## Architecture and Business Change

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## Business Analysis

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## Enterprise Data & Business Intelligence

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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 & Contraction” 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.

Enterprise Engineering

- Models from My Bookshelf – 75 years of experience
- 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 Practicities
- “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

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 Architecture

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.

Course Outline

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, 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.

"Finally it all comes together. Great examples and stories. Continue with passion – it’s really good."

Willem van den Brink, Team Manager Enterprise Architecture, APG Asset Management

“Fun, informative and eye-opening. Very educational, friendly and helpful lecturers”

Shiraz Adam, Application & Intelligence Architect, Next Group PLC

"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 with your enquiries.
Dynamic Strategies for Investing in Change

Chris Potts

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: 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

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.

Audience
Dynamic Strategies for Investing in Change 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

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

28-29 April 2020
London
Fee: £1,295 + VAT

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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 – “FrulTion”, RecEAtion” and “DefriCtion” - that explore through story-telling the past, present and future of enterprise strategies for investing in change.

IRM UK
Architecting the Digital Business Platform

Michael Rosen

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 with your enquiries.
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 incompatibility 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

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

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

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

Roger Burlton

Overview
Quick and effective business change means that Business Architects must know the interconnections among business elements so that as the business models 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 straightforward and useful Business Architecture looks like
- Learn how to implement the concepts and practices of the BIZBOK
- 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
- What 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 Object
- Concept Model
- Business Vocabulary
- Deriving the Information Model

Workshop: What is your Business Object/Concept Model?

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-focused 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
- Information and 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
- Mission, 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

Business Analysis Public Courses London

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

Presenters
Roger 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.

Kay Butterworth, Business Architect, Department for Work and Pensions

"Great real life experiences that brought the subject to life.”
Sheldon Bedwell, Senior Manager
Business Architect, Carnival UK Group

"Brilliant content – took so much away that I will use, very engaging, clear and logical with useful examples. Beyond expectations, the best course I have been on.”

Roger Burlton, Business Architect, BPTrends Associates

In-House Training: This course is available on-site. E-mail customerservice@irmuk.co.uk with your enquiries.
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
Case study Workshop: Developing digitalized mortgage process capabilities and resources

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: Developing 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 IBPMS, Decision and Rules engines
• Standards and Protocols
• Technical Foundation

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 with your enquiries.
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.

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 for 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

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

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.
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 overview
- 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 impact on business processes
- A modular, feature-based approach to process design
- The lowly procedure and its impact on organisational culture

Process Modelling for People – Methods to Maximise Stakeholder Engagement

- Avoiding the common errors in process modelling / process mapping
  - “Scope before flow” – how and why to build a “Process Scope Model” and a “Process Summary Chart” before modelling process workflow
  - The “Augmented Scope Model” and why it’s often an effective alternative to feature modeling (e.g., swimlane diagramming)
- When and when not to use BPMN, UML, and other technically-oriented approaches
- “Flow first, detail later” – a fast approach to building a first-cut flow model and then refining it
- Progressive detail in flow models, and the role of scenarios and process instance models
- Conventions for comprehension in process model graphics
- When to stop process mapping and shift to other forms

Designing an Implementable and Sustainable Business Process

- Five common difficulties with process design / redesign
- Seven common process problems to look out for
- Using a structured, enabler-based assessment of the as-is process to generate creative ideas for the to-be process
- Uncovering unanticipated consequences – an enabler-based assessment of features
- Establishing the essence (the “what”) of the to-be process before determining “who and how”
- A real-life case study illustrating the methodology
- A checklist for ensuring the process is sustainable

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

In-House Training: This course is available on-site. E-mail customerservice@irmuk.co.uk with your enquiries.
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
- Using the Brown Cow model to give you different and beneficial ways to look at the problem
- Setting the system boundary
- 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 will 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.

In-House Training: This course is available on-site. E-mail customerservice@irmuk.co.uk with your enquiries.
Overview

Business analysis is changing – for the better. Whether you work in a traditional environment, or as part of an agile team, your business analysis approach today can be more flexible, more nimble, more effective, more focused on solving the right problem and delivering real value. Despite all our technological advances, our biggest problem is still the human one: How to ensure you know your customer’s real problem, and how to ensure that your solution is correctly solving that problem. Business analysis agility means using an adaptable approach to challenge assumptions, to make better use of feedback, to iterate, to use more flexible tools, and to understand the customers’ value when discovering their real, underlying needs. For it is only by addressing the right needs and solving the right problem can you deliver real value to your customer and your sponsor. This course gives you a different approach to business analysis. This one provides a business analysis framework that works regardless of whether you are part of an agile environment and need to provide stories for iterative development, or whether you are in a traditional environment and need to produce a requirements specification suitable for more formalized environments and outsourcing. This course gives you a vision of the modern business analyst, one who understands the role is much more than writing requirements.

