



# IRM UK

## Strategic Business & IT Training

### Public Courses & In-House Training 2019, London

Presented by the World's Leading Business & IT Management Experts

#### Architecture & Strategy

---

Architecting the Digital Business Platform	Michael Rosen	2
BizOps – Integrating Architecture, Business Analysis, DevOps, Lean and Agile	Michael Rosen	3 <i>New!</i>
Zachman Enterprise Architecture Certification: Modelling Workshop	John Zachman & Cort Coghill	4
Great Skills Make Great Architects	Michael Rosen	5 <i>New!</i>

#### Business Analysis

---

Business Architecture Best Practices	Roger Burlton	6
Digital Process Analysis and Design	Roger Burlton	7
Working with Business Processes: Process Change in Agile Timeframes	Alec Sharp	8
Advanced Business Process Techniques	Alec Sharp	9
Mastering the Requirements Process	James Robertson	10
Pre-Project Problem Analysis: Practical Techniques for Early Business Analysis Engagement	Adrian Reed	11

#### Enterprise Data & Business Intelligence

---

Data Governance: A Practical Guide	Nigel Turner	12
Unified Data Delivery – From Data Lake to Enterprise Data Marketplace	Mike Ferguson	13
Information Management Fundamentals	Chris Bradley	14
Ten Steps to Data Quality	Danette McGilvray	15

#### Business Change & Transformation

---

Dynamic Strategies for Investing in Change	Chris Potts	16 <i>New!</i>
IRM UK 2019 Conferences		17
Booking Form		18



Group Booking &  
Multiple Course  
Discounts Available

[irmuk.co.uk](http://irmuk.co.uk)

# Architecting the Digital Business Platform

Michael Rosen

11-12 June 2019

London

Fee: £1,295 + VAT

Group Booking & Multiple Seminar Discounts Available

**Architecture & Strategy Public Courses, London**

**Business Architecture Best Practices**  
3-5 June 2019

**Architecting the Digital Business Platform**

11-12 June 2019

**BizOps**

13-14 June 2019

**Zachman Enterprise Architecture Certification**

16-18 September 2019

**Great Skills Make Great Architects**  
24-25 October 2019

**Business Change & Transformation Public Course, London**

**Dynamic Strategies for Investing in Change**

28-29 November 2019

## Multiple Booking Discount

Attend more than one of our public course and you will be entitled to the following discounts:

2nd course	10%
3rd course	15%
4th course	20%
5th+course	25%

## Group Booking Discount

2-3 Delegates	10%
4-5 Delegates	20%
6+ Delegates	25%

Only one discount can be applied at any one time

## Presenter



Mike Rosen is Chief Scientist at Wilton Consulting Group providing advice to CIOs, IT Leaders, and Architects on creating the new Digital Business Platform, using architecture as a tool for digital transformation and improved decision making. He is also a Founding Member and VP of the Business Architecture Guild. Mr. Rosen has more than 35 years of technical leadership experience architecting, designing, and developing solutions, applications, and products. He was previously CTO at startup AZORA Technologies and chief architect, product architect, technical leader, and developer for commercial middleware products from IONA, BEA and Digital. Mr. Rosen is a well-known international speaker and author of 3 books and hundreds of articles.

## Overview

Is your organization planning, initiating or undergoing a digital transformation initiative? Then you know how important architecture and technology is to building a sustainable foundation. Yet so much has changed in the past 2 or 3 years that it's hard to know what that should look like anymore. The environment is now part of a larger business ecosystem. Scale, speed and scope are greatly expanded. Business architecture is different. Information and data architecture are different. Application architecture is different. Technology architecture is different. Security architecture is different. And, how they all fit together is different too. This workshop answers two key questions:

1. What does architecture for digital transformation look like?
2. How can you keep up to speed on all the changes that implies?

This workshop briefly explores the requirements for the new digital economy, and then describes the new "Digital Business Platform" necessary to meet those requirements and sustain success. Continuing from there, it lays out the overall architecture needed to create that platform and goes into detail about the new business, information, application, technology, performance, and security architectures that comprise it. A detailed case study is woven throughout the workshop to illustrate the platform, architectural tradeoffs, and a wide variety of work products across all domains. Interactive exercises will give attendees an opportunity to use the new techniques in real time.

## Learning Objectives

- How the Digital Economy requires a new platform and architecture
- The overall architecture for the "Digital Business Platform"
- How to use business architecture to evaluate and plan digital transformation opportunities and options and shape the platform requirements
- The new information and data architecture to support an intelligent core and the 'sense, compute, act' paradigm and typical usage patterns that drive tradeoffs.
- Performance architecture for providing real time reporting on key enterprise business outcomes
- Application architecture in the era of microservices, containers, APIs, DaaS, FaaS, PaaS.
- Cloud and hybrid technology architectures for a sustainable, scalable, reliable flexible business platform.
- Security architecture to ensure Digital Trust, including Intelligence AI, and SECaaS.

## Course Outline

### What is Digital Transformation?

- Digital Transformation Defined
- Four Dimensions of Transformation – Business Model, Operating Model, Information, Technology

### Sense, Compute, Act

- The New Application Paradigm
- Application Examples

### Business and Operating Models and Strategies

- Digital Business Models
- Digital Operating Models
- Evaluating Opportunities

### Architecting the New Digital Business Platform

- Intelligent core, Integration, Development, Engagement
- The new architecture framework
- 5 S's of architecture transformation

### Business Architecture

- BA overview
- Articulating strategies
- Capability framework

### Case Study

- Planning strategy to execution
- Value based planning

### Performance Architecture

- Outcomes, Critical Success Factors, KPIs
- Business Motivation Model
- Performance framework

### Information Architecture

- Decision Centric Computing
- Cognitive approaches – AI, ML, DL
- Data lakes
- Data patterns

### Application Architecture

- Microservices, services, and APIs
- CaaS, FaaS
- PaaS
- DevOps
- Rationalization and Technical Debt

### Technology Architecture

- Hybrid solutions
- Cloud transition strategies
- Integration

### Security Architecture

- State of cybersecurity
- Four disciplines of security management
- Security economics
- Digital trust
- GDPR
- Blockchain

## Audience

Attendees should have an understanding of Enterprise Architecture and a familiarity with a variety of architectural model and deliverables.

- Enterprise Architects
- Business Architects
- Information Architects
- IT Architects
- Business Analysts
- Strategic Planners
- Business Leaders
- IT Executives
- Anyone else concerned with designing and sustaining an agile digital transformation

**In-House Training:** This course is available on-site. E-mail [customerservice@irmuk.co.uk](mailto:customerservice@irmuk.co.uk) with your enquiries.

# BizOps - Integrating Architecture, Business Analysis, DevOps, Lean and Agile

Michael Rosen

## Overview

Is your organization planning to, or already underway with Agile development and / or DevOps? Does it seem like an excuse not to do architecture, analysis or design, because it shouldn't be. At a project level, you're building things faster, but at an enterprise level, you don't know if you're building the right things, or instead, just creating redundancy and inconsistency faster. While speed is important, it is the right things at the right speed – the "speed of business change" – that is critical to success in the new digital economy. And, while DevOps is a critical component of any business or digital transformation initiative it is not incompatible with, in fact it is better with, architecture and design. Moreover, the enterprise benefits don't end there.

BizOps extends the continuous feedback, faster cycle time, and tighter integration atmosphere, mindset, and process of Lean, Agile, and DevOps, "development-to-operations" upstream to include "business-to-development-to-operations" creating alignment with strategy while ensuring flexibility and agility. This includes a business driven "intentional architecture" and common vision that enable innovation, rapid change and emergent business design.

This interactive seminar will mix presentations and simulation planning exercises to answer three key questions:

1. How does BizOps improve delivery and speed of business change?
2. How can you successfully integrate business and enterprise architecture into your DevOps and Agile environments?
3. How do architecture, analysis, design, and development activities change to take advantage of the best of both worlds?

## Learning Objectives

- What is BizOps
- How to scale DevOps
- What are the core principles of Agile and Lean that must be scaled
- How architecture and Agile practices complement each other
- How to create an "intentional architecture" using DevOps
- How to extend DevOps to BizOps using business architecture and analysis
- How to fit architecture and analysis into a CD/CI and test-driven environment
- The new role of architects and business analysts

## Course Outline

### What are BizOps and DevOps?

#### Agile and Lean Principles

- Shorter cycles, continuous feedback, smaller batches, lower transaction cost, faster cycle time, test driven, tighter integration...

#### Scaled Agile Approaches

- SAFe
- Scaled Agile

#### Architecture, Analysis and Design in the world of DevOps

- Opportunities
- Benefits
- Challenges

#### Fitting Architecture into Scrum

- Creating 'enabling' stories
- Managing the backlog
- Defining 'done'
- Daily standup

#### Workshop Part I: Architecture and Analysis at the Team Level

##### Creating an 'Intentional Architecture'

- Architectural enablers
- Shared vision
- Individual responsibility
- Clarity and competence

## Audience

**Audience Skill Addressed:** All levels. Attendees will gain an understanding of how all the different techniques fit together. Attendees with exposure to Agile and DevOps will be able to quickly apply the learnings to their organizations.

- Enterprise Architects
- Business Architects
- IT Architects
- Application Architects
- IT managers
- Agile leaders and developers
- Business Analysts
- participants in DevOps

#### Workshop Part II: Architecture and Analysis at the Program Level

##### Business Architect and Analysis helps Agile Scale

- Extending SAFe roles
- Defining Release Trains
- Business Capabilities influence Features
- Value Streams influence backlogs and priorities
- Portfolio concerns

#### Workshop Part III: Architecture and Analysis at the Portfolio Level

##### Architecture and Testing

- Test-driven development
- Automated testing
- Continuous Integration

##### Getting Architects and Analysts to "Think Agile"

##### New Roles and Responsibilities

- Architects
- Analysts
- Agile / DevOps leaders
- Developers

##### Conclusion

13-14 June 2019  
London  
Fee: £1,295 + VAT

Group Booking & Multiple Seminar Discounts Available

#### Architecture & Strategy Public Courses, London

**Business Architecture Best Practices**  
3-5 June 2019

**Architecting the Digital Business Platform**  
11-12 June 2019

**BizOps**  
13-14 June 2019

**Zachman Enterprise Architecture Certification**  
16-18 September 2019

**Great Skills Make Great Architects**  
24-25 October 2019

**Business Change & Transformation Public Course, London**

**Dynamic Strategies for Investing in Change**  
28-29 November 2019

#### Multiple Booking Discount

Attend more than one of our public course and you will be entitled to the following discounts:

2nd course	10%
3rd course	15%
4th course	20%
5th+course	25%

#### Group Booking Discount

2-3 Delegates	10%
4-5 Delegates	20%
6+ Delegates	25%

Only one discount can be applied at any one time

#### Presenter



Mike Rosen is Chief Scientist at Wilton Consulting Group providing advice to CIOs, IT Leaders, and Architects on creating the new Digital Business Platform, using architecture as a tool for digital transformation and improved decision making. He is also a Founding Member and VP of the Business Architecture Guild. Mr. Rosen has more than 35 years of technical leadership experience architecting, designing, and developing solutions, applications, and products. He was previously CTO at startup AZORA Technologies and chief architect, product architect, technical leader, and developer for commercial middleware products from IONA, BEA and Digital. Mr. Rosen is a well-known international speaker and author of 3 books and hundreds of articles.

# Zachman Enterprise Architecture Certification: Modelling Workshop

John Zachman and Cort Coghill

16-18 September 2019

London

Fee: £1,995 + VAT

This fee includes Level 1 and Level 2

Certification

Group Booking & Multiple Seminar Discounts Available

Architecture & Strategy Public Courses, London

Business Architecture Best Practices

3-5 June 2019

Architecting the Digital Business Platform

11-12 June 2019

BizOps

13-14 June 2019

Zachman Enterprise Architecture Certification

16-18 September 2019

Great Skills Make Great Architects

24-25 October 2019

Business Change & Transformation Public Course, London

Dynamic Strategies for Investing in Change

28-29 November 2019

Multiple Booking Discount

Attend more than one of our public course and you will be entitled to the following discounts:

2nd course	10%
3rd course	15%
4th course	20%
5th+course	25%

Group Booking Discount

2-3 Delegates	10%
4-5 Delegates	20%
6+ Delegates	25%

Only one discount can be applied at any one time

## Presenters



John Zachman is the originator of the "Framework for Enterprise Architecture" which has received broad acceptance around the world as an integrative framework, or "periodic table" of descriptive representations for Enterprises.



