Four events. One registration.
All at the world’s largest and longest running conferences on business rules.

BUSINESS RULES FORUM
...the premier Conference dedicated to Business Rules. Learn how you can achieve greater business agility. Be where the future of Business Rules, Rules Management, Compliance & Governance is taking shape!

ENTERPRISE DECISION MANAGEMENT SUMMIT
...the only Conference focused on the automation and improvement of operational decisions. With the widest selection of decision-making technology vendors, the Summit offers a unique opportunity to learn how to compete with decisions.

RULES TECHNOLOGY SUMMIT
...the only Conference of its kind for IT Architects and IS Professionals focused on the development and deployment of state-of-the-art business software that is geared to both your current and long-term business needs.

PRODUCT EXPO
...where all the vendors come together under one umbrella at one time!

Diamond Sponsors

REGISTRATION BEFORE SEPTEMBER 19 AND SAVE $100.00!
Change Is The Only Constant

Your enterprise undergoes change all the time—and this change gets faster every day. Entering into new markets. Introducing new products. Complying with new regulations. Making new agreements with customers and suppliers. Changing business direction through mergers, acquisitions, alliances and divestitures. Are your systems and procedures keeping up? Are you getting ahead of the curve or just falling behind?

Business Rules, Decisioning and Related Technologies Can Help You Achieve...

- BUSINESS AGILITY
- HIGHER CUSTOMER SATISFACTION
- ANALYTIC DECISION-MAKING
- REVENUE GROWTH
- ROBUST COMPLIANCE
- COMPETITIVE ADVANTAGE

Find Out How At The Forum Conferences!

CONFERENCE EVENT SCHEDULE AT A GLANCE

<table>
<thead>
<tr>
<th>Event</th>
<th>Sunday, Oct. 26</th>
<th>Monday, Oct. 27</th>
<th>Tuesday, Oct. 28</th>
<th>Wednesday, Oct. 29</th>
<th>Thursday, Oct. 30</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-Conference Tutorials</td>
<td>2:30pm – 5:30pm</td>
<td>9:00am – 4:30pm</td>
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<tr>
<td>Conference Sessions</td>
<td></td>
<td>8:45am – 5:15pm</td>
<td>9:00am – 4:45pm</td>
<td>8:00am – 3:50pm</td>
<td></td>
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<tr>
<td>Fun Labs</td>
<td>4:45pm – 6:45pm</td>
<td></td>
<td>2:05pm – 4:05pm</td>
<td>1:40pm – 3:40pm</td>
<td>4:00pm – 6:00pm</td>
</tr>
<tr>
<td>RulesExpo</td>
<td></td>
<td>5:15pm – 7:45pm</td>
<td>12:00pm – 2:00pm</td>
<td>12:00pm – 1:45pm</td>
<td>4:00pm – 6:30pm</td>
</tr>
</tbody>
</table>

The Largest Rules and Decisioning Product Expo ever held. Want to see the latest technology solutions? Over 25 vendors showcase the latest product innovations under one roof!

Test-drive the Vendors’ Tools. Try them out on laptops and facilitated case studies provided by the vendors. Demystify the technology! Get a feel for what the tools can do!

This was my second year attending the Forum. I will certainly continue to attend.

- Scott Rotella, Vice President, Wells Fargo Bank
Responsive Systems.  
Re-Usable Decision Logic.  
High-Touch Customer Service.  
Analytic Competition... 

Now you can deliver all that and much more!

In most organizations today, business rules are locked away in legacy systems, user manuals — or in the heads of a few key workers. It’s a challenge simply tracking them down. The good news is that once you harvest and manage the rules you can then re-deploy them far more rapidly and effectively than most professionals have ever imagined. And rules provide the ideal platform for bringing data mining and analytics to bear on your day to day operations, adding even more value.

If you want to improve your business processes — make them smarter — you must adopt architectures and tools to keep your decision logic right at your fingertips. Business Rules, Enterprise Decision Management (EDM) and related technologies are the practical solution to solve a whole host of challenges facing both business and IT today.

Did you know Business Rules and Decisioning were about all this too?

**AGILE**  
Traditional programming technology tends to be resistant to change and utterly obscure to the business — not what an Agile project needs. Agile projects can engage stakeholders more effectively by adopting business rules as an approach and business rules management systems as a technology.

