

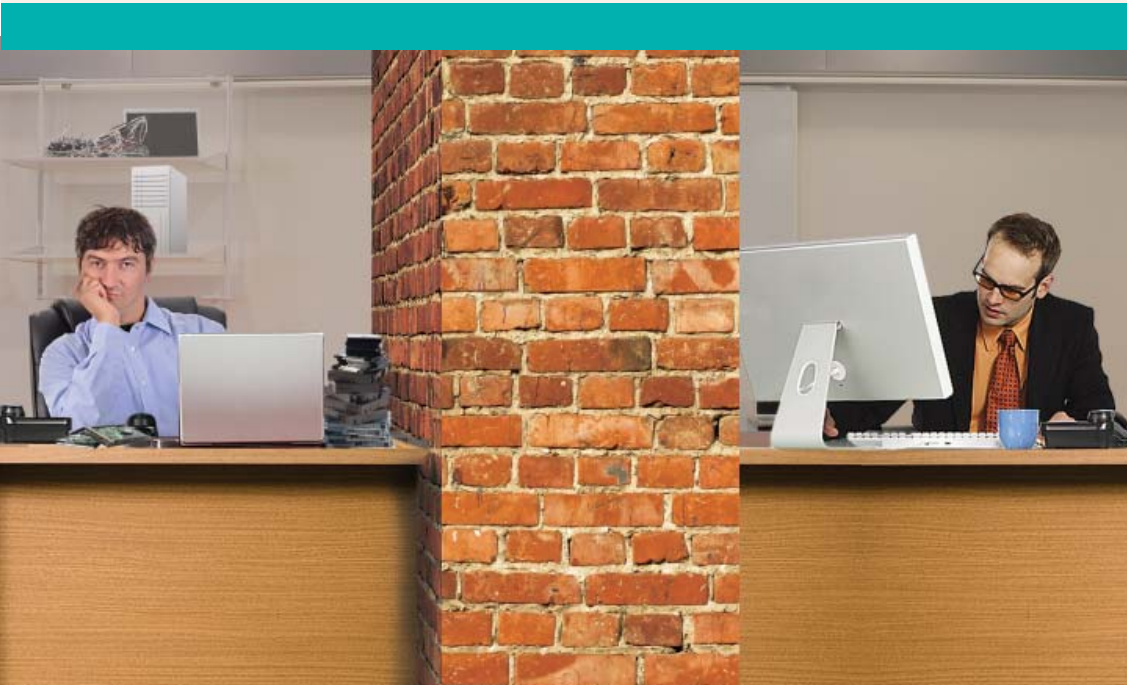
**Gartner**  
Business Process  
Management  
Summit 2008

September 10-12, 2008  
Pre-Conference Tutorials September 9

Gaylord National Resort and Convention Center | Washington, D.C.  
[gartner.com/us/bpm-fall](http://gartner.com/us/bpm-fall)

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# BREAK DOWN THE BARRIERS TO IMPLEMENTING YOUR BPM STRATEGY.



Establish your organization's path to optimizing business value at the world's most comprehensive BPM event.

## HOT TOPICS

- Advanced Practices in BPM
- BPM and Business Intelligence
- BPM Project Management: Do's and Don'ts
- BPM Roles and Organizational Best Practices
- BPM Center of Excellence

## Business or IT... beginner or advanced... your path to breakthrough success with BPM starts here.

What's standing between you and process improvement? Not enough collaboration between IT and business? Lack of a high-level vision? Inadequate know-how to get started? Whatever it is, the **Gartner Business Process Management Summit 2008** can help eliminate obstacles.

No matter who you are — business or IT professional — or where you are on the BPM experience curve, you can replace inefficient processes with ones that provide the agility today's business world demands.

Immerse yourself in dozens of in-depth sessions on everything from overseeing small-scale improvements to building an entire process-powered infrastructure. Pick up hundreds of not-to-be-missed insights, strategies and tactics. Plus, take advantage of extensive access to over 20 Gartner analysts, BPM's foremost independent experts.

More BPM practitioners turn to the Gartner Business Process Management Summit 2008 than any other BPM event. Find out why September 10-12 in Washington, D.C.

## Gartner Gives You More

- **NEW! BPM Workshop Series:** 3-hour "how-to" workshops — a deep dive into topics critical to successful BPM implementations.
- **NEW! Pre-Conference Networking User Roundtables:** Get answers to your most challenging BPM questions during these free networking sessions with peers, industry practitioners and Gartner analysts.
- **Solution Provider Sessions & Case Studies:** Leading providers discuss best practices, strategy and offerings. End users share "lessons learned" from real implementations.
- **Solution Provider Showcase:** Discuss challenges one-on-one with company reps. A great opportunity to focus on product comparisons.
- **Analyst One-on-One Sessions:** Sit down privately for 30 minutes with a Gartner analyst for advice on any issue you choose.
- **End User Case Studies and Panels:** Hear from the practitioners behind the most successful process innovation efforts.
- **Power Breakfasts:** Start your day off right. Get the viewpoints of Gartner analysts and other BPM experts on future trends and opportunities.
- **Analyst-User Roundtables:** Small group discussions moderated by a Gartner analyst. New insights guaranteed!
- **Hospitality Suites:** An ideal forum for informal networking. Great food, drink and entertainment courtesy of our sponsors.

# Benefits of Attending

Get insight into the hot topics that business and IT executives care about most:

- Build a Business Process Competency Center to coordinate BPM activities
- Understand BPM project management do's and don'ts
- Keep up with the latest advances in methodologies and tools underpinning BPM success
- Align and strengthen the business/IT relationship
- Ready your organization for transformation with the latest change management advice
- Evaluate, compare and choose suites and tools wisely
- Save time, effort and money by leveraging BPM best practices
- Create a communication plan to ensure successful BPM adoption

## You Get All This at One Event!

- 4 Tracks with 33 Gartner-led Sessions
- 6 Keynote Addresses
- 6 BPM Series Workshops
- 4 Power Breakfasts
- 4 Customer Panels
- 2 Customer Case Studies
- 21 Analyst-User Roundtables
- Private Analyst One-on-One sessions
- Peer-to-Peer Networking Roundtables
- 20 Solution Provider Sessions & Case Studies

# Who Should Attend

IT and business executives involved with BPM initiatives including:

## IT

- Application development managers
- BPM project managers
- Enterprise architects
- Application integration managers
- System integrators

## Business

- Chief process officers
- Business analysts
- Business process owners
- Quality managers



## Business Process Improvement Insider

Gain access all year to Gartner BPM analysts, advice and insight. The Business Process Improvement Insider is a monthly e-mail newsletter focused on business process modeling, analysis, design, implementation and optimization. Special features include:

- Exclusive Research Reports
- Webcasts & Teleconferences
- Event Updates
- Surveys & Polls



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## NEW! Networking User Roundtables

Generate ideas, share practices and network with peers in these highly interactive, pre-conference forums focused on 10 BPM topics. Discussions are limited to the first 100 users, so be sure you have a seat at the table.