Learning Objectives

- How to discover your customer’s needs and values
- How to ensure your solution solves the right problem
- How safe-to-fail probes can establish that your solution delivers value
- How to see the bigger picture of business processes and business needs
- How to be a better business analyst

Course Outline

**Agile Business Analysis**
- An agile framework for business analysis
- Continuous nature of discovery and delivery
- Agile or traditional requirements

**Do You Know What Your Customers Value?**
- Identify and prioritise the customer segments
- Value propositions
- Value to the customers, value to your organisation

**Are You Solving the Right Problem?**
- Essence of the customer’s problem
- Generating multiple candidate solutions
- Safe to fail probes to prove a candidate solves the right problem
- Finding the best candidate solution

**Investigate the Solution Space**
- Scoping the solution space – the extent of the solution
- Business processes within the solution

**Audience**

Business analysis is a universal task, but it normally falls to skilled people with a job title such as:
- Business Analysts working with agile teams
- Business Analysts working with traditional teams
- Product Owner
- Agile team member
- Business stakeholders
- Project Leader
- Requirements Engineer
- Product or Program Manager
- ... or similar titles.

We also find Business Stakeholders, Users and Software Customers benefit from learning advanced business analysis techniques, and how they can contribute to the organisation’s wellbeing.

**Special Features**

- Teaching chapters are reinforced with hands-on workshops
- The course is run interactively with lots of opportunity to discuss issues with the instructor, and with other participants
- You are shown how the course applies to your own work situation
- Participants receive a copy of Business Analysis and Leadership, edited by Penny Pullan and James Archer
- Your instructor has real world experience, and is willing to discuss how you can be most effective doing business analysis in your organisation.

In-House Training: This course is available on-site. E-mail 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, focuses 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

In-House Training: This course is available on-site. E-mail customerservice@irmuk.co.uk with your enquiries.
Overview

Old masterpieces, such as BI and DW, are the foundation for a digital business but only table stakes for survival. Data lakes, predictive analytics, social media, and the Internet of Things are but stepping stones to the digital future; as they stand, they won’t guarantee a thriving transformation. We need a new IT architecture that reintegrates all decision making and action taking across all the people, processes and information of the coming digital era. An architecture that incorporates all the technological advances in databases, NoSQL stores, data integration and delivery, as well as the old challenges of operational BI, spreadsheets, metadata, virtualisation, and collaboration. That provides a comprehensive structure for information and process integration— with speed and consistency— across the entire enterprise. Built on modern tools and techniques, from object stores to cognitive computing, from algorithms to neuroscience, from on-premises to hybrid cloud. Building on thirty years of data warehousing experience and expanding from his comprehensive and well-respected “Business unIntelligence” architecture to include a host of emerging topics, from data to AI. Dr. Barry Devlin crafts a creative but realistic path from data warehouses and lakes, BI and analytics, to show how to design and build a digital business from the existing systems running your enterprise today. With the clear and enormous impact of digital transformation, now is the time to start building the skills, organisation and infrastructure in architecture, technology and planning to build out your BI environment with AI and other emerging techniques to create a successful digital business.

Learning Objectives

• The meaning and implications of digital business
• Drivers, structure and components of digital business architecture including:
  • The Business unIntelligence conceptual and logical architectures
  • Data and information—the foundation for everything
  • Formal and informal business processes— getting from information to action
  • Data collection, preparation, integration, and use in a digital business
  • Business context and meaning in information use
• People—action-oriented decision making and engaging innovation
• Technological foundations of information processing, traditional and emerging
• Database and data management technologies
• Data virtualization and preparation tools for integration across warehouses and lakes
• BI tools, analytics and algorithms in support of decision making
• A dive into artificial intelligence and cognitive computing:
  • A brief history and explanation of AI evolution, key concepts, and terminology
  • Understanding how IoT and social media enable AI as the new driver of business value
  • Approaches to applying AI to decisions and actions: augmentation vs. automation
  • Technology needed to build business applications and manage data for AI
  • Planning and implementation—practical steps for building a digital business
• Ethical, economic, and social considerations for your business and society

Course Outline

Digital Business—History and Emergence
• A brief history of decision-making support—from BI to AI
• Origins and meaning of digital business

Rationalise pro and con digital business

The Why and How of a New Architecture
• The emergence and impact of big data, the Internet of Things and artificial intelligence
• New, future-proof hypotheses for a new architecture
• A new approach beyond layering—Information, Process, and People
• The pillars of a new architecture that supports multiple storage technologies

The Information Resource—the Foundation for Everything
• New classes of information and data—human-sourced and machine-generated—and how they interact with the traditional process-mediated data stores of the business
• Big data and data lakes—hype and reality, sources and types, business and IT implications
• Key considerations—timeliness/consistency, structure/context, and reliance/usage
• New conceptual and logical architectures for all information and data
• Metadata as information—sources and stores, tools and techniques, data modelling
• Relational database evolution—structures, software and hardware
• NoSQL and NewSQL data stores, object stores, and more
• What’s happening to Hadoop?