**BUSINESS PROCESS MANAGEMENT (BPM)**  
Identifying, automating and managing the decisions within a process are critical next steps for greater efficiency and effectiveness in organizations today. For smarter, simpler and more agile processes, you need business rules and enterprise decisioning.

**SERVICE-ORIENTED ARCHITECTURE (SOA)**  
One of the drivers for SOA is increasing agility — making it easier to dynamically reconfigure systems and thus businesses to meet the challenge of continuous change. Using business rules to deliver agile decision services can deliver the full promise of SOA for your organization.

**DATA MINING/PREDICTIVE ANALYTICS**  
Experienced data miners know that getting to an analytic result is just the beginning — to get real value you must put your analytics to work in day to day operations. Business rules and EDM provide the ideal platform for operationalizing analytics, enhancing expert judgment with automated analytics and ensuring high-quality decisions.

**BUSINESS INTELLIGENCE**  
As organizations struggle with the challenges of pervasive BI and operational business intelligence, many are turning to business rules and decision management. Old-school BI is not going to get it done. Becoming more decision-centric is the way forward.

**COMPLIANCE**  
Governance, compliance, risks and internal controls are mounting concerns. Forward-thinking organizations are exploring new ways in which compliance can be built-in. Business rule management systems offer exciting new solutions.

**LEGACY MIGRATION**  
Legacy migration projects often focus almost exclusively on technology platforms, but that’s only one part of the real problem. Learn how other organizations are harnessing business rules and related technologies to harvest decision logic and enable robust legacy modernization.

Find out what Business Rules and Decisioning can do for you in these crucial areas.
### Conference Schedule

#### Sunday, October 26, 2008

**PRE-CONFERENCE TUTORIALS**

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
</tr>
</thead>
<tbody>
<tr>
<td>2:30pm - 5:30pm</td>
<td>Business Rules from A to Z: What You Need to Know&lt;br&gt;Ronald G. Ross, Business Rule Solutions, LLC, Principal and <a href="http://www.BRCommunity.com">www.BRCommunity.com</a>, Executive Editor</td>
</tr>
<tr>
<td>Break: 4:00pm - 4:15pm</td>
<td>Succeeding as a Decision-Centric Organization&lt;br&gt;Neil Raden &amp; James Taylor, Smart (enough) Systems, Co-Founders</td>
</tr>
<tr>
<td>4:45pm - 6:45pm</td>
<td>SOA and Business Rules - Building a Powerful, Flexible Application Platform&lt;br&gt;Michael Krouse, Charter Solutions, Chief Technology Officer and Director of Management Consulting Services</td>
</tr>
</tbody>
</table>

**REGISTRATION OPEN 1:00PM - 6:00PM**

#### Monday, October 27, 2008

**PRE-CONFERENCE TUTORIALS**

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00am - 12:00pm</td>
<td>Capturing Business Rules – from Facilitated Sessions, from Great Big Book and from Application Code&lt;br&gt;Gladys S.W. Lam, Business Rule Solutions, LLC, Principal and Conference Executive Director</td>
</tr>
<tr>
<td>10:30am-10:45am</td>
<td>Developing a Business Process Architecture and Program of Change&lt;br&gt;Roger Burton, Process Renewal Consulting Group Inc., Founder</td>
</tr>
<tr>
<td>12:00pm - 1:30pm</td>
<td>Agile Model Driven Development (AMD): Practices for Scaling Agile Software Development&lt;br&gt;Scott Ambler, IBM, Practice Leader Agile Development</td>
</tr>
<tr>
<td>1:30pm - 4:30pm</td>
<td>Attending Networking Lunch&lt;br&gt;John Rymer, Forrester Research, Inc., Vice President</td>
</tr>
<tr>
<td>3:00pm-3:15pm</td>
<td>A Framework for Selecting Business Rules Platforms and Principal Analyst&lt;br&gt;Top 10 Data Mining Mistakes (and how to avoid them)&lt;br&gt;John Elder, Elder Research, Inc., Chief Scientist</td>
</tr>
<tr>
<td>3:10pm - 4:10pm</td>
<td>Optimization Technology and Business Innovation&lt;br&gt;David Simchi-Levi, MIT, Professor of Civil and Environmental Engineering and Engineering Systems</td>
</tr>
</tbody>
</table>