Cort Coghill, is a Director of FEAC Education Operations. He is also one of the very few Zachman Certified - Enterprise Architect Educators (Level 3) in the world, setting Cort apart as one of the foremost experts on the Zachman Framework, in both education and project work.

"Lots of energy and enthusiasm. Passionate."

Simon Bathie, Group IS Programme Plan Manager, MBDA UK

"The enthusiasm, energy and breadth of experience remain, as ever, infectious and mesmerising. This week has been money very well spent."

Rob Austen, Managing Director, Austen Consultancy Services

"Excellent first hand explanation. Very powerful."

Marco van Leeuwen, Process Architect, Van Lanschot Bankiers

## Overview

Enterprise Architecture is fundamental for enabling an enterprise to assimilate internal and external changes in response to the dynamics and uncertainties of the information age environment. Enterprise architecture not only constitutes a baseline for managing change but also provides the mechanism by which the reality of the enterprise and its systems can be aligned with management intentions. This updated workshop is based on the Zachman Framework V3.0, and incorporates actual modelling practice. **The workshop consists of 6-8 hours of guided self-learning through a series of videos and assignments and culminates in a three-day instructor-led workshop.** The workshop is based on actual Enterprise experience and is designed to give the participants hands-on experience creating both "Primitive" (architecture) models as well as "Composite" (implementation) models. **The workshop prepares delegates for both levels of the Zachman Certified-Enterprise Architect program: Zachman Certified™ - Enterprise Architect Associate (Level 1) and Zachman Certified™ - Enterprise Architect Professional (Level 2).** The certification fee both Level 1 & Level 2 are included in the registration fee. The "Zachman Certified - Enterprise Architect" examination is a two hour, online examination that upon passing, results in the award of Enterprise Architect Associate (Level 1) Certification. Delegates will then subsequently be awarded the Enterprise Architect Associate (Level 2) Certification upon submitting a case study. If you want to understand the "Complexity & Contradiction" in Enterprise Architecture and are struggling to manage a non-adaptive enterprise and dysfunctional systems, this will be an essential experience! Learn how an ontology allows you to make use of multiple frameworks (e.g. architecture, sales, software development, innovation, etc.) in an enterprise.

## Learning Objectives

- Identify the sense of urgency for aggressively pursuing Enterprise Architecture
- Identify a comprehensive definition (description) of Enterprise Architecture
- Differentiate between Enterprise Architecture from Systems Implementation
- Differentiate an Ontology from Methodology
- Utilizing Enterprise Architecture for operational decision making
- Identify the elements for creating a strategy for reducing "time-to-market" for systems implementations to virtually zero
- Create a strategy for integration beyond jurisdiction (Interoperability)
- Identify architectural principles for meeting enterprise requirements
- Develop traceability across the artifacts for impact analysis and change management
- Employ primitive problem patterns to address complex issues facing any enterprise.

## Course Outline

### Setting the Context for Enterprise Architecture (EA)

- The contribution of IT People to an Information Age Enterprise
- Global Environment: Escalating Complexity and Escalating Change
- Applying the Concept of Mass-Customization to the Enterprise

### Introduction to Enterprise Architecture (The Zachman Framework V3.0)

The Zachman Framework is perhaps the most referenced in the industry. This session provides participants with a unique opportunity to learn first-hand about its concept and utility, directly from the man who developed it. Discussions include version 3.0 of the framework and its evolution.

- Definition of Enterprise Architecture
- The Zachman Framework - Architecture Is Architecture Is Architecture
- Ontologies Versus Methodologies

**Workshop: Row 1 Models: Defining enterprise scope and developing the enterprise lexicon**

**Workshop: Row 2: Defining business concepts and business value**

**Workshop: Row 3: Developing enterprise logic to support technology and implementation decisions.**

### Enterprise Engineering

- Models from My Bookshelf - 75 years of experience (Implementation, Composite Models)
- The Elegance of Primitives (Their essential contribution)
- Enterprise Entropy - Removing Internal Cost of Operations
- Enterprise Engineering Design Objectives - Alignment, Integration, Reusability, Flexibility, Interoperability
- Reducing Cycle Time from Order to Implementations (Mass-Customization)
- Implementation Practicalities
- "Federated Architecture" (Integrating Beyond Jurisdictional Boundaries)
- Migrating from Legacy to Architecture

**Workshop: Using Primitives to create horizontal Integration and Vertical Transformation**

**Case Study: Application Rationalization Using Primitives**

**Workshop: Identify Framework Cells for Given Enterprise Problem Definitions**

**Workshop: Using Primitives to solve for enterprise entropy**

## Audience

- CIOs
- Enterprise Architects
- Chief Architects
- Business Architects
- IT Architects
- Process Architects
- Application Architects
- Solution Architects
- Software Architects
- Technology Architects
- Data Architects
- Business Analysts
- System Analysts
- IT Strategists
- Business Strategists
- Strategic Planners
- Program Managers
- Information Systems Management
- Business Process Managers
- Data, Applications, Technology Management
- Consultants

**This course is available as a public course (face to face) or via live streaming**

**In-House Training: This course is available on-site. E-mail [customerservice@irmuk.co.uk](mailto:customerservice@irmuk.co.uk) with your enquiries.**

# Great Skills Make Great Architects

Michael Rosen

## Overview

Has your organisation embraced business, enterprise or IT architecture? While many organisations have formed architecture teams and given people the job title of 'architect', they don't always have insight or training into specific architectural skills, or the industry best practices associated with being an architect.

Luckily, there is help. This course focuses on the principles and skills needed to be an effective architect. Whether you're an enterprise architect, business architect, solution architect, IT architect, or software architect, this course will provide practical principles, skills and techniques for improving your performance and influence.

Mike Rosen has combined his 25 years of experience as an Architect, 20 years as an instructor and his passion for learning and architecture to help develop participants into great architects. The course explores the architectural skills involved in supporting strategy and project development from ideation and conception through planning, design and implementation, and the engagement models and interactions with different stakeholders throughout the lifecycle.

The course is structured as a mix of presentation, interactive discussion and group-based exercises, with an emphasis on applying the new concepts and skills to example scenarios during the facilitated workshops.

## Learning Objectives

- Understand the underlying principles of architecture and how to apply them across different scenarios
- Improve basic architectural skills of modeling, abstraction, conceptualization
- Visual and communicate architectural concepts to non-technical stakeholders
- Enhance advanced architectural skills of critical thinking and system thinking
- Apply industry best practices for standards and patterns
- Learn the secrets of architectural influence

## Course Outline

### Architecture Principles and Skills

- Architecture principles
  - Making principles actionable
- Architecture skills overview
- The architecture of Architecture
- Modelling skills
  - Consistency
  - Relevance and readability
- Thinking like an architect
  - Breadth versus depth
  - Interdisciplinary
- System Thinking
- Intelligent, effective inquiry
  - Challenging assumptions
  - Critical Thinking
- Integrating the big picture view
- Abstraction
  - Generalization, partitioning
  - Removal of properties, distancing of ideas
- Architectural analysis

### Visualization and Communications

- Visualization
  - Contextual, conceptual and formal visualizations
- Contextualization and conceptualization
- Formalization
  - Types of models
  - Models and metamodels
- Patterns
  - Using patterns
  - Creating patterns
- Standards
  - What, where, when?
  - Practice what you preach
- Communications
  - Stakeholder management
  - Interaction models
  - Focused work products
- Architectural review
  - Designing and performing
  - Getting buy-in and delivering value
- Conclusion

## Special Features

This course provides a comprehensive overview of the skills required to be an effective architect. It is illustrated with real life examples, full of workshops, and leaves the student with new skills and techniques to help with their current job and future aspirations. After completion of this course students will be able to answer the following questions:

- What are the relevant skills for an architect?
- Which skills are most useful at each point in an architectural or project lifecycle?
- Which skills should I focus on improving for my career goals?
- How can I be an architect that helps, rather than the person who says no?
- How do I interact with different stakeholders?

## Audience

Existing Architects who want to improve their skills, including:

- Business Architects
- Enterprise Architects
- IT Architects
- Solution Architects
- Application Architects
- Information Architects
- Software Architects
- Security Architects
- Architecture Managers
- Anyone who aspires to become an Architect.

24-25 October 2019

London

Fee: £1,295 + VAT

Group Booking & Multiple Seminar Discounts Available

Architecture & Strategy Public Courses, London

Business Architecture Best Practices  
3-5 June 2019

Architecting the Digital Business Platform  
11-12 June 2019

BizOps  
13-14 June 2019

Zachman Enterprise Architecture Certification  
16-18 September 2019

Great Skills Make Great Architects  
24-25 October 2019

Business Change & Transformation Public Course, London

Dynamic Strategies for Investing in Change  
28-29 November 2019

### Multiple Booking Discount

Attend more than one of our public course and you will be entitled to the following discounts:

2nd course	10%
3rd course	15%
4th course	20%
5th+course	25%

### Group Booking Discount

2-3 Delegates	10%
4-5 Delegates	20%
6+ Delegates	25%

Only one discount can be applied at any one time

### Presenter



Mike Rosen is Chief Scientist at Wilton Consulting Group providing advice to CIOs, IT Leaders, and Architects on creating the new Digital Business Platform, using architecture as a tool for digital transformation and improved decision making. He is also a Founding Member and VP of the Business Architecture Guild. Mr. Rosen has more than 35 years of technical leadership experience architecting, designing, and developing solutions, applications, and products. He was previously CTO at startup AZORA Technologies and chief architect, product architect, technical leader, and developer for commercial middleware products from IONA, BEA and Digital. Mr. Rosen is a well-known international speaker and author of 3 books and hundreds of articles.

In-House Training: This course is available on-site. E-mail [customerservice@irmuk.co.uk](mailto:customerservice@irmuk.co.uk) with your enquiries.

# Business Architecture Best Practices: Practical Methods to Enable Business Change

Roger Burlton

3-5 June 2019, London

Fee £1,595 + VAT

Group Booking & Multiple Seminar Discounts Available

## Business Analysis Public Courses London

### Working with Business Processes

21-22 May 2019

### Advanced Business Process Techniques

23-24 May 2019

### Business Architecture Best Practices

3-5 June 2019

### Digital Process Analysis and Design

6-7 June 2019

### Mastering the Requirements Process

13-15 November 2019

### Pre-Project Problem Analysis

26-27 November 2019

### Multiple Booking Discount

Attend more than one of our public course and you will be entitled to the following discounts:

2nd course	10%
3rd course	15%
4th course	20%
5th+course	25%

### Group Booking Discount

2-3 Delegates	10%
4-5 Delegates	20%
6+ Delegates	25%

Only one discount can be applied at any one time

### Presenters



Roger T Burlton is the co-founder of BPTrends Associates, founder of Process Renewal Group and the author of 'Business

Process Management: Profiting from Process'. He is considered an industry leader in the introduction of innovative approaches for organizational change. To date, he has conducted over seven hundred seminars and has presented to over fifty thousand professionals. His seminars have been translated for diverse audiences around the globe.

**IIBA** Endorsed Education Provider

This course, Business Architecture, is a course endorsed by the IIBA and registered under BPTrends Associates, an IIBA Endorsed Educational Provider. The course is aligned with the BABOK v2.0. Attendees will earn 24 PDs (Professional Development) hours or 24 CDUs (Continuing Development Units) for attending this course.

## Overview

Quick and effective business change means that Business Architects must know the interconnections among business elements so that as the business model is updated, they can identify what's impacted and design with deliberate integrity and reuse in mind. A solid business architecture that assures the avoidance of redundancy, maximizes the sharing of capabilities and makes best use of supporting resources, is essential. With a sound architectural foundation, business-wide transformation, digitalization and continuous optimization can be accomplished and change efforts can progress smoothly. This is a highly participative workshop and will delve into all aspects of Business Architecture, as defined by the Business Architecture Guild's BIZBOK along with other established and new methods, leaving the participant with the skills required to make Business Architecture disciplined, repeatable and yet practical.