# Keynote Speakers

## Dan Roam, Author of *The Back of the Napkin*



### **The Back of the Napkin: Solving Problems and Selling Ideas with Pictures**

Thursday, September 11,  
8:20-9:20 am

Dan Roam is the founder of Digital Roam Inc., a management consulting company that helps business executives solve complex problems through visual thinking. His new book is titled, *The Back of the Napkin: Solving Problems and Selling Ideas with Pictures*.

Through consulting projects and lectures, Dan has used his unique approach to resolve challenges at Microsoft, Wal-Mart, eBay, Wells Fargo, Infosys Consulting and the US Navy, among many others.

Dan discovered the power of pictures as a business problem-solving tool in the late 1980s when he founded the first marketing communications company in the (then) Soviet Union. With no Russian language skills, Dan quickly realized that his business pictures transcended the language barrier. He has been fine-tuning his visual thinking tools ever since.

## David Osborne, Author & Senior Partner of the Public Strategies Group

### **Beyond Bureaucracy: Transforming Government in an Era of Permanent Fiscal Crisis**

Wednesday, September 10,  
4:45-5:45 pm

David Osborne is the author or co-author of five books as well as numerous articles for the *Washington Post*, the *Atlantic*, the *New York Times Magazine*, *Harpers*, *Governing*, and other publications.

David is a senior partner of the Public Strategies Group, a consulting firm that helps public organizations improve their performance.

He has worked with governments large and small, from cities and counties to states, federal agencies and foreign governments.



In 1993, he served as a senior advisor to Vice President Gore, to help run what the Vice President often called his "reinventing government task force," the National Performance Review. He was the chief author of the NPR report, called by *Time* "the most readable federal document in memory."

## Sara Roberts, President and Chief Executive Officer, Roberts Golden Consulting



### **Organizational Change Management 2.0: Transforming Your Organization for Innovation**

Thursday, September 11,  
5:10-6:00 pm

Sara Roberts is the co-author of the best-selling book, *Light Their Fire: Using Internal Marketing to Ignite Employee Performance and Wow Your Customers*.

Sara has championed multiple change management and performance improvement efforts for Fortune 500 leaders in a variety of industries. Her work has included large-scale transformations such as mergers and acquisitions, technology implementations and corporate restructures.

An expert in people engagement and performance issues, she has partnered with companies on the development and execution of internal marketing and branding strategies to increase employee engagement, retention and buy-in at all levels.

# Tracks and sessions for every level of BPM maturity.

**A Track A — Establishing the Foundation for BPM Success**  
Is your organization struggling to gain control over operational inefficiencies and measure its business activities? Are your business opportunities being curtailed by rigidity in both your business practices and IT systems? Are you thinking about applying BPM disciplines, but don't know where to start? Through best practice presentations, case studies, and client panels, learn how to successfully lay the foundation required for sustaining BPM efforts. Armed with frameworks and tactical guidelines, you'll be better able to build a business case for BPM, develop a BPM plan and get your first project going. Sessions in this track are designed to help those who are in the earliest stages of BPM maturity, whether in the business or IT, to establish a BPM initiative within their company.

**B Track B — Intermediate BPM: Becoming a Process-Savvy Business**  
This track focuses on BPM as a discipline and targets attendees from organizations at the intermediate levels of the Gartner BPM maturity model (Establishing Intra-process and Inter-process Automation and Control). These organizations have begun their business process modeling efforts and have begun to identify process owners, apply business metrics effectively, and transform their organizations in order to automate and control selected business processes. Sessions build on the change management, governance, and organizational transformation research presented in Track A and emphasize how BPM complements compliance, CRM, and other applications. This track provides actionable best practices and decision frameworks for sustaining BPM as a discipline.

**C Track C — Intermediate BPM: Establishing and Sustaining IT Solutions for the Process-Savvy Business**  
This track targets more technically savvy attendees from organizations at the intermediate levels of the Gartner BPM maturity model (Establishing intra-process and inter-process automation and control). This track delves further into the use of Business Process Analysis (BPA) tools, Business Process Management Suites (BPMSs), and Business Rule Management Systems (BRMSs). Sessions show how to incorporate BPM into your organization and infrastructure and probe into how best to apply SOA, BI, and BAM to BPM solutions as well as the organizational change techniques to sustain your BPM effort. Gain an understanding of the major vendors and the technologies that will implement the infrastructure portion of a BPM strategy.

**D Track D — Pushing the Envelope with BPM**  
Sessions in this track target both business stakeholders and technology specialists who are interested in exploiting BPM at the highest levels of the Gartner BPM maturity model (Establishing Enterprise Valuation and Control, Creating an Agile Business Structure). Sessions confront various workforce and technology challenges: How does the nature of work change and what skill sets are needed? What happens to organizations when the line between business processes and social interactions blurs? How will IT departments adopt more agile software development lifecycles in response to volatile business processes? You'll also get a provocative view of what implementing and sustaining a successful process-centric organization will entail in 2015.

# Meet the Gartner Analysts

For over 25 years, Gartner analysts have been the trusted advisors to many of the world's largest and most demanding organizations. Gartner analysts draw constantly from the real-life challenges and solutions experienced by more than 45,000 clients worldwide.