**REGISTRATION OPEN 8:00AM - 7:00PM**

#### Tuesday, October 28, 2008

**Pre-Conference Registration Open 7:30AM - 7:30PM**

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:30am - 8:45am</td>
<td>Continental Breakfast&lt;br&gt;General Session: Conference Welcome / Opening Remarks: Gladys S.W. Lam, Conference Executive Director</td>
</tr>
<tr>
<td>8:45am - 9:00am</td>
<td>General Session: Keynote: From Here to Agility&lt;br&gt;Ronald G. Ross, Business Rule Solutions, LLC, Principal and <a href="http://www.BRCommunity.com">www.BRCommunity.com</a>, Executive Editor</td>
</tr>
<tr>
<td>9:00am - 10:00am</td>
<td>General Session: Keynote: From Here to Agility&lt;br&gt;Ronald G. Ross, Business Rule Solutions, LLC, Principal and Conference Executive Director</td>
</tr>
<tr>
<td>11:05am - 12:00am</td>
<td>Integrating Business Rules Change&lt;br&gt;Control by Effective Principles, Policy and Guidelines&lt;br&gt;Sam Paper, Bank of America, SW-SR Architect</td>
</tr>
<tr>
<td>12:00pm - 1:30pm</td>
<td>It's All About the Data: Success with Data Projects Using a Business Rule Approach&lt;br&gt;Pat Wilson, Walt Disney World Co., Information Technology Analyst</td>
</tr>
<tr>
<td>1:30pm - 2:00pm</td>
<td>Process and Rules: The Collaboration Effect&lt;br&gt;Kelly Karlen, Blue Cross Blue Shield, Manager, Rules Management Office&lt;br&gt;Darren Kocik, Hotwire, Sr. Manager, Revenue Management</td>
</tr>
<tr>
<td>2:05pm - 3:05pm</td>
<td>“One Size Doesn’t Fit All”&lt;br&gt;Joe Garrity, The Hartford, Senior Architect&lt;br&gt;Kathleen Barrett, The Hartford, Application Development Specialist</td>
</tr>
<tr>
<td>3:10pm - 4:10pm</td>
<td>Solving a multi-decade problem for 200,000 users using business rules management&lt;br&gt;Josh Sharman, California Association of REALTORS®, Chief Technology Officer</td>
</tr>
<tr>
<td>4:15pm - 5:15pm</td>
<td>Agile Scenarios for Retirement Systems&lt;br&gt;Mike Freiling, Conceptis Inc., Business Rule Architect&lt;br&gt;Jordan Masango, Oregon Public Employees Retirement System, Technology Officer</td>
</tr>
<tr>
<td>4:45pm - 6:45pm</td>
<td>Business Decisions from real-time processing&lt;br&gt;Paul Vincent, TBCO, CIO Business Rules and CEP</td>
</tr>
<tr>
<td>5:15pm - 7:15pm</td>
<td>Building a Decision Engine&lt;br&gt;Chris Collard, Dell Inc., Sr. Solutions Architect</td>
</tr>
<tr>
<td>5:15pm - 7:15pm</td>
<td>Building a Servicing Backbone with Rules and Process&lt;br&gt;Stephen Zisk, Pegasystems Inc., BPM Product Marketing Manager</td>
</tr>
<tr>
<td>6:00pm - 7:30pm</td>
<td>Rules and Process Management for Insurers&lt;br&gt;Owen Williams, Chubb and Sons, Vice President&lt;br&gt;Ian Brodie, Fair Isaac Corporation, Client Partner</td>
</tr>
<tr>
<td>7:00pm - 7:30pm</td>
<td>Business Decisions from real-time processing&lt;br&gt;Paul Vincent, TBCO, CIO Business Rules and CEP</td>
</tr>
</tbody>
</table>

