



# IRM UK

## Strategic Business & IT Training

### Public Courses & In-House Training 2018 - 2019, London

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

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

# Zachman Enterprise Architecture Certification: Modelling Workshop

John Zachman and Cort Coghill

18-21 September 2018  
26 February - 1 March 2019  
London

Fee: £1,995 + VAT

This fee includes Level 1 and Level 2 Certification  
Group Booking & Multiple Seminar Discounts Available

## Architecture & Strategy Public Courses, London

### Zachman Enterprise Architecture Certification

18 - 21 September 2018

### Leadership Strategies for Enterprise Architects

29 - 30 November 2018

### Business Change & Transformation

### Public Course, London

### Advanced Portfolio Management

29-30 November 2018

### Multiple Booking Discount

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

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

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

Only one discount can be applied at any one time

## Presenters



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



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

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

Rob Austen, Managing Director, Austen Consultancy Services

*"Lots of energy and enthusiasm. Passionate."*

Simon Bathie, Group IS Programme Plan Manager, MBDA UK

*"Excellent first hand explanation. Very powerful."*

Marco van Leeuwen, Process Architect, Van Lanschot Bankiers

## Overview

Enterprise Architecture is fundamental for enabling an enterprise to assimilate internal changes in response to the external dynamics and uncertainties of the information age environment. It 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 four day seminar and workshop, based on the Zachman Framework V3.0, incorporates actual modelling experience. The modelling 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 course will prepare the participants 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) is included in the registration fee. The "Zachman Certified - Enterprise Architect" examination, is a two hour, on-line examination that upon passing, results in the award of Enterprise Architect Associate (Level 1) Certification. This examination can be taken any time after the course. Delegates will then subsequently be awarded the Enterprise Architect Associate (Level 2) Certification upon submitting a case study. This is a very exclusive certification program. If you want to understand the "Complexity & Contradiction" in Enterprise Architecture and are struggling to manage a non-adaptive enterprise and dysfunctional systems, this will be an important experience!

## Learning Objectives

- A sense of urgency for aggressively pursuing Enterprise Architecture
- A comprehensive definition (description) of Enterprise Architecture
- Differentiation of Enterprise Architecture from Systems Implementation
- Creating Enterprise Strategy Models which form the basis for Enterprise Architecture
- Differentiation of Ontology from Methodology
- Utilizing Enterprise Architecture for operational decision making
- A strategy for reducing "time-to-market" for systems implementations to virtually zero
- Strategy for integration beyond jurisdiction (Interoperability)
- Architectural Principles for meeting enterprise requirements
- Ensuring traceability across the artifacts for impact analysis and change management
- BPM, SOA, BI, MDA, ITIL, etc. in the context of the Zachman Framework
- Row by row modelling of the Zachman Framework inside the tool
- Case study decision making and model analysis inside the tool

## Course Outline

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

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

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

The Zachman Framework is perhaps the most referenced in the industry. This session provides participants with a unique opportunity to learn first-hand about its concept and utility, directly from the man who developed it. The just released V3.0 will be discussed.

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

Workshop: What's Wrong with My Architecture?

Workshop: Creating Enterprise Strategy Models Using Row 1 Primitives

Case Study: Creating Composite Strategy Models Using Business Motivation (BMM) and Balanced Scorecard

### Enterprise Engineering

- Models from My Bookshelf - 75 years of experience (Implementation, Composite Models)
- The Elegance of Primitives (Their essential contribution)

- Enterprise Entropy - Removing Internal Cost of Operations
- Enterprise Engineering Design Objectives
- Alignment, Integration, Reusability, Flexibility, Interoperability
- Reducing Cycle Time from Order to Implementations (Mass-Customization)

Workshop: Deconstruct Business Process Model (BPMN) using Framework Principles

Case Study: Creating Multiple Target Models

Case Study: Component Modeling Using UML 2.0 for Business Domain

### Implementation Practicalities

- "Federated Architecture" (Integrating Beyond Jurisdictional Boundaries)
- Migrating from Legacy to Architecture

Workshop: Using Primitives to create horizontal Integration and Vertical Transformation

Case Study: Application Rationalization Using Primitives

Workshop: Creating Metrics and the Necessary Enterprise Models for Meeting Enterprise Goals

Workshop: Identify Framework Cells for Given Enterprise Problem Definitions

### Strategies for Constraining the Modeling to Fit the Time Constraints

Mock Test: Preparation for the On-Line Certification Examination

## Audience

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

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

# Post Conference Workshops at the Enterprise Architecture & BPM Conference

Also available to non conference attendees • 25 October 2018, London

## Achieving Business Agility and the Business Agility Manifesto

Fee: £795 + VAT

**Speakers:** John Zachman, CEO, Zachman International, Roger Burlton, President, Process Renewal Group, Ronald G. Ross, Co-Founder and Principal, Business Rule Solutions

Your organization is facing unprecedented challenges from all sides. Customers now expect highly personalized products and services and seamless digital interactions. Your data seems never as reliable as it should be. Programs and projects fail to achieve synergies, silos persist, and traditional organization hierarchies struggle. How can you keep pace of a marketplace in flux, a need for constant innovation, and an ever-shifting regulatory landscape? Is faster software development the answer? Flexed organization schemes? How do you equip the organization for rapid, never-ending change? Come to this lively, roundtable session and hear what the three authors of the Business Agility Manifesto have to say about achieving true business agility in the Knowledge Age. Ask these global thought leaders about the critical questions you need answered. Conduct an eye-opening high-level assessment of your own organization's agility. John, Ron and Roger will present their perspectives and engage in dialogue on the topics as they are tackled throughout the day. The session will be highly interactive so bring your challenges and join in the challenge of the century as we move to a new age in business..

- The perpetual nature of business change is perpetual
- The imperatives for management and how they must shape solutions
- The criticality of a value centric business and operating model
- Why reusable business knowledge is the new critical business asset
- Reconfiguration agility
- Understanding and modeling for an agile business
- Now what?

## Architecting the Digital Business Platform

Fee: £795 + VAT

**Speaker:** Mike Rosen, Chief Scientist, Wilton Consulting Group

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:

- What does architecture for digital transformation look like?
- How can you come 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, and security architectures that comprise it. A detailed case study will be 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.

