You will learn how to:

- EVALUATE potential performance management solutions and set realistic expectations
- ESTABLISH a master plan and carry it through to a successful implementation
- ADDRESS Sarbanes-Oxley compliance issues
- INCORPORATE best practices in performance management
- MAKE a build versus buy decision on systems deployment
- DETERMINE technical requirements while supporting strategic goals
- GAIN stakeholder acceptance and arbitrate conflicts
- MEET the technical challenges that are required of mapping and cleaning data

www.dci.com/events/performance
Dear Colleague

I am excited to invite you to the premiere of DCI’s Performance Management Conference. This conference is designed for both attendees who are in the evaluation stage of performance management solutions as well as those who are in the midst of their enterprise-wide deployment. Questions which will be addressed and answered include:

- How can performance management impact your bottom line?
- Which solutions support your compliance with Sarbanes-Oxley?
- In a rapidly evolving industry, how can you be sure to select and deploy the optimal performance management solution?
- What are the current best practices for budgeting, planning, balanced scorecards and executive dashboards?
- How do you determine the best metrics for your industry and your company?

Driven by new regulatory and economic imperatives, as well as the ongoing need to strengthen budgeting, forecasting and reporting, performance management has become an important area of enterprise software. A growing number of organizations are turning to performance management, also known as Business Performance Management (BPM) or Corporate Performance Management (CPM), to improve their financial reporting. Like you, these executives are under pressure to leverage their investments in existing systems, ensure compliance with recent federal laws like the Sarbanes-Oxley Act of 2002 and increase the reliability and accuracy of revenue projections.

Today’s performance management systems will give your organization more accurate, timely and actionable information. Performance management incorporates a set of methodologies, processes and applications with features such as key performance indicators (KPIs), balanced scorecards and executive dashboards to measure and enhance the performance of an enterprise.

If improving the performance of your company is important to you, then you cannot afford to miss this conference. It is the only event with an exclusive and objective focus on practical approaches to managing business performance. I hope you’ll join me at the Boston Park Plaza, December 2–4, 2003 for this exciting event!

Sincerely,

Craig Schiff
Conference Chairman
President and CEO, BPM Partners
Performance management is a method to organize, automate and analyze the metrics, information and processes that are the product of any viable organization. It requires the fundamental partnership of IT and the business units in order to provide genuine value. This conference will help you identify solutions that have been proven to add business value by helping organizations to perform better. Experts will present options to avoid costly large-scale deployments and still enable you to meet your business needs.

What You Will Learn

Knowing the range of performance management options available and leveraging the learning achieved in other organizations dramatically increases the odds of success for your project. This conference gives you these two crucial advantages. By attending this conference you will gain the insight to understand the differences in available technologies and prepare you to select the service provider who is best aligned with your needs.

What Makes This Event Unique

This conference gives you two crucial advantages. First, it will focus exclusively and in depth on performance management. This ensures that after DCI’s Performance Management Conference, you will return with specific lessons and practical knowledge that you can apply immediately to benefit your company. Second, this conference brings together the leading practitioners, thinkers and users in the field. As a result, you will enjoy not only a strategic, forward-thinking view of performance management, you will be able to leverage many opportunities for informal discussions of your company’s particular challenges and project plans, with both peers and specialists.

Who Will Be There

- Chief Financial Officers
- Chief Information Officers
- Chief Technology Officers
- Vice Presidents of Finance
- Directors of Finance
- Directors of Budgeting
- Directors of Business Intelligence
- Controllers
- Business Department Heads
- Managers of Information Systems
- Strategic Planning Managers
- Reporting Managers
- Systems Architects
- Project Managers

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According to META Group:
“85% of Organizations to Have BPM Initiatives Underway by End of 2004.”
Tuesday, December 2, 2003 • 9:00–10:20 AM
Chair Address: Performance Management: Realities and Myths, Benefits and Risks

Craig Schiff, President and CEO, BPM Partners, Inc.

Within the next two years, your company will embark on a performance management initiative in some form. BPM is driven by demands for greater accuracy and accountability for financial reporting, shorter cycles for closing the books and quickly tying operational performance to a more tightly controlled budget. The potential upside for your organization is significant, but adequately gauging the risk elements is key. This session will address each phase of a BPM project. You’ll come away with straightforward guidelines to meet your company’s strategic goals and improve financial performance.

Key Issues
- What can BPM really do for a company and what is just hype?
- How do ERP vendors compare to best of breed BPM vendors and innovative start-ups?
- What current trends will impact the future of BPM?

Tuesday, December 2, 2003 • 3:00–3:50 PM
Masterminds’ Panel: Where Do We Go From Here?

Moderator: James Bramante, Global and Americas Leader of Financial Management, IBM Business Consulting Services

BPM has made great strides and is delivering ROI for companies today, but what is next? BPM vendors discuss the current status of BPM acceptance and success, and look ahead to what BPM can achieve for users in the future. The focus will be on surpassing the status quo: most companies with BPM implementations today have gone no further than budgeting-related functionality. To progress and reap more value from BPM, users need to promote more sharing of information, and vendors must deliver better system integration. The aim is not only to compare the vendors’ vision and get their public commitment to future product development, but to understand how corporations will be changed by BPM, and how IT departments can align their initiatives today to better support future BPM systems.