## Summit Chairs



**Michele Cantara**  
Research VP

- Focus Areas
- Business Process Management  
Software Markets
  - BPM Consulting
  - SaaS
  - Outsourcing



**Elise Olding**  
Research Director

- Focus Areas
- Business of IT
  - Business Process Management

## Analysts



**Michael J. Blechar**  
Research VP

- Focus Areas
- Information and Application Architecture
  - Business Process Management



**French Caldwell**  
Research VP

- Focus Areas
- High-Performance Workplace
  - Regulatory Compliance



**Bill Gassman**  
Research Director

- Focus Areas
- Business Intelligence
  - Business Activity Monitoring
  - Web Analytics



**Yvonne Genovese**  
VP,  
Distinguished  
Analyst

- Focus Areas
- Application
  - Application Strategy & Governance



**Mike Gerrard**  
VP,  
Distinguished  
Analyst

- Focus Areas
- IT Management



**Janelle Hill**  
Research VP & Role  
Service Director for  
Leaders in Business  
Process Improvement

- Focus Areas
- BPM
  - SOA and Web Services
  - Business of IT
  - Application Integration/Middleware



**Isher Kaila**  
Research Director

- Focus Areas
- Global Customer Relationship Management
  - End-to-End Business Processes  
Management



**Marc Kerremans**  
Research Director

- Focus Areas
- Business of IT
  - Business Process Management
  - Business Rules Management



**Anne Lapkin**  
Research VP

- Focus Areas
- Enterprise Architecture



**Benoit J. Lheureux**  
Research Director

- Focus Areas
- Application Development Integration &  
Web Technology



**Matt Light**  
Research VP

- Focus Areas
- Application Development & Integration



**David McClure**  
Managing VP

- Focus Areas
- Government



**David McCoy**  
Managing VP &  
Gartner Fellow

Focus Areas

- Application Development & Integration
- Business Process Management
- Emerging Trends & Technologies



**Diane Morello**  
VP &  
Gartner Fellow

Focus Areas

- IT Workforce Strategy
- Organizational Change Management
- Leadership and Organizational Credibility



**Daryl C. Plummer**  
Managing VP &  
Gartner Fellow

Focus Areas

- Application Development & Integration
- Emerging Trends & Technologies
- Business Process Management



**Bill Rosser**  
VP,  
Distinguished  
Analyst

Focus Areas

- Business of IT
- Business Process Management
- Enterprise Architecture



**Roy Schulte**  
VP,  
Distinguished  
Analyst

Focus Areas

- SOA and EDA
- Event Processing
- Business Activity Monitoring (BAM)
- Application Architecture



**Michael Smith**  
Research VP

Focus Areas

- Business of IT
- ITMS/PPM
- IT Management Strategies

## An all-access pass to Gartner BPM analysts.

- **33 Analyst-led Sessions.** Get unmatched insight and objectivity on the BPM topics most relevant to you.
- **Analyst One-on-One Sessions.** Discuss your most pressing BPM issues with a Gartner analyst during a private, 30-minute consultation.
- **Biz/Tech Team-Up.** Engage in a one-hour working session with a Gartner analyst to improve collaboration and alignment between business and IT team members.
- **Analyst-User Roundtables.** Interact with your peers in these exciting small-group discussions moderated by Gartner analysts.
- **Just Ask Gartner.** Submit your most top-of-mind questions online now at [justask@gartner.com](mailto:justask@gartner.com). We'll post answers and make recommendations on what analyst sessions you should attend at the Summit to help you achieve your BPM goals.



*Best conference I've attended. The quality and credentials of the speakers was outstanding. I am leaving feeling reinvigorated and reenergized and anxious to apply what I've learned here to my organization.*



**Stacey Prezel**

Manager Process Management, Scottsdale Insurance



**Gartner**  
Business Process  
Management  
Summit 2008

September 10-12, 2008

Gaylord National Resort and Convention Center | Washington, D.C.

## Agenda at a Glance

Experience a unique mix of Gartner analyst presentations, guest keynotes, real-life case studies, interactive panels and solution provider sessions. It all adds up to one cutting-edge program agenda.

### Tuesday, September 9

- 2:00 pm Pre-registration
- 2:00 pm Paid Workshops (PW1+PW2)
- 2:30 pm Tutorial (T1)
- 3:45 pm Tutorial (T2)
- 5:00 pm Networking User Roundtables (NURT)

### Wednesday, September 10

- 7:00 am Registration
- 7:30 am Breakfast
- 8:30 am Welcome Address
- 8:45 am Keynote Address (K1)
- 10:00 am Track Sessions (A1-D1)
- 11:15 am Solution Provider Sessions & Case Studies (SPS)
- 12:15 pm Attendee Luncheon & Solution Showcase Dessert Reception
- 2:00 pm Paid Workshop (PW3)
- 2:15 pm Track Sessions (A2-D2)
- 3:30 pm Solution Provider Sessions & Case Studies (SPS)
- 4:45 pm Keynote Address (K2)
- 5:45 pm Solution Showcase Reception

### Thursday, September 11

- 7:00 am Registration
- 7:30 am Power Breakfasts (PB1)
- 8:20 am Keynote Address (K3)
- 8:30 am Paid Workshop (PW4)
- 9:30 am Track Sessions (A3-D3)
- 10:40 am Solution Provider Sessions & Case Studies (SPS)
- 11:40 am Attendee Luncheon & Solution Showcase
- 1:40 pm Track Sessions (A4-D4)
- 2:00 pm Paid Workshop (PW5)
- 2:50 pm Solution Provider Sessions & Case Studies (SPS)
- 4:00 pm Track Sessions (A5-D5)
- 5:10 pm Keynote Addresses (K4)
- 6:15 pm Hospitality Suites

### Friday, September 12

- 7:30 am Power Breakfasts (PB3+PB4)
- 8:45 am Paid Workshop (PW6)
- 8:45 am Keynote Address (K6)
- 10:00 am Track Sessions (A6-D6)
- 11:15 am Solution Provider Sessions & Case Studies (SPS)
- 11:45 am Attendee Luncheon
- 12:45 pm Track Sessions (A7-D7)
- 2:00 pm Track Sessions (A8-D8)
- 3:15 pm Closing Keynote (K7)

**BUILD YOUR OWN CUSTOMIZED AGENDA ONLINE.**

Use our convenient Agenda Builder tool to create your own personalized Summit schedule before the event. Go to [gartner.com/us/bpm-fall](http://gartner.com/us/bpm-fall)

# Keynote Sessions

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## K1: BPM Transforms the Enterprise

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Business market dynamics have fundamentally changed over the last 10 years with the rise of the Internet and globalization. Today's businesses compete on a global and electronically connected scale. BPM is the latest process management discipline designed to help business leaders better manage their businesses under these different operating conditions. BPM recognizes that, to be a market leader, operational excellence based on standardized processes and efficiency metrics isn't good enough anymore. BPM disciplines and technologies transform your business by enabling process attributes to be adjusted in real time in response to today's market conditions.