Attendees will learn:

- 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.
- 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.

Audience Skill Addressed: Intermediate and Advanced. Attendees should have an understanding of Enterprise Architecture and a familiarity with a variety of architectural model and deliverables

## Running Enterprise Design Sprints Using A Milky Way Map

Fee: £795 + VAT

**Speaker:** Milan Guenther, Partner, Enterprise Design Associates

During this workshop you will learn how to develop a Milky Way Enterprise mapping to rapidly innovate and facilitate faster changes using Enterprise Design Sprint. It will help you take the next step to create faster innovation and change, grounded in your business' situation. We accomplish this by using the Milky Way mapping as a universal model in Enterprise Design. We'll show how Enterprise Design Sprints are a fast, workable approach to innovate and transform the whole business (not only IT). This enables us to go from the big picture, to details and back to the big picture again: making the links visible, tracing performance and decisions, and engaging stakeholders.

Topics covered:

- Introduction to Strategic Enterprise Design
- Planning and running Enterprise Design Sprints for business impact
- Using The Milky Way mapping technique as you go through the Sprint
- Translating mappings and models from stakeholder views to architecture

# Leadership Strategies for Enterprise Architects: Choosing the Interventions that Maximize Success

Chris Potts

27-28 November 2018

21-22 May 2019

London

Fee: £1,245 + VAT

Group Booking & Multiple Seminar Discounts Available

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Only one discount can be applied at any one time

### Presenter



Chris works worldwide with Executives, Enterprise Architects and Portfolio Managers, on strategies for Enterprise Investment

- co-ordinating Enterprise Architecture and Portfolio Management, to achieve organisational excellence at investing in change. He has chaired world-class Enterprise Architecture conferences and delivered EA-related guest lectures at universities in New York, London, and Copenhagen. Chris is also the author of a trilogy of business novels - "FruITion", "RecrEAtion" and "DefrICTion"- that explore through story-telling the past, present and future value of investing in Enterprise Architects.

*"Chris Potts brought relevant experience to discussions and delved into topics we wanted to discuss more."*

Marie Grosvenor, Business Architecture, E.ON

*"Truly an essential seminar for anyone seeking to embed enterprise architecture at the highest levels of their organisation."*

Philip Hellyer, Senior Consultant, Philip & Finch (UK) Ltd

## Overview

**There will never be enough Enterprise Architects.** They are uniquely-valuable, specialised, and scarce, and their contributions come through their leadership of others. This intensive and interactive workshop focuses on the strategies that Enterprise Architects use to choose their most productive interventions and maximise their success.

**How Enterprise Architects choose to invest their time and skills shapes the value of Enterprise Architecture (EA).** Their interventions demonstrate, in practice, EA's positive and durable impacts - on the changes people conceive of and design, on the investment projects that deliver those changes, and on the enterprise's overall performance.

**Enterprises constantly redesign themselves.** Being an Enterprise Architect is different from many other kinds of architect. In an enterprise, anyone, at any time can have an architectural idea. Executives make architectural investments, whether they know it or not. Helping people to distinguish architectural ideas and investments from all the non-architectural ones is a vital reason why enterprises need architects.

**Enterprise Architects are leaders, influences and facilitators.** They work with a scope that is specific to the enterprise goals, are tuned-in to the organisational culture, and are guided by measures of the enterprise's structural performance. They grow their influence through their role in the investment process, their win-win network, and their leadership of others.

## Learning Objectives

- Maximise each Enterprise Architect's contribution to the enterprise goals
- Tune the Enterprise Architect's strategy to the organisational culture
- Validate Enterprise Architecture's role in the investment process
- Shape the enterprise's architectural ideas and investments
- Grow each Enterprise Architect's leadership and influence

## Course Outline

### Successful Leadership Strategies for Enterprise Architects

- Why some strategies work, and some don't
- Identifying, validating and navigating strategy constraints

### Establishing the Strategy's Scope

- Enterprise Architecture's value proposition
- What Enterprise Architects do, might do, and never do

### Measuring the Enterprise's Architectural Performance

- Creating structural performance metrics from operational business results
- Using 'EA Guiding Ratios' to choose the strategic priorities

### Diagnosing the Enterprise Culture for Investing in Change

- Using tangible evidence to map the organization's Enterprise Investment Culture
- Interpreting the culture's impact on the Enterprise Architect's probability of success

### Validating the Design of the Enterprise Investment Process

- Ensuring the process is designed to value Enterprise

Architecture

- Positioning Enterprise Architects in the process, to maximise their contribution

### Integrating Enterprise Architecture with Strategies and Investments

- Tuning-in to people's preferences for exploring and enacting strategy
- Using scenario planning techniques to drive architectural innovations and investments

### Making 'Play-or-Pass' Decisions to Maximise Success

- Concluding the best leadership strategy, given the organizational context
- Setting, applying and reviewing the Enterprise Architect's 'play-or-pass' criteria

### Building the Influence Network for Enterprise Architecture

- Focusing on the key relationships
- Developing a win-win basis for each relationship

## Audience

Leadership Strategies for Enterprise Architects is a course designed for everyone who is interested in maximising the contribution of Enterprise Architecture, including:

- Chief Enterprise Architects
- Enterprise Architects, Business Architects
- Change Portfolio Managers
- Senior Business Analysts
- Consultants specialising in Strategy, Enterprise Architecture or Portfolio Management

## Special Features

- Entirely founded on Chris's work with enterprises around the world
- Case study based on real life situations and experiences
- Compatible with any EA-related method, framework or tool
- Interactive and participative, workshop format
- Chris's training regularly receives 10/10 for content and delivery

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

# Advanced Portfolio Management: From Projects-Driven to Goals-Driven Investment in Change



Chris Potts

## Overview

**Organisations that excel at investing in change use a goals-driven portfolio.** They prioritise their goals, invest more in their priority goals, and choose projects that can achieve those priorities with the lowest-possible risks and resources. This intensive and interactive workshop focuses on how to design and use a goals-driven portfolio, transform from a projects-driven investment culture, and multiply the value of Portfolio Management.