## Learning Objectives

- Understand what a straight forward and useful Business Architecture looks like
- Learn how to implement the concepts and practices of the BIZBOK
- Understand what outputs the business produces and how it delivers them to create value for its customers and other stakeholders (Business Model)
- Define how the business is organized and how it operates in the context of broader business ecosystems (Operating Model)
- Align what investments in resources the business should make (Resources Model)
- Learn to build information, capability and process architecture models and interconnect them through a business performance lens
- Be able to use the architecture to accelerate change projects and deliver breakthrough digital technologies

## Course Outline

### Why Business Architecture?

- Enable Transformation, Disruption and need for Innovation
- Requirement for Business Agility

### Business Architecture and Related Disciplines

- Zachman, TOGAF
- BIZBOK
- The Business Architecture Landscape

Workshop: What is your Architecture maturity and readiness?

### Architecture Scoping and Value Chain Identification

- Whole company or one Value Chain?
- Intercompany Value Chains?

Workshop: What Value Chains do you have and what's in scope for Business Architecture?

### Business Strategy Understanding

- Business Ecosystem Analysis: Uncertainties, Scenarios, Opportunities and Threats
- Stakeholder Context Model: Item exchanges
- Stakeholder Value Proposition: Expectations and Experience Assessment, KPIs and Objectives
- Business Motivation Model: Ends before Means

Workshop: Who are your stakeholders and what is of value to them?

### Framing the Strategy for Business Architecture Consumption

- Building your 'North Star': Goals and Objectives
- Establishing Strategic Capabilities and Requirements
- Choosing your Architecture scenario and plan of attack

Workshop: What are the Critical Capabilities and Requirements for the Business Architecture?

### Business Object/Concept Modeling: The Basis for Information, Capability and Process Architecture Models

- Business Objects
- Concept Model
- Business Vocabulary
- Deriving the Information Model

Workshop: What is your Business Object/Concept Model?

## Audience

This course will be of benefit to professionals and managers of all types involved with planning and designing organizational change and building business capability to adapt and innovate continuously.

- Business Architects
- Business Analysts
- Process Architects and Analysts
- Enterprise Architects
- Change Agents
- Strategic Planners
- Business Managers
- Anyone preparing for Business Architecture Certification

**In-House Training:** This course is available on-site. E-mail [customerservice@irmuk.co.uk](mailto:customerservice@irmuk.co.uk) with your enquiries.

### Business Capabilities

- What is a Business Capability?
- BIZBOK view
- Capability Modeling
- Assuring unique non-redundant Capabilities
- The Burlton Capability Hexagon

Workshop: What are your Business Capabilities?

### Business Process Architecture: Value Streams: and an End-to-End view

- Value Streams and Business Processes: BIZBOK view
- Stakeholder Journeys and Lifecycle
- The Skeleton Process Architecture
- Value Streams and Value Stream Stages
- Deriving a value-focussed Process Architecture
- Using Business/Industry Frameworks
- Examples of real company Architectures

Workshop: What are your Value Streams and End-to-End Processes?

### Alignment to Decisions and Business Rules

- Policies, Decisions and Business Rules and their architectural alignment
- The Operational Decision Questions Hierarchy

Workshop: Articulating critical Decisions and Business Rules?

### Business Performance Models

- Characteristics of Good Performance Indicators
- The new Balanced Scorecard
- Lagging and Leading Indicators
- Measurement Traceability to Strategic Objectives
- Measuring Operating Processes

Workshop: What is your Performance Scorecard?

### Alignment of Business Architecture with IT Enablement

- Services, Microservices and APIs
- BPMS (process engines)
- BRMS (rules engines)
- Business Activity Monitoring and Analytics (measurement)
- ERP

### Alignment with Human Competencies

- Competence
- Motivation, Behavior and Culture
- Structural and Cultural Maturity

### Prioritization of Change: Heat Maps

- Evaluating Process, Information and Capability Value and Performance Gaps
- Heat Map Grids
- Pain - Gain Analysis for assessment of Capabilities, information and Processes
- The Burlton Capability Framework for Resource Change Planning
- Defining Change Priorities

Workshop: What are your Business Process and Capability Priorities?

### Leveraging the Architecture into a Business Change Portfolio

- Using the Business Architecture Models in Business Change
- Cross Mapping Capabilities and Processes: Impact Analysis
- Defining the Portfolio of Process and Capability Changes
- Scoping a Change Project
- Building the Roadmap

Workshop: Which Processes and Capabilities are in scope for projects.

### Sustaining the Architecture through Governance

- Governance Maturity Checklist
- Architecture Sustainment - CoE Support

### Summary

- Lessons Learned

# Digital Process Analysis and Design:

## Optimising the Customer Experience through Digital Innovation

Roger Burlton

### Overview

This course will address what degree of process work is required for today's organizations striving to establish digital business capabilities to optimize the end to end customer journey and leverage resources in the most effective manner. It will emphasize the customer aspects of the challenge given that customers are no longer recipients of what we do but are key actors with us in doing it. They are a part of newly conceived business processes in partnership with us. We have to design shared processes with them in mind. This course deals with the development of digitalized processes and services. It does not address digital strategies or digital architecture directly.

### Learning Objectives

- Build a customer journey and find moments of truth
- Segment customer types and define personas
- Understand existing customer bottlenecks and constraints and opportunities to remove them
- Identify potentially useful digital technologies
- Design end to end value stream processes that start and end with the customer process
- Reconceptualise the customer interaction with our processes
- Recognize genuine design constraints from other outside stakeholders
- Deal with behavioral and cultural change
- Define the change program

### Course Outline

#### The Digital Challenge

- Drivers and Trends of Digitalization
- Digital Strategy
- Digital vs Digitalization
- Some definitions and truths

Examples: Uber, AirBnB and other usual suspects

#### Process Methodology Response

- Traditional approaches
- Process Analysis and Design for the digital world
- The Concept Model as home base
- The Burlton Capability Hexagon

Case study Workshop: Developing your concept model

#### Understand: Stakeholders, Vision and Scope

- Value Chain and the scope of your included processes
- External Stakeholders classification
- Segmentation and Personalization
- The use of Personas
- Customer needs and value proposition
- Customer experience
- The North Star for your design

Example: Ordering of customized confectionery

Case study Workshop: Analyzing the Stakeholders

Case study Workshop: Defining the North Star

#### Analysis: Modelling and Analyzing the Process

- How much current analysis and modeling is needed
- Analysis and Modeling options
- Dealing with the data

Case study Workshop: Analysing the current capability

#### Customer Process Experience Baseline

- A typical Customer Experience pattern
- Finding Moments of Truth
- The Customer Journey map
- Attributes of a great customer experience

Case study Workshop: Developing the Customer Journey

#### Digital Inspirations

- Digital Solution Patterns and Benchmarks
- Omni-Channel characteristics
- Mobile characteristics
- RPA (Robotic Process Automation) characteristics
- AI and Cognitive characteristics
- Automating Decisions and Business Rules
- Additional Technology potential

Example: Mortgage Decisioning Redesign

#### Design the Process and Capabilities

- Small Change vs Substantive change
- Design principles

- Creative workshops to leverage the inspiration
- The new digital process
- Designing measurement and feedback
- Detailed mapping
- The required capabilities and resources

Example: Justice System peer to peer case resolution

Case study Workshop: Designing the digitalized process workflow

Case study Workshop: Validating with the process scenarios

Case study Workshop: Defining the digitalized process capabilities and resources

#### Culture and Behavioural Change

- Developing the competencies: the core skills needed
- Specifying the group behaviour as a set of requirements
- Overcoming internal stakeholder concerns
- Communication: what to say and when
- Sustaining the journey: measuring, monitoring and coaching

Example: Board of Directors Digitalization

#### Implementation Options

- Digital Base Capabilities
- The role of iPBS, Decision and Rules engines
- Standards and Protocols
- Technical Foundation

6-7 June 2019

London

Fee: £1,295 + VAT

Group Booking & Multiple Seminar Discounts Available

#### Working with Business Processes

21-22 May 2019

#### Advanced Business Process Techniques

23-24 May 2019

#### Business Architecture Best Practices

3-5 June 2019

#### Digital Process Analysis and Design

6-7 June 2019

#### Mastering the Requirements Process

13-15 November 2019

#### Pre-Project Problem Analysis

26-27 November 2019

#### Multiple Booking Discount

Attend more than one of our public course and you will be entitled to the following discounts:

2nd course	10%
3rd course	15%
4th course	20%
5th+course	25%

#### Group Booking Discount

2-3 Delegates	10%
4-5 Delegates	20%
6+ Delegates	25%

Only one discount can be applied at any one time

#### Presenter

Roger T Burlton is the co-founder of BPTrends Associates, founder of Process Renewal Group and the author of 'Business Process Management: Profiting from



Process'. He is considered an industry leader in the introduction of innovative approaches for organizational change. To date, he has conducted over seven hundred seminars and has presented to over fifty thousand professionals. His seminars have been translated for diverse audiences around the globe.

### Audience

- Process Analysts and Designers
- Business Analysts
- Business Leaders
- Agilists
- Business Architects
- Anyone else concerned with designing and sustaining an agile business

This class will be of benefit to professionals and managers of all types involved with designing and developing digitalized business processes.

### Special Features

- Modernizes process analysis and design work to optimize digital processes
- Deals with customer-in-command processes and business solutions: Journeys and Experiences
- Minimizes Process Analysis for Digital Process to only enough of what you really need?
- Brings a wealth of opportunities for Process Innovation
- Features several examples of digitalized processes
- Involves a series of hands on progressive exercises in designing a digital process solution

**In-House Training:** This course is available on-site. E-mail [customerservice@irmuk.co.uk](mailto:customerservice@irmuk.co.uk) with your enquiries.

# Working with Business Processes: Process Change in Agile Timeframes

Alec Sharp

21-22 May 2019

London

Fee: £1,295 + VAT

Group Booking & Multiple Seminar Discounts Available

## Working with Business Processes

21-22 May 2019

### Advanced Business Process Techniques

23-24 May 2019

### Business Architecture Best Practices

3-5 June 2019

### Digital Process Analysis and Design

6-7 June 2019

### Mastering the Requirements Process

13-15 November 2019

### Pre-Project Problem Analysis

26-27 November 2019

### Multiple Booking Discount

Attend more than one of our public course and you will be entitled to the following discounts:

2nd course	10%
3rd course	15%
4th course	20%
5th+course	25%

### Group Booking Discount

2-3 Delegates	10%
4-5 Delegates	20%
6+ Delegates	25%

Only one discount can be applied at any one time

### Presenter



Alec Sharp's expertise includes business analysis, data modelling, project recovery, facilitation, and, especially, business process change. In addition to his consulting practice, he conducts top-rated workshops and conference presentations on five continents a year. Alec is the author of "Workflow Modeling, second edition" which is widely used as a consulting guide and university text.

*"Alec made the learning fun with a great blend of humour, involvement and time for reflection. The seminar was well structured and it flowed end to end. I had heard that Alec was a great presenter and I was not disappointed"*

Malcolm Priestner, Senior Business Analyst, Met Office

*"Excellent. Best seminar ever attended. Outstanding, engaging, knowledgeable, inspiring."*

Stella Reynard, Business Analyst, Aveva

*"Quite simply the best seminar I have been on. Used techniques I've never seen used before to engage the audience, keep us entertained, help us learn and understand and ... make us laugh. I was expecting great things and it delivered."*

Susan Allan, Business Systems Manager, Wood Group PSN

## Overview

Delegates to this course will first learn exactly what a "business process" is, and techniques to effectively convey the concept to others. The key factors to consider when working with processes and how to avoid the most common pitfalls are also introduced. On this foundation, the course then shows how to discover and scope a business process, clarify its context, assess it and establish improvement objectives, apply various approaches for modelling it to an appropriate level of detail, re-assess it in light of findings from modelling, and employ a structured approach to designing a new process. A modular, "feature-based" approach to process design is described that delivers significant change in Agile timeframes, often in as little as a few days. Everything is backed up with real-world examples, repeatable guidelines, workshop exercises, and group discussions.

