. We will consider key steps in their evolution, where each is today, and how, despite a fundamentally different conceptual approach, they are likely to evolve into a common technology in the near future. This session will focus on the following:

- Key events in the evolution of rules-based thinking
- Key features of rule based approaches and methodologies
- Key features of rule based approaches and

- methodologies
- Key features of today's business process methodologies
- The nature of the likely synthesis of the two approaches

Wednesday | 10:25 AM - 11:25 AM | Chief Architect Track  
**The Effects of Change on the Economy**



**Tom Debevoise**  
*Senior Vice President  
Innovations Software Technology Corporation*



**Troy Foster**  
*Chief Technology Officer  
Innovations Software Technology Corporation*

Decision or risk models can no longer stay static in a world of turbulent change, and financial losses associated with old models being applied to new conditions are almost unfathomable. Empowering those who manage the systems that calculate and measure risk is critical to the survival of today's organizations. What You Will Learn:

- How and why organizations such as financial institutions, insurance firms and manufacturing companies use Business Rules to comply with new standards and regulations
- How models can be calibrated to observed or anticipated responses to change
- How Business Rules empower risk managers and change the paradigm of risk management

Wednesday | 11:30 AM - 12:30 PM | Case Studies Track  
**West Bend Continues To Rule!**



**Jeff Wegner**  
*Senior Business Process Analyst  
West Bend Mutual Insurance Company*

West Bend Mutual (WBM) has offered commercial and personal property/casualty insurance in the Midwest since 1894. WBM prides itself on innovative products, steady growth, financial stability, as well as its reputation for legendary customer service. WBM adopted a business rules approach ultimately culminating in the successful launch of a new product offering – realizing true business agility. Join us to hear how WBM continues to Rule! Learn about our:

- Approach Maturity
- Go-Live Stories
- Lessons Learned

## FORUM CONFERENCE SESSIONS

*continued*

Wednesday | 11:30 AM - 12:30 PM | How To Track

### **Business Rules Governance and Management: A Case Study in the Public Sector**



**Eric Charpentier**  
*Consultant*  
*Primatek Consulting, Inc.*

Implementing Business Rules Governance and Management is a demanding but essential task to ensure the success of present and future initiatives in your organization. This presentation will discuss:

- What do you need to think about?
- What are the best practices?
- A case study
- Lessons learned

Wednesday | 11:30 AM - 12:30 PM | BPM Track

### **An Organizational Fitness Approach to Process Management**



**Michael McDermott**  
*Enterprise Consultant*

Improving Organizational Fitness is the key to running a successful BPM effort.

We will examine the six systems that influence organizational fitness. We will explore these systems and their relationship to process. Finally, we will examine ten common techniques for influencing the processes that support these systems. What you will learn:

- Organizational Fitness as the key to BPM
- The Organizational Systems
- The Configurable Elements
- The Points of Influence

Wednesday | 11:30 AM - 12:30 PM | Chief Architect Track

### **Using Hard and Soft Rules to Define and Solve Optimization Problems**



**Dr. Barry O'Sullivan**  
*Associate Director*  
*Cork Constraint Computation Centre*



**Dr. Jacob Feldman**  
*CTO*  
*OpenRules, Inc.*

In this presentation we will show how to define optimization problems using hard and soft rules. While every solution of the problem must satisfy hard rules, soft rules can be broken to a certain degree. We will use a scheduling example to show how a problem defined by business rules can be solved as a constraint satisfaction problem using a constraint solver.

What you will learn:

- how to define hard and soft rules using constrain programming
- how to control the degree of rules violations
- how to use a rule engine and a constraint solver to represent and solve a scheduling problem

Wednesday | 2:00 PM - 3:00 PM | Case Studies Track

### **Enterprise Business Rules Repository that is Rule Engine Independent and its Benefits**



**Shikha Khan**  
*Application Project Manager / Rules Architect,*  
*Business Rules Center of Excellence (BR\_COE)*  
*Freddie Mac*

Business rules should be expressed in the natural language of business. An Enterprise rules engine independent Business Rules Repository empowers the business to maintain a common vocabulary of terms that closely integrates with a business concept. It enables business users to express rules in the natural language of business. The Rules are visible to business users and promotes reuse of business rules. This presentation demonstrates how business success is achieved by externalizing Rules from policies, procedures etc and maintained in a Repository. What you will learn is how to:

- Define terminology and business concepts according to the business domain
  - Enforce rule dependency on terms, facts and concepts
- Benefits of a central Repository



## FORUM CONFERENCE SESSIONS

*continued*

Wednesday | 2:00 PM - 3:00 PM | EDM Track

### Decisioning; Counterparty Risk for Financial Markets



**Zachary Springborn**  
COO  
*OneData, LLC*

The last 12 months have been incredibly strenuous for financial market participants. OneData has developed rules based systems to develop risk management applications for financial market participants using the complete data set of Counterparty Link, Ltd. This allows users to:

- Effectively assess counterparty risk by aggregating securities at their ultimate parent level
- Use decisioning tools to effectively assess overall counterparty risk
- Automatically perform real-time counterparty risk assessment to lower overall risk exposures.

What you will learn:

- Organizational Fitness as the key to BPM
- The organizational systems
- The configurable elements
- Layering for process concerns

Wednesday | 2:00 PM - 3:00 PM | BPM Track

### First Hundred Days of a BPM



**Jim Sinur**  
Vice President  
*Gartner*

Wednesday | 3:05 PM - 4:05 PM | Chief Architect Track

### Enhancing Customer Experience with Enterprise Decision Management: A Case Study



**Mike Betzer**  
President, Relationship  
Management Technology  
*Convergys Corporation*

Learn how a Fortune 50 company sought a decisioning platform to help them increase customer satisfaction and reduce thousands of calls to agents for simple, recurring

inquiries. They implemented an enterprise decision management system to proactively provide customized, personalized messages to specific customers that would meet the consumers' needs while improving call containment and agent call deflection. You Will Learn:

How a leading Fortune 50 company improved call containment to almost 93% by implementing intelligent notification based on repeat inquiries.

How the company integrated an enterprise decision management system with their existing Interactive Voice Response (IVR) to provide personalized customer assistance. Why customer experience enrichment and cost containment are no longer mutually exclusive propositions.

Wednesday | 3:05 PM - 4:05 PM | Case Studies Track

### Special Practitioner's Panel (in Exhibit Hall)



**Moderator: Gladys S.W. Lam**  
Principal & Conference Executive Director  
*Business Rule Solutions, LLC*

Wednesday | 3:05 PM - 4:05 PM | EDM Track

### Five Ways to Lower Costs with Predictive Analytics



**Eric Siegel**  
President (*Prediction Impact*) & Conference  
Chair (*Predictive Analytics World*)

How does predictive analytics actively deliver increased returns? By driving operational decisions with predictive scores – one score assigned to each customer.

But, in tough times, our attention turns away from increasing returns, and towards decreasing costs. On top of boosting us up the hill, can predictive analytics pull us out of a hole? Heck, yes. Marketing more optimally means you can market less. By predicting churn, customers may be retained more efficiently. And more. What You Will Learn:

- How customer prediction drives decision automation in order to lower costs
- Five ways predictive analytics lowers costs without decreasing business

## FORUM CONFERENCE SESSIONS

*continued*

Wednesday | 3:05 PM - 4:05 PM | How To Track

Wednesday | 2:00 PM - 3:00 PM | Chief Architect Track

### **Business Rules in the Integration Tier: The System of Record**



**David Read**  
CTO  
*Blue Slate Solutions*

Business rules are more than components of a business application. Rules apply meaning to data. This presentation explores the fact that data may be misinterpreted or incorrectly modified if separated from the rules. Given the focus on intra- and inter- company system integrations, having a consistent interpretation of data is vital. What You Will Learn:

- How to identify which rules and data need to be linked within their own organizations
- How to ensure system integrations are appropriately leveraging business rules to encapsulate the data
- What other organizations are doing to ensure there is a consistent interpretation of their data

Wednesday | 4:30 PM - 5:30 PM | Case Studies Track

### **A Methodology for Evaluating Business Rule Management Software (BRMS) in Large Organizations**



**David Goldstein**  
Lead Consultant  
*RuleAgents, Inc.*



**Ming Su**  
US Patent and Trademark Office

Large organizations have costly infrastructure to be considered in significant software purchases. Business rules projects must consider only organizational resources as well as diverse stakeholders impacted by both the effort and software. Conversely, a vendor's large reward for enterprise-wide adoption fosters keen interest. This paper discusses a methodology to examine numerous candidate tools for satisfying organization's detailed business rule re-

quirements. What You Will Learn:

- How to structure an evaluation to ensure infrastructure compatibility
- How an evaluation process can address the needs of diverse stakeholders
- How to structure an evaluation process to accommodate large numbers of respondents

Wednesday | 4:30 PM - 5:30 PM | EDM Track

### **Integrating Predictive Analytics and Business Rules Management to Enhance Insurance Marketing Strategies**



**Mo Masud**  
Senior Manager  
*Deloitte Consulting*



**Laura Ward**  
Senior Consultant  
*Deloitte Consulting*

The commercial Property & Casualty insurance industry has been using predictive analytics and business rules management to enhance decision making within its underwriting process for several years. However they been slow to extend to other business processes. This session examines how predictive analytics and business rules management can be used to enhance agency marketing strategies in the insurance industry including:

- Applying predictive analytics and business rules management for smart lead generation
- Applying predictive analytics and business rules management for new agency appointments and retention
- Taking an Enterprise wide view of predictive analytics and business rules management

Wednesday | 4:30 PM - 5:30 PM | How To Track

### **Questions => Discover How They Can Lead Us to Rules**



**Cindy Scullion**  
Senior Consultant  
*Business Rule Solutions, LLC*

Does your organization have a lot of questions that need to be answered? Are you unsure what to do with the answers once you get them?



## FORUM CONFERENCE SESSIONS

*continued*

Discover how to utilize questions to drive the organization of the information. Once organized, discover how to effectively obtain the answers your organization is looking for. This presentation will illustrate a roadmap – starting with the questions and finishing with the business rules. Along the way, you will discover the importance of facts and terms. Learn:

- How to dissect questions
- How to organize terminology
- How to utilize business rules

Wednesday | 4:30 PM - 5:30 PM | BPM Track

### WORKSHOP

#### A Facilitated Peer-to-Peer Workshop: BPM as a Service: Product, Challenges and Issues



**Sandy Kemsley**  
*BPM Analyst and System Architect*  
*Kemsley Design*

This will be a facilitated audience conversation to discuss what's happening in the emerging area of BPM offered via a software-as-a-service model. Many vendors are leaping into the field, with mixed results, but there are still a lot of challenges to using it within organizations: legal, cultural and technological. Bring your experiences with BPM as a service, or your thoughts on why it would or wouldn't be adopted within your organization.

Wednesday | 4:30 PM - 5:30 PM | Chief Architect Track

### WORKSHOP

#### A Facilitated Peer-to-Peer Workshop: Semantic Processes, Services and Events



**Paul Haley**  
*Founder*  
*Automata, Inc.*

Semantic technology provides the most general and flexible form of data modeling along with logical and rule-based capabilities. A new wave of semantic tools and standards, including models of time, events, and processes promise to align enterprise data modeling, application development, service-oriented architecture and business process management more closely with the perspectives of knowledge management and business rules practition-

ers. What we will discuss:

- How semantic standards extend model-driven architecture to knowledge management
- How semantic architectures and models unify SOA and BPM, including events
- How semantics increases the impact of business intelligence and activity monitoring
- How BPMN, SBVR, PRR and complex event processing do or don't intersect

Thursday | 9:00 AM - 10:00 AM

### KEYNOTE

#### Smarter Systems for Uncertain Times



**James Taylor**  
*CEO*  
*Decision Management Solutions*

In an uncertain world, businesses require agility more than ever. Agile businesses cannot be bound by fixed or hard to change systems. Equally the realities of the modern business environment do not allow for manual processes and purely human decision making. Outsourcing, customer service delivered through complex business webs, a need for real-time response and huge data volumes all force the issue – we must automate processes and decision-making. Yet we must ensure this automation gives us flexibility to change our approach, allows us to experiment and sets us up to learn.

This keynote shows applying Decision Management to existing systems builds in agility, supports experimentation and ensures our systems learn from the data they collect.

Thursday | 10:05 AM - 11:05 AM | EDM Track

### Verbish Models



**Ronald G. Ross**  
*Co-Founder & Principal,*  
*Business Rule Solutions, LLC*  
*Executive Editor, Business Rules Journal*

If it were as simple as designing data models or class diagrams, our industry would have resolved all the 'big' problems many years ago. But it's not that simple.