Key Issues
- Discover the impact BPM will have on corporations in the near-term
- Learn how companies are moving beyond budgeting to full BPM solutions
- Get early access to a view of the future of BPM solutions from industry experts

Wednesday, December 3, 2003 • 10:30–11:20 AM
Keynote Address: Business Performance Management: What are the Challenges and What is the Return?

Henry D. Morris, Vice President, Applications and Information Access, IDC

Difficult economic times demand accountability and business performance management (BPM) is a critical response. BPM’s objective must be to provide timely feedback in a form that enables ongoing correction and improvement to business operations. IDC has studied the emerging market for business performance management over the past six years, measuring the supply and demand for BPM technology. In addition, IDC has interviewed dozens of organizations on their experiences with BPM and analytic applications.

Key Issues
- How large is the market for business performance management software and how fast is it growing?
- What are the critical success factors for a business performance management initiative?
- What return on investment can organizations expect?

Wednesday, December 3, 2002 • 4:30–5:20 PM
Keynote Address: Performance Management Meets Compliance: Emerging Best Practices

John Hagerty, Vice President, Research, AMR Research

Compliance mandates are garnering an ever-increasing amount of finance and it’s attention, time, and money. An effective performance management framework is essential to guarantee bullet-proof financial reporting; but many companies are quickly realizing that thorough compliance also includes rock-solid forward visibility and a close attention to managing operational and financial risk. In this session, AMR Research will discuss the intersection of these two hot topics and how specific companies have started to address both issues.

Key Issues
- How performance management can enable better compliance
- Using data in concert with a visualization and analytic tool
- Getting staff the right information to identify and assess risk

Thursday, December 4, 2003 • 8:30–9:20 AM
Keynote Address: Performance Management Vendor Comparisons

John Van Decker, Vice President, META Group

Companies have many performance management solution alternatives for comprehensive suites and point solutions addressing critical BPM functionality from leading BI, financial analytics and ERP vendors. Meanwhile, the solutions landscape is changing as business intelligence and analytic solutions are being merged through many acquisitions. Although organizations can assemble an integrated solution from several point products, in many cases the optimal approach is to evaluate solutions from vendors that provide integrated solutions.

Key Issues
- Gain a perspective on leading BPM solutions
- Get an insight into the continued consolidation in this space
- Leverage key observations on BPM alternatives from a 2003 META multi-client study

Thursday, December 4, 2003 • 11:30 AM–12:00 PM
Conference Wrap-Up

Craig Schiff, President and CEO, BPM Partners, Inc.

Please join conference chair, Craig Schiff, in an informal and interactive conference wrap-up. Come and share your thoughts and experiences, ask questions and join in the discussion.
# Conference Agenda

## Monday, December 1, 2003

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>1:00–5:00 PM</td>
<td><strong>Pre-Conference Seminar:</strong> Six Sigma and Performance Management: Mixed Methods and Metrics For Improved Results, Kent Bauer, GRT Corporation</td>
</tr>
<tr>
<td>1:00–5:00 PM</td>
<td><strong>Pre-Conference Seminar:</strong> Assessing Company Readiness for BPM, David Galloway, BearingPoint, Inc.</td>
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## Tuesday, December 2, 2003

<table>
<thead>
<tr>
<th>Time</th>
<th>Track</th>
<th>Business Strategies</th>
<th>Implementation Tactics</th>
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<tbody>
<tr>
<td>9:00–10:20 AM</td>
<td>Chair Address</td>
<td>Performance Management: Realities and Myths, Benefits and Risks, Craig Schiff, BPM Partners, Inc.</td>
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<tr>
<td>10:30–11:20 AM</td>
<td>Using BPM to Address Sarbanes-Oxley</td>
<td>Kathleen Wilhilde, Finance and Technology Consulting</td>
<td>Case Study: Vitas Uses Business Performance Management to Stay Healthy, Celia Spitz and Neil Golub, VITAS Innovative Hospice Care®</td>
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<tr>
<td>12:30–2:00 PM</td>
<td>Lunch Break</td>
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<tr>
<td>2:00–2:50 PM</td>
<td>Performance Management and Balanced Scorecards</td>
<td>Beckie B. Voss, BearingPoint, Inc.</td>
<td>Build versus Buy, Brenda Moncla, ThinkFast Consulting, Inc.</td>
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<td>4:00–6:00 PM</td>
<td>Welcome Reception / Visit the Product Showcase</td>
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<tr>
<td>6:00–7:30 PM</td>
<td>Business Performance Management Forum Roundtable: Building the Performance Accountable Organization</td>
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## Wednesday, December 3, 2003