Artificial Intelligence—History and Foundations
• A brief history and directions of AI
• Overview of artificial neural networks and other techniques
• Directions for development and use

The Processes—Getting from Data/Information to Decisions and Actions
• Data preparation, ETL, data warehouse automation, wrangling, and data virtualisation
• The new role of users in “application development”
• Understanding adaptive, close-loop business processes
• Service Oriented Architecture and Microservices
• A dive into decision making and action taking—the adaptive decision loop
• How pervasive mobile connectivity, processing and storage

Managing and Governing Data in an AI-Flavoured World
• Data sources for AI use
• Data/information preparation and governance from external sources
• Conflicting and overlapping data, erroneous data
• The role and importance of context in gathering, preparing and using data for AI
• Governance, privacy and other ethical issues
• From exploration to production across data warehouses, lakes and operational systems

The People—Understanding Needs and Engaging Innovation
• Motivation and the workings of the human mind in business
• Classes of BI—information-centric, process-centric and collaborative
• BI and data lakes and other decision support tools
• Decision-making and action-taking in a close-loop, real-time environment
• Beyond rational choice theory and the role of emotions and social behaviour in decisions

Applying AI to Decision Making
• AI in information use and decision making / action taking
• Operational, tactical and strategic decision-making considerations
• Automation vs. augmentation—the importance of understanding the difference
• Centralisation vs distributed processing
• Model management

Planning and Implementation
• Evolution—not revolution
• The Staged Implementation Roadmap
• Organisational considerations; changes in IT culture and responsibilities
• Selected possible first migration steps

Building the Digital Business—Overcoming Considerations
• Ethical considerations for data-based analytics and AI in business
• Wider ethical concerns for society
• The impact of AI on the economy and employment
• Avoiding societal breakdown

Audience

• Enterprise, Systems, Solutions and Data Warehouse Architects
• Systems, Strategy and BI/Analytics Managers
• Data Warehouse/Lake and Systems Designers and Developers

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

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

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Overview

This course provides a solid foundation of the different information disciplines across the complete Information Management spectrum. By attending the course, delegates will get a firm grounding of the core Information Management concepts and illustrate their practical application with real examples of how they are applied. Additionally, this course highlights the key curriculum items for students wishing to take the Industry professional certification the DAMA Certified Data Management Professional (CDMP). At the end of day 3 of the course, students will optionally have the opportunity to take the CDMP examination. Full details of the CDMP examinations, levels and costs are available at https://cdmp.info/.

Learning Objectives

Level set understanding & terminology:
- Learn about the need for and the 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 appreciate why they are important
- Understand the difference between Master Data Management and Data Quality in terms of 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
- Understand the different facets (dimensions) of Data Quality and explore a workable Data Quality framework;
- Discover the major considerations for successful Data Governance and its crucial role in introducing bite-sized pieces;
- 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 Data Management, DMDB0 & overview of the CDMP certification:
- What is Data Management, the drivers and issues if it goes wrong
- What is the DMDB0, its intended purpose and audience of the DMDB0
- What are the disciplines of Data Management in the DMDB0
- Overview of the DAMA CDMP professional certification, what are the levels and how can you progress from one level to the next.

Data Governance
- What is Data Governance
- Why Data Governance is at the heart of successful Information Management.
- A typical Data Governance reference model.
- Data Governance roles & responsibilities.
- Overview of the role of Data Governance in the enterprise and the way data consumed by BI solutions and the resulting reports are managed.
- How to get started with Data Governance.

Data Quality Management
- What is Data Quality and why “Validity” is often confused with “Quality”
- The different Dimensions of Data Quality.
- The policies, procedures, metrics, technology and resources for ensuring Data Quality is measured and ultimately continually improved.
- A Data Quality reference model & how to apply it.
- Root cause analysis & 5-whys
- Capabilities & functionality of tools to support Data Quality management.
- Data Quality measures – guidelines for their creation & monitoring.

Master & Reference Data Management
- The differences between Reference & Master Data.
- Identification and management of Master Data across the enterprise.
- 4 generic Master Data Management architectures & their suitability in different cases.
- The different genres of Master Data Management solutions & pitfalls to avoid.
- Different approaches for Master Data Management implementation.
- The essential relationship between Master Data Management, Data Quality, and Data Governance.
- The under looked but critical aspect of Reference Data Management.