## Learning Objectives

- Identify a "true" business process, and specify its boundaries and goals
- Describe the key factors that differentiate process and functional approaches
- Employ a variety of techniques to keep stakeholders involved, and promote "process orientation"
- Establish the scope, issues, and goals for a business process
- Model process workflow at progressive levels of detail using Swimlane Diagrams
- Stop process modeling at the appropriate point, and move on to other techniques or phases
- Conduct a structured assessment of a business process
- Transition to the design of a new process while avoiding common (and serious!) pitfalls

## Course Outline

### Business Processes – What They are and How to Discover Them

- Variations on what is meant by "process"
- Guidelines for well-formed processes and business processes
- Impacts of incorrectly identifying business processes
- Example – using this method in identifying "true" business processes
- Summary – six rules for business processes

### Working with Business Processes – Frameworks, Difficulties and Methods

- Two perspectives: functional (skills and resources) and business process (results and value)
- Reconciling the two – philosophies and methods for helping functions and processes get along
- Impact of business processes for application and process architects
- Introduction to process modeling techniques – decomposition, flow, and other techniques
- Progressive detail – working through the scope, concept, and specification levels
- Understanding the six enablers of a business process – a critical framework
- Methodology overview – a three-phase approach to completing a process-oriented project

### Discovering your Enterprise's Business Processes

- Depicting "process areas" with an "overall process map" or "process landscape"
- Using "off the shelf" frameworks
- Contrasting top-down and bottom-up methods for process discovery
- When to use one-on-one interviews, when to use group sessions
- Beginning your analysis by clarifying terminology – a structured approach
- Process patterns and inter-process relationships that will emerge

Case study: hands-on practice with process discovery, team work and group debrief

### Framing the Process – Determining Scope, Issues, and Goals

- Separating the "what" from the "who and how"
- Defining "what" (the essence) and "who and how" (the current implementation)
- Case study – defining process scope
- Initial assessment of the "as-is" process and goal-setting for the "to-be" process
- Clarifying strategic direction – the process "differentiator"
- Issues and opportunities in applying the differentiator framework to a business process

### Case study – process assessment, goals, and differentiator

### Workflow Models – the Essentials

- The philosophy behind workflow models ("swimlane diagrams") – why we really do it
- The three most common errors in workflow modeling, and three keys to success
- Real examples of effective and ineffective process flow models
- Getting started – three questions to drive your initial swimlane diagram
- The three questions in practice – a real example
- Knowing when to stop – controlling the detail of your models
- Real example – what happens when detail gets out of control
- Three levels of workflow model ("handoff", "service", and "task") with examples and guidelines
- A warning sign that you've crossed the line and aren't modeling workflow anymore
- Making the transition to use cases, procedures, work instructions, and other job aids

### Workflow Models – the Finer Points

- Guidelines for actors – who or what can or cannot be an actor on a swimlane diagram
- Special cases – depicting systems or machines, holding areas, and other processes as actors
- Guidelines for steps – naming, multi-actor, and sequential, parallel, and collaborative steps

- A translation guide – correcting unclear or misleading step names
- Guidelines for flow – what that arrow really means, common errors, parallel vs. exclusive flows
- Ensuring clarity with parallel vs. collaborative steps
- Additional symbols, keeping it simple, transition to BPMN

### Techniques for Facilitating an As-Is workflow Modelling Session

- A reminder – why we really model the as-is process (to enable a holistic, fact-based assessment)
- The basics – participants, resources, and tools
- Facilitated session ground rules – specifics for "process" sessions
- How to actually finish a flow diagram – one process, case, scenario, and path at a time
- Recap – the three questions to drive your initial "handoff level" workflow model

### Case study – hands on practice with developing the initial workflow model

- Five more questions to validate and extend the initial model

### Case study – hands on practice with refining the initial workflow model

### Transition to Process Design

- Three common redesign problems, three techniques to avoid them
  - (1) Enabler-based assessment of the as-is process – a proven framework and its role in redesign
  - A decision point – five options for going forward
  - (2) Challenging process assumptions – a practical technique for generating creative improvements
  - (3) Uncovering unanticipated consequences – an enabler-based assessment of characteristics
  - Finalising to-be process characteristics in a "process requirements document"
- Case study – assessing the as-is and characterizing the to-be process
- The to-be workflow – from characteristics to workflow model
  - A reminder – factors to make the new process sustainable

## Audience

**Business Analysts** who are responsible for requirements specification or are involved in business process re-design or improvement.

**Business and Process Architects** responsible for establishing frameworks and direction for enterprise processes

**Business Managers and Content Experts** who will participate in process re-design or process-oriented application development efforts.

**Prerequisites:** There are no prerequisites in this course. However, Business Analysts who expect to do extensive process analysis will find that some understanding of information systems concepts may be helpful in establishing context.

**In-House Training:** This course is available on-site. E-mail [customerservice@irmuk.co.uk](mailto:customerservice@irmuk.co.uk) with your enquiries.

# Advanced Business Process Techniques

## Aligning Process Work with Strategic, Organisational and Cultural Factors

Alec Sharp

### Overview

Many organisations radically improve their performance through business process change initiatives, while others fall short. It's easy to blame failure on technical factors, but they are almost never the primary cause. Experience shows three recurring themes in successful initiatives:

- True end-to-end processes were identified, and the right ones were selected for transformation;
- A holistic approach balanced technical factors with human, organisational, and cultural factors;
- That holistic understanding was reflected in an implementable and sustainable process design.

This intensive workshop provides proven, repeatable methods for successful business process change in Agile timeframes, well beyond what is covered in introductory courses. Throughout, the emphasis is on methods that support shared understanding and engagement, leading to buy-in and support for change. Specific techniques for discovering and assessing individual behavior and organisational culture are a centerpiece of this unique workshop. Participants will be well-prepared for the challenges of successful business process change. In fact, many organisations apply techniques learned in this workshop to all of their organisational change initiatives.

Topics will be covered with a discussion of the issue, a review of techniques, guidelines and examples, a brief workshop exercise, and a group solution and debriefing. The emphasis is on maximizing the delivery of content while keeping everyone engaged.

Real-life case studies are employed throughout – some participants say the examples of how the techniques are applied in practice is the best part of the workshop.

### Learning Objectives

- Understand how to communicate business process concepts with executives, managers, and individual contributors in a way that stimulates interest and builds support for change.
- Learn objective criteria for an end-to-end process, and top-down and bottom-up methods for discovering business processes and rapidly developing a process architecture.
- Learn how to encourage support for business process change at every stage of an initiative, and the critical importance of a “what first, who and how next, only then why?” approach.
- Understand a practical and agile business process change methodology incorporating specific techniques for addressing human, organisational, and cultural factors.
- Be able to apply innovative techniques for rapidly building relevant, accessible process models, especially at the scope (context) and conceptual (understanding) levels.
- Become familiar with the techniques for designing a future-state process, and how they are applied in a proven, step-by-step method.

### Course Outline

#### Communicating about “Business Process” with Executives, Managers, and Individual Contributors

- Why senior executives (and everyone else) often misunderstand “process”
- Five key points to cover in an executive briefing
- Winning over the masses - why people fear “process,” how to get them on board
- Business Process within a framework for Business Analysis

#### Discovering Processes and Developing a Process Architecture

- “Process” fundamentals, components, conventions, and a process architecture taxonomy
- A bottom-up approach to process discovery
- Using standard frameworks and generic models in top-down approaches
- Exercising caution when using “off-the-shelf” process reference frameworks
- Case study – a multi-pronged approach to building a process architecture within tight budget and time constraints
- Methods for assessing, prioritizing, and selecting processes for transformation
- Case Study – Using the Process Architecture to assess and support a new initiative

#### Building Support for Change into Your Business Process Methodology

- Five techniques to avoid
- Seven specific techniques to build support for process change
  - The power of “venting”
  - What first, who and how later – abstraction to the essence
  - How to build a compelling and blame-free Case for Change that answers why?
  - Clarify what you need to be great at – the process’ strategic differentiator
  - Understand enablers – the levers of change, and the ones that matter most
  - Frameworks for assessing culture and beliefs, and their

### Audience

Anyone involved in Business Process Change and Business Process Management (BPM), especially:

- Business Process Analysts and Designers
- Business Analysts
- BPM professionals
- Business Architects
- Process Architects
- Information Systems Architects
- Organisational Change professionals
- Project / Programme Managers
- Business Managers and other professionals responsible for effecting process change, and needing to learn more about business processes

**In-House Training:** This course is available on-site. E-mail [customerservice@irmuk.co.uk](mailto:customerservice@irmuk.co.uk) with your enquiries.

23-24 May 2019

London

Fee: £1,295 + VAT

Group Booking & Multiple Seminar Discounts Available

#### Working with Business Processes

21-22 May 2019

#### Advanced Business Process

#### Techniques

23-24 May 2019

#### Business Architecture Best

#### Practices

3-5 June 2019

#### Digital Process Analysis and Design

6-7 June 2019

#### Mastering the Requirements

#### Process

13-15 November 2019

#### Pre-Project Problem Analysis

26-27 November 2019

#### Multiple Booking Discount

Attend more than one of our public course and you will be entitled to the following discounts:

2nd course	10%
3rd course	15%
4th course	20%
5th+course	25%

#### Group Booking Discount

2-3 Delegates	10%
4-5 Delegates	20%
6+ Delegates	25%

Only one discount can be applied at any one time

#### Presenter



Alec Sharp, a senior consultant with Clariteq Systems Consulting, has deep expertise in a rare combination of fields – business process analysis and redesign,

strategy development, application requirements specification, and data modelling. His 35 years of hands-on consulting experience, practical approaches, and global reputation in model-driven methods have made him a sought-after resource in locations as diverse as Ireland, Illinois, and India. He is also a popular conference speaker, mixing content and insight with irreverence and humor. Among his many top-rated presentations are “The Lost Art of Conceptual Modeling,” “Modelling Failure,” “Getting Traction for ‘Process’ – What the Experts Forget,” and “Mind the Gap! – Integrating Process, Data, and Requirements Modeling.” Alec literally wrote the book on business process modeling – he is the author of “Workflow Modeling: Tools for Process Improvement and Application Development – second edition.” Popular with process improvement professionals, business analysts, and consultants, it is consistently a top-selling title on business process modeling, and is widely used as an MBA textbook. The completely rewritten second edition was published in 2009, and has a “5 star” Amazon.com rating. Alec was also the sole recipient of DAMA’s 2010 Professional Achievement Award, a global award for contributions to the Data Management field. Alec’s popular workshops on Working With Business Processes, Data Modeling (introductory and advanced), Requirements Modeling (with Use Cases and Business Services,) and Essentials of Facilitation and are conducted at many of the world’s best-known organizations. His classes are practical, energetic, and fun, with a most common participant comment being “best course I’ve ever taken.”

# Mastering the Requirements Process: Getting Requirements Right

James Robertson

13-15 November 2019

London

Fee £1,595 + VAT

Group Booking & Multiple Seminar Discounts Available

**Business Analysis Public Courses**  
London

**Working with Business Processes**  
21-22 May 2019

**Advanced Business Process Techniques**  
23-24 May 2019

**Business Architecture Best Practices**  
3-5 June 2019

**Digital Process Analysis and Design**  
6-7 June 2019

**Mastering the Requirements Process**

13-15 November 2019

**Pre-Project Problem Analysis**  
26-27 November 2019

**Multiple Booking Discount**  
Attend more than one of our public course and you will be entitled to the following discounts:

2nd course	10%
3rd course	15%
4th course	20%
5th+course	25%

**Group Booking Discount**

2-3 Delegates	10%
4-5 Delegates	20%
6+ Delegates	25%

Only one discount can be applied at any one time

## Presenter



James Robertson is a business analyst, problem solver, author, speaker, instructor, designer, and sought-after consultant. His courses on business analysis and requirements are popular in several continents. James is a principal of the Atlantic Systems Guild and is an author of the Volere requirements techniques and templates which have been adopted by organisations all over the world as their standard for gathering, discovering, communicating, tracing, and specifying solution needs. has contributed to the development of and taught the Volere approach to requirements and business analysis for the last 8 years.

*"Inspirational. Able to provide lots of examples to demonstrate theories and practices."*

Zoey Moore, Business Project Manager, Aegon UK Services

*"Lively, knowledgeable, articulate - absolutely excellent."*

Steve Coe, Requirements & Testing Manager, Department for Work and Pensions

## Overview

Requirements is the most crucial part of development. Requirements today is about uncovering the real needs of the problem space, understanding the needs of the people who use your solution, recognising the environment for the solution, then, in a timely manner, delivering requirements that are concise, clear and testable. This workshop, presented by a real business analyst, gives you a thorough and well-established process for uncovering the real requirements, testing them for correctness, and ensuring that all the requirements have been discovered. The process is used with variations by both agile and traditional projects. It starts with the business, for it is only within the business that you discover the real needs. When you know the real needs, it becomes possible to determine what will best serve those needs, and to write the requirements or stories to build the right solution.