**A goals-driven portfolio is essential for making agile investment decisions.** As rapidly as the market changes, and today's projects vary in their probabilities of success, executives and portfolio managers can re-appraise the enterprise's investment choices. They can decide what to keep the same in the portfolio and what to change – to achieve their goals at the speed they need to achieve them, and for the risks that they are prepared to take.

**There are four generations of Change Portfolio.** The first generation is projects-driven and resources-constrained, focusing the organisation on its implementation goals, budgets, and other resource limits. Progressively, the focus of the portfolio becomes the enterprise's investment goals, the probability of achieving them, and the total risks taken.

**The value of Portfolio Management multiplies with each new generation of portfolio.** A portfolio is more than the sum of its individual projects: portfolio managers know and track the up-to-date investment goals, total risks and resources, and probabilities of the portfolio succeeding. They highlight and deal with gaps in the portfolio, where there are insufficient projects to achieve the goals, allocate provisions for future investment priorities, and ultimately lead the organisation's strategy for investing in change.

## Learning Objectives

- Benchmark the maturity of your Change Portfolio
- Design and use a goals-driven portfolio
- Recognise and transform a projects-driven investment culture
- Make agile and efficient investment choices
- Multiply the value of your Portfolio Management

## Course Outline

### Achieving success at investing in change

- The two fundamental strategies
- Applying investment principles to business change

### The Four Generations of Change Portfolio

- From implementation goals and resources, to investment goals and risks
- Which generation is your current portfolio?

### Diagnose your organisation's Investment Culture

- Why understanding culture is essential for success
- Your organisation's personality and maturity as an investor in change

### Design a goals-driven portfolio

- Projects-driven or goals-driven: how to tell the difference
- Create a goals-driven portfolio design, for your enterprise and culture

### Transform your projects-driven portfolio

- Reveal all-new knowledge from existing projects data
- A technical, political and cultural journey

### Make agile and efficient investments

- Embed agility in the portfolio, and in the selection of investments
- Minimise the total risks and resources

### Track up-to-date portfolio performance

- Target outcomes, probabilities and actuals
- Goals-driven portfolio governance

### Multiply the value of your Portfolio Management

- Core capabilities of goals-driven portfolio managers
- From informing to supporting, through facilitation to leadership

29-30 November 2018

21-22 May 2019

London

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London**

**Advanced Portfolio  
Management**

29-30 November 2018

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

## Audience

Advanced Portfolio Management is a course designed especially for people who are essential to the success of your investments in change:

- Enterprise Architects
- Business Architects
- Portfolio Managers
- Business Analysts
- Consultants specialising in Portfolio Management or Enterprise Architecture

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



# Business Architecture: Enabling Business Agility and Change

Roger Burlton

19-21 November 2018, London

Fee £1,595 + VAT

Group Booking & Multiple Seminar Discounts Available

Business Analysis Public Courses  
London

**Mastering the Requirements Process**

14-16 November 2018

**Business Architecture: Enabling Business Agility and Change**

19-21 November 2018

**Digital Process Analysis and Design**

22-23 November 2018

**Working with Business Processes**

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5-6 March 2019

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30 April - 1 May 2019

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**Presenters**



Roger T Burlton is the co-founder of BPTrends Associates, founder of Process Renewal Group and the author of 'Business Process Management: Profiting from Process'. He is considered an industry leader in the introduction of innovative approaches for organizational change. To date, he has conducted over seven hundred seminars and has presented to over fifty thousand professionals. His seminars have been translated for diverse audiences around the globe.

**IIBA** Endorsed Education Provider

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

## Overview

Quick business change means that Business Architects must be able to describe what's needed to design with deliberate integrity, reuse and inherent agility 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 such a sound architectural foundation, business-wide transformation, digitalization and continuous optimization can be accomplished and change efforts can progress smoothly and quickly.

This highly participative workshop will delve into all aspects of Business Architecture from top to bottom and side to side.

## Learning Objectives

- Understand what a useful Business Architecture looks like
- Understand what outputs the business produces and how it delivers them to create value for its customers and other stakeholders (**Business Model**)
- Define how the business is organized and how it operates in the context of broader business ecosystems (**Operating Model**)
- Align what investments in resources the business should make (**Resources Model**)
- Learn to build market, 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 the introduction of breakthrough digital technologies and digitalized processes

## Course Outline

### Why Business Architecture?

- Response to Disruption and need for Innovation
- Foundation for Business Agility

### Business Architecture and Related Disciplines

- Related Frameworks: Zachman, TOGAF and BIZBOK
- Service Oriented Architecture (SOA)
- Process Renewal Group Business Architecture Landscape

Workshop: What is your Architecture readiness?

### Value Chain Identification and Architecture Scoping

- All value chains or one Line of Business?
- Cross company Value Chains?

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

### Marketplace Understanding

- Business Ecosystem (Market) Analysis: Opportunities and Threats
- External Stakeholder Context Model
- Customer Value proposition: Needs, Experience, Measures and Objectives
- Business Motivation Model: Ends and Means
- The Business Model Canvas

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

### Framing the Strategy for Business Architecture Consumption

- Consolidating your 'North Star' Goals and Objectives
- Deriving Critical Resource Strategies
- Establishing Strategic Capability Requirements
- Choosing your Architecture scenario and plan of attack

Workshop: What are the Critical Requirements for the Architecture?

### Business Concept Model: The Basis for Information, Capability and Process Architecture Models

- Concept Model
- Business Vocabulary
- Deriving the Information Model

Workshop: What is your Concept Model?