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<tr>
<td>8:30–9:20 AM</td>
<td>Ways to Determine True ROI, Lawrence Serven, The Buttonwood Group LLC</td>
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<td>9:30–10:20 AM</td>
<td>Case Study: The Planning Revolution at Lucent Technologies, Dan Bearison and JoAnn Cannella, Lucent Technologies</td>
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<td>Keynote Address: Business Performance Management: What are the Challenges and What is the Return?, Henry D. Morris, IDC</td>
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<tr>
<td>11:30 AM–1:20 PM</td>
<td>Networking Luncheon / Visit the Product Showcase, Product Showcase Open</td>
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<tr>
<td>1:30–2:20 PM</td>
<td>Determining KPIs: User Centered and Customer Driven, Bob Lord, SBI.Razorfish</td>
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<tr>
<td>2:30–3:20 PM</td>
<td>BPM and the Evolving Role of Corporate Finance, Dean Sorensen, Bywater Management Consulting</td>
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<td>Case Study: Better Budgeting, Ian Ahern, Stratature</td>
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<td>Conference Wrap-Up, Craig Schiff, BPM Partners, Inc.</td>
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<td>1:00–5:00 PM</td>
<td>Post-Conference Seminar: The Vendor Selection Process, Barbara Brahmstedt, BPM Partners, Inc.</td>
</tr>
<tr>
<td>1:00–5:00 PM</td>
<td>Post-Conference Seminar: Defining and Designing Your Performance Management System, Chris Iervolino, ITEC Incorporated</td>
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For Conference Schedule Updates Visit: [www.dci.com/events/performance](http://www.dci.com/events/performance)
Business Strategies was created to meet the pressing concerns of CEOs, CFOs, IT and finance directors, business unit managers and others with strategic responsibility for choosing, managing, and using performance management systems. You’ll come away with insight on the processes involved, and a clear sense of how performance management can alter the culture at your organization in positive and valuable ways.

Tuesday, December 2, 2003 • 10:30–11:20 AM
Using BPM to Address Sarbanes-Oxley
Kathleen Wilhilde, CEO, Finance and Technology Consulting

With the enactment of the Sarbanes-Oxley Act in 2002, public companies need to deliver corporate results more quickly than ever, and with a level of accuracy that requires increased visibility into those transactions that represent compliance risk. The use of technology to support the Sarbanes-Oxley processes and requirements is a key element in more sophisticated financial reporting, performance management processes that highlight areas for further analysis and in implementing processes that stand up to strict certification requirements. These requirements are driving finance organizations to evaluate currently available Business Performance Management (BPM) applications such as consolidations and reporting, planning/forecasting and corporate dashboards/scorecarding as part of an overall strategy to establish and platform for compliance.

Key Issues
- Current and evolving BPM applications as a solution for compliance
- Analytics to foster greater internal visibility, decision support and consistent processes
- Controls that will markedly increase confidence in externally reported results

Tuesday, December 2, 2003 • 11:30 AM–12:20 PM
RSA Security Builds a Roadmap to a Budgeting Opportunity
David Stack, Manager of Corporate Financial Plan, RSA Security, Inc.

With more than 9,000 customers around the globe, RSA Security is recognized as the strategic e-security partner to companies leveraging the Internet to grow their businesses and improve their bottom line.

Challenge:
With far reaching multinational growth in Japan, the Asia Pacific Region, and Europe, RSA Security’s product managers needed more timely access to consistent product information and a clearer view of their own operating budgets and expenses.

Solution:
A BPM solution provides RSA Security’s worldwide users Web access to an innovative application of the software — championed and developed by the Financial Planning and Analysis team — all without IT intervention. Comshare MPC integrated formerly disparate processes and systems; offered the best value proposition; complemented RSA Security’s Microsoft business intelligence platform; and had a product vision that matched its long term needs.

Result:
The ability to plan and predict the future has improved, plans are matching actual results in every quarter and there is an increased efficiency in getting timely and accurate information to decision-makers.

Tuesday, December 2, 2003 • 2:00–2:50 PM
Performance Management and Balanced Scorecards
Beckie B. Voss, Senior Manager, BearingPoint, Inc.

The balanced scorecard is a strategic management system that serves as the focal point for strategy implementation. A balanced scorecard helps the organization translate its vision and strategy into terms they can understand. From general to specific, from qualitative to quantitative, it communicates what is important and provides that line of sight for teams and employees to focus their behaviors. Further, balanced scorecards provide a method to increase the efficiency and effectiveness of the operating, planning and budgeting processes. This session will take you through the process of designing a balanced scorecard from general qualitative statements of strategic vision to specific quantitative measures of the organization’s performance.

Key Issues
- Selecting a tool to support your balanced scorecard process
- How to build your scorecard
- Communication and change management

Tuesday, December 2, 2003 • 10:30–11:20 AM
Ways to Determine True ROI
Lawrence Serven, Principal, The Buttonwood Group LLC

“Why should we buy this?” This is arguably the most frequently asked question in business today; especially given the current economic climate and competitive landscape. Provide the right answer to this question, and you’ll win the support you need (and more importantly the purchase order). Failing to answer this question — in compelling terms — will sentence you to living with your current circumstances. How exactly you go about building your case to support your technology purchase is what separates a “yes” from a “no” decision. This presentation is designed to show you how to be successful at first convincing yourself, and then convincing others, that an investment in technology is worthwhile. It will provide you with the tools you need to build a defensible ROI for your proposal and win a “yes” decision.