## FORUM CONFERENCE SESSIONS

*continued*

In particular, there is the problem of how your company can make better, more consistent, more agile operational decisions. Related to that challenge is how it can retain knowledge in a form that is traceable, manageable and re-deployable. Last but not least is the need to express business rules, communicate operational business know-how, and develop requirements. All these things have to do with verbalization.

Most IT techniques for designing data models or class diagrams have always been noun-ish – oriented ultimately to the things to be stored in databases or managed in computer memories. But there has always been a verbish counterpart, best typified by the fact models of Terry Halpin and Sjr Nijsen. This presentation explains what you need to know about verbish models.

What fact models offer

- How to reduce ambiguity to a minimum
- The ABCs of effective business vocabulary development
- A pragmatic, proven, well-grounded approach to semantics
- How to be more effective in day-to-day work with business rules

Thursday | 10:05 AM - 11:05 AM | BPM Track

### **Business Event Driven Enterprises Rule!**



**Brian Dickinson**  
*President*  
*Logical Conclusions, Inc.*

I'll make this short:

After all the corporate and government seminars I've taught, all the books I've written and all the conference talks I've given, I can emphatically say: "There is no better way to model and implement an organization than with Event-Driven concepts."

Let me prove this to you in this talk. You'll learn:

- What is "Event-Driven" and what is an Event in the business world?
- How is Event Partitioning different than what is typical in business today?
- How can you become a Customer Focused, Event Driven organization?

- Utilizing an Event-Driven strategy will truly differentiate your business from the rest.

Thursday | 10:05 AM - 11:05 AM | Special Interest Track

### **The Business Rule - Business Analyst Connection**



**Kathleen Barrett**  
*President and Chief Executive Officer*  
*IIBA*

Article 1.1 of the Business Rules Manifesto got it right – Rules are first-class citizens of the requirements world. Requirements documents without business rules are just a collection of features with no function.

And Business Analysts are the champions of the business rule because they recognize how essential rules are to specifying the functions and solutions that best meet the business' needs.

International Institute of Business Analysis (IIBA®) was founded in March 2004 to support the growing field of business analysis and to support its practitioners with a body of knowledge and certification program. In March of this year, IIBA® released version 2 of A Guide to the Business Analysis Body of Knowledge® (BABOK®). Business Rules form a key component.

THREE KEY DELIVERABLES that the audience will gain from this presentation:

- What is contained within the BABOK® Guide
- How the IIBA® helping to drive recognition and appreciation for the importance of business analysis
- How the IIBA® can help drive the recognition and appreciation of the importance of business rules

Thursday | 11:20 AM - 2:40 PM | Case Studies Track

### **SBVR Distilled: Essence of Business Rules**



**Keri Anderson Healy**  
*Editor*  
*BRCommunity.com*

In December 2007, the OMG published "Semantics of Business Vocabulary and Business Rules" (SBVR 1.0), a groundbreaking new standard. However, at over 400 pages it is not a book to curl up with for a weekend of light reading! Are you a business rule practitioner looking for where to begin? This session demystifies what SBVR means by 'business rules', getting to the heart of what

## FORUM CONFERENCE SESSIONS

*continued*

SBVR is all about and showing how you can to put it work for you. What you will learn:

What are the keys of SBVR's approach to business rules?  
How can SBVR be applied to practical businss scenarios?  
What is the state of SBVR practice, including some free (and nearly-free) offerings?

Thursday | 11:20 AM - 12:20 PM | EDM Track

### Taking a Decision Focused Approach to Business Rules Analysis



**Lee Lambert**  
*Managing Partner*  
*New Wisdom Software*



**Marcy L. Perks, P.A.H.M.**  
*Manager, eBusiness Development*  
*Independence Blue Cross*

This session will use the case study method to present an overview of the decision focused approach to business rule discovery, analysis and management, including fundamental terms and concepts. We will outline the benefits of integrating this approach with business process management and discuss some of the key capabilities that are required to do so successfully. What you will learn:

- What is the decision focused approach and how does it differ from traditional approaches to managing business rules?
- What benefits does the decision focused approach offer?
- How can business rules practitioners integrate this approach into their current projects?