## Audience

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

- Business Architects
- Process Analysts
- Business Analysts
- Strategic Planners
- Business Leaders
- IT Architects
- IT Executives
- Anyone else concerned with designing and sustaining an agile business

**In-House Training:** This course is available on-site. E-mail [customerservice@irmuk.co.uk](mailto: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: Analyzing the current capability

#### Customer Process Experience Baseline

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

Case study Workshop: Developing the Customer Journey

#### Digital Inspirations

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

Example: Mortgage Decisioning Redesign

#### Design the Process and Capabilities

- Small Change vs Substantive change
- Design principles
- Creative workshops to leverage the

inspiration

- The new digital process
- Designing measurement and feedback
- Detailed mapping
- The required capabilities and resources

Example: Justice System peer to peer case resolution

Case study Workshop: Designing the digitalized process workflow

Case study Workshop: Validating with the process scenarios

Case study Workshop: Defining the digitalized process capabilities and resources

#### Culture and Behavioural Change

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

Example: Board of Directors Digitalization

#### Implementation Options

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

22-23 November 2018

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#### Mastering the Requirements Process

14-16 November 2018

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4-5 Delegates	20%
6+ Delegates	25%

Only one discount can be applied at any one time

#### Presenter



Roger T Burlton is the co-founder of BPTrends Associates, founder of Process Renewal

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

### Audience

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

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

### Special Features

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

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

# Working with Business Processes: Process Change in Agile Timeframes

Alec Sharp

26-27 November 2018

London

Fee: £1,245 + VAT

Group Booking & Multiple Seminar Discounts Available

**Business Analysis Public Courses  
London**

**Mastering the Requirements  
Process**

14-16 November 2018

**Business Architecture: Enabling  
Business Agility and Change**

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## Presenter



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

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

Malcolm Priestner, Senior Business Analyst, Met Office

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

Stella Reynard, Business Analyst, Aveva

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

Susan Allan, Business Systems Manager, Wood Group PSN

## Overview

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

## Learning Objectives

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

## Course Outline

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

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

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

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

### Discovering your Enterprise's Business Processes

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

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

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

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

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

### Workflow Models – the Essentials

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

### Workflow Models – the Finer Points

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

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

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

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

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

- Five more questions to validate and extend the initial model

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

### Transition to Process Design

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

## Audience

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

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

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

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

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



# Advanced Business Process Techniques

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

Alec Sharp

### Overview

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

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

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

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

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

### Learning Objectives

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

### Course Outline

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

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

#### Discovering Processes and Developing a Process Architecture

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

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

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

### Audience

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

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

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

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#### Presenter



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

# Mastering the Requirements Process: Getting Requirements Right

James Archer

14-16 November 2018  
9-11 April 2019

London

Fee £1,595 + VAT

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Business Analysis Public Courses  
London

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14-16 November 2018

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## Presenter



James Archer is a business analyst, consultant, teacher, writer and innovator. He is co-editor and contributing author of Business Analysis and Leadership. He identifies the key to great business analysis as an inclusive leadership style, thinking innovatively, working collaboratively, acting strategically and helping people discover their real requirements. James is one of the founders and organisers of the Business Analysis European Conference. He is also an associate of the Atlantic Systems Guild and has contributed to the development of and taught the Volere approach to requirements and business analysis for the last 8 years.

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

Zoey Moore, Business Project Manager, Aegon UK Services

*"James Archer was excellent, knowledgeable and approachable. One hundred per cent of the content was relevant. The seminar exceeded my expectations."*

Kieran Neeson, Business Analyst, Waters

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

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

## Overview

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

## Learning Objectives

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

## Course Outline

### The Requirements Process

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

### Project Blast-Off

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

### Trawling for Requirements

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

### Functional Requirements

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

### Non-functional Requirements

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

### Requirements for Agile Projects

- How requirements work with agile techniques
- Role of the business analyst in agile
- Writing better user stories

### Prototypes and Deviations

- Using sketches and prototypes to drive out requirements
- Low and high-fidelity prototypes
- Exceptions, alternatives and misuses

### Writing Requirements

- Communicating requirements
- Correct formulation of requirements
- How to write fit criteria to make your requirements precise and accurate

### The Quality Gateway

- How to test requirements and ensure that they are fit for purpose
- How to prevent scope creep
- How to avoid gold-plated requirements that add little value to the system
- How to ensure the requirement is a complete statement of need

### Managing Your Requirements

- Strategies for requirements projects
- Using the Requirements Knowledge Model to manage your requirements

### Prioritising requirements

- Dealing with conflicting requirements
- Automated requirements tools

### Your Requirements Process

- Making your own process more effective
- Incorporating your organisation's requirements practices into what you have learned

## Audience

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

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

## Special Features

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

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

# Business Analysis Agility

James Robertson

## 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](mailto:customerservice@irmuk.co.uk) with your enquiries.

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### Presenter

James Robertson has been associated with

hundreds of projects. From this rich experience he has witnessed time and again that development efforts only succeed when they profoundly understand the problem to be solved, and derive a solution that elegantly delivers the needed functionality and qualities. He has established an agile approach to business analysis that gives the team better opportunities to explore and understand the real problem. Only by doing so can they deliver an innovative solution that is welcomed – and used – by its customers. James is the author of six books, numbers courses, video instruction, and many articles and talks that have provided insights to better business analysis. He is a founder of The Atlantic Systems Guild, a think tank known for its innovations in the world of systems and development techniques.

# Pre-Project Problem Analysis:

## Practical Techniques for Early Business Analysis Engagement

Adrian Reed

5-6 March 2019, London

Fee: £1,245 + VAT

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#### Presenter



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



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

### 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
- Requirements Manager
- Requirements Engineers
- Product Owner

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



# Ten Steps to Data Quality

Danette McGilvray

## Overview

Simply put, information quality is providing the correct set of accurate information, at the correct time and place, to the correct people. However, ensuring quality information is far from simple. Whether you are just starting a project or are already in production, it is not unusual to find that data quality issues prevent organizations from realizing the full benefit of their investments in business processes and systems.

The Ten Steps to Data Quality course teaches a practical approach to creating, improving, and managing the quality of information critical to providing products and services, satisfying customers, and achieving goals for any type of organization. If you are working on real data quality-related issues that need real results, this is the course for you. What is learned applies to all kinds of data and every type of organization – for-profit businesses of all sizes, education, government, healthcare, and nonprofit – because all depend on trusted information to succeed.

Both concepts and practical application are included. Concepts provide a foundation for understanding data quality. Concepts are put into action through the Ten Steps™ process. Both are needed to apply the methodology appropriately to the many data quality related situations that attendees will face within their organizations. In addition to discussion and exercises (individual and as a group), attendees will practice what is learned by applying the steps and techniques to a course project of their choice.