Key Issues
- The three levels of ROI and recognizing when to use each
- What senior management is really looking for
- Beyond the number crunching: building a compelling business case

Wednesday, December 3, 2003 • 9:30–10:20 AM
The Planning Revolution at Lucent Technologies
Dan Bearison, Director of Planning and Analysis, Lucent Technologies
JoAnn Cannella, Director, Revenue and Forecasting Process, Lucent Technologies

Lucent Technologies designs and delivers networks for the world’s largest communications service providers.

Challenge:
Facing an industry under fire and constantly changing dynamics Lucent was striving to keep finance in line with operations. A spreadsheet-based internal planning process was not conducive to high participation and collaboration across functions. In order to continue growing and developing as a world-renowned organization, Lucent needed to increase visibility into all areas of the
The finance function with the tools that will enable it to play a more significant role in shaping and executing strategy. In addition, Lucent could quickly adjust their model to reflect unforeseen changes. Even better, the scalable, Web-based application was easy to use and deploy across the enterprise leading to high participation across functions.

Result:
People were no longer arguing about numbers, but were discussing strategic alternatives and opportunities. In addition, Lucent was able to:

- Reduce annual plan cycle time from 18 months to 2 months
- Reduce corporate finance planning staff by 50%
- Achieve greater visibility into product, geography, channel and business unit level plans and results

Wednesday, December 3, 2003 • 1:30–2:20 PM

Determining KPIs: User Centered and Customer Driven
Bob Lord, Senior Vice President, SBI.Razorfish

A Key Performance Indicator (KPI) is a critical measure that describes and monitors performance integral to the success of a business—such as cost reduction, defect rates, sales trends, customer satisfaction, utilization and profitability. In the IT space, we’re seeing more companies deploy digital dashboards these days. A digital dashboard is a Web-based application that furnishes decision makers with real-time access to critical information within the enterprise. Measuring KPIs, however, is only worth doing if it creates value and provides the user with relevant information. In these challenging economic times, it’s more important than ever to identify how a business is performing by measuring KPIs in real-time and make adjustments on an ongoing basis. An organization that can tie KPI measurement to customer value is a step ahead.

Key Issues
- Choose KPIs with relevance
- Keep KPIs tied to customer value
- Measure performance with KPIs

Wednesday, December 3, 2003 • 2:30–3:20 PM

BPM and the Evolving Role of Corporate Finance
Dean Sorensen, Principal, Bywater Management Consulting

CEOs, shareholders and market analysts expect senior finance executives to play a more significant role in shaping and executing strategy. In other words, they are expected to create value, rather than just control costs. Providing capabilities that promote the “right decisions” is central to achieving this. In this context, their ability to meet these growing expectations will likely be governed by the BPM applications in which they choose to invest. CFOs and their teams need to look beyond traditional budgeting, reporting and performance management to create new capabilities—one that provides the basis to coordinate activities across functional and organizational boundaries by presenting information in the “right context.”

Key Issues
- The means to fundamentally change the management process
- The ability to create new sources of value for organizations that can self fund BPM investments
- The finance function with the tools that will enable it to play a more active role realizing this value

Thursday, December 4, 2003 • 9:30–10:20 AM

Change Management Strategies for Realizing BPM Value
Dean Sorensen, Principle, Bywater Management Consulting

Despite the many benefits offered by BPM, actually realizing value from the underlying capabilities can be challenging for many organizations. This is because these value sources are predicated on open and honest communication about resource allocation and performance issues. In some organizations, this “openness” can be very threatening, and is often met with resistance because it conflicts with existing cultural norms. Understanding these potential sources of resistance is important because the management process is one of the most political within organizations—particularly budgeting. As organizations become larger and more complex, implementing changes to this process becomes increasingly challenging. Developing a comprehensive change management program is essential to ensure a smooth transition to new processes and roles.

Key Issues
- The components of, and the process for structuring, a successful change management program
- How to define and address political behavior underlying potential resistance
- How to structure the program to develop new skills and roles for finance professionals

Thursday, December 4, 2003 • 10:30–11:20 AM

Better Budgeting
Ian Ahern, President and CEO, Stratature

Why do so many companies separate financial and operational planning? This session will review how three companies in the retail, distribution and manufacturing industries improved their planning accuracy and accountability by focusing on a driver-based approach, while reducing the time and cost of the planning cycle. All three companies are highly successful in their respective markets and prove that integrated real-time planning leads to repeatable success.

Key Issues
- Why many successful companies take a holistic view of their planning process
- The benefits of basing financial plans on operational capability
- Implementation drivers for a real-time planning process
Implementation Tactics focuses on practical, tactical aspects of putting performance management systems and processes into effect. These presentations are ideal for CIOs, IT and finance directors, budgeting managers and others who seek an in-depth, nuts-and-bolts understanding of how to carry the BPM initiative to success. An examination of common implementation pitfalls and obstacles will enable you to control project risks, and you'll return to your company with a clear roadmap of how you and your personnel should collaborate to move ahead with BPM.