Thursday | 11:20 AM - 12:20 PM | Special Interest Track

### Standards for Business Rules



**John Hall**  
*Director*  
*Model Systems*

Standards have two major impacts on business rules – more and better tools to support use of business rules, and improved interoperability and interchange. Rules-related standards are maturing

- Business-oriented standards: SBVR (OMG) is in Revision 1.1; the Business Motivation Model (OMG) V1.1 is accepted and ready for publication.
- IS-oriented standards: W3C's Rule Interchange Format (RIF) for the Semantic Web is in final publication; OMG's Production Rule Representation (PRR) is finalized and ready for publication; more in the pipeline from OMG and RuleML
- Related aspects of business and system modeling, including: business process modeling; organization structure; regulatory compliance are increasingly including business rules within their scope

These standards are being brought into use on major projects. What you will learn:

- Current and emerging standards and how they fit together
- Emerging tools to support them
- What happens next?

Thursday | 12:20 PM - 1:40 PM

### Attendee Boxed Lunch & Panel Discussion — "Rules on the Web"

Co-Presented by the Business Rules Forum and RuleML



**Moderator: John Hall**  
*Director*  
*Model Systems*

In 2008 we saw the standards arrive. This year people have been putting them to work.

By the time we get to the Forum, usable drafts of much of the W3C Rule Interchange Format (RIF) will be public The OMG's Production Rules Representation (PRR) will be released, as will the next revision of Semantics of Business Vocabulary and Business Rules (SBVR). RuleML is updating its Reaction Rules to align with RIF.

These standards need to – and will – work together. One high-profile example is the ONTORULE project (<http://ontorule-project.eu>), a 3-year, \$10m project coordinated by ILOG (now an IBM company). ONTORULE will take rules authored in SBVR by business users through to IT specifications in open standards (including PRR, RIF and OWL) – and will demonstrate the approach with implementations, delivered by Audi and ArcelorMittal Steel, on commercial platforms.

If you are interested in rules on the Web, pick up a boxed lunch and come to this joint BR Forum and RuleML panel session.

## FORUM CONFERENCE SESSIONS

*continued*

Thursday | 1:40 PM - 2:40 PM | Case Studies Track  
**SBVR Distilled: Essence of Business Rules**



**Keri Anderson Healy**  
*Editor*  
*BRCommunity.com*

In December 2007, the OMG published "Semantics of Business Vocabulary and Business Rules" (SBVR 1.0), a groundbreaking new standard. However, at over 400 pages it is not a book to curl up with for a weekend of light reading! Are you a business rule practitioner looking for where to begin? This session demystifies what SBVR means by 'business rules', getting to the heart of what SBVR is all about and showing how you can put it to work for you. What you will learn:

What are the keys of SBVR's approach to business rules? How can SBVR be applied to practical business scenarios? What is the state of SBVR practice, including some free (and nearly-free) offerings?

Thursday | 1:40 PM - 2:40 PM | EDM Track  
**Consolidated Customer View - Integrating Rules with Data to Drive Consistency**



**Alex Raul Pascua**  
*BI Consultant*  
*Toyota Canada Inc.*

For a number of years, mining for customer data at TCI involved a tedious process of going over a number of disparate systems. In addition, questions would be raised as to the accuracy of the data in terms of ensuring that definitions and rules were applied consistently.

The Data Warehouse Team built a Consolidated Customer View and aligned all source data to the same customer using common dimensions and certain business rules. The presentation will present the steps the project took to deliver the framework model for the Customer View.

Thursday | 1:40 PM - 2:40 PM | How To Track  
**The Exception that Confirms the Rule**



**Silvie Spreeuwenberg**  
*Founder & Director*  
*LibRT*

The exception proves the rule, therefore exceptions are common to all organizations and are a core aspect of business rules management. Did you experience that exceptions make it hard to know if you have covered all situations? Are you afraid that exceptions introduce conflicts? What You Will Learn:

- Strategies to deal with exceptions from a business perspective
- How to deal with exceptions to decision tables
- How to deal with exceptions in an inference engine
- How to deal with exceptions in an Object Oriented environment
- Impact of a strategy to exceptions when choosing a technology

Thursday | 1:40 PM - 2:40 PM | BPM Track  
**How Business Rules and Processes Fit Together**



**Jan Vanthienen**  
*Professor in Business Information Systems*  
*K.U. Leuven*

When modeling business processes, we need a dynamic approach, where not only the business logic inside activities is flexible (discount policies, premiums, allowances), but where the entire process is guided, and often constrained, by business rules. Hard coding process flow into process models is too static. When the rules of the business change, the processes should change accordingly, leading to simple, agile and compliant processes.