Come with your particular needs in mind, be ready to participate, practice applying what is learned to your situation and leave with realistic methods for managing data quality.

## Learning Objectives

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

## Course Outline

### The Data and Information Quality Challenge

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

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

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

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

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

#### Step 1 Determine Business Need and Approach

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

#### Step 2 Analyze Information Environment

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

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

#### Step 3 Assess Data Quality

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

#### Step 4 Assess Business Impact

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

#### Step 5 Identify Root Causes

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

#### Step 6 Develop Improvement Plans

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

#### Step 7 Prevent Future Data Errors

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

#### Step 8 Correct Current Data Errors

- Implement steps to make appropriate data corrections.

#### Step 9 Implement Controls

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

#### Step 10 Communicate Actions and Results

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

## Audience

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

- Data Analysts
- Data Quality Analysts
- Business Analysts
- Data Designers/Modellers / Architects
- Data Stewards (Business and Technical)
- Application Developers

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

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**17-19 June 2019, London**  
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Only one discount can be applied at any one time

### Presenter



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

*"Danette McGilvray is very inspirational"*

Radhia Ghanem, Data Quality Analyst, NHS PS, UK

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

Naomi Thomas, Data Quality Analyst, Gocompare.com

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

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

# Business-Oriented Data Modelling:

## A Business-Oriented Approach to Entity-Relationship Modelling

Alec Sharp

15-16 October 2018

London

Fee: £1,245 + VAT

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**Presenter**



With over 30 years of consulting experience, Alec Sharp has provided hands-on data modelling expertise throughout North America, Asia, and Europe – this workshop is based on real-world experience, not textbook theory. Alec has also delivered hundreds of Data Modelling and Advanced Data Modelling workshops, and top-rated presentations at international conferences. Alec is the principal author of “Workflow Modelling, 2nd Edition” which is a consistent best-seller in the field, and is widely used as an MBA text and consulting guide.

### Overview

Data modelling is critical to the design of quality databases, but is also essential to other requirements specification techniques such as workflow modelling, use cases, and service definition because it ensures a common understanding of the things – the entities – that processes and applications deal with. This workshop introduces entity-relationship modelling from a non-technical perspective, and explores contextual, conceptual, and detailed modelling techniques that maximise user involvement.

### Learning Objectives

- Apply a variety of techniques that support the active participation and engagement of business professionals and subject matter experts
- Use entity-relationship modelling to depict facts and rules about business entities at different levels of detail, including conceptual (overview) and logical (detailed) models
- Use top-down and bottom-up approaches to initiating development of a data model
- Recognise the four basic patterns in data modelling, and when to use them
- Effectively use definitions and assertions (“rules”) as part of data modelling
- Use an intuitive approach to data normalisation within an entity-relationship model
- Apply various techniques for discovering and meeting additional requirements
- Read a data model, and communicate with specialists using the appropriate terminology

### Course Outline

#### Essentials of Data Modelling

- What really is a data model?
- Essential components – entities, relationships, and attributes
- Hands-on case study – how data modelling resolved business issues, and supported other business analysis techniques
- The basics of diagramming – Entity-Relationship Diagrams (“ERDs”)
- The narrative parts of a data model – definitions and assertions
- Common misconceptions about data models and data modelling
- The real purpose of a data model
- Three types of data models – different levels of details for different purposes
- Contextual, Conceptual, and Logical Data Models – purpose, audience, definition, and examples
- How data models help in process improvement, requirements definition, and reporting
- Forward- and reverse-engineering uses of data modelling
- Overview of a three-phase methodology for developing a data model

#### Establish the Initial Conceptual Data Model

- Top down vs. bottom up approaches to beginning a data model – when is each appropriate?
- Advantages of a bottom-up approach
- A bottom-up approach focusing on collecting and analysing terminology
- A structure for sorting terms and discovering entities
- Entities – what they are and are not
- Guidelines for naming and defining entities
- Three questions to help you quickly develop clear, useful entity definitions
- Five criteria that entities must satisfy, and four common errors in identifying entities
- Identifying relationships
- Fundamental vs. irrelevant or transitive relationships
- Good and bad relationship names
- Multiplicity or cardinality – 1:1, 1:M, and M:M relationships, and useful facts about each
- Common errors and special cases – recursive, multiple, and supertype-subtype relationships
- Attributes – guidelines and types
- Attributes in conceptual models vs. logical models

#### Develop the Initial Logical Data Model By Adding Rigour, Structure and Detail

- What’s involved in developing a logical model – shifting the focus from entities to attributes
- Multi-valued, redundant, and constrained attributes, with simple patterns for dealing with each
- An understandable guide to normalisation – first, second,

- and third normal forms
- Higher order (fourth and fifth) and Boyce-Codd normal forms
- Guidelines for a smooth progression from conceptual to logical
- Four types of entities – kernel, characteristic, associative, and reference
- Guidelines and patterns for dealing with each type of entity
- How to draw your E-R Diagram for maximum readability and correctness
- Optional and mandatory relationships
- Considering time and history when looking at relationships
- Six questions to ask whenever a data range appears in a data model
- Identifying and dealing with transitive relationships – clues and proof

#### Refine and Extend the Logical Data Model By Discovering and Meeting New Requirements

- Attribute granularity – definitions of non-atomic and semantically overloaded attributes
- Guidelines for making non-atomic attributes atomic
- The perils of semantic overload, and what to do about it
- Dealing with derived attributes, and when to show them on the model
- A classword-based approach to attribute naming
- Typical attribute documentation
- A common source of confusion and disagreement – primary keys
- What primary keys are, what they’re really for, and three essential criteria
- Alternate and foreign keys
- Why meaningless primary keys are used, and guidelines for creating them
- Guidelines for reference data
- Using event analysis to discover additional requirements
- How data modelling relates to process modelling, use cases, and services
- A layered framework for business analysts
- How other techniques (e.g., workflow modelling) support data modelling
- A three-step procedure for meeting new requirements
- Advice on extending the model in an orderly fashion
- Recap – contextual, conceptual, and logical data models
- Different skills and participants for conceptual vs. logical modelling
- How the modeler’s/analyst’s role changes as a project progresses
- A little philosophy for effective data modelling
- The four Ds of data modelling – definition, dependency, detail, and demonstration

### Audience

**Data Modellers, Data Analysts, and DBAs** will benefit from the workshop’s practical methods and guidelines. The workshop is also very popular with **Business Analysts** and **Application Designers/Developers** needing to understand data modelling and how it

supports requirements definition or process analysis. **Business Professionals and Managers** who need to understand how this technique can uncover and resolve inconsistency in business terminology, policy, and rules.