**Janelle Hill, Research VP  
and Michele Cantara, Research VP**

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## K2: Beyond Bureaucracy: Transforming Government in an Era of Permanent Fiscal Crisis

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Our current models of governance, developed during the industrial era, have become unsustainable. An aging population and the rising cost of health care have combined to create a permanent fiscal crisis at all levels. Health care costs rise an average of 10 percent a year, while government revenues increase six percent.

To cope with these new realities we must reinvent our public institutions. We need post-bureaucratic organizations that increase their productivity by continuously improving everything they do. To make this transformation, we must literally change the DNA of government, using five strategies with proven power:

- The Core Strategy: Creating clarity of purpose
- The Consequences Strategy: Creating rewards and sanctions for performance
- The Customer Strategy: Making public organizations accountable to their customers
- The Control Strategy: Empowering those responsible for performing
- The Culture Strategy: Creating a culture that produces innovation and results

**David Osborne, Author & Senior Partner  
of the Public Strategies Group**

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## K3: The Back of the Napkin: Solving BPM Problems with Pictures

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Pop-quiz: You've got 3 minutes to share your BPM plans with your execs and convince them to keep you funded. What are you going to say? How about creating a set of simple and powerful pictures that say it all? In this fast-paced and interactive session, Dan Roam will show how anyone — regardless of artistic talent, training, or confidence — can discover, develop, and sell complex ideas through the use of simple pictures.

**Dan Roam,  
Author & Founder of Digital Roam Inc.**

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## K4: Organizational Change Management 2.0: Transforming Your Organization for Innovation

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Organizations of all sizes are actively seeking to become more innovative. They know that to survive and thrive they must constantly evolve to stay ahead of their competition. However, in this quest to become more innovative, one of the biggest challenges they're facing is changing their corporate culture to enable and embrace innovation.

It's certainly no wonder that with a focus on cost cutting and process development, we've fostered corporate cultures focused on operational excellence and risk avoidance. By limiting responsibility for innovation to a specific function, organizations are not fully leveraging the capabilities of other employees. Organizations must create a culture of innovation that permits a "fail-safe" attitude and harnesses the creativity of its customers and employees.

Learn how proactively leading change (vs. managing it) can be a key enabler for creating the culture needed to take your company to the next level. After all, as they say: change happens. It's whether you harness it or not that counts.

- The key factors that can assist cultural change
- What leading edge companies and organizations are doing to create a culture of innovation
- Tips for stimulating innovation

**Sara Roberts, CEO & President  
of Roberts Golden Consulting**

# Keynote Sessions

## K5: User Interaction and Empowerment Disrupts Business Application Transformation

Historically, personal productivity applications were separate and distinct from transaction-oriented applications. Pressure for business process flexibility and agility, coupled with a desire for new cross-application, enterprise-spanning process perspectives, is permeating applications and projects as a planning boundary.

Less apparent, but equally disruptive, is the need to revisit the person-to-process boundary from the perspectives of user interaction and integration with business processes. The “process of me” will be disruptive to the current wave of business application transformation as it begins to incorporate the person-to-process interaction. The model of application-driven, dialogue-oriented transaction applications fully gives way to a perspective with the users at the center, participating in multiple processes and applications through multiple interaction models, thus enabling the enterprise to embrace information workers into current business application technology patterns.

**Yvonne Genovese,**  
VP, Distinguished Analyst

## Get added value from solution providers at the Summit.

Exhibitors at the Summit do much more than oversee booths. As an attendee, you can arrange to have a private Solution Briefing, get hands-on product demonstrations in our Solutions Showcase, listen to exhibitors on Case Studies Panels, and see them showcase their products or services in Turnkey Exhibits. Meet up with these industry leaders to learn what’s out there and what’s right for you.

## K6: BPM and SOA: When Grand Plans Collide, Chaos Ensues

SOA horror stories are starting to appear as organizations face problems realizing productivity and cost benefits from SOA. However, BPM offers a set of technologies and a discipline that can make SOA more consistent in value. This presentation examines how to govern services, to model behavior, and to use BPM to revolutionize the development methodologies of the future.

- What is the relationship of BPM to SOA?
- How can BPM be used to both govern and to evolve an SOA?
- What technologies, vendors, and practices are the most effective to build SOA success?

**Daryl Plummer,**  
Managing VP and Gartner Fellow

**Register by July 18  
and SAVE \$200!**

Go to [gartner.com/us/bpm-fall](http://gartner.com/us/bpm-fall)  
or call 1 866 405 2511

Use the priority code above your address to take advantage of this early bird savings offer.

## K7: Closing Keynote: Gartner Open Research Meeting

Gartner Open Research Meetings are lively affairs, with exchanges of ideas and perspectives. In this special session, we invite you to participate in an open discussion with Gartner analysts and other delegates as we explore the highlights and key takeaways from the conference experience, what assumptions were validated and what assumptions weren’t. Don’t be surprised if the interactive dialogue opens a few eyes, bringing new and important ideas to the forefront, building possible new strategic assumptions around BPM topics.

**Yvonne Genovese,**  
VP, Distinguished Analyst

# Power Breakfasts

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## **PB1: EA and BPM: How to Make the Synergy Work**

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Enterprise architecture and business process management should be complementary disciplines working toward the common goal of supporting the enterprise business strategy. Yet in many organizations they do not exploit their natural synergy and consequently neither delivers the full range of benefits that the enterprise should expect. In this presentation, we explore that synergy and define how EA and BPM should work together.

- What do we mean by EA and BPM?
- What are the natural synergies that should be exploited and how should these disciplines work together?
- What benefits accrue to the enterprise when they do?