## Learning Objectives

- Determine the real needs of your stakeholders
- Understand the role of the business analyst in agile projects
- Write agile stories that are more effective and accurate
- Write requirements that are complete, traceable, and testable
- Learn diverse elicitation techniques to uncover the real requirements
- Use the Volere Knowledge Model to ensure you have all the needed information, and nothing that is not needed
- Understand the need for, and how to write, functional and non-functional requirements.
- Precisely define the scope of the problem
- Discover all the stakeholders and keep them involved
- Uncover the essence of the business
- Use prototypes, sketches and storyboards to discover hidden needs
- Use state of the art requirements techniques
- Get the requirements quickly, and incrementally
- Write the right requirements and stories

## Course Outline

### The Requirements Process

- An overview of the process for gathering and verifying requirements
- A discussion on how this process can fit into your organization
- A demonstration of how requirements fit into agile processes

### Project Blast-Off

- Scope, Stakeholder, and Goals; the holy trinity of requirements gathering
- How to define a precise scope for the business area to be studied
- How to "Step Back" for a better look at the business
- How to use stakeholder maps to find all the stakeholders
- How to ensure the project's goal is measurable and testable

### Trawling for Requirements

- How to use business events and business use cases to find the right business
- How to use apprenticeship, workshops and other elicitation techniques
- Using the Brown Cow model to see the work more clearly
- How to be more innovative with requirements

### Functional Requirements

- Use case scenarios, and how they are used to find the right product to build
- Determining the system boundary
- How to find the requirements, and write them clearly
- How to write requirements, not solutions
- How to handle requirements for agile projects

### Non-functional Requirements

- The importance of non-functional requirements
- Usability, look and feel, performance, security and other non-functional requirements.
- How to find the non-functional qualities the product must have

## Audience

If you want to be involved in delivering the right systems—the ones that get used, then this course is for you. Typical delegates include:

- Business Analyst
- Agile Team Members
- Systems Analyst
- Requirements Manager
- Requirements Engineer
- Project Leader / Manager
- Product or Program manager
- Product Owner
- Consultant

## Special Features

- Your instructor is not an "announcer". He or she is a practicing business analyst who also happens to be an excellent instructor.
- The course is written to show real-world situations and provide real-world solutions. You will be able to relate your own work situation to the course.
- You can discuss your own requirements issues with your instructor.
- You learn that requirements come from understanding the business and its internal processes, and how the business interacts with its external customers.
- The course provides a realistic framework for requirements discovery, not a strict methodology. The framework provides the freedom and encouragement to adapt to your own organizational needs.
- The techniques are applicable regardless of your development method – agile, traditional or anything else.
- The Brown Cow model to give you different and beneficial ways to look at the problem.
- The Volere requirements knowledge model which ensures you collect the right information, and the right amount of it.
- You receive the Volere Requirements Specification Template (downloaded over 20,000 times) with advice on how to make this your own template.
- A free copy of Suzanne and James Robertson's best-selling book, Mastering the Requirements Process – 3rd Edition, Getting Requirements Right.

**In-House Training:** This course is available on-site. E-mail [customerservice@irmuk.co.uk](mailto:customerservice@irmuk.co.uk) with your enquiries.

# Pre-Project Problem Analysis:

## Practical Techniques for Early Business Analysis Engagement

Adrian Reed

### Overview

Increasingly, organisations are operating in fast-moving and often volatile business environments. Project teams need to respond quickly to tricky and often ill-defined problem situations, enabling the organisation to adapt and meet the ongoing demands of its customers and environment. In these contexts the pre-project stage is crucial: For our change initiatives to be successful, we need to truly understand the problem we are trying to solve. By understanding the problem we can ensure that any future project activity is built upon a firm foundation, and is heading towards a set of goals that are concise, precise and have been agreed upon.

This practical, hands-on workshop, focusses on the problem-solving skills that practitioners need in order to collaboratively explore and describe problems, and to co-create potential options for improvement. These skills are extremely valuable pre-project and early in the project lifecycle, and this course will be of interest to business analysts and other practitioners who help analyse, assess and solve tricky organisational problems.

### Learning Objectives

- Understand what pre-project problem analysis is, and its significance in the analysis and project lifecycle
- Understand the importance of stakeholder identification, categorisation and management
- Be able to use a range of problem analysis techniques to understand problem situations
- Be able to define a problem using a 'problem statement' and understand how successful outcomes can be articulated with Critical Success Factors and Key Performance Indicators
- Understand what a Business Use Case diagram is and understand its value in articulating scope during pre-project problem analysis
- Use a 1 page 'Project Concept Summary' template to bring together a potential project idea onto a page

### Course Outline

#### Introduction

- What is 'Problem Analysis?': A brief introduction to the course, and a discussion of why it is important that we analyse the problem before assuming or implementing a solution

#### Stakeholders in Problem Analysis

- Identifying Stakeholders: Tips for identifying likely stakeholders, along with suggestions of potential 'generic' stakeholder types that regularly warrant consideration
- Stakeholder Analysis: Categorisation of stakeholders
- Communication/Engagement Planning: Planning how to liaise with stakeholders in the early stages of problem investigation
- Power & Politics: Discussion of how power & politics can affect problem solving, and how it affects us as practitioners

#### Understanding the Problem Situation

- Elicitation Techniques: Overview of a range of techniques for eliciting information about a problem situation (Interviews, Workshops, Observation, Document Analysis)
- Categorising Problematic Situations: The difference between a 'difficulty' and a 'mess'
- Problem Analysis Techniques: Practical overview of:
  - 5 Whys
  - Fishbone Diagram
  - Multiple Cause Diagram
  - Causal Loops
- External Environment Analysis: Practical overview of STEEPLE technique for analysing the broader business or organisational context
- Perspectives: The importance of understanding that different stakeholders may perceive the problem situation differently
- Defining the Problem: Overview of a typical 'Problem Statement', along with a discussion of pros/cons and when it is most useful
- Defining Success: Critical Success Factors (CSFs), Key

Performance Indicators (KPIs), Balanced Business Scorecard

#### Defining Business Requirement Scope

- Roles & Goals: Defining the 'roles' that are involved in the problem space and their (business) goals
- Business Use Case Diagram: Introduction to Business Use Case diagrams as a way of scoping out the high level business requirements on a problem situation/potential project concept
- Requirement Types: Brief discussion of other requirement types that may emerge early in the project lifecycle

#### Identifying Areas for Change

- Gap Analysis: Comparing the output from the techniques in previous sections to identify areas where change is desirable
- Existing Solution Evaluation: Discussion on approaches for benchmarking/measuring existing solutions to determine where improvement may be needed

#### Generating Improvement Ideas

- Creative Thinking Techniques: Techniques for generating a range of potential ideas for improvement:
  - Brainstorming
  - Brainstorming Enhancers
- Types of Improvement Approach: Discussion of the breadth of improvement approaches that are generally available, which is often wider than initially anticipated. Discussion on feasibility: What might stop or inhibit an approach being acceptable

#### Bringing It All Together

- Project Concept Summary: Overview of a one page 'project concept summary' outlining the problem, likely requirement scope, and potential solutions
- Validation: How to ensure the 'project concept summary' is validated by key stakeholders
- Next steps: What next after the 'project concept summary'

### Audience

This course is well suited for anyone needing to understand how to undertake problem analysis early in the project lifecycle. It will be of particular interest to BA teams that are looking to 'left shift' and seek early engagement. Typical delegates include:

- Business Analysts
- Business Systems Analyst
- Consultants
- Requirements Manager
- Requirements Engineers
- Product Owner

**In-House Training:** This course is available on-site. E-mail [customerservice@irmuk.co.uk](mailto:customerservice@irmuk.co.uk) with your enquiries.

26-27 November 2019

London

Fee: £1,295 + VAT

Group Booking & Multiple Seminar Discounts Available

**Business Analysis Public Courses**  
London

**Business Analysis Public Courses**  
London

**Working with Business Processes**  
21-22 May 2019

**Advanced Business Process Techniques**

23-24 May 2019

**Business Architecture Best Practices**

3-5 June 2019

**Digital Process Analysis and Design**  
6-7 June 2019

**Mastering the Requirements Process**

13-15 November 2019

**Pre-Project Problem Analysis**  
26-27 November 2019

#### Multiple Seminar Discount

Attend more than one of our public course and you will be entitled to the following discounts:

2nd course	10%
3rd course	15%
4th course	20%
5th+course	25%

#### Group Booking Discount

2-3 Delegates	10%
4-5 Delegates	20%
6+ Delegates	25%

Only one discount can be applied at any one time

#### Presenter



Adrian Reed is a true advocate of the analysis profession. He is a Principal Consultant and Director at Blackmetric Business Solutions where he provides Business Analysis consultancy and training solutions to a range of clients in varying industries. Adrian is Immediate Past President of the UK chapter of the IIBA and he speaks internationally on topics relating to Business Analysis and business change.



This course, Pre-Project Problem Analysis: Practical Techniques for Early Business Analysis Engagement, is a course endorsed by the IIBA. The course is aligned with the BABOK v3. By attending this course you will earn 14 PDs (Professional Development hours) or 14 CDUs (Continuing Development Units).

# Data Governance: A Practical Guide

Nigel Turner

21-22 November 2019

London

Fee: £1,295 + VAT

This fee includes Level 1 and Level 2

Certification

Group Booking & Multiple Seminar Discounts Available

**Enterprise Data Courses, London**

**Ten Steps to Data Quality**

17-19 June 2019

20-22 November 2019

**Information Management**

**Fundamentals**

7-9 October 2019

**Unified Data Delivery – From Data**

**Lake to Enterprise Data Marketplace**

10-11 October 2019

**Data Governance: A Practical Guide**

21-22 November 2019

**Multiple Booking Discount**

Attend more than one of our public course and you will be entitled to the following discounts:

2nd course	10%
3rd course	15%
4th course	20%
5th+course	25%

**Group Booking Discount**

2-3 Delegates	10%
4-5 Delegates	20%
6+ Delegates	25%

Only one discount can be applied at any one time

**Presenters**



Nigel Turner is Principal Information Management Consultant for EMEA at Global Data Strategy Ltd.

and Vice-Chair of the Data Management Association of the UK. Nigel has worked in Information Management for over 25 years, both as an in-house implementer of Information Management solutions at British Telecommunications plc and subsequently as an external consultant to more than 150 clients, including the Environment Agency, British Gas, HSBC, Intel US and others.

## Overview

Data Governance is rapidly becoming a 'must have' for any organisation wanting to manage its data, improve its quality, and control its security, access and uses. An average organisation's data is doubling every 15 months. Propelled by Big Data, Cloud Computing and other innovations, this rapid increase in volumes is compounded by the increasing speed and complexity with which data is created and stored. Organisations are also under increasing customer, regulatory and legal pressures to get data right. Data Governance is seen as a keystone in any solution to address these challenges. Many organisations have already recognised the potential value of Data Governance and have started governance initiatives. Though some have succeeded, many are faltering or have failed. Attending this 2-day seminar & workshop will ensure that you set off on the right path to successful and sustainable Data Governance. Key Topics include:

- What is Data Governance?
- Why is it increasingly a 'must have' for organisations
- Building the internal case for Data Governance
- How and where do you start to

introduce Data Governance

- What are the main components of a successful Data Governance initiative
- How can you revitalise or recover a faltering Data Governance programme
- Creating the Data Governance roadmap

What benefits can you expect and how you measure them

- Real life Data Governance success stories
- Your role in Data Governance – how to prepare yourself to win

Note that course will help you whether you are new to Data Governance or already working as part of an existing Data Governance team or programme.