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

# Advanced Data Modelling: Communication, Consistency, and Complexity

Alec Sharp

## Overview

There are experienced data modellers who somehow develop accurate and stable models that are actually used, often in non-typical or high-pressure situations. Others modellers might have great technical skills, but fare poorly, maintaining tense relationships with content experts and developers who "just don't get it," and watching in dismay as their models are continually undone by "new" requirements. What accounts for the difference? It's having a concrete set of frameworks, methods, techniques, scripts, heuristics, and other tools that they draw on to keep the process moving, with everyone engaged, even when complex, difficult situations are encountered. In this workshop, you will learn specific, repeatable techniques that you can use to drive your data modelling skills to the next level.

## Learning Objectives

- Understand "the four Ds of data modelling" – definition, dependency, demonstration, and detail
- Be able to implement lists, trees, and networks with recursive relationships
- Know how and when to use supertypes/subtypes (generalisation/specialisation) vs. roles vs. both
- Combine subtyping and recursion, as appropriate, to model difficult rules
- Recognise the "category vs. types vs. instances" problem, and model reference data properly
- Model "vectors" (attributes that repeat a fixed number of times) properly – entity or attribute?
- Use multi-way associations, associations of associations, and relationship constraints to handle complex rules
- Handle circular relationships and cyclic dependencies properly with advanced normal forms
- Model history, corrections, and time-dependent business rules with "temporal data models"
- Understand the connection between analytic data structures (star schema or dimensional models) and ER models
- Rapidly develop a first-cut dimensional model from a well-structured ER model
- Prepare and deliver a data model review presentation

## Course Outline

### A quick recap – level-setting on terms, concepts, conventions, and structures

- Conventions for the essential components: entities, relationships, attributes, and identifiers
- Effective naming and definition
- E-R Diagramming – symbol sets and their problems, rules for readability and comprehension
- Types of data models – contextual, conceptual, logical, and physical
- Three types of data models before the physical database – contextual, conceptual, and logical
- The four Ds of data modelling – definition, dependency, detail, and demonstration

### Working with higher-level models

- Contextual, conceptual, logical models – what they are, who they're for, when we need them
- Definitions for each type of model, and common sources of confusion
- How the different kinds of data models relate to process, use case, and service models
- Avoiding the "deep dive into detail" – a three-phase method for data modelling
- How to start a large project with a contextual data model
- Guidelines for staying at the conceptual level, and how to tell when you've gone too far

### Modelling time, history, and time-dependent business rules

- Historical vs. audit data, and when to show them on a data model
- "Do you need history?" – how to tell when your client is misleading you
- Four variations on capturing history in a data model
- Modelling time – special considerations for recording past, present, and future values
- Six questions you should always ask when a date range appears
- Thanks, Sarbanes-Oxley! Why we need "as-of reporting" and how to model data corrections

### Correctly handling attributes

- The basic patterns – handling multi-valued, redundant, and constrained attributes
- Granularity – dealing with non-atomic and semantically overloaded attributes
- Dealing with reference data and the "classification vs. specification vs. instances" problem
- Three attributes that always need a qualifier
- Vector modelling – entity or attribute?

### Modelling rules on relationships and associations

- Using multi-way associations to handle complex rules
- "Use your words" – how assertions, scenarios, and other techniques will improve your modelling
- Associative entities – circular relationships, shared parentage, and other issues
- Alternatives for modelling constraints across relationships
- Advanced normal forms – how to quickly recognize potential 4NF and 5NF issues
- A simpler view – why the five normal forms could be reduced to three

### Interesting structures – generalisation, recursion, and the two together

- Generalisation (subtyping) – when to use it, and when not to
- Generalisation with and without specification
- Guidelines for using recursive relationships
- Generalisation and recursion working hand-in-hand as a cure for literalism
- Recognizing lists, trees, and networks, and modelling them with recursive relationships
- Modelling difficult rules by combining generalisation (subtyping) and recursion
- Staying clear on generalisation vs. roles, states, and aggregation

### Bridging the "E-R vs. Dimensional" divide – the world's shortest course on dimensional modelling

- The perils of dimensional modelling without understanding the underlying E-R model
- Spotting facts and dimensions – the relationship between dimensional models and E-R models
- Saving time – building a first-cut dimensional model from an ER model

### Better models through using data modelling in conjunction with other techniques

- Things, events, services, use cases, and processes – how they fit together and synergize
- The Weasel's Guide to doing data modelling without anyone knowing it
- Event analysis as a rapid way to gather requirements
- Use Cases and Service Specifications, and their role in data modelling
- Process Modelling, and the vital role data models play

### Interesting approaches and uses

- Developing a first-cut data model from business artifacts (forms, reports, screens, etc.)
- Living with legacy – the role of reverse-engineering and data profiling
- "Shock and dismay" – showing the business their current data model, and what it's doing to them
- Where and how data modelling fits into selecting and implementing packaged applications
- The role of generic data models

### Effectiveness skills for data modellers – communication, facilitation, presentation and consistency

- Preparing and delivering a data model review presentation
- Facilitation techniques specifically for the data modeller
- "The Magical Number Seven" and what it has to do with modelling
- Repeatable methods for discovering, assessing, and meeting new requirements
- A consistent approach – "scripts" to use while building a data model
- "Challenges" to use when validating a data model
- "Future-proofing" – what you can do to improve the lifespan of your model
- Seven techniques for "humanizing" data modelling and making data models more accessible

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### Presenter



With over 30 years of consulting experience, Alec Sharp has provided hands-on data modelling expertise throughout

North America, Asia, and Europe – this workshop is based on real-world experience, not textbook theory. Alec has also delivered hundreds of Data Modelling and Advanced Data Modelling workshops, and top-rated presentations at international conferences. Alec is the principal author of "Workflow Modelling, 2nd Edition" which is a consistent best-seller in the field, and is widely used as an MBA text and consulting guide.