Data Warehousing & BI Management
- What is a Data Warehouse & why are they used.
- Provision of Business Intelligence (BI) to the enterprise and the way data consumed by BI solutions and the resulting reports are managed.
- Particularly important if the data is replicated into a Data Warehouse.
- The major DW architectures (Inmon & Kimball)
- Introduction to Dimensional Data Modelling
- Overview of slowly changing dimensions and why they are required

Data Modelling
- What are Data Models & why do we need them.
- What are the different types of Data Models, their use and how they interrelate.
- The development, and exploitation of data models, ranging from Enterprise, through Conceptual to Logical, Physical and Dimensional.
- Data modelling & Big Data - why data modelling is NOT just about Relational database design
- The use of data models in Data Governance, and Data Quality Management.

Metadata Management
- What is (and isn’t) Metadata
- The provision of metadata repositories and the means of providing business user access and glossaries from these.
- Different types of Metadata & their uses
- Where is metadata found – the different sources of metadata.
- What metadata do we need to manage

Course Details

Fee: £1,595 + VAT

Group Booking & Multiple Seminar Discounts
- 6+ Delegates 25%
- 4-5 Delegates 20%
- Only one discount can be applied at any one time.

Presenter

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. Chris is Director of the E&P standards committee “DMDB0”, an author of several books including “Data Modelling for The Business” and “DMDB0 2.0”, and is the Editor-in-Chief of the Meta Data Professional Organisation (MDPO) a body 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”.

Information Management Fundamentals (with optional CDMP Professional Certification)

Chris Bradley

Audience

- Business Intelligence & Data Warehouse Developers & Architects
- Data Architects / Analysts
- Data Governance Managers
- Data Quality Managers
- Information Quality Practitioners
- Enterprise / Solution / Application / Information Architects
- Business Analysts
- Data Modellers
- Creators & Consumers of Data
- Architects & Analysts
- Developers
- Project / Programme Managers
- IT Consultants

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10-11 March 2020

Data Governance: A Practical Guide

12-13 March 2020

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Overview
With data being at the forefront of ALL business, the need for organisations to produce a wide-ranging Data Strategy is greater than ever, with both the increase in data regulations and the focus on data driven business outcomes. Yet, creating an enterprise wide data strategy and the governance to support it can be a formidable task. Often, it is difficult to know where to begin, and how best to prioritise efforts due to the large number of stakeholders and many competing initiatives. Data is at the heart of all organizations, almost like blood flowing through its arteries and veins. However, all too often Information is not professionally managed with the rigour and discipline that it demands. Nonetheless the implications of poorly managed Information can be catastrophic, from legal and other regulatory sanctions ultimately to business collapse. Professor Joe Peppard (European School of Management, Cranfield) summed it up when he said: “The very existence of an organisation can be threatened by poor data”. This 2-day course will provide concrete practical approaches to get you started on your Data Strategy, the typical contents of a Data Strategy, and the ways in which your supporting Data Governance framework can be organised.

Learning Objectives
Level set understanding & terminology:
- Understand the key components that comprise a Data Strategy.
- Learn how to create a case for obtaining business buy-in for a data strategy.
- Understand the different types of Data Strategy and how to set the scope for it.
- Learn how to create metrics for tracking the progress of your data strategy.
- Learn about the need for and the application of Data Asset management and Governance for different categories of challenges.
- Understand why a Business focused Data Governance framework must be aligned with your emerging data strategy.
- Appreciate the critical role that Data Management plays in core Information disciplines including Master Data Management and Data Quality management, and why this should be recognised in your Data Strategy.
Pragmatic Learning:
- Discover the different types of data strategies and which is most appropriate and practical for you.
- Learn the different motivations for Data Asset management and Governance and how best to implement DG 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
- Learn how to create an actionable road map to implement your data strategy.
- Understand how to identify the additional activities that are necessary to support the data strategy.

Course Outline
Components of a Data Strategy
- Where do I Start & What is the Scope of the Data Strategy?
- Building Blocks of a Data Strategy & Architecture
Establishing Goals & Gaining Buy-In
- Motivation and Drivers
- Internal Factors
- External factors
Data Management Maturity Assessment
- Data Management Maturity Assessment of the Disciplines of Data Management.
- Maturity for Organisational Enablers of Information Management
- People
- Executive Sponsorship/Policy
- Technology
- Compliance
- Measurement
Data Management Processes / Practice
Data Governance: Managing people, Organisation & Process
- Governance
- Steering and Governance
- The organisation structure for data governance
- Charters or terms of reference for steering group(s) and the recommended constitution of each group
- Sponsorship
- Roles & Responsibilities & People Capabilities
- The essential Data Governance roles
- Capabilities for core Data Management roles may be covered in a strategy
- Data Management Process
- A Data strategy should tie in the Change Management Process, and