## Learning Objectives

- Understand what Data Governance is, and what it isn't
- Assess the readiness of your organisation for Data Governance
- Be able to align a Data Governance proposal and initiative with your key organisational & departmental drivers

- Make the internal business case for investment in Data Governance
- Be able to identify and apply the six necessary components of a Data Governance framework
- Create a realistic plan of action for Data Governance

- Apply these practices to a fictional, but highly realistic organisation via a hands on case study
- Learn from best practices in other organisations who are already implementing Data Governance

## Course Outline

### Scene Setting & Introductions

- Scope & objectives of the seminar
- Seminar agenda & attendee expectations
- Introduction to the case study

### Data Governance Context & Drivers

- The overall data landscape
- Some recent data disasters & horrors
- Current & future data challenges
- The overall industry impact of poor data
- A call for action

### Data Governance – An Industry Assessment

- Data Governance – definitions and focus
- How successful has Data Governance been?
- Why Data Governance can fail
- Key components of success – breaking down the barriers

### The Components of Successful Data Governance

- The DAMA DMBOK wheel – the centrality of Data Governance
- The Data Governance Framework explained:
- Vision & Strategy
- Organisation & People
- Processes & Workflows
- Data Management & Measures
- Culture & Communications
- Tools & Technology
- Applying the Data Governance Framework

### Establishing a Starting Point – Data Governance Readiness

- Plotting the journey – Data Governance maturity
- Implications of the maturity assessment
- Case study exercise 1 – context and maturity assessment

### Building the Data Governance Strategy

- Vision & Strategy
  - Creating a clear Data Governance vision
  - Understanding business drivers
  - Identifying key data challenges
  - Producing a Motivation Model
  - Building a business case for Data Governance
- Case study exercise 2 – Creating a Motivation Model
- Organisation & People
  - Organising for Data Governance – industry model structures
  - The pros & cons of each model
  - Required teams, roles & skills
  - Deciding on the right model for any specific organisation
- Case study exercise 3 – Designing a Data Governance organisation
- Processes & Workflows
  - Data Governance & business process design & operation
  - Analysing business processes – Lean approaches
  - Designing Data Governance processes & workflows
  - Data Governance processes explained
  - Case study exercise 4 – Business process analysis & Data Governance processes and workflows
- Data Management & Measures
  - The importance of measurement in Data Governance
  - What to measure & how to measure it – the importance of data definition
  - Establishing baselines and improvement targets
  - Data Improvement Projects
  - Tracking and sustaining the benefits

- Case study exercise 5 – Data definitions and Data Improvement Projects
- Culture & Communications
  - The importance of selling Data Governance
  - Cultural change & Data Governance
  - Key skills & competencies required
  - Communications strategies and plans
  - Case study exercise 6 – Creating a Communications Plan
- Tools & Technology
  - The role of IT in Data Governance
  - Potentially useful tools in Data Governance
  - Making the case for new tools & technologies
  - Case study exercise 7 – Tool selection & procurement business case

### Creating the Data Governance Roadmap

- Bringing it all together – the Data Governance Roadmap
- Hints & tips for developing Roadmaps
- Implementing the Roadmap: a three phase approach
  - Case study exercise 7 – Creating a Data Governance roadmap & selling it

### Data Governance in Reality

- A summary of real life Data Governance success stories
- Telecommunications
- Utilities
- Banking & Finance
- Retail
- Professional Certification Organisation
- Lessons learned from these case studies

### Summary & Conclusions

## Audience

Individuals and teams who are playing, or would like to play, an active role in the implementation of a Data Governance initiative. It will also be of interest to anyone working in a relevant business or IT role who wants to know more about Data Governance concepts and practices. Typical roles who will benefit from this tutorial / workshop include:

- Heads of Data Governance & their teams
- Chief Data Officers & their teams

- Data Stewards
- Data Owners
- Information Strategists & Architects

- Business Analysts
- Data Quality Specialists
- Master Data Management Practitioners

**In-House Training: This course is available on-site. E-mail [customerservice@irmuk.co.uk](mailto:customerservice@irmuk.co.uk) with your enquiries.**

# Unified Data Delivery – From Data Lake to Enterprise Data Marketplace

Mike Ferguson

## Overview

This course looks at the challenges faced by companies trying to deal with an exploding number of data sources, collecting data in multiple data stores (cloud and on-premises), multiple analytical systems and at the requirements to be able to define, govern, manage, unify and share trusted high-quality data products in a distributed and hybrid computing environment. It also explores a new approach to organising your data in a logical data lake and how IT data architects, business users and IT developers can work together to build ready-made trusted data products that can be published in a data marketplace available to others to consume and use to drive value. This new DataOps approach to unifying data includes data ingestion, automated data discovery, data profiling, tagging and publishing data in an information catalog. It also involves refining raw data to produce trusted 'data products' available as a service that can be published in a data marketplace (catalog) available for consumption across your company.

## Learning Objectives

- How to define a strategy for producing trusted data as-a-service in a distributed environment of multiple data stores and data sources
- How to organise data in a centralised or distributed data environment to overcome complexity and chaos
- How to design, build, manage and operate a logical or centralised data lake within their organisation
- The critical importance of an information catalog in understanding what data is available as a service
- How data standardisation and business glossaries can help make sure data is understood
- An operating model for effective distributed information governance
- What technologies and implementation methodologies they need to get their data under control and produce ready-made trusted data products
- Collaborative curation of trusted, ready-made data products and publishing them in a data marketplace for people to shop for data
- How to apply methodologies to get master and reference data, big data, data warehouse data and unstructured data under control irrespective of whether it be on-premises or in the cloud.
- Fuelling rapid 'last mile' analytical development to reduce time to value

## Course Outline

### Establishing a Data Strategy for Rapid Unification of Trusted Data Assets

- The ever-increasing distributed data landscape
- The siloed approach to managing and governing data
- IT data integration, self-service data preparation or both? – data governance or data chaos?
- Key requirements for data management
- Dealing with new data sources – cloud data, sensor data, social media data, smart products (the internet of things)
- Understanding scope of your data lake
- Building a business case for distributed data management
- Defining an enterprise data strategy
- A new collaborative approach to governing, managing and curating data
- Introducing the data lake and data refinery
- Data lake configurations – what are the options?
- Establishing a multi-purpose data lake and Information Supply Chain to produce data products for the enterprise
- DataOps – a component-based approach to curating trusted data products
- The rising importance of an Information catalog and its role as a data marketplace
- Key technology components in a data lake and information supply chain – including data fabric software
- Using Cloud storage or Hadoop as a data staging area and why it is not enough
- Implementation run-time options – the need to curate data in multiple environments
- Integrating a data lake into your enterprise analytical architecture

### Information Production Methodologies

- Information production and information consumption
- A best practice step-by-step methodology structured data governance
- Why the methodology has to change for semi-structured and unstructured data
- Methodologies for structured Vs multi-structured data

### Data Standardisation, the Business Glossary and the Information Catalog

- Semantic data standardisation using a shared business vocabulary within an information catalog
- The role of a common vocabulary in MDM, RDM, SOA, DW and data virtualisation
- Why is a common vocabulary relevant in a data lake, data marketplace and a Logical Data Warehouse?
- Approaches to creating a common vocabulary
- Business glossary products storing common business data names
- Alteryx Connect Glossary, ASG, Colibra, Informatica, IBM Information Governance Catalog, Microsoft Azure Data Catalog Business Glossary, SAP Information Steward Metapedia, SAS Business Data

- Network and more
- Planning for a business glossary
- Organising data definitions in a business glossary
- Key roles and responsibilities – getting the operating model right to create and manage an SBV
- Formalising governance of business data names, e.g. the dispute resolution process
- Business involvement in SBV creation
- Beyond structured data – from business glossary to information catalog
- What is an Information Catalog?
- Why are information catalogs becoming critical to data management?
- Information catalog technologies
- Information catalog capabilities

### Organising and Operating the Data Lake

- Organising data in a centralised or logical data lake
- Creating zones to manage data
- New requirements for managing data in centralised and logical data lakes
- Creating collaborative data lake projects
- Hadoop or cloud storage as a staging area for enterprise data cleansing and integration
- Core processes in data lake operations
- The data ingestion process
- Tools and techniques for data ingestion
- Implementing automated disparate data and data relationship discovery using Information catalog software
- Using domains and machine learning to automate and speed up data discovery and tagging
- AI in the catalog – Alation, IBM Watson Knowledge Catalog, Informatica CLAIRE, Silwood, Waterline Data Smart Data Catalog
- Automated profiling, PII detection, tagging and cataloguing of data
- Automated data mapping and lineage discovery
- The data governance classification and policy definition processes
- Manual and automated data governance classification to enable governance
- Using tag-based policies to govern data

### The Data Refinery Process

- What is a data refinery?
- Key requirements for refining data
- The need for multiple execution engines to run in multiple environments
- Options for refining data – ETL versus self-service data preparation
- Key approaches to scalable ETL data integration using Apache Spark
- Self-service data preparation tools for Spark and Hadoop, e.g. Alteryx Designer, Informatica Intelligent Data Lake, IBM Data Refinery, Paxata, Tableau Prep, Tahr, Talend, Trifacta
- Automated data profiling using analytics in data preparation tools
- Executing data refinery jobs in a logical data lake using Apache Beam to run anywhere
- Approaches to integrating IT ETL and self-service data preparation tools
- ODPi Egeria for metadata sharing
- Joined up analytical processing from ETL to analytical pipelines

- Publishing data and data integration jobs to the information catalog
- Mapping produced data products into your business vocabulary
- Data provisioning – publishing trusted, ready-made data products into an Enterprise Data Marketplace
- The Enterprise Data Marketplace – enabling information consumers to shop for data
- Provisioning trusted data using data virtualisation, a logical data warehouse and on-demand information services
- Consistent data management across cloud and on-premise systems

### Unifying Big Data, Master Data and Data Warehouse Data to Drive Business Value

- A walk through of end-to-end data lake operation to create a Single Customer View
- Types of big data & small data needed for single customer view and the challenge of bringing it together
- Connecting to Big Data sources, e.g. web logs, clickstream, sensor data, unstructured and semi-structured content
- Ingesting and analysing clickstream data
- The challenge of capturing external customer data from social networks
- Dealing with unstructured data quality in a Big Data environment
- Using graph analysis to identify new relationships
- The need to combine big data, master data and data in your data warehouse
- Matching big data with customer master data at scale
- Governing data in a Data Science environment

### Information Audit & Protection – Governing Data Across a Distributed Data Landscape

- What is Data Audit and Security and what is involved in managing it?
- Status check – Where are we in data audit, access security and protection today?
- What are the requirements for enterprise data audit, access security and protection?
- What needs to be considered when dealing with the data audit and security challenge?
- Automatic data discovery and the information catalog – a huge help in identifying sensitive data
- What about privileged users?
- Using a data management platform and information catalog to govern data across multiple data stores
- Securing and protecting data using tag-based policies in an information catalog
- What technologies are available to protect data and govern it? – Apache Knox, Cloudera Sentry, Dataguise, IBM, Informatica Secure@Source, Imperva, Micro Focus, Privitar
- Can these technologies help in GDPR?
- How do they integrate with Data Governance programs?
- How to get started in securing, auditing and protecting your data

10-11 October 2019

London

Fee: £1,295 + VAT

Group Booking & Multiple Seminar Discounts Available

## Enterprise Data Courses, London

Ten Steps to Data Quality

17-19 June 2019

20-22 November 2019

Information Management

Fundamentals

7-9 October 2019

Unified Data Delivery – From Data Lake to Enterprise Data Marketplace

10-11 October 2019

Data Governance: A Practical Guide

21-22 November 2019

## Multiple Booking Discount

Attend more than one of our public course and you will be entitled to the following discounts:

2nd course	10%
3rd course	15%
4th course	20%
5th+course	25%

## Group Booking Discount

2-3 Delegates	10%
4-5 Delegates	20%
6+ Delegates	25%

Only one discount can be applied at any one time

## Presenter



An analyst and consultant, Mike Ferguson specialises in business intelligence/ analytics, data management, big data and enterprise architecture. With over 35 years of IT experience, Mike has consulted for dozens of companies on business intelligence strategy, technology selection, enterprise architecture, and data management. He has spoken at events all over the world and written numerous articles.

## Audience

- Chief Data Officers
- Data Architects
- Master Data Management Professionals
- Big Data Professionals
- Data Integration Developers
- Business Data Analysts doing self-service data integration
- Content Management Professionals
- Database Administrators

In-House Training: This course is available on-site. E-mail [customerservice@irmuk.co.uk](mailto:customerservice@irmuk.co.uk) with your enquiries.