### Audience

Specialist **Data Modellers, Data Architects, and DBAs** who wish to hone their skills. Also **Business Analysts, Application Developers**, and anyone else with substantial data modelling experience who needs additional skills.

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



# Designing, Operating and Managing an Enterprise Data Lake

Mike Ferguson

4-5 October 2018

London

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### Presenter



An analyst and consultant, Mike Ferguson specialises in business intelligence/ analytics, data management,

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

### Audience

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

## Overview

This 2-day course looks at the challenges faced by companies trying to deal with an exploding number of data sources, collecting data in multiple data stores (cloud and on-premises), multiple analytical systems and at the requirements to be able to define, govern, manage and share trusted high quality information in a distributed and hybrid computing environment. It also explores a new approach of how IT data architects, business users and IT developers can collaborate together in building and managing an enterprise data lake to get control of your data. This includes data ingestion, data discovery, data profiling and tagging and publishing data in an information catalog. It also involves refining raw data to produce enterprise data services that can be published in a catalog available for consumption across your company. We also introduce multiple data lake configurations including a centralised data lake and a 'logical' distributed data lake as well as execution and governance across multiple data stores. It emphasises the need for a common collaborative process and common approach to governing and managing data of all types.

## Learning Objectives

- How to define a strategy for producing trusted data as-a-service in a distributed environment of multiple data stores and data sources
- How to organise data in a centralised or distributed data environment to overcome complexity and chaos
- How to design, build, manage and operate a distributed or centralised data lake within their organisation
- The critical importance of an information catalog for delivering data-as-a-service
- How data standardisation and business glossaries can help define the data to make sure it is understood
- An operating model for effective distributed information governance
- What technologies they need and implementation methodologies to get their data under control.
- 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.

## Course Outline

### Strategy & Planning

- The ever increasing distributed data landscape
- The siloed approach to managing and governing data
- IT data integration, self-service data wrangling or both? - data governance or data chaos?
- Key requirements for data management
- Dealing with new data sources - cloud data, sensor data, social media data, smart products (the internet of things)
- Understanding scope of your data lake
- Building a business case for data management
- Defining an enterprise data strategy
- A new inclusive approach to governing & managing data
- Introducing the data reservoir and data refinery
- Data lake configurations - what are the options
- The rising importance of an Information catalog
- Key roles and responsibilities - getting the model right
- Types policy to govern data
- Formalising governance processes
- Integrating a data lake into your enterprise analytical architecture

### Methodology & Technologies

- A best practice step-by-step methodology structured data governance
- Why the methodology has to change for semi-structured and unstructured data
- Technology components in the new world of distributed data
- Hadoop as a data staging area
- Why Hadoop is not enough
- Data management technology platforms
- Self-service data wrangling tools
- Self-service data integration in BI tools
- Implementation options

### Data Standardisation & the Business Glossary

- Semantic data standardisation using a shared business vocabulary within an information catalog
- SBV vs. taxonomy vs. ontology
- The role of a SBV in MDM, RDM, SOA, DW and data virtualisation
- How does an SBV apply to data in a Hadoop data lake?
- Approaches to creating an SBV
- Business glossary products
- Planning for a business glossary
- Organising data definitions in a business glossary
- Business involvement in SBV creation

- Using governance processes in data standardisation

### Organising the Data Lake

- Organising data in a centralised or distributed data lake
- Zoning the data lake
- New requirements for managing data in a centralised and distributed data lakes
- Creating collaborative data lake projects
- Hadoop as a staging area for enterprise data cleansing and integration
- Beyond structured data - from business glossary to information catalog
- Information catalog technologies
- The power of a graph database for storing metadata - dynamic tracking of data and data relationships in real-time
- The data ingestion process
- Tools and techniques for data ingestion
- Using domains and machine learning to speed up auto tagging

### The Data Refinery Process

- Implementing systematic disparate data and data relationship discovery
- Data discovery tools Global IDs, IBM Watson Data Platform, Informatica, Silwood, Waterline Data Smart Data Catalog
- Automated profiling and tagging of data
- Automated data classification and cataloguing to enable governance
- Automated data mapping
- Automated data profiling using analytics in data wrangling tools
- Generating data cleansing and integration jobs using common metadata
- Key approaches to scalable data integration using Apache Spark
- Self-service data Wrangling tools for Spark and Hadoop
- Executing data refinery jobs in a distributed data lake using Apache Beam to run anywhere
- Approaches to integrating IT ETL and self-service data wrangling
- Joined up analytical processing from ETL to analytical workflows
- Publishing data and data integration jobs to the information catalog
- Mapping discovered data of value into your DW and business vocabulary
- Data provisioning - provisioning consistent information into data warehouses, MDM systems, NoSQL DBMSs and transaction systems
- Achieving consistent data provisioning through re-usable data services
- Provisioning consistent refined data using data virtualisation and on-demand

- information services
- Governing the provisioning process using rules-based metadata
- Consistent data management across cloud and on-premise systems

### Refining Big Data & Data for Data Warehouses

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

### Information Audit & Protection - The Forgotten Side of Data Governance

- What is Data Audit and Security and what is involved in managing it?
- Status check - Where are we in data audit, access security and protection today?
- What are the requirements for enterprise data audit, access security and protection?
- What needs to be considered when dealing with the data audit and security challenge?
- Automatic data discovery and the information catalog - a huge help in identifying sensitive data
- What about privileged users?
- Securing and protecting Big data using tag based policies
- How can you use it for GDPR?
- What technologies are available to tackle this problem? - Apache Knox, Cloudera Sentry, Dataguise, Hortonworks Ranger, HP Enterprise, IBM Optim & Guardium, Imperva, Privitar
- How do they integrate with Data Governance programs?
- How to get started in securing, auditing and protecting you data