**REGISTRATION OPEN 7:30AM - 7:30PM**

#### Wednesday, October 29, 2008

**PRE-CONFERENCE TUTORIALS**

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00am - 9:00am</td>
<td>Continental Breakfast&lt;br&gt;General Session: Keynote: Competing on Decisions&lt;br&gt;James Taylor and Neil Raden, Smart (enough) Systems, Co-Founders</td>
</tr>
<tr>
<td>9:00am - 10:00am</td>
<td>Organizing a Business Rule Harvesting Project – Divide and Conquer&lt;br&gt;Gladys S.W. Lam, Business Rule Solutions, LLC, Co-Founder &amp; Principal</td>
</tr>
<tr>
<td>10:05am - 11:05am</td>
<td>Integration of a rules engine with Sonic SOA Environment&lt;br&gt;Gabor Liptak, Kemper, Architect</td>
</tr>
<tr>
<td>11:05am - 12:00am</td>
<td>Putting Business Rule Repositories in place: Separating repositories from implementations to empower your SOA&lt;br&gt;Paul Avilez, Liberty Mutual Insurance Group, Agency Markets, Senior Software Developer&lt;br&gt;Natalie Wilson, Circuit City Stores, System Consultant</td>
</tr>
<tr>
<td>11:05am - 11:20am</td>
<td>Vendor Panel&lt;br&gt;Moderator: John Rymer, Forrester Research, Inc., Vice President and Principal Analyst</td>
</tr>
<tr>
<td>11:20am - 12:20pm</td>
<td>Enterprise Lexicon Services (ELS)&lt;br&gt;Jason Dorum, ASWEJAVAEN/S/SCI-SD, N66R3ELS Project Lead</td>
</tr>
<tr>
<td>12:20pm - 1:40pm</td>
<td>RulesExpo - Private Reception for Conference Attendees&lt;br&gt;Break&lt;br&gt;It’s a Wild World – Introducing a Rules Methodology in a Changing Environment&lt;br&gt;Kathy Garm, Insurance Corporation of British Columbia, Manager, Business Transformation Services&lt;br&gt;Kristen Seer, Business Rule Solutions, LLC, Senior Consultant</td>
</tr>
<tr>
<td>1:40pm - 2:30pm</td>
<td>Implementing Complex Decision Services in an SOA Infrastructure&lt;br&gt;Kevin Forbes, Healthways Inc., Enterprise Architect</td>
</tr>
<tr>
<td>2:30pm - 3:30pm</td>
<td>From Scores to Strategies – the Use of Analytics in Business Decisions&lt;br&gt;Lamar Shahbazian, McCainity, Vice President&lt;br&gt;Sharon O’Reilly, KeyBank, Sr. Project Manager</td>
</tr>
</tbody>
</table>

**REGISTRATION OPEN 8:00AM - 6:30PM**

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**Register online at www.businessrulesforum.com**
WEDNESDAY, OCTOBER 29, 2008

REGISTRATION OPEN 8:00AM - 6:30PM

1:40pm - 2:40pm  BMRS, BPM, EA and SOA – Building an Agile Technology Stack for your Enterprise
Michael Krouse, Charter Solutions, Chief Technology Officer and Director of Management Consulting Services
Vocabulary and Rule Management, the next generation Silvia Sprowenenberg, LightB, Founder & Director, Rik Gerrits, RuleArts, Chief Architect
Automated Customer Acquisition Enabled by Business Rules Don Amer, HealthCurrents, Inc., President
Predictive Analytics Produces Business Rules That Deliver Eric Siegel, Prediction Impact, Inc., President

CHIEF ARCHITECT
BMRS Requirements and Reference Architecture
Art Tortoreto, Innovations Software Technology, President

2:45pm - 3:45pm Special Practitioners Panel: The Real-World Dos and Don’ts of Business Rules
Moderator: Gladys S.W. Lam, Business Rule Solutions, LLC, Co-Founder & Principal and Conference Executive Director

4:00pm - 4:20pm

HOT TOPICS! HARD HITTING IN-AND-OUT DISCUSSION SESSIONS ON CURRENT ISSUES

Robert Albrecht, RIS Information Technology, Global Managing Principal - Development & Integration Practice
Integrated Business Rules and Constraint Programming Technologies for EDM Eugene Freuder, Cortics’ll, Computation Centre, Director
Jacob Feldman, OpenRules, Inc., CTO

4:25pm - 4:45pm

HOT TOPICS! HARD HITTING IN-AND-OUT DISCUSSION SESSIONS ON CURRENT ISSUES

See updated Conference schedule www.businessrulesforum.com as we continue to update our program offerings