Solutions Development Process with data touch points during the Systems Delivery Life Cycle (SDLC).
Prioritising Business Critical Data and Capabilities
- Capabilities & Critical Data
  - Defining & managing the business-critical data and the people capabilities required for their management.
- Architecture
  - Building the appropriate technical architecture for the known and anticipated data needs, incorporating the need for flexibility and emerging trends.
- Recommending the overall Technical Data Architecture for assessing the priority needs of the data strategy.
- Principles & Minimum Standards for data
  - The principles for data management with rationale, implications minimum standards and metrics.
Defining an Actionable Roadmap
- Success Metrics
  - From the Principles and Minimum standards, quantifiable success metrics can be developed. Examples will be used to illustrate this.
- Priorities & Quick Wins
  - Business initiatives and priorities that are used in the formulation of the roadmap and transition steps. In particular, the transition steps will be aligned with business initiatives.
- Roadmap, Dependencies and Transition Steps
  - Roadmap of the recommended activities to move the data initiative forward.
- The overall roadmap must make it clear that there will be dependencies with some activities, for example to undertake XYZ Master Data Management, a minimum viable Data Governance process and responsibilities must be established for area XYZ.
  - The overall “Roadmap” is made up of Transition steps which can be bundled into Transition projects. The key consideration here is that the most successful transitions are where they are aligned with business initiatives and are not simply ‘data projects’.
- Culture, Communication, Sustainability & Education
- Development of a communication plan regarding the data strategy. The communication plan needs to have at least: Audience, Message, Method, Frequency.
- Development of an education plan to raise Data Management competencies across the organisation & ensure the sustainability of the strategy.
- Funding Model
  - Recommendations on funding approach for Data initiatives.
Additional Activities to Support the Strategy
- Identify Candidates for Roles
- Determine Data Owners & Stewards
- Assess Current Roles and Skills, Perform Gap Analysis
- Identify Training Required to Address Gaps
- Brief and Mentor Data Owners
- Define Data Subject Areas & Develop Conceptual Data Models
- Determine & Prioritise Business Areas for Data Governance Rollout

Audience
- Data Strategists
- Data Governance Managers
- Data Quality Managers
- IT / Developers
- Data Architects
- MDM Managers
- Information Architects
- Business Intelligence & Data Warehouse Developers & Architects
- IT Architects
- Solution Architects
- Application Architects
- Business Analysts
- Project / Programme Managers
- IT Consultants
- Information Quality Practitioners

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Presenter
Christopher Bradley has spent 39 years in the forefront of the Information Management field, teaching for International organisations in Information Management Strategy, Data Governance, Information Quality, Information Assurance, Master Data Management, Metadata Management, Data Governance and Business Intelligence. Chris is an Information Strategist and a recognised thought leader. He advises clients including, Alibra UK, American Express, ANZ, British Gas, Bank of England, BP, Celgene, Cigna Insurance, EDP, Emirates NBD, Enterprise Oil, ExxonMobil, GSK, HSBC, NAB, National Grid, Riyad Bank, SABB, SABIC, Saudi NCI, Saudi Aramco, Shell, StatOil, and TOTAL. He is VP of Professional Development for DAMA International, the inaugural Fellow of DAMA CDPMP, past president of DAMA UK. He is an author of the DMBoK 2 and author and examiner for professional certifications. In 2016 Chris received the lifetime achievement award from DAMA International for exceptional services to furthering Data Management education & to the International Data Management community. Chris guides Global organisations on Information Strategy, Data Governance, Information Management best practice and how organisations can genuinely manage Information as a critical corporate asset. Frequently he is engaged to evangelise the Information Management and Data Governance message to Executive management, introduce data governance and new business processes for Information Management and to deliver training and mentoring. Chris is Director of the E&P standards committee “DBMBoard”, sits on several International Data Standards committees, teaches at several Master’s Degree University Classes Internationally. He authored “Data Modelling for the Business”, is a prior author of DMBoK 2.0, a member of the Meta Data Professionals Organisation (MPO) and a holder at “Fellow” level of CDMP and examiner for several professional certifications.

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

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Data Modelling Essentials

Chris Bradley

21-22 April 2020
London
Fee: £1,295 + VAT
Group Booking & Multiple Seminar Discounts Available

Overview

This 2-day course addresses the core data management topic of data modelling. Often misunderstood and relegated to just the technical aspect of "database design", data modelling is one of the most important disciplines of data management. The course introduces delegates to data modelling, its purpose, the different types of models, how to construct and read a data model, and the wider use of data models beyond the traditional area of database design. It contains a wide-ranging clarification of data modelling concepts and terminology, together with techniques for producing usable data models.

Learning Objectives

This course explains the essential data modelling building blocks. It will help students to understand the differences between relational and dimensional models, and between the different levels of Conceptual, Logical and Physical models. On completion they will be able to:

- Describe the purpose of, Conceptual, Logical, and Physical data models
- Create a Conceptual and a Logical Data model
- Read and interpret a data model
- Understand different approaches for fact finding and how to apply normalisation techniques
- Understand how to validate a data model.