**Anne Lapkin, Research VP**

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## **PB2: Managing Processes Better in Government**

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Business process management is a growing buzzword in government. It is considered essential for success in process redesign, streamlining, and integration involving single-purpose line-of-business activities and similar cross-functional areas. There are inherent challenges in applying BPM in government, few of which relate to the technology. This discussion will explore the drivers and realities of taking a successful approach to BPM in government.

- What major drivers are influencing interest in BPM in government?
- What are key BPM opportunities and challenges for government?
- What actions should government, business and IT leaders take to optimize use of BPM?

**David McClure, Managing VP**

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## **PB3: Measuring Business Performance of Your BPM Initiatives**

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Most organizations struggle to complete and execute an effective strategic plan. In this session we will explore the common obstacles companies face with strategic planning, and how these obstacles can be overcome with business process and performance management. Our focus will be on using real-world examples that demonstrate how best practices in business process and performance management can assist organizations to become strategy-driven.

- How do we translate vision to action?
- How can performance management help drive business process optimization?
- What business metrics should we focus on?

**Michael Smith, Research VP and  
Bill Rosser, VP, Distinguished Analyst**

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## **PB4: Process Architecture – The Key to Process Relationships**

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Understanding process modeling doesn't help identify and design the relationships between processes. This session will explore the current state of the art with regard to defining and designing an appropriate process architecture.

- What are the traditional approaches to process architecture?
- What are the pros and cons of different process architecture techniques? (functional decomposition, business services, RIVA, case handling, "black magic")
- What is the relationship between process maturity levels and process architecture?
- How do you establish "buy in" for Process Architecture efforts?

**Derek Miers, CEO, BPM Focus**

## **Have BPM questions? Just Ask Gartner.**

**Submit your questions now to [justask@gartner.com](mailto:justask@gartner.com)**

What's that one burning question you have to have answered? At the BPM Summit this September, 20 Gartner analysts will be directly available to you to answer those questions – through private One-on-One meetings, analyst-moderated user roundtables, Biz/Tech Team-Ups and informative Gartner-led sessions. But you don't have to wait until then. Submit your questions online now and we'll post answers and make recommendations on what sessions you should attend at the Summit to help you achieve your BPM goals.

# Paid Workshops

## PW1: BPM Measurement: Principles and Practice

Participants will learn how to start or to improve existing measurement activities in a BPM initiative.

In the first section Dr. Alden will cover:

- Current landscape for BPM measurement
- Measurement and its link to strategy
- Frameworks for guiding measurement programs and their lifecycle(s)
- How the maturity of business processes affects BPM measurement capability and analytics
- Where to start or how to improve

In the second section, participants will engage in group discussion to provide tangible outcomes, evaluate their preparedness for BPM measurement and develop a road map tailored to the maturity of their business.

**Dr. John Alden, Managing Partner, Capability Measurement**

## PW2: Applying Agile Development Strategies to BPM Initiatives

Over the past five years the primary driver for BPM has been performance and process improvement. However, many leading organizations are also beginning to use BPM to realize 60%–70% reductions in deployment time for mission-critical business solutions. This intensive workshop focuses on presenting key methodologies and case studies for applying agile development strategies to BPM initiatives. Included will be a brief primer on agile development and how it aligns with the benefits delivered by BPM.

Participants will learn:

- What tools and techniques teams are using to minimize risk and speed time-to-value in BPM projects
- How agile methods can be leveraged in modeling and prototyping capabilities of BPM
- How to leverage agile methods with key features of BPM suites

**Clay Richardson, Business Process Improvement Practice Leader, Project Performance Corporation**

## PW3: Making the Problems in the “As Is” Process Visible

Process mapping is a very powerful tool to illustrate the flow of work and information through a process. However, by just looking at the flow chart, it is difficult to ascertain the problems that exist in the “as is” process. This workshop will help attendees explore the various problems that could exist in a process and the advantages to making the problems visual.

The workshop will cover the following:

- Process mapping and levels of detail
- Functional-Activity flow chart
- Using icons, colors, data and text to make each of the problems visible
- Cases illustrating the use of visual tools

**Dan Madison, Value Creation Partners**

## PW4: Can You Handle Change? Managing Business Process Projects and Programs

Business process management is rapidly evolving and expanding. Business analysts help build a clear understanding of business needs vs. established business processes, and can model and redesign processes, workflows and roles in support of business change. These efforts alone require considerable coordination, but increasingly business analysts are called on further, to function as change agents and to lead projects and their implementation. This workshop will look at these changing roles and expanding demand, and will bring practitioners together to explore experiences and consider when and whether to take on new roles.

**Matt Light, Research VP, Gartner**

*“Like drinking through a firehose. It gave us much to chew on in the coming months.”*

**Deborah Bosner**  
Deputy Manager SBMS, Battelle

# Paid Workshops & Pre-Conference Tutorials

## PW5: The Back of the Napkin Workshop: Putting Your BPM Pictures to Work

See first-hand how to put Dan's simple pictures, tools and rules to work, helping you discover, develop and share your BPM concepts – even if you draw like a kindergartner. Come with a BPM problem and get ready to start solving it on the back of a napkin. Literally.

**Dan Roam,**  
Author & Founder of Digital Roam Inc.

### From Gartner Research

*“The six-step Gartner BPM Maturity Model is an important foundation and can be used to open up the minds of those who had thought BPM was just another technology. Practitioners can see the depth and sequence required.”*

## PW6: Organizational Change Management “How-to” Workshop – Building Your Change Management Plan

In this session you will learn the critical must-haves to gain buy-in and adoption for your change efforts. You will explore case studies of how companies in a wide variety of industries have approached their most challenging change initiatives and walk away with a thorough knowledge of best (and worst) practices as well as the ability to apply a systematic process and model to your change efforts. Key Issues:

- Articulating your case for change
- Getting your stakeholders aligned on a common vision
- How to structure and approach a change initiative from stakeholder analysis to implementation
- A model for reinforcing change and making sure it sticks

**Sara Roberts, CEO and President  
of Roberts Golden Consulting**

## T1: Tutorial: BPM Technology: From Best-of-Breed Tools to Process

This tutorial session will provide an overview of the core technologies associated with BPM. From the modeling tools to the run-time engines such as the Business Process Management Suite (BPMS), this primer will help business and technical professionals understand the core and contributing BPM-enabling technologies and how they tie together to support business process improvement efforts.