# Information Management Fundamentals

Chris Bradley

7-9 October 2019

London

Fee: £1,595 + VAT

Group Booking & Multiple Seminar Discounts Available

## Enterprise Data Courses, London

### Ten Steps to Data Quality

17-19 June 2019

20-22 November 2019

### Information Management Fundamentals

7-9 October 2019

### Unified Data Delivery – From Data Lake to Enterprise Data Marketplace

10-11 October 2019

### Data Governance: A Practical Guide

21-22 November 2019

### Multiple Booking Discount

Attend more than one of our public course and you will be entitled to the following discounts:

2nd course	10%
3rd course	15%
4th course	20%
5th+course	25%

### Group Booking Discount

2-3 Delegates	10%
4-5 Delegates	20%
6+ Delegates	25%

Only one discount can be applied at any one time

## Presenters



Chris Bradley has spent 37 years in the forefront of the Information Management field, working for

International organisations in Information Management Strategy, Data Governance, Data Quality, Information Assurance, Master Data Management, Metadata Management, Data Warehouse and Business Intelligence. He advises clients including National Grid, EDP, BP, Enterprise Oil, Saudi Aramco, Shell, Statoil, TOTAL, Qatar Gas, Alba Leasing, Alinma Bank, American Express, ANZ, Bank of England, Celgene, Cigna Insurance, Emirates NBD, GSK, HSBC, NAB, SABB and Riyadh Bank. Chris is Director of the E&P standards committee "DMBoard", an author of several books including "Data Modelling for The Business" and "DMBoK 2.0", a member of the Meta Data Professionals Organisation (MPO) a Fellow of BCS and DAMA CDMP, recipient of the DAMA Lifetime Achievement Award for Data Management Excellence, and author of significant parts of professional certifications. Chris is an acknowledged thought leader in Data Modelling and Data Governance, author of several papers and books including "Data Modelling for the Business".

*"Good overview – covered a lot of ground in just 3 days. Very knowledgeable with lots of real world examples."*

Stuart Kay, Master Reference Data Team Leader, Natural Resources Wales

## Overview

This course address all the Information Management disciplines as defined in the DAMA body of knowledge (DMBoK). Taught by an industry recognized DAMA DMBoK(2.0) author and CDMP (Fellow) this course provides a solid foundation across all of the disciplines across the complete Information Management spectrum. By attending the course, delegates will get a firm grounding in all of the core Information Management concepts and illustrate their practical application throughout with real examples of how Information Architecture is applied. Additionally this course provides a solid foundation for students wishing to consider proceeding to take the Industry professional DAMA CDMP certification.

## Learning Objectives

This course is intended to provide delegates with the knowledge, methods and techniques required to analyse, mature and implement information management solutions within your organisation. At the end of the course, delegates would have gained the following:

### Level set understanding & terminology:

- Learn about the need for and application of Information Management disciplines for different categories of challenges
- Explore an Information Management framework and understand how it aligns with other architecture frameworks
- Explore concepts such as lifecycle

management, normalisation, dimensional modelling and data virtualisation and why they are important

- Understand the critical roles of Master Data Management and Data Governance and how to effectively apply them

### Pragmatic Learning

- Learn the different MDM architectures, their suitability for

different needs and how best to implement Master Data Management approaches

- Develop a set of usable techniques that can be applied to a range of information management challenges
- Learn the best practices for managing Enterprise Information needs
- Through practical examples, learn how to apply techniques in information architecture planning

## Course Outline

### Introduction to the DMBoK

- What is the DMBoK, its intended purpose and audience.
- Changes due in DMBoK 2.0, and the relationship of the DMBoK with other frameworks (TOGAF / COBIT etc.).
- DAMA CDMP professional certification overview & CDMP exam coverage by DMBoK section.

### Data Governance

- Why Data Governance is at the heart of successful Information Management.
- A typical DG reference model
- DG roles & responsibilities, the role of the Data Governance Office (DGO) & its relationship with the PMO.
- How to get started with Data Governance.

### Data Quality Management

- The Dimensions of Data Quality, policies, procedures, metrics, technology and resources for ensuring Data Quality is measured and ultimately continually improved.
- A DQ reference model & how to apply it.
- Capabilities & functionality of tools to support Data Quality management.

### Master & Reference Data Management

- The differences between Reference & Master Data.
- Identification and management of Master Data across the enterprise.
- 4 generic MDM architectures & their suitability in different cases.
- MDM maturity assessment to consider business procedures for MDM and the provision and appropriateness of MDM solutions per major data subject area.

- How to incrementally implement MDM to align with business priorities.

### Data Warehousing & BI Management

- Provision of Business Intelligence (BI) to the enterprise and the manner in which data consumed by BI solutions and the resulting reports are managed. Particularly important if the data is replicated into a Data Warehouse.
- Types of BI, DW and Analytics.

### Data Modelling & Metadata Management

- Provision of metadata repositories and the means of providing business user access and glossaries from these.
- The development, use and exploitation of data models, ranging from Enterprise, through Conceptual to Logical, Physical and Dimensional.
- Maturity assessment to consider the way in which models are utilized in the enterprise and their integration in the Software Development Life Cycle (SDLC).

### Data Integration & Architecture Management

- What are the business (and technology) issues that Data Integration is seeking to address, the different styles of Data Integration, their applicability and implications.
- The approaches, plans, considerations and guidelines for provision of Data Integration and access.
- Consideration of P2P, ETL, CDC, Hub & Spoke, Service-orientated Architecture (SOA), Data Virtualization and assessment of their suitability for the particular use cases.

### Data Lifecycle Management

- Proactive planning for the management of Data across its entire lifecycle from inception through, acquisition, provisioning, exploitation eventually to destruction. This IM discipline and its maturity assessment determine how well this is planned for and accomplished.

### Data Risk Management, Security & Privacy

- Identification of threats and the adoption of defences to prevent unauthorized access, use or loss of data and particularly abuse of personal data.
- Exploration of threat categories, defence mechanisms & approaches, and implications of security & privacy breaches.
- Identification of risks (not just security) to data and its use, together with risk mitigation, controls and reporting.

### Regulatory Compliance

- The policies and assurance processes that the enterprise is required to meet.
- Adapting to the changing legal and regulatory requirements related to information and data.
- Assessing the approach to regulatory compliance & understanding the sanctions of non-compliance.

### Data Management Tools & Repository

- Examination of the categories of tools supporting the IM disciplines.
- How to select the appropriate toolset.
- Discussion of an example policy for use of specific technology to ensure consistency and interoperability across the enterprise.

## Audience

Practitioners involved in Information Management, Data Governance, Master Data Management and Data Quality initiatives including:

- Information Managers
- Information Architects
- Data Architects
- Enterprise Architects
- MDM Managers
- Data Governance Managers

- Data Quality Managers
- Information Quality Practitioners
- Business Analysts
- Technology Leaders
- Business Technology Partners

In-House Training: This course is available on-site. E-mail [customerservice@irmuk.co.uk](mailto:customerservice@irmuk.co.uk) with your enquiries.

# Ten Steps to Data Quality

Danette McGilvray

## Overview

Simply put, information quality is providing the correct set of accurate information, at the correct time and place, to the correct people. However, ensuring quality information is far from simple. Whether you are just starting a project or are already in production, it is not unusual to find that data quality issues prevent organizations from realizing the full benefit of their investments in business processes and systems. The Ten Steps to Data Quality course teaches a practical approach to creating, improving, and managing the quality of information critical to providing products and services, satisfying customers, and achieving goals for any type of organization. If you are working on real data quality-related issues that need real results, this is the course for you. What is learned applies to all kinds of data and every type of organization – for-profit businesses of all sizes, education, government, healthcare, and nonprofit – because all depend on trusted information to succeed. Both concepts and practical application are included. Concepts provide a foundation for understanding data quality. Concepts are put into action through the Ten Steps™ process. Both are needed to apply the methodology appropriately to the many data quality related situations that attendees will face within their organizations. In addition to discussion and exercises (individual and as a group), attendees will practice what is learned by applying the steps and techniques to a course project of their choice. Come with your particular needs in mind, be ready to participate, practice applying what is learned to your situation and leave with realistic methods for managing data quality.

## Learning Objectives

- Turn data quality challenges into actionable projects with clear objectives
- Connect data quality issues to business priorities
- Understand concepts that are fundamental to data quality management, (for example, the Framework for Information Quality, information life cycle, data quality dimensions, business impact techniques, root cause analysis)
- Choose the appropriate steps/activities from the Ten Steps™ process to address business needs
- See how other data management topics such as data governance, data modeling, metadata, business rules, master data, reference data, and data standards fit into the process for ensuring high quality data

## Course Outline

### The Data and Information Quality Challenge

- Information and data quality defined
- Why we care about data quality
- Data quality in action through programs, projects, and operational processes
- The Ten Steps™ methodology – key concepts plus the Ten Steps™ process

### Key Concepts – A Necessary Foundation for Understanding Information Quality

- Framework for Information Quality (FIQ) – Components that impact information quality:
  - Business Needs - Goals, Strategies, Issues, Opportunities
  - Information Life Cycle (POSMAD – Plan, Obtain, Store and Share, Maintain, Apply, Dispose)
  - Key Components that affect information quality (Data, Processes, People/Organizations, Technology)
  - Interaction between the Information Life Cycle and the Key Components
  - Location (Where) and Time (When and How Long)
  - Broad-Impact Components (RRISC – Requirements and Constraints, Responsibility, Improvement and Prevention, Structure and Meaning, Communication, Change)
- The relationship between Data Governance, Stewardship, and Data Quality

### Step-by-Step: The Ten Steps™ Process

- Each of the Ten Steps is covered in the seminar with instructions, techniques, examples, templates and best practices.
- Data quality tools will also be discussed in the applicable steps.
- Exercises and working on a course project with small teams give attendees the opportunity to practice what is learned.

#### Step 1 Determine Business Need and Approach

- Define and agree on the issue, the opportunity, or the goal to guide all work done throughout the project.
- Refer to the business need throughout the other steps in order to keep the goal(s) at the forefront of all activities

#### Step 2 Analyze Information Environment

- Gather, compile, and analyze information about the current situation and the information environment.
- Document and verify the information life cycle, which provides a basis for future steps, ensures that relevant data are being

- assessed, and helps discover root causes
- Design the data capture and assessment plan

#### Step 3 Assess Data Quality

- Evaluate data quality for the data quality dimensions applicable to the issue
- Results of assessments provide a basis for future steps, such as identifying root causes and determining needed improvements and data corrections
- Overview of all the dimensions of data quality and how to choose which dimensions will best support business needs

#### Step 4 Assess Business Impact

- Determine the impact of poor-quality data on the business using a variety of qualitative and quantitative techniques.
- This step provides input to establish the business case for improvement, to gain support for information quality, and to determine appropriate investments in your information resource

#### Step 5 Identify Root Causes

- Identify and prioritize the true causes of the data quality problems.
- Develop specific recommendations for addressing the problems.

#### Step 6 Develop Improvement Plans

- Finalize specific recommendations for action.
- Develop improvement plans based on the recommendations.
- Establish ownership for implementation.

#### Step 7 Prevent Future Data Errors

- Implement solutions that address the root causes of the data quality problems.

#### Step 8 Correct Current Data Errors

- Implement steps to make appropriate data corrections.

#### Step 9 Implement Controls

- Monitor and verify the improvements that were implemented
- Maintain improved results by standardizing, documenting, and monitoring appropriate improvements

#### Step 10 Communicate Actions and Results

- Document and communicate the outcome of quality tests, improvements made, and results of those improvements.
- Communication is so important that it is part of every step

## Audience

Individual contributors and team members responsible for or interested in the quality of data in their business processes, systems or databases. This includes roles such as:

- Data Analysts
- Data Quality Analysts
- Business Analysts
- Data Designers/Modellers
- Data Stewards
- Application Developers
- Any data professional impacting the quality of data upon which

their business depends

- Managers and project managers of individual contributors and team members. They need to understand what is involved in addressing data quality because they hire resources, assign people's time, provide support, and remove roadblocks to data quality work.
- Users of data whose work has been affected by poor data quality and want to find solutions for those problems.

**In-House Training:** This course is available on-site. E-mail [customerservice@irmuk.co.uk](mailto:customerservice@irmuk.co.uk) with your enquiries.