Tuesday, December 2, 2003 • 10:30–11:20 AM

VITAS Uses Business Performance Management to Stay Healthy

Celia Spitz, Vice President, Planning and Analysis, VITAS Innovative Hospice Care®

Neil Golub, Manager, Planning and Analysis, VITAS Innovative Hospice Care®

VITAS is the nation’s largest provider of hospice care, with 5,300 employees serving more than 7,500 patients daily.

Challenge:
Serving a growing patient base, while maintaining a high standard of care, requires vigilant business performance management.

Solution:
VITAS implemented a solution that enables real-time analysis of key operational factors affecting profitability, while facilitating the compilation of corporate data for budgeting, forecasting and planning. Executives access a graphical dashboard, while financial planners access an Excel-like front-end.

Result:
The executives use up-to-date information to spot trends or anomalies, perform real-time “what if” scenarios, and ultimately, drive strong, profitable growth and exceptional service. The financial planners now spend less time gathering and more time analyzing operational and financial information.

Tuesday, December 2, 2003 • 11:30 AM–12:20 PM

Gaining User Buy-In

Gary Reck, National Director of IT Business Development, Resources Connection, Inc.

The success of your business performance management project is riding on user buy-in. If users haven’t bought into your decision, they will jeopardize it. Users typically come in three sizes: executive, middle management, and hands-on staff. Each user has their own agenda based on their current (and perceived future) role in the company. They have an inherent need to balance their own goals with the company’s objective to become more efficient and profitable. These personal agendas must not only be managed carefully, but also need to be influenced to maximize the success of the overall project.

Key Issues

- Proven strategies to help motivate each type of user
- Ideas to keep the solution from becoming “shellware”
- Tools to help users balance personal vs. company goals

Tuesday, December 2, 2003 • 2:00–2:50 PM

Build versus Buy

Brenda Moncla, Director of Data Warehousing, ThinkFast Consulting, Inc.

As your enterprise contemplates implementing a performance management system, one of the key questions is, “can you buy it out of a box?” Many companies are dealing with the challenge of making effective strategic decisions in the face of growing organizational size and complexity. For example, decisions to change procurement operations will eventually be reflected in inventory levels and are likely to have an impact on other business functions such as order fulfillment, product distribution, shipping and customer support. The technology “assist” for making these strategic decisions is often embodied in a BPM initiative, containing components such as business performance metrics, digital dashboards, budgeting, forecasting, reporting and predictive analysis. This session will explore the “build versus buy” decision as it relates to the individual components of a BPM solution.

Key Issues

- Be able to recognize the discrete elements of a company’s BPM initiative
- Understand which elements can be purchased to optimize time to implementation
- Identify critical components of the solution that must be developed in order to ensure long-term success

Wednesday, December 3, 2003 • 8:30–9:20 AM

The Evolution of BPM at Union Bank of California

Lois-Grace Golde, Senior Vice President of Strategic and Financial Planning & Analysis, Union Bank of California

Union Bank of California (UBOC) is the fourth largest commercial bank in California and among the top 35 nationally. Over the past several years the executive team at UBOC has implemented several BPM projects including a complete financial planning and analysis solution incorporating their annual budget, a rolling forecast and capital planning. These projects, which engaged hundreds of contributors, have been thoughtfully implemented by their team and have been designed to progressively build towards their long-term goal of a fully integrated planning, reporting and analysis platform across the entire enterprise.

Key Issues

- How the bank began their thought leadership
- What has been learned to date
- Where UBOC will be going with BPM in the future

Enhance your Education with a Pre- and Post-Conference Seminar!
See pages 10-11 for details.
**Wednesday, December 3, 2003 • 9:30–10:20 AM**

**The Truth About BPM Implementations**

Craig Schiff, President and CEO, BPM Partners, Inc.

Business and technical leaders need to know what really happens after licensing a new BPM solution. This session will look at the harsh realities of BPM implementations and the specific steps you can take to minimize the risks of your project going astray. Real-life examples of implementation successes and painful learning experiences will be discussed. You will learn what types of third-party expertise are available to help and where each fits into the project. Equally important, you’ll acquire perspective on which BPM functionalities to implement in the near term, and which capabilities are better added in a follow-on phase.

**Key Issues**

- How long will it take to fully implement an effective BPM solution?
- How much will the services cost?
- What can go wrong and how can you minimize risk?
- What payoffs from the implementation are realistic and what expectations are appropriate to establish in your company?

**Wednesday, December 3, 2003 • 1:30–2:20 PM**

**CASE STUDY**

**VIASYS Healthcare Increases the Speed, Flexibility and Accuracy of its Financial Reporting**

John Imperato, Vice President, Finance, VIASYS Healthcare

Matthew Gualtieri, Program Manager/Senior Systems Analyst, VIASYS Healthcare

VIASYS Healthcare is a global market leader in health care technology, specializing in developing, manufacturing and marketing high technology medical products focused on respiratory care, neuroscience, critical care medicine and medical/surgical products.