Performance tuning in business rules Open Source Tools — Good, Bad & Ugly
Managing rules across multiple projects Text Analytics and determining

4:00pm - 6:30pm RulesExpo

THURSDAY, OCTOBER 30, 2008

REGISTRATION OPEN 7:30AM - 4:00PM

7:00am - 8:00am

Continental Breakfast

8:00am - 9:00am

Nestor Alonso, Finance Bureau of the Republic of Honduras, Database Administrator (DBA)

9:05am - 10:05am Security of Services
David Read, Blue State Solutions, CTO
Michael Strianese, Blue State Solutions, Program Leader

Good Business Process
Kathy A. Long, Innovative Process Consulting, Inc., President

Reducing Risk by Using a Phased-in Approach to Rules Integration
Jim Soroffy, Canada Revenue Agency, Manager

Integrating Predictive Analytics and BRM to Improve Health Plan Member Experience
John Lucker, Deloitte Consulting LLP, Principal
Mo Massud, Deloitte Consulting LLP, Senior Manager

9:05am - 10:05am

The “OMG Certified Expert in BPM” Exam and the Role of Business Rules
Tom Debevec, Tipping Point Solutions, Chief Technology Officer
Jon Siegel, Object Management Group, Vice President, Technology Transfer

Business and People Issues in Implementing Business Rule Management for Decision Makers
Frank Habraken, CSC Australia, Program Manager

Business People Don’t Set New Approaches to Creating, Visualizing and Comparing Strategies
Stuart Crawford, Fair Isaac Corporation, Vice President, Research

10:20am - 11:20am A Case Study for Business Rules in Mortgage Lending - Minnesota Housing
Meg Lately, Minnesota Housing, Project Manager
Bruno Trimmouille, LGS, Director of Marketing Development, Financial Services

The “Rules of Rules: Automating Project Tailoring for Process and Rule Best Practices
Fred Waskiewicz, OMG, Director

Rex Bosma, European Patent Office, Project Manager

Increasing the IQ of Processes for Profitability
James Mills, Cobuild Partners, LLC, Consultant

Business and People Issues in Implementing Business Rule Management for Decision Makers
Frank Habraken, CSC Australia, Program Manager

Business Rules – Standards Are Here
John Hall, Model Systems, Director

12:25pm - 1:45pm “Rules on the Web” Boxed Lunch Panel Session
Moderator: John Hall

1:45pm - 2:45pm Emerging Trends & Decisioning Panel: Moderator: Kristen Seen, Business Rule Solutions, LLC, Senior Consultant

Tipping Point Strategies
Fred Waskiewicz, OMG, Director of Standards and Licensings

2:50pm - 3:50pm Lessons Learned - Practical Tips for Integrating BPEs in a SOA-environment: An Automated Underwriting Example
Donald Searing, Ph.D., Cobuild Partners, LLC, Managing Consultant
James Mills, Cobuild Partners, LLC, Consultant

Documenting Business Rules Using Off the Shelf Requirements Software: Not Business Requirements Are Usual
Giovanni Diviacchi, Fannie Mae, Senior Business Analyst

The Rules of Rules: Automating Project Tailoring for Process and Rule Best Practices
Vanessa Carter, RIS, Director of Asset Management, Rules & Requirements Management Office
Art Moore, Clear Systems LLC, Principal

Using EOM to Allocate Marketing Resources
David Raab, Raab Associates Inc., Principal

Standards Panel: Moderator: John Hall, Model Systems, Director

Very well organized. Nice mix of speakers and topics. Expo was very valuable for me. Learning about tools available and expertise in this space all at the same place is convenient and a good use of time and resources.