**Marc Kerremans, Research Director**

## T2: Tutorial: BPM Primer: Getting the Basics Right First

This tutorial identifies the basic landscape of process topics and terms. Not for the faint-of-heart or the casual listener, this session is a rapid-fire and content-rich core dump. It sets the context for the remainder of the conference and prepares you with a triage background of terms, topics and concepts related to the world of business processes. Come prepared to take notes and be engaged.

**Michele Cantara, Research VP and  
Janelle Hill, Research VP**

## Attend both Summits and SAVE \$995

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# Agenda Session Descriptions

## Track A — Establishing the Foundation for BPM Success

### A1: Getting Started with Business Process Management

Business process management continues to gain attention from both CEOs and CIOs because of its promise to not only improve operational performance results but also transform and innovate business operations. Despite this potential, most organizations struggle to identify and scope their first initiative. Gartner's Business Process Management Maturity Model provides guidance for becoming a process-managed enterprise.

- How should users assess organizational readiness for BPM?
- Who should initiate BPM and what does a plan for getting started look like?
- What are the critical success factors to long-term success with process management?

**Elise Olding, Research Director**

### From Gartner Research

*“BPM projects are different from IT projects. They have different tasks and methods, and they require much more user impact analysis than application development projects.”*

### A2: Key Roles that Enable a Process-Managed Organization

The growing focus on operational excellence has led business leadership to explore process orientation as an alternative to functional orientation. However, becoming process-driven has far-reaching effects on organizational staffing, roles and responsibilities, governance, skills, methods and disciplines. In this presentation, we explore emerging roles that enable organizations to accelerate their process maturity.

- Why do roles need to change?
- What new roles are emerging?
- What are best practices for transforming to a process-managed organization?

**Bill Rosser, VP, Distinguished Analyst**

### A3: BPM Technology: Walk Before You Run

BPMS hype is nearing the “peak of inflated expectations” on Gartner's BPM Hype Cycle. Vendors promise flexible processes, designed and maintained by business users rather than IT. Business rules and flows can be modified in real time! Existing IT assets can be integrated into new, more adaptive, business processes without disruption! Do these claims seem too good to be true? We provide pragmatic guidance for setting expectations appropriately and increasing your chances of continued success.

- What are BPM-enabling technologies?
- What are the best practices for success for an initial BPMS project?
- How will BPM and SOA technologies evolve over the next 5-10 years?

**Janelle Hill, Research VP**

### A4: Panel: Gaining Adoption for Your BPM Initiative

BPM initiatives change the culture and the way people think about work – challenges that must be addressed and overcome to establish a BPM discipline. Our panelists will present their challenges in changing their enterprise culture and the approaches that helped them implement BPM successfully.

**Panel: David Carpenter, Director, Business Process Management, Archstone; Anthony Renda, Program Manager, Siemens; Bret Rupe, IT Manager, Weyerhaeuser Realty Investors; Moderator: Elise Olding, Research Director**

### A5: The Business Process Method to Risk Management and Compliance

BPM vendors have entered the governance, risk and compliance (GRC) marketplace with solutions that range from do-it-yourself kits to well-architected platforms for enterprise GRC management. We'll examine how enterprises can maximize effectiveness with GRC.

- What are the drivers for GRC?
- How can enterprises take a business process approach to GRC?
- What are the strengths and weaknesses of applying BPM solutions to the GRC architecture?

**French Caldwell, Research VP**

## Track A (continued)

### A6: Understand Your Organization's Style and Boost Governance Effectiveness

Many organizations are struggling to implement effective governance to guide their BPM efforts. However, not all organizations are the same, and there is no one right way to implement effective governance. This presentation will examine the drivers of effective governance and the best practices to ensure its implementation, adoption and sustained performance.

**Mike Gerrard, VP, Distinguished Analyst**

### A7: Eight Steps to Take If You Need Consulting and SI Help with Your BPM Projects

Lack of expertise is one of the major inhibitors to BPM adoption. Organizations are desperately seeking help with architecture, governance, business process modeling, and SOA. Furthermore, BPM alters the way business and IT work together. This session explores which BPM skills and activities you should obtain from an external service provider, identifies a number of vendors who offer BPM consulting and integration services, and outlines what you should look for when selecting a consultant or systems integrator to help you with your BPM initiative.

**Michele Cantara, Research VP**

### A8: First-Timers BPM

Are you new to BPM or contemplating getting your effort going? Our panelists will highlight their first BPM efforts, discuss lessons learned and leave you with some specific tips to help you get off to the right start with your BPM work.

**Panel: Dawn Miller, Organization Effectiveness Supervisor, Sacramento Municipal Utility District; Kevin Flowers, Director, Enabling Technologies, Coca-Cola; Kim Metcalf, Manager, Web Management, Portland General Electric; Moderator: Elise Olding, Research Director**

## Track B — Intermediate BPM: Becoming a Process-Savvy Business

### B1: Using BPM to Drive Customer Centricity

There is a high degree of fragmentation across the functional domains of sales, marketing, finance and customer service but in many cases the underlying processes are inextricably linked. The ability to make business processes more able to be modified in a more agile manner while also delivering a closer fit to business requirements is the challenge. Effective end-to-end business process management will demand that organizations take an end-to-end, designed process-centric approach toward customer relationship management.

**Isher Kaila, Research Director**

### B2: Case Study: After Katrina – How BPM Helped the City of New Orleans

Anthony Jones had been a proponent of BPM prior to Katrina, but in the aftermath he has become an advocate for the power of BPM. Mr. Jones will discuss how BPM played a major role in bringing the city back online after Katrina.

**Anthony Jones, CIO, City of New Orleans**

### B3: Building a Business Process Competency Center (BPCC)

As BPM gains adoption within the enterprise, a natural next step is to create a competency center. In this session we will discuss the best practices, pitfalls and implementation approaches to ensure your competency center is successful and supports the adoption of BPM.

- What is a BPCC and what types of activities does it support?
- What are implementation models and how do you select the one that is best for your organization?
- What are best practices and lessons learned?