What you will learn:

- How to design more flexible business processes
- Combining the best of rules and processes
- Identifying best practices for developing agile applications
- Rule-based processes
- How to obtain flexibility and compliance in service-oriented architectures

Thursday | 1:40 PM - 2:40 PM | Special Interest Track

## Unique Design of Enterprise Wide Business Rules Engine for Fortune 20 Pharmaceutical Company



**Dale Danilewitz**  
*Chief Information Officer*  
*AmerisourceBergen Specialty Group*



**Steve Widom**  
*Founder*  
*Chordial Solutions Inc.*

An Enterprise-wide Business Rules Engine with a plug-gable architecture has been written. A unique design provides functionality not achieved by commercial systems and is a blend between Microsoft's latest .NET, as well as open source, technology – fitting into a scalable SOA.

What You Will Learn:

- The business case for a Rules Engine as applied to a multi-billion dollar per year eCommerce system specific to Pharmaceutical specialty drug distribution.
- Organization of Rules in an ad-hoc "folder system" manner
- The use of the open source ANTLR parser for storing Rules in a database using a vendor-neutral format

Thursday | 2:45 PM - 3:45 PM | Case Studies Track

## Emerging Trends & Decision Panel



**Moderator: Kristen Seer**  
*Senior Consultant*  
*Business Rule Solutions, LLC*

## POST-CONFERENCE TUTORIALS

Friday | 9:00 AM - 12:00 PM

### TUTORIAL

## Business Process Innovation: Beyond Continuous Improvement



**Roger Burlton**  
*Founder*  
*BPTrends Associates / Process Renewal Group*



12th INTERNATIONAL  
**BUSINESS  
RULES  
FORUM**



# RulesExpo FIND THE RIGHT SOLUTION

RulesExpo is the only Event of its kind dedicated to the technology used to develop and deploy business software applications that are more responsive to business needs. Meet and learn from the vendors offering the leading Business Rules, Process Management and Decisioning applications and services.

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## DEMYSTIFY THE TECHNOLOGY!

Ever wonder how some of the rule and decisioning tools work, and how they may fit with your organization's needs? Here's your chance to get a feel for what the vendors' packages can do! Pick the technology solutions that interest you most, and take them on a test-drive on laptops and facilitated case studies provided by the vendors.

## INCLUDED WITH YOUR REGISTRATION TO THE CONFERENCES

Sign up for the Fun Lab sessions that interest you most. Seats are strictly limited for each session to ensure the best hands-on experience for everyone.

## GET YOUR PICK OF THE FUNLABS!

Each attendee at the Forum Conferences gets to choose a Fun Lab! from those available at the time of registration. We are anticipating the Fun Labs! will fill up fast. Participation is limited. Register early - Get your best pick! Visitors can pre-register for their desired FunLab session(s) when they Register for the Conference through our website.

## 2009 SCHEDULE OF EVENTS:

*To be announced*

## 2009 EVENT PRICING

Options	S Nov 1	M Nov 2	T Nov 3	W Nov 4	T Nov 5	F Nov 6	Super Early Bird Registration Until June 30, 2009	Early Bird Registration Until Sep 18, 2009	Registration From Sept 19, 2009
Conference + both days of Tutorials + Business Alignment Symposium	X	X	X	X	X		\$1,895	\$2,195	\$2,495
Conference + Monday Tutorials Only + Business Alignment Symposium		X	X	X	X		\$1,695	\$1,995	\$2,295
Conference Only			X	X	X		\$1,295	\$1,595	\$1,895
Tutorials Only—both days	X	X					\$895	\$995	\$1,095
RuleML with any Conference registration					X	X	\$350	\$400	\$450
RuleML Only					X	X	\$500	\$600	\$700

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Business Rules Forum  
1685 H Street, #221  
Blaine, WA 98230 USA

Phone: (877) 604-8622  
Fax: (866) 832-5168  
Email: [registrations@BusinessRulesForum.com](mailto:registrations@BusinessRulesForum.com)