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



# Information Management Fundamentals

Chris Bradley

## Overview

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

## Learning Objectives

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

### Level set understanding & terminology:

- Learn about the need for and application of Information Management disciplines for different categories of challenges
- Explore an Information Management

framework and understand how it aligns with other architecture frameworks

- Explore concepts such as lifecycle management, normalisation, dimensional modelling and data virtualisation and why they are important
- Understand the critical roles of Master Data Management and Data Governance and how to effectively apply them

### Pragmatic Learning

- Learn the different MDM architectures, their suitability for different needs and how best to implement Master Data Management approaches
- Develop a set of usable techniques that can be applied to a range of information management challenges
- Learn the best practices for managing Enterprise Information needs
- Through practical examples, learn how to apply techniques in information architecture planning

## Course Outline

### Introduction to the DMBoK

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

### Data Governance

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

### Data Quality Management

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

### Master & Reference Data Management

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

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

### Data Warehousing & BI Management

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

### Data Modelling & Metadata Management

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

### Data Integration & Architecture Management

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

### Data Lifecycle Management

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

### Data Risk Management, Security & Privacy

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

### Regulatory Compliance

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

### Data Management Tools & Repository

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

## Audience

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

- Information Managers
- Information Architects
- Data Architects
- Enterprise Architects
- MDM Managers
- Data Governance Managers
- Data Quality Managers
- Information Quality Practitioners
- Business Analysts
- Technology Leaders
- Business Technology Partners

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3-5 October 2018

2-4 April 2019, London

Fee: £1,595 + VAT

Group Booking & Multiple Seminar Discounts Available

## Enterprise Data & BI Public Courses, London

### Designing, Operating and Managing an Enterprise Data Lake

4-5 October 2018

### Information Management Fundamentals

3-5 October 2018

### Business-Orientated Data Modelling

15-16 October 2018

### Advanced Data Modelling

17-19 October 2018

### Ten Steps to Data Quality

24-26 October 2018

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3rd course	15%
4th course	20%
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2-3 Delegates	10%
4-5 Delegates	20%
6+ Delegates	25%

Only one discount can be applied at any one time

## Presenters



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

International organisations in Information Management Strategy, Data Governance, Data Quality, Information Assurance, Master Data Management, Metadata Management, Data Warehouse and Business Intelligence. He advises clients including National Grid, EDP, BP, Enterprise Oil, Saudi Aramco, Shell, Statoil, TOTAL, Qatar Gas, Alba Leasing, Alinma Bank, American Express, ANZ, Bank of England, Celgene, Cigna Insurance, Emirates NBD, GSK, HSBC, NAB, SABB and 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. Chris is an acknowledged thought leader in Data Modelling and Data Governance, author of several papers and books including "Data Modelling for the Business".

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

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



## IRM UK In-House Training

IRM UK is a leading provider of strategic Business and IT Training for Business and IT Management. We provide in-house training, public courses and conferences in the areas of:

- **Enterprise Architecture & Strategy**
- **Business Change & Transformation**
- **Business Analysis**
- **Enterprise Data & Business Intelligence**

Running a course in-house gives you the following benefits:

- Tailor the course to your organisation's specific needs
- Case studies and problem solving will be about your organisation - the course presenter is, in fact, your consultant for the day
- Train a large group of people without having to pay for their travel and living expenses
- You can decide when you need and want the course to be presented
- You can receive vital training without having to leave your office
- Cost savings for multiple delegates, compared to using public courses

### Previous In-House clients include:

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- AstraZeneca
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- Avis
- BAA
- Bank for International Settlements
- Barclays
- Bayer
- Biogen
- Capgemini
- Centrica
- Coca Cola
- Credit Suisse
- Deloitte
- Department for Work & Pensions
- Dutch Tax Office
- DVLA
- Eircom
- European Medicines Agency
- Ernst & Young
- Essity
- Eurojust
- European Central Bank
- GCHQ
- GE Life
- GlaxoSmithKline
- IKEA
- Jaguar Cars
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- Land Registry
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- Lloyds Register
- Lloyds TSB
- M&G
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- Orange FT
- Ordnance Survey
- Partner RE
- Philip Morris
- Prudential
- Qatar Fertiliser Company (QAFCO)
- QinetiQ
- Riyad Bank
- Royal Mail
- Saudi Telecom Company
- Scottish & Newcastle
- Seagate
- Societe Generale Corporate and Investment Banking
- Sony
- South Yorkshire Police
- St James Place Wealth Management
- Standard Bank
- Statistics Netherlands
- SWIFT
- Foreign & Commonwealth Office
- Unilever
- Vertex
- Virgin
- Virgin Money
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- Waters
- Which

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## Business Analysis Conference

24-26 September 2018, London

*"It's a shame we can't attend all sessions! They have all been very thought-provoking and insightful. Every BA must experience this."*

Chetan Patel, Business Analyst,  
Lloyds Banking Group

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

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

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

Annette O'Donovan, Senior Business  
Analyst, Genworth



## IRM UK Enterprise Architecture & Business Process Management Conference

22-25 October 2018, London

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

Philip Ainsworth, Business Architect,  
Student Loans Company

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

Terje Bremnes, Enterprise Architect,  
Helse Vest, Norway

*"IRM EAC is turning into a must attend EA event for the calendar. Excellent value for time and money invested!"*

Amitabh Apte, CTO, Fujitsu



## IRM UK Enterprise Data & Business Intelligence Analytics Conference

19-22 November 2018, London

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

Andy Moore, Process Specialist,  
Information, Rolls-Royce

*"Great opportunity to validate my views and to learn from others."*

Garry Manser, Head of Data  
Governance, Visa Europe

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

Ana Teresa Szmoes,  
Caixa Geral de Depósitos



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

## Registration Information:

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

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

2 days	£1,245 + VAT (£249)	£1,494
3 days	£1,595 + VAT (£319)	£1,914
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 3rd course 15%  
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## Cancellation Policy:

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

## Cancellation Liability:

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

## Course Timetable:

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

## Course Venue

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

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

## Hotel Accommodation Details:

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

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