**Elise Olding, Research Director and Marc Kerremans, Research Director**



*Worth every mile, minute and dollar.*

**Zev Lavon**  
Enterprise Architect, Carefirst



# Agenda Session Descriptions

## Track B — Intermediate BPM: Becoming a Process-Savvy Business (continued)

### B4: Case Study: Putting “Continuous” into Continuous Process Improvement at Wachovia Technology Services Division

This case study explores the day-to-day process improvement culture at Wachovia’s Production Services. Learn how BPM CPI methods and best practices are used at the team level to optimize both internal processes and the customer experience.

**Ken Randall,**  
VP, Production Services, Wachovia



*Wonderful information in a support group type of environment, so we all realize we are not alone.*

**Conni Franz**  
IT Requirements Manager, Ball Corporation



### B5: Harnessing End-to-End Processes for Process Change

Managing end-to-end business processes is emerging as a key differentiator. Enterprises can take an end-to-end business orientation to balance greater customer centricity with operational excellence. Determining the current landscape of vendor offerings will help enterprises understand where they can align their own end-to-end business process strategies with emerging trends. This presentation addresses how enterprises leverage end-to-end processes for enhanced business agility.

- How can end-to-end process management be harnessed for business benefits?
- Can process-driven operational excellence lead to greater customer centricity?
- What tactical elements should enterprises include in their strategic planning for process management?

**Isher Kaila, Research Director**

### B6: Panel: The Many Paths to BPM

What is the best way to establish a BPM discipline? The answer is not a clear-cut one. In this panel presentation we will have a lively discussion from different vantage points — starting in the business, starting in enterprise architecture and starting in applications development. Many paths will converge at the same outcome — adoption and maturing BPM.

**Panel: Ed Daniels, Director Enterprise Architecture, GE Commercial Finance; Susan Greene, Principal Global Markets Strategic Architecture, Bank of America; Lynn Cote, Manager, BPM Program and Enterprise Portal, Export Development Canada; Moderator: Bill Rosser, VP, Distinguished Analyst**

### B7: Rethinking Change: The Practical Realities of Successful Transformation

Nearly 90% of IT leaders report being involved in some form of transformation, yet the practical realities of scoping out, shaping and galvanizing change remain elusive. Where do you focus? Are you equipped? Using contextual situations that our clients face, we plot a road map through the concepts, frameworks and practices that predict change success.

- How can leaders anticipate people’s acceptance of new business practices and large-scale change?
- What are the most effective approaches for preparing people and organizations for change?
- Which practices will sustain business and IT effectiveness and innovation?

**Diane Morello, VP & Gartner Fellow and Elise Olding, Research Director**

### B8: All Together Now? BPM and IT Governance

BPM and IT governance are intertwined but not the same. This presentation will examine best practices for each to avoid possible conflicts and to understand where and how they can be leveraged together for greater combined effect.

**Mike Gerrard, VP, Distinguished Analyst**

## Track C — Intermediate BPM: Establishing and Sustaining IT Solution for the Process-Savvy Business

### C1: Employing Business Intelligence about and within Your Business Processes

Business intelligence can enhance business process management by providing continual business activity monitoring as well as delivering historical, current and predictive information at decision points within a process. While there is much to gain, deployment of these solutions has been limited to early adopters.

- Why are BI, BAM and BPM technologies converging?
- How can BI technologies improve business processes?
- Which tactics help to successfully link BI and BAM with BPM?

**Bill Gassman, Research Director**

### C2: What Infrastructure Do You Need to Enable BPM Deployments

Various converging architecture and middleware approaches enable BPM and distributed application deployments. There's a plethora of IT infrastructure solutions to support service-oriented architecture, data and process integration, and application development. How do you choose among them?

- How is IT convergence impacting BPM deployments?
- What IT problems must be solved to link distributed applications and processes?
- Which solutions best support BPM and various forms of integration?

**Benoit Lheureux, Research Director**

### From Gartner Research

*"The first thing to acknowledge is that BPM is a journey, not a one-time, quick-fix, follow-the-formula technique. It is a difficult task to gain enterprisewide adoption; however, the payoff can be significant."*

### C3: Is SaaS a Viable Option for Process Improvement Projects?

Interest in SaaS is exploding, fed by the promise of lower cost of ownership by avoiding infrastructure maintenance and software upgrade cycles. What happens to process improvement and management efforts when a segment of your business process is no longer under your control? This presentation examines the SaaS wave and the role of BPMS in SaaS offerings.

- How significant will SaaS be over the course of the next five years and in what areas will SaaS make the most impact?
- Which providers are using BPMS within their SaaS offerings?
- What degree of process agility can customers expect from SaaS providers and what should they look for?

**Michele Cantara, Research VP**

### C4: BPM & Modeling

Process models are business assets — a tool for communication, a reference architecture, and a way of driving business and IT closer together. This session focuses on BPMN (Business Process Modeling Notation), and touches on other modeling techniques such as Role Activity Diagrams and Business Capability/Services Modeling.

- What is BPMN?
- How widely has it been adopted by vendors?
- How is BPMN applied in tools? Is there consistency of adoption?
- What are the implications of BPMN models between tools? What other standards are relevant?
- How to build simple BPMN models.

**Derek Miers, CEO, BPM Focus**

# Agenda Session Descriptions

## Track C — Intermediate BPM: Establishing and Sustaining IT Solution for the Process-Savvy Business (continued)

### C5: Model-Driven Business Processes

Business process analysis (BPA) tools are growing in importance as business managers, process architects and process analysts streamline and make their business processes visible. Process modeling is both essential and routine in business process improvement projects, and is a crucial requirement for successful enterprise architecture and SOA endeavors.

- What roles do the primary users of BPA tools play?
- How do organizations use business process modeling to promote business and IT collaboration?
- Who are the leading tool providers in the BPA space and how are they differentiated?

**Michael Blechar, Research VP**

### C6: Panel: CIO Perspective: View from the Top

Do you know what your CIO thinks about BPM? Is your CIO BPM-supportive, BPM-neutral or BPM-antagonistic? Does BPM even make your CIO's radar screen? Our panel will give you a view from the top, showing you what about BPM excites CIOs and what miscues will make them doubt the BPM promise. If you're trying to promote BPM, you need to know what will resonate with your CIO. If you don't have support from the top, you're on a path to disaster.