- Jessica Abbott,
Business Systems Analyst, MetLife

REGISTER ONLINE AT WWW.BUSINESSRULESFORUM.COM
Business Rules from A – Z: What You Need to Know

Ronald G. Ross
Business Rule Solutions, LLC | Principal
www.BRCommunity.com | Executive Editor

What are Business Rules, and how can you apply them effectively in your organization? What pitfalls have other organizations encountered, and how can you avoid them? How can you get up to speed about the very latest in the field? This tutorial tells you what you need to know to get into the express lane for Business Rules. It provides clear, authoritative insight into the essential concepts, techniques and tools of the Business Rules Approach. Find out what you need to know to be successful in your organization on a point-by-point basis, amplified by far-ranging professional experience. Cut through the hype about technology, methodology and standards. Learn about the key areas of practical importance to your company. If you are looking for a way to get the latest and best scoop on what’s happening, this tutorial is for you. Come prepared with questions you want answered! What you will learn:

- Achieving business agility through Business Rules
- Business Rule methodologies
- Fitting Business Rules into projects... and into your organization
- Pitfalls, lessons learned and best practices
- The latest trends and emerging standards
- Establishing rule management

Succeeding as a Decision-Centric Organization

Neil Raden
Smart (enough) Systems | Co-Founder
James Taylor
Smart (enough) Systems | Co-Founder

Organizations are adaptive to compete using analytics, build adaptive/agile infrastructure and optimize their business operations must become more decision-centric. It is clear that the precision, consistency, agility, speed and cost of operational decisions are key to effective and efficient operations. This session will cover the principles of Enterprise Decision Management, its application to critical business processes and decisions and the appropriate use of available technology. What you will learn:

- How to identify and prioritize the operational decisions that drive your organization’s success
- How to use business rules as a foundation to automate these decisions for maximum agility
- How to improve these decisions using data mining and predictive analytics
- How to ensure continuous improvement and competitive advantage using adaptive control

SOA and Business Rules - Building a Powerful, Flexible Application Platform

Michael Krouze
Charter Solutions | Chief Technology Officer and Director of Management Consulting Services

Service Oriented Architecture (SOA) is a powerful paradigm for developing new applications and integrating new service-level features into existing applications. As the popularity and maturity of SOA grows, organizations are looking at how they can best leverage Business Rules Engines (BRE) in these new architectures. This session will provide a quick review of SOA then dive into the value proposition of BREs in SOA, traditional and non-traditional uses of BREs in SOA, and finally a review of different approaches to integrating a BRE into your SOA with benefits and challenges of each. What you will learn:

- How to evaluate the value of integrating a BRE with your SOA
- Uses of BREs as a core part of an Enterprise SOA platform
- When to use various BRE integration techniques in your SOA
- How to leverage a BRE in shoring up inherent weaknesses in the SOA approach

Capturing Business Rules – from Facilitated Sessions, from Great Big Book and from Application Code

Gladys S.W. Lam
Business Rule Solutions, LLC | Principal
Conference Executive Director

Business Rules should come from the business. However, you cannot simply ask business people to come together and then multiply rules. In this practical tutorial session, Ms. Lam will present a comprehensive approach for gathering business rules from business experts using facilitated sessions. Ms. Lam will also discuss the steps required to harvest rules from great big source documents and share her experience on reverse engineering business rules from application code. What you will learn:

- How to coordinate facilitated sessions to collect business rules, including preparation, objectives, agenda and documentation for each session
- The four primary business model deliverables – Policy Charter, Workflow, Fact Model, and Business Rules
- Techniques for capturing, presenting and documenting the deliverables
- A pragmatic way of harvesting rules from great big source documents
- Insight and experiences in reverse engineering business rules from application code
- Lessons learned and pitfalls to avoid

Developing a Business Process Architecture and Program of Change

Roger Burlton
Process Renewal Consulting Group Inc. | Founder

In most organizations there are many initiatives of various types underway or anticipated. Typically these are not traceable to business value creation nor are they aligned to one another. It is now apparent that an enterprise-wide, process-oriented Business Architecture’s real role is to make sense of the mess and connect the dots to ensure that the business and all of its capabilities can work together and respond as needed. This session will cover the Principles of Business Architecture, Stakeholders and Relationships, Developing the Process Architecture, Alignment of other Architectures, Program Prioritization and Planning and Management and Tools Support. What you will learn:

- How to develop a Business Process Architecture that reflects the business drivers and strategic intent of the enterprise
- How to define the organizational capabilities required for the enterprise to realize its purpose
- How to develop a Process Architecture that will provide the basis for aligning the IT Architecture with the creation of business value
- How to ensure the ongoing management of cross-functional processes as assets themselves

Agile