At the end of the course, delegates would have gained the following:

Level Set Understanding & Terminology:
- Learn about the need for and application of Data Models

Course Outline

Data Modelling Basics
- What is Data Modelling and why does it matter
- What is the relationship between a data model and other types of models in the Enterprise Architecture
- What is a Conceptual Data model, why it’s important and the pivotal role it plays in all architecture disciplines
- The major differences between Enterprise, Conceptual, Logical, Physical and Dimensional data models
- Data vs MetaData; what’s the difference and why does it matter

Data Model Components
- Data Modelling Basics; Entities, Attributes, Relationships
- How to identify Entities and Subtypes
- What are the differences between exclusive and non-exclusive subtypes?
- How do different data modelling notations represent subtypes?
- Basic standards that you can use right away
- Relationships: Cardinality & Optionality, Identifying, Non-identifying, recursive, and many-to-many
- How does cardinality and referential integrity lead to better data quality?
- Rules for handling Super types, subtypes, many to many and recursive relationships
- Keys: Primary, Natural, Surrogate, Alternate, Inverted, Foreign
- What are the alleged and actual benefits of surrogate keys?
- Attribute properties & attribute domains

Creating Data Models
- How to get started with data models
- What core information is needed to create a data model, how models can be easily communicated to business people, and what visual constructs to use to get their attention
- Templates and guidelines for a step-by-step approach to implementing a high-level data model in your organization
- How to capture requirements for data models

Approaches for creating a data model (Top Down, Bottom Up, Middle out) and when to use them.

Using Data Models
- How to use high-level data models to communicate with business people to get the core information you require to build robust applications.
- The critical role played by Data Models in all disciplines of Information Management.
- Why Data Models are required for software package implementation
- Data models are not just for DBMS design, the other areas where models are critical.
- Maturity assessment to consider the way in which models are utilized in the enterprise and their integration in the System Development Life Cycle (SDL).

Dimensional Data Modelling Basics
- Facts and Dimensions, the basics of Dimensional models
- The key differences between Dimensional & Relational models
- The use of Dimensional data models in Business Intelligence & Data Warehousing
- Inmon vs Kimball Data Warehouse approaches
- How to cater for change in Dimensional models; the different types of slowly changing dimensions
- Aggregation and Summarisation – what you really need to know
- Columnar/Database & Data warehouse – a forgotten treasure?

Improving your Data Models
- Data Modelling Notations and tooling
- Normalisation: 1st, 2nd and 3rd normal form and a brief overview of other normal forms
- Ten steps for checking the quality of your data models
- Layout, presenting, and communicating a data model to non-modellers

Audience

Practitioners who will need to read, consume or create data models to gain a better understanding of data during Information Management initiatives including:

- Business Intelligence & Data Warehouse Developers & Architects
- Data Modellers
- Data Architects
- Data Analysts
- Enterprise Architects
- Solution Architects
- Application Architects
- Information Architects
- Business Analysts
- Developers
- Database Administrators
- Project / Programme Managers
- IT Consultants
- Data Governance Managers
- Data Quality Managers
- Information Quality Practitioners

Presenter

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, Célgene, Cigna Insurance, Emirates NBD, GSK, HSBC, NAB, SABB and Riyad 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.

In-House Training: This course is available on-site. E-mail customerservice@irmuk.co.uk with your enquiries.
This course explores the more advanced techniques for Data Modelling. In addition, techniques will be taught on how (and when) to create Data Models for non-relational solutions including Big Data together and the uses for data models beyond Relational DBMS development.

Level Set Understanding & Terminology:
- Learn about the need for and application of Data Models in Big Data and NoSQL environments.
- See the areas where Data modelling adds value to Data Management activities beyond Relational Database design.
- Understand the critical role of Data models in other Data Management disciplines particularly Master Data Management and Data Governance.

Pragmatic Learning:
- Learn the best practices for developing Data models for Big Data and NoSQL environments.
- Understand how to create data models that can be easily read by humans.
- Recognise the difference between Enterprise, Conceptual, Logical, Physical and Dimensional Data models.
- Through practical examples, learn how to apply different Data modelling techniques.

Audience:
- Business Intelligence & Data Warehouse Developers & Architects
- Data Modellers
- Developers
- Data Architects
- Data Analyst
- Enterprise Architects
- Solution Architects
- Application Architects
- Information Architects
- Business Analysts
- Database Administrators
- Project / Programme Managers
- IT Consultants
- Data Governance Managers
- Data Quality Managers
- Information Quality Practitioners

Course Outline:

Data Modelling Recap:
- Data modelling basics
- major constructs
- identifying entities
- model types, and the linkage between them

Levels of Models:
- Enterprise, Conceptual, Logical & Physical
- What is the purpose of each, do we need all of these in a Big Data world?
- Where does Dimensional modelling fit in?