**Challenge:**

After being spun out from its parent company, VIASYS Healthcare inherited a legacy financial reporting system with manually intensive processes and limited reporting capabilities. VIASYS was in need of a new solution that would enable it to more effectively plan, measure, report and manage its business.

**Solution:**

VIASYS selected a single Web-based application that streamlines and automates the entire financial and performance management process.

**Result:**

- Faster financial closing cycle
- Greater visibility into business
- Automation of manually intensive processes
- Improved data accuracy and quality
- Increased time for value-added analysis
- Improved internal and external communications
- Actual, budget, forecast and KPIs in one integrated system

**BPM Engagement Management**

Barbara Brahmstedt, Vice President—Services, BPM Partners, Inc.

BPM implementations are not like most software initiatives, because they require a broader layer of management and control to ensure success. In fact, BPM solutions are much more complex, touching more users and a broad range of stakeholders. They entail multiple applications that draw data from multiple systems and data sources. As such, they call for expertise that today is lacking in most corporations, and raise political issues difficult for the traditional IT project manager to resolve. This session addresses challenges that include controlling scope creep during implementation, keeping the right balance of business process and technology change and communicating effectively with both implementers and future users.

**Key Issues**

- What skill set is necessary for guiding and carrying out the engagement?
- How do leading companies deliver BPM projects on time and on budget?
- How to avoid scope creep and gain end-user buy-in for a successful BPM project rollout

**Thursday, December 4, 2003 • 9:30–10:20 AM**

**Building an Executive Dashboard**

Barbara Brahmstedt, Vice President - Services, BPM Partners, Inc.

Dashboards must be effectively designed, with thought given to the graphic presentation of data. They raise technical and business issues of where users can drill down into data, and how integration to multiple data sources is handled. There is a sharp disconnect between the high business value of executive dashboards, and the scant number of them in active use. Dashboards are harder to design than their appearance suggests, yet more useful than many expect based on their simplicity. This session looks at buy-versus-build, pre-packaged solutions and tools available for constructing executive dashboards.

**Key Issues**

- Should your dashboard be one-way and presentation-only, or collect user input for a two-way information flow?
- Is the preferred delivery vehicle an Excel spreadsheet, a Web browser, a PDA, or all of the above? What are the strengths and weaknesses of each?
- How do you incorporate security and possibly role-based aspects into your dashboard; are they really “executive” or should they serve a wide swath of managers?

**Thursday, December 4, 2003 • 10:30–11:20 AM**

**ETL: Identifying and Mapping Data**

Craig Colby, Vice President, UpStream Software

During this session, we will explore the different ETL (extract, transform and load) requirements and data sources needed, based on the BPM application that needs to be loaded. The requirements for a CRM analytical application will be vastly different than the requirements for a statutory management reporting application. We will discuss the cost of building and maintaining custom ETL solutions as opposed to an “out of the box” approach. We will show how to incorporate key Sarbox controls in the ETL process. We will demonstrate how you can manage and ensure data integrity for your BPM applications while maximizing the value of your investment.

**Key Issues**

- Identify key data sources for different BPM applications
- Set guidelines for defining the requirements of data integration for BPM applications
- Help your organization drive down the time and cost of BPM implementations
Pre-Conference Seminar: Six Sigma and Performance Management: Mixed Methods and Metrics For Improved Results

Kent Bauer,
Principal Consultant, GRT Corporation

Corporate Performance Management (CPM) has garnered reputation and respect for finally aligning business strategy with targeted metrics, powerful analytics and flexible reporting options to actually deliver improved business results. The key challenge still remains integration of all the components - methodologies, metrics, processes and systems - into a complete technology-enabled end-to-end solution. Six Sigma can guide your journey from vision to reality. Six Sigma has built a strong following by driving impressive results to the bottom line. Although Six Sigma and performance management have different lineages - operations vs. planning - they each promote empowerment, pro-activity, customer-focus, benchmarking, stretch goals, change agents and fact-based decision making. In this workshop, we will examine how Six Sigma methodologies and techniques can be successfully leveraged in the development and implementation of CPM systems from data warehouses to digital dashboards.

Key Issues
- Align vision and strategy to KPIs (Key Performance Indicators) with CTQ (Critical-To-Quality) framework
- Drive CPM needs and priorities with the VOC (Voice of the Customer) approach
- Develop and implement an effective digital dashboard
- Identify and eliminate data quality “pain points” using FEMA and Pareto analysis
- Baseline CPM processes and data flows leveraging SIPOC constructs
- Improve performance of “under the hood” CPM data management - including data integration, data warehousing and business intelligence - using DMAIC methodology

Pre-Conference Seminar: Assessing Company Readiness for BPM

David Galloway, Senior Manager, BearingPoint, Inc.