**Panel: Valeria Adamo, CIO, Workplace Safety and Insurance Board, Ontario; Anthony Jones, CIO, City of New Orleans; Shannon B. Brown, CIO, Office of the Federal Detention Trustee Department of Justice; Moderator: Michael Smith, Research VP**

### C7: Intelligent Decision Management with Business Rules

Business rule management (BRM) is a set of techniques and technologies that are under-exploited by most enterprises. Yet BRM can enhance your organization's decision-making capabilities, allowing you to react more quickly and effectively to changing business conditions. This presentation examines the impact that analytics and business intelligence are having on the BRM market and the potential of this concept across the enterprise.

- What is business rule management (BRM)?
- What emerging business intelligence applications are most relevant to the BRM market?
- How can the addition of analytics to BRM transform enterprise decision making?

**Marc Kerremans, Research Director and Gareth Herschel, Research Director**

### C8: BPM's Role in E-Commerce and B2B Projects

Companies have been increasing their domain expertise and deployment of BPM, particularly within their own organizations. But how will companies apply those same skills and technologies in e-commerce and B2B (business-to-business) project scenarios?

**Benoit Lheureux, Research Director**

## Media Partners (as of June 23, 2008)



## Track D — Pushing the Envelope with BPM

### D1: Event Processing: “The Next Big Thing”

The concept of a “technical event” is not new, but only now is the “business event” becoming a first-class citizen in business processes and applications design due to computer science advances. This session will give the background to understand the important concept of event.

- What is an event and why do events matter?
- How will event-driven architecture (EDA) applications differ from conventional SOA systems?
- How will event processing affect BPM and business activity monitoring (BAM)?

**Roy Schulte, VP, Distinguished Analyst**

### D2: Dynamic BPM: How Adaptable Are Your Processes?

The future of business is to be proactive, reactive, flexible and efficient to deliver on the promise of agility. Business processes are not always agile. Dynamic BPM is a growing category of capabilities for enhancing agility. With SOA, events and rules are allowing business processes to be more ad-hoc and dynamic. This presentation discusses the need for dynamic BPM where rules, processes and events come together. Key Issues:

- What is Dynamic BPM and why will it be necessary over the next 5 years?
- What best practices will enable companies to take advantage of dynamic BPM during the next five years?
- What impact will SOA, the Web, governance and events have on BPM?

**Daryl Plummer, Managing VP  
& Gartner Fellow**

“

*A great way to immerse yourself in the BPM world, get a sense of where you stand on the maturity curve, and check your efforts against best practices.*

”

**Rashel Kesilman**  
Business Systems Analyst, NSTAR

### D3: The New Agile BPM Method: Effective Integration of BPM and Agile Software Development Methods

Application development organizations are under pressure to deliver business value in a more responsive and flexible manner. Businesses are being pushed to shorten business process revision cycles and are pursuing model-driven development using BPM methods. The goal of both business and IT is agility. This session provides guidelines for integrating your BPM efforts with agile software development techniques.

- What is agile software development and how does it relate to BPM?
- Which agile software development methods are best suited for BPM initiatives?
- What are best practices for integrating BPM methodologies and agile software development methods?

**Michael Blechar, Research VP**

### D4: The Hitchhiker’s Guide to Business Processes in the Cloud

Business process improvement is an ethereal subject — even without bringing “cloud” into the equation. Until now business processes supported by cloud computing have been a “black box,” an area 51, within an organization’s end-to-end processes. The use of Business Process Management Technologies (BPMTs) by providers of cloud computing makes these hidden processes visible to stakeholders and allows for holistic process optimization.

- What’s the relationship between BPM disciplines and technologies and cloud computing?
- How will the adoption of cloud computing affect companies’ business process improvement efforts?
- What can organizations do now to prepare for these challenges?

**Michele Cantara, Research VP and Daryl Plummer, Managing VP & Gartner Fellow**

# Agenda Session Descriptions

## Track D — Pushing the Envelope with BPM (continued)

### D5: SOA Changes the Game: Compositions in the BPM and SOA World

Service-oriented architectures present problems for organizations seeking to build next-generation applications. The venerable application model does not generally apply and new skills and methodologies must be employed. When customers buy composite applications infrastructure, they must recognize that composition is becoming the common thread. This presentation examines what composition is and what it means to use composition in an SOA and BPM world.

- What is composition, and how does it affect SOA and BPM?
- What practices, roles, and scenarios will be most effective using composition?
- What technology will support composition for successful initiatives?

**Daryl Plummer, Managing VP & Gartner Fellow**

### D6: Future Worker 2015: Extreme Individualization

In 2015, your workers will be empowered by social networks, a plethora of knowledge sources, and user-driven development tools. How will you manage them and harness their energy and insight for business process improvement? This session focuses on the key issues that will affect the workforce in 2015.

- How will people's work behavior and perspectives change during the next 10 years and what will be the impact?
- How can business and IT leaders maximize the characteristics, skills and innovation of the future?
- How will global and economic trends affect worker behavior and motivation?

**Diane Morello, VP & Gartner Fellow**

### D7: Will Your Information Architecture Constrain Business Process Improvement?

The focus of BPM initiatives and SOA implementations is to create more agile and reusable services. Agility depends on the availability of the data and content the services need. This session will examine the best practices for ensuring business process improvement.

- What effect do SOA and next-generation content-driven solutions have on agility?
- What best practices will be used to implement data rules and specifications in modeling tools, rules engines, software services, data services and stored procedures?
- How can organizations transition people, processes and technology to ensure information agility for BPM and related content-driven solutions?

**Michael Blechar, Research VP**

### D8: BPM in 2015

As the pace of change and competition accelerates in today's global economy, enterprises are under tremendous pressure to continuously improve the way they do business. Business leaders need to deliver products and services faster, rein in costs, grow revenues, and take advantage of market opportunities. Enterprises need to adapt and improve or they will be outdone by competitors. Most business leaders lack the management skills and tools to deal with this new reality. In this presentation, we show the requirements for meeting these fundamental changes over the next 5 to 10 years.

**Janelle Hill, Research VP**

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