17-19 June 2019  
20-22 November 2019  
London

Fee: £1,595 + VAT  
Group Booking & Multiple Seminar Discounts Available

### Enterprise Data Courses, London

Ten Steps to Data Quality  
17-19 June 2019  
20-22 November 2019

Information Management  
Fundamentals  
7-9 October 2019

Unified Data Delivery – From Data  
Lake to Enterprise Data Marketplace  
10-11 October 2019

Data Governance: A Practical Guide  
21-22 November 2019

**Multiple Booking Discount**  
Attend more than one of our public course and you will be entitled to the following discounts:

2nd course	10%
3rd course	15%
4th course	20%
5th+course	25%

**Group Booking Discount**

2-3 Delegates	10%
4-5 Delegates	20%
6+ Delegates	25%

Only one discount can be applied at any one time

### Presenter



Danette McGilvray is an experienced trainer, consultant and author of Executing Data Quality Projects: Ten Steps to

Quality Data and Trusted Information™. An internationally respected expert, her Ten Steps™ approach to information quality has been embraced as a proven method for creating, improving, and managing the quality of all types of data for any kind of organization. Her book is used as a textbook in university graduate programs.

*"Very easy to follow and apply to the work/challenges that I am going to face. Danette was great at using every day experiences and relating them to data quality. A great presenter who is open to new ideas irrespective of being in Data Quality for over 20 years."*

Naomi Thomas, Data Quality Analyst,  
Gocompare.com

*"The course has helped me put into perspective and break down the areas of data quality that should fall under investigation in any project - the steps methodology ensures you have captured all the areas that affect data quality completely."*

Eirini Basta, Local Data Steward,  
Business Systems, HEINEKEN UK

# Dynamic Strategies for Investing in Change

Chris Potts

28-29 November 2019

London

Fee: £1,295 + VAT

Group Booking & Multiple Seminar Discounts Available

Architecture & Strategy Public Courses, London

Business Architecture Best Practices

3-5 June 2019

Architecting the Digital Business Platform

11-12 June 2019

BizOps

13-14 June 2019

Zachman Enterprise Architecture Certification

16-18 September 2019

Great Skills Make Great Architects

24-25 October 2019

Business Change & Transformation Public Course, London

Dynamic Strategies for Investing in Change

28-29 November 2019

Multiple Booking Discount

Attend more than one of our public course and you will be entitled to the following discounts:

2nd course	10%
3rd course	15%
4th course	20%
5th+course	25%

Group Booking Discount

2-3 Delegates	10%
4-5 Delegates	20%
6+ Delegates	25%

Only one discount can be applied at any one time

Presenter



Chris works worldwide with Executives, Portfolio Managers and Enterprise Architects, on strategies for Enterprise Investment – achieving organisational excellence at investing in change. He has chaired world-class conferences on innovation, business change, transformation and enterprise architecture, and delivered guest lectures at universities in New York, London, and Copenhagen. Chris is also the author of a trilogy of business novels – “FruITion”, “RecrEAtion” and “DefrICTion”- that explore through story-telling the past, present and future of enterprise strategies for investing in change.

## Overview

**Change is accelerating and fragmenting, fast. This workshop is for everyone who needs to have a joined-up view of change:** joined-up goals, architectures, requirements, risks, resources and methods. If that's you, then your role is about creating across-the-board outcomes that are more than just the sum of individually-chosen changes.

**The acceleration of change is outside-in.** Markets transform and customer choices evolve faster than many enterprises are capable of changing, yet slower than others would prefer. Getting out-of-sync with the market, one way or the other, is now more likely than ever and will soon show up in the business results. Speed-to-outcomes is now a defining requirement in choosing the best changes to invest in.

**Fragmented change is both a trend and a choice.** Global developments, such as digitalization, AI and enterprise agility, are exploding the volume and diversity of ideas to invest in. Meanwhile, people are dividing-up changes – where possible – into small, low-risk and iterative deliveries, worked on by self-governing teams. So, being dynamic at creating co-ordinated outcomes, through diverse and fragmented initiatives, is now at the heart of our excellence at investing in change.

**Two days. Eight inter-related workshop sessions. As many of your real-world challenges as we can answer in the time.** Starting with what it takes to be excellent at investing in change, and finishing with what you want to do next. We'll explore strategy, culture, process, portfolio, structure and performance. And, conclude the “dream team” capabilities that every enterprise needs today – to create joined-up outcomes, at market-speed, from an increasing diversity of ideas and initiatives.

## Learning Objectives

- **Create joined-up outcomes from a diversity of ideas and initiatives.** The six inter-related ingredients of success at investing in change.
- **Use one goals-driven and dynamic Change Portfolio.** Joined-up investment in ideas, innovations, transformations, waterfall projects, agile releases, and so on.
- **Map your Investment Process and Culture, and fix any significant gaps:** Speed-to-Outcomes as the momentum for change.
- **Transform your enterprise in-sync with the market.** Why it is essential to invest in your enterprise's structure.
- **Grow the impact and value of your change-related capabilities.** The “dream-team” capabilities for driving dynamic and joined-up change.

## Course Outline

### How to Be Excellent at Investing in Change

- Having a clear Investment Strategy, using tried-and-tested principles
- Why some changes work better than others, and some don't work at all
- The six ingredients of dynamic, efficient and goals-driven change

### Culture Cooks-Up, and Eats, the Changes Your Enterprise Invest In

- Start here: diagnose and map the Investment Culture
- Your culture's personality, maturity, and impact on results
- How to fix an underperforming culture

### Turning Ideas into Outcomes, at Market-Speed

- The Investment Process at the heart of your enterprise
- Using Speed-to-Outcomes to drive momentum and choices
- Working with multi-speed methods for implementing change

### Priority Goals, Dynamic Choices, Efficient Investments

- The four generations of Change Portfolio
- From initiatives-driven to goals-driven change, and beyond
- Prioritise goals, then dynamically invest in the best mix of ideas

## Audience

This workshop is a multi-disciplinary workshop, for everyone involved in joined-up change, including:

- Enterprise Architects
- Business Architects
- Senior Business Analysts
- Change Portfolio Managers and PMO leaders, including those working in Finance and IT
- Organisational Change Specialists
- Business Process Designers
- Consultants specialising in Business Change and Transformation

### Transforming In-Sync with the Market

- The three inter-related architectures: market, enterprise, business
- What outcomes you need from transformational changes?
- Why it's essential to invest in Structural Performance

### People Create Outcomes from Change

- Who is, in reality, driving your Portfolio Performance?
- Creating shared outcomes from self-governing changes
- How to manage diverse, and realistic, probabilities of success

### Joined-Up Capabilities, for Joined-Up Outcomes

- How your enterprise achieves more than just the sum of its silos
- The dream-team capabilities, for driving co-ordinated investments
- Enterprise Architects + Business Analysts + Change Portfolio Managers

### Your Enterprise: What Next?

- What's already working, what to focus on now
- The to-do list for tomorrow and beyond: technical, cultural, political?
- Choosing your results-driven, practical and dynamic interventions.

*'The opportunity to meet and talk to people from different industries was invaluable.'*

Deanne Earle, Principal Consultant, Unlike Before



## IRM UK Business Change & Transformation Conference

18-20 March 2019, London

*'Great! Very inspirational, Will come next Year. Will recommend It. '*

Maria Laveron, Head of Processes and Tools, Eurofight GMBH

*"Superb conference. Will go back filled with great ideas. Where to start though?!"*

Michael Sheahan, BI Manager, IKEA Service BV



## IRM UK Master Data Management Summit & Data Governance Conference

13-16 May 2019, London

*"High quality event with top speakers and topics. A perfect mix between MDM and Data Governance status and trends."*

Galand Vincent, Senior Business Analyst, ING Belgium

*"This is really a great event to share ideas and learn from the industry. I will definitely come to the next one!"*

Isha Jain, BA Best Practice & Standards Lead, National Grid



## IRM UK Business Analysis Conference

23-25 September 2019, London

*"So glad I got the opportunity to attend. Brilliant to meet so many people in the same profession and to learn from them."*

Annette O'Donovan, Senior Business Analyst, Genworth

*"There's a reason why people keep coming back year after year – great conference (as always)."*

Terje Bremnes, Enterprise Architect, Helse Vest, Norway



## IRM UK Enterprise Architecture & Business Process Management Conference

21-24 October 2019, London

*"Possibly the best conference I've ever attended for the insights and ideas it has provided."*

Philip Ainsworth, Business Architect, Student Loans Company

*"Great conference, the best event in Data Management! Excellent speakers and very interesting content."*

Ana Teresa Szmoes, Caixa Geral de Depósitos



## IRM UK Enterprise Data and Business Intelligence & Analytics Conference Europe

18-22 November 2019, London

*"This event never fails to enable me to connect with people who I can learn from and who can re-energise me in Data Management."*

Andy Moore, Process Specialist, Information, Rolls-Royce



IRM UK is a leading provider of strategic Business and IT Training for Business and IT Management. We provide courses and conferences on Enterprise Architecture and Strategy, Business Analysis and Enterprise Data Management. We have a wide range of speakers, many of whom are leading figures in their fields. Our events are condensed and rigorous combining technical explanations with management advice and discussions of future directions.

## Registration Information:

Full payment or a purchase order is due prior to the event. Payment may be made in Sterling (£) or Euros (€). If paying in Euros the prevailing exchange rate of the country of the delegate or delegates' company is to be used. The total Euros remitted should be the amount required to purchase the sterling pound cost of the event on the day of payment. All delegates must add VAT (20%) to their total event fees. VAT may be reclaimed by delegates from the tax authorities after the event.

The registration fee includes the lectures, documentation, refreshment breaks and lunch on each day of the event. The cost of hotel accommodation is not included in the event fee.

2 days	£1,295 + VAT (£259)	£1,554
3 days	£1,595 + VAT (£319)	£1,914
4 days	£1,995 + VAT (£399)	£2,394

### Group Booking Discounts:

2-3 delegates 10% • 4-5 delegates 20% • 6+ delegates 25%

### Multiple Seminar Discounts:

Attend more than one of our courses and you will be entitled to the following discounts:

2nd course 10%  
 3rd course 15%  
 4th course 20%  
 5th course 25%

Only one discount can be applied at any one time.

## How to Register

e-mail: [customerservice@irmuk.co.uk](mailto:customerservice@irmuk.co.uk)

Website: [www.irmuk.co.uk](http://www.irmuk.co.uk)

Phone: +44 (0)20 8866 8366

### Booking Reference:

Please quote this booking code when registering:

**EVNT**



Follow us @IRMUK  
[www.twitter.com/IRMUK](https://www.twitter.com/IRMUK)



Join our various LinkedIn  
 Conference Groups via  
[www.irmuk.co.uk](http://www.irmuk.co.uk)

## Cancellation Policy:

Cancellations must be received in writing at least two weeks before the commencement of the course and will be subject to a 10% administration fee. It is regretted that cancellations received within two weeks of the course date will be liable for the full fee. Substitutions can be made at any time.

## Cancellation Liability:

In the unlikely event of cancellation of the course for any reason, IRM UK's liability is limited to the return of the registration fee only. IRM UK will not reimburse delegates for any travel or hotel cancellation fees or penalties. It may be necessary, for reasons beyond the control of IRM UK, to change the content, timings, speakers, date and venue of the course.

## Course Timetable:

08.30 – 09.00 Registration (first day only)  
 09.00 – 12.30 Course  
 12.30– 13.30 Lunch  
 13.30 – 17.00 Course

## Course Venue

etc.venues Marble Arch  
 Garfield House,  
 86 Edgware Rd,  
 London W2 2EA

Course venues may change occasionally. Please therefore check the course website for updates.

## Hotel Accommodation Details:

IRM UK in association with JP Events have arranged special discounted hotel rates at hotels nearby. Contact JP Events:

Info@jpetem.com  
 Tel: +44 (0)84 5680 1138  
[www.jpevents-bookings.co.uk/](http://www.jpevents-bookings.co.uk/)

## IRM UK

2nd Floor  
 Monument House  
 215 Marsh Road  
 Pinner  
 Middlesex HA5 5NE  
 T: +44 (0)20 8866 8366  
 E: [customerservice@irmuk.co.uk](mailto:customerservice@irmuk.co.uk)  
 W: [www.irmuk.co.uk](http://www.irmuk.co.uk)

Copyright ©2018  
 IRM UK Strategic IT Training Ltd