This seminar will focus on today’s driving forces for implementing a performance management solution and will guide participants toward the key areas of focus within their organizations. Understand how to determine whether your company is ready for performance management, what needs to be in place first and what are the critical success factors. See the critical linkage between strategy, performance measurement and rewards. Learn about the methodologies, metrics, processes and technologies that comprise BPM. Hear about the phases of implementing a BPM framework — from gauging the current state, building a business case, through technology implementation.

Key Issues
- Gain an understanding of the predominant driving forces for BPM
- Learn the different phases of a BPM implementation
- Learn how similar companies have approached their BPM implementations

Post-Conference Seminar: The Vendor Selection Process

Barbara Brahmstedt,
Vice President – Services, BPM Partners, Inc.

This in-depth seminar addresses the challenging issues inherent in identifying the optimal BPM solution for your specific needs and selecting the right vendor. BPM vendors generally can be classified as tools vendors, application vendors, ERP suppliers, or technology innovators. Making the right choice starts with an accurate definition of your requirements, which may entail a self-audit. The session will explore the “tough” questions to ask vendors and how to verify that their functionality meets your requirements, while keeping an eye on their development plans to confirm alignment with your future intentions. You’ll learn what to insist on seeing in demonstrations, and how to create an RFP that saves time by eliciting the right answer. You’ll emerge with a clear path from “It’s decided. We need BPM” to establishing a mutual, successful commitment with the right vendor.

Key Issues
- What are the questions you should ask of your organization before you start the vendor selection process?
- How can you effectively cut through the marketing hype and ask vendors targeted questions that help you choose a solution that meets your business needs?
- What are the important topics to cover in your Request for Proposal (RFP) and live software demonstrations?
- How do you control the vendor selection process, to culminate in obtaining the optimal software system at the lowest possible TCO?
Chris Iervolino, Senior Managing Director, ITEC Incorporated

BPM systems provide the structure to deliver two distinct types of benefits. Firstly, they serve to optimize and automate business processes and secondly, they enable the ability to monitor and analyze key strategic and operational information. This functionality can be grouped into four interrelated BPM system components as follows:

- Scorecarding
- Planning and Budgeting
- Consolidation and Reporting
- Information Analysis and Delivery

Although all of these systems should share certain best-practice design characteristics, designing for individual application effectiveness while allowing for overall interoperability between applications can be a balancing act. This seminar will discuss common application design best practices and interoperability issues for BPM solutions. It will review common technologies, products and processes involved in a typical BPM effort and clarify these discussions with vendor examples.

Key Issues:

- What functionality each BPM component needs to provide
- What vendor solutions exist in each area and how they should be designed to meet functional requirements
- How each system overlaps with one another and related interoperability issues and potential solutions
- Additional opportunities to leverage a BPM platform to empower overall analysis ability

Presented By: Richard Putz, Unisys and Freshwater Partners, Inc. and Frank Kassel, Unisys

The Sarbanes-Oxley Act of 2002 represents the most significant legislation affecting United States’ corporate governance since the securities laws of the early 1930’s. It impacts how corporate executives govern, how managers manage, how auditors audit, how financial and event data is identified, how technology is used in organizations and who sets the rules.

Sarbanes-Oxley mandates governance compliance in prescribed areas and provides real sanctions, civil and criminal, for non-compliance. Corporations must begin due diligence and planning activity now to assure the organization, processes, technology, partners and audits are in compliance by mandated dates.

This 3-day course, designed for senior managers, will provide you with a complete understanding of how Sarbanes-Oxley changes corporate governance. It delivers a tailored compliance remediation and implementation roadmap to take back with you.

By attending this premier action workshop seminar, you will return to your organization with:

- Your own roadmap and action plan for implementing Sarbanes-Oxley leadership and compliance techniques
- Risk assessment tools, event detection and prevention models and forms
- A comprehensive course manual providing all tools and exercises used in the workshop
- Answers to your individual application questions
- Plus access to the instructors in the following weeks

Agenda Topics

- Understanding the new environment
- Corporate governance, leadership and ethics
- Risk assessment and prevention
- Event detection and interdiction
- Compliance reporting and remediation
- Social and marketplace sanctions and penalties

For complete seminar details and registration information visit the online brochure at: http://www/dci/com/events/s-o
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The BPM Forum is an important new organization helping to advance the understanding of business performance management techniques, technologies and processes in global enterprises. The not-for-profit group brings together influential business line managers and senior executives overseeing enterprise finance, operations and technology functions. Forum members are joining in the pursuit of innovations in business performance management, a term that describes the methodologies, metrics, processes and systems used to monitor and manage a company’s business performance.

Media and Association Co-Sponsors

DM Review, published by Thomson Media Group, is recognized as the premier business intelligence, analytics and data warehousing publication. For more than a decade, DM Review has provided thought-provoking and informative editorial covering business intelligence, analytics, data warehousing and CRM across all major industries. DM Review’s authors and columnists are internationally recognized experts in a variety of business intelligence fields.