Data Modelling – Back to the Future?
- Data Modelling didn’t start with relational models. This may be a surprise to many people, but the first uses of data models were well before Relational data bases became the norm. The techniques are applicable to many of the modern non-relational formats we see today.
- Modelling in the pre-relational days. We didn’t have DBMS’s. We had flat files, Sequential, VSAM, Hierarchical DBMS’s, Network DBMS’s, Inverted Architecture DBMS’s. The techniques that were developed for these are directly appropriate to the NoSQL and Big Data world of today.

Data Modelling for Big Data & NoSQL:
- What has to change when we are developing data models for a Hadoop or other Big Data environment?
- Do modelling tools support Big Data technologies, what are the restrictions and considerations?
- What data modelling techniques are applicable when targeting a Big Data platform?
- Does normalisation still have a place in the Big Data world?
- Where’s our metadata in the model now?
- In the age of big data, popular data modelling tools (eg ER/Studio, ERWin, PowerDesigner) continue to help us analyse and understand our data architectures by applying hybrid data modelling concepts. Instead of creating pure a relational data model, we now can embed NoSQL submodels within a relational data model. In general, data size and performance bottlenecks are the factors that help us decide which data goes to the NoSQL system.
- Key Value Pairs: A common misconception is that using data structures like JavaScript Object Notation (JSON) prevents us from needing a data model; THIS IS WRONG. We’ll show several examples & conclude that a set of JSON files can be just as complicated as a 100 table 3rd Normal Form data model.
- NoSQL & Hadoop: How the 4 types of NoSQL databases still need data models, and how the ACID vs BASE paradigm affects this.

Modelling for Hierarchical Systems & XML:
- What must change when developing data models for XML & Hierarchical systems?

Services Oriented Architecture (SOA):
- Why data models are essential for success.

Massively Denormalised Files:
- Is modelling needed?
- How do we create data models for Data lakes?

Dimensional Data Models:
- How do we create a dimensional model?
- Converting an ER model to Dimensional.
- Slowly changing dimensions, what types and when are they applicable.
- Beyond the basics with conformed dimensions, bridges, junk dimensions & fact less facts.

Application Packages & Data Models:
- Do we need to develop data models when implementing a COTS package?
- Uses and benefits.

Using Data Models for Data Integration & Lineage:
- How to exploit data models for design of data integration approaches and in data lineage.

Top Down Requirements Capture:
- When it is appropriate.
- What are the limitations.

Bottom Up Requirements Synthesis:
- When this works, where it is appropriate.
- How do we cope with existing DBMS’s and systems.

How to Capture Requirements for Both Data and Process Needs:
- What comes first Data or Process – we’ll show the answer.
- The critical importance of understanding processes to get your data models right (and vice versa).
- Interaction between process and data models.
- Approaches for capturing Process AND Data Requirements.

Checking the Data vs the MetaData: Why Does it Matter?

Use of Standard Data Model Constructs and Pattern Models:
- Understanding the Bill of materials (BOM) construct. Where can it be applied, why it’s one of the most powerful modelling constructs.
- Party; Role; Relationship: Why mastering this construct can provide phenomenal flexibility.
- Mastering Hierarchies: Different approaches for modelling hierarchies.

Different Data Modelling Notations & a Comparison Between Them:

Normalisation:
- Progressing beyond 3NF, 4NF, 5NF Boyce-Codd, and why, and when to use them.

Overview:
This course explores the more advanced techniques for Data Modelling. In addition, techniques will be taught on how (and when) to create Data Models for non-relational solutions including Big Data together and the uses for data models beyond Relational DBMS development.

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Data Modelling Essentials 21-22 April 2020

Mastering Data Modelling Techniques 23-24 April 2020
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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 flailing 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 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

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
- Case study exercise 6 – Creating a Communications Plan
- Tools & Technology
  - The role of IT in Data Governance
  - Potentially useful tools & 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 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
- Design the capture and assessment plan
- Assess 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
- Determine the impact of poor-quality data on the business using a variety of qualitative and quantitative techniques
- Identify root causes and set priorities
- Develop specific recommendations for addressing the problems
- Finalize specific recommendations for action
- Establish ownership for implementation
- Implement solutions that address the root causes of the data quality problems
- Implement steps to make appropriate data corrections
- Monitor and verify the improvements that were implemented
- 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
- Develop improvement plans based on the recommendations
- Communication is so important that it is part of every step

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, Prevention, Structure and Meaning, Communication, Change)
- The relationship between Data Governance, Stewardship, and Data Quality

Step-by-Step: The Ten Steps™ Process

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

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.

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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.