The EAI Industry Consortium is a non-profit global advocacy group developed to promote EAI and all related integration technologies through sponsored research, the establishment of standards and guidelines, best practice and the articulation of EAI’s strategic and measurable benefits. We are unifying and developing a common understanding within the industry, educating and informing the marketplace, and introducing and promoting integration technologies.

ebizQ is an essential information resource for e-Business and application integration technologies. ebizQ serves this market with the ebizQ.net online community, the expoQ virtual conference and tradeshow and the ebizQ Insider newsletter.

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• Clarity Systems
• Longview Solutions
• OutlookSoft Corporation
• CorVu Corporation
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Submit Your Qualifications for your FREE* Product Showcase Pass (82370)
SHOWCASE HOURS: Tuesday, December 2, 2003 • 4:00–6:00 PM & Wednesday, December 3, 2003 • 11:30 AM–1:20 PM

5 EASY WAYS TO REGISTER:

Online: www.dci.com/events/performance
Phone: (978) 470-3880 8:00AM–5:30PM EST
Fax: (978) 749-8716 24 hours a day
Email**: ExpoReg@dci.com
Mail: DCI, 204 Andover St. Andover, MA 01810

*Product showcase is free only for qualified attendees registered before November 28, 2003. Attendees registering onsite will be charged a $50 registration fee to enter the showcase. The product showcase is open to qualified business and IT professionals only. No one under 21, including infants, will be admitted. DCI reserves the right to refuse admission to anyone they deem unqualified.
Networking Opportunities & Product Showcase

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Tuesday, December 2, 2003 • 6:00–7:30 PM
Building the Performance Accountable Organization

Advancing performance accountability across the organization is one of the most pressing strategic imperatives facing corporate executives today. Driven by heightened regulatory scrutiny around accounting scandals, increased demands for improved operational conditioning, and compliance requirements of Sarbanes-Oxley, top executives and other critical corporate stakeholders see an essential enterprise-wide need to strengthen business performance management practices and processes. Companies face significant obstacles, however, in overcoming cultural, organizational, and implementation barriers that challenge successful business performance management practices.

Key Issues
- Discover the challenges and opportunities facing companies today in enabling a truly performance accountable organization
- Hear stories and perspectives from frontline industry executives, technology experts and financial/operational professionals on what it takes to surpass hurdles and make significant strides towards accountability
- Learn from collective experiences of members from the BPM Forum

No pre-registration required: Free for all paying conference attendees.

Networking Opportunities

Tuesday, December 2, 2003 • 4:00–6:00 PM
Welcome Reception
Sample festive food and drink while networking with fellow colleagues and solution providers on the showcase floor. Learn about the latest in performance management technology and services to help you save time and money.

Wednesday, December 3, 2003 • 11:30 AM–1:20 PM
Networking Luncheon
Take the opportunity to network with leading solution providers on the product showcase floor while enjoying a casual lunch.

Product Showcase

Tuesday, December 2, 2003 • 4:00–6:00 PM
& Wednesday, December 3, 2003 • 11:30 AM–1:20 PM

Take this opportunity to get your feet wet and explore the leading performance management technologies from vendors in the industry. Speak one-on-one with solution providers while viewing live demonstrations of performance management solutions. Get valuable advice and gain new perspectives into how others are utilizing performance management initiatives in their organization.

Position Your Company as a Leader!
JOIN LEADING organizations on the showcase floor and get your product or service in front of a highly qualified, decision-making audience. Reserve your booth space on the product showcase floor today by calling (978) 470-3870 and speaking with Christopher Erb, Director of Sales at DCI, or emailing cerb@dci.com and join event sponsors already signed up! View exhibit and sponsorship details online at http://exhibit.dci.com/performance

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BEST VALUE! Executive Package ............................ $1595
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   Includes the 2½-day core conference PLUS a pre- AND post-conference seminar. (Please select below.)

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   Includes the 2½-day core conference sessions, exhibits and special events.

Pre-Conference Seminars

Half Day • Stand Alone Fee ................................. $295
Monday, December 1, 2003 • 1:00–5:00 PM
☐ (71656) Six Sigma and Performance Management: Mixed Methods and Metrics For Improved Results
☐ (71652) Assessing Company Readiness for BPM

Post-Conference Seminars

Half Day • Stand Alone Fee ................................. $295
Thursday, December 4, 2003 • 1:00–5:00 PM
☐ (71685) Vendor Selection Process
☐ (71625) Defining and Designing Your Performance Management System

Product Showcase

☐ (82370) Product Showcase Only ........................ FREE*

* Product Showcase is free only for qualified attendees registered before November 28, 2003. Attendees registering onsite will be charged a $50 registration fee to enter the showcase. The Product Showcase is open to qualified business and IT professionals with valid business cards. No one under 21, including infants, will be admitted. DCI reserves the right to refuse admittance to anyone they deem unqualified.

Registration Information for Concurrent Seminar

Tuesday through Thursday • December 2–4, 2003
☐ (71616) Corporate Governance and Sarbanes-Oxley: A C-Level Roadmap for What to Do, Why and When .......................... $1595
(See page 11 for details)