"The course exceeded my expectations!"
Andrew Dickens, Data Manager, Land Registry, UK

"Danette McGilvray was brilliant. I would definitely recommend this course to colleagues."
Graham Wall, Data Management Analyst, PageGroup

"Danette McGilvray is very inspirational" Radhia Ghanem, Data Quality Analyst, NHS P&B, UK
Overview

This course looks at the challenges faced by companies trying to deal with an exploding number of data sources, collecting data in multiple locations. Mike Ferguson explores the need for data governance, mapping, and cataloguing of data, and the importance of a common business glossary. He discusses the role of data governance in a data lake and data refinery context, and the importance of information standardisation using a glossary and the Information Catalog. The course also covers methodologies for structured versus multi-structured data, and the use of data lakes and data refineries to create trusted data products and services.

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 manage, maintain, 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 endemic approach to managing and governing data
  - IT Big Data, integration, self-service data preparation or both? - data governance or data chaos?
  - Key approaches to managing data
  - Dealing with new data sources - cloud data, sensor data, social media data, smart products (the internet of things)
  - Understanding scope of your data lake
  - Organising data in a centralised or logical data lake
  - Data lake configurations - what are the options?
  - Establishing a multi-purpose data lake and Information Supply Chain to produce data
  - DataGaps - a component-based approach to curating trusted data products
  - The importance of an Information catalog and its role as a data marketplace
  - Key technology components in a data lake and Information supply chain
  - Integrating data lake into your enterprise analytical architecture
- Information Production Methodologies
  - Information production and information consumption
  - A best practice step-by-step methodology structure
data management
  - 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 enterprise and across conglomerates
  - 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 Lake?
  - Approaches to creating a common business vocabulary
  - Business glossary storing common business data names
  - Alteryx Connect Glossary, ASC, Colibris, Informatica, IBM Information Governance Catalog, Microsoft Azure Data Catalog, Business Glossary, SAP Information Steward Metapace, SAS Business Data catalog in understanding what data is available as a service.
  - How data standardisation and business glossaries can help make sure data is understood.
- Planning for a business strategy
  - Organising data definitions in a business landscape
  - 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 rules 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
  - Using Cloud storage or Hadoop as a staging area for enterprise data cleansing and integration
  - Core processes in data lake operations
  - Information catalog technologies
  - Tools and techniques for data ingestion
  - Implementing automated disparate data mapping and lineage discovery
  - 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 vs self-service data preparation
  - Key approaches to scalable ETL data integration using Apache Spark
  - Self-service data preparation tools for Spark
  - Informatica
  - Alteryx Data Preparation
  - Intelligent Data Lake
  - IBM Data Refinery, Pouda, Tableau, R, Talend, Trifacta
  - Automated profiling using analytics in data preparation tools
  - Executing data refinery jobs in a logical data lake using Apache Brain to run anywhere
  - Approaches to integrating IT ETL and self-service data preparation tools
  - ODI 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
  - Themes, the Data Marketplace - enabling information consumers to shop for data
  - Provisioning trusted data using data virtualisation to enable logical data warehouse and on-demand information services
  - Consistent data management across on-premise and enterprise systems
- Identifying Data & Data Warehouse Data to Drive Business Value
  - A walk through end-to-end data lake operation to create a single Customer View
  - Types of big data & small data needed for a 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
  - Integrating and analysing clickstream data
  - The challenge of capturing external data
  - 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
  - Governing data in a Data Science environment

Information Audit & Protection - Governing Data Across a Distributed Data Landscape

- Data is Audit and Security and what is important to protect data?
- 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 architectures
- Securing and protecting data using tagged data and policies in an information catalog
- Why technologies are important for protecting data and governance? - Apache Knox, data privacy, Dataguard, IBM, Informatica Secure (Source, Imperva, Micro Focus, Privitar)
- Can these technologies help in GDPR?
- How do they integrate with Data catalogue?
- How to get started in securing, auditing and protecting your data

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Galand Vincent, Senior Business Analyst, ING Belgium

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Marta Korus, Lead Business Analyst, Lloyds Banking Group

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“Great conference, the best event in Data Management! Excellent speakers and very interesting content.”
Ana Teresa Szmoes, Caixa Geral de Depósitos

“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

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“It is a ‘must attend’ MDM & DG event for any practitioners and the program gets better every year.”
Mary Drabble, Principal Data Governance Analyst, Aberdeen Standard Investments

“It’s a must attend MDG & DG event for any practitioners and the program gets better every year.”
Louise Tharnthong, Head of Transformational Change, O2

“I learnt so much from the event; networked and met some fantastic people.”
Louise Tharnthong, Head of Transformational Change, O2

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08.30 – 09.00 Registration (first day only)
09.00 – 12.15 Course
12.15 – 13.15 Lunch
13.15 – 17.00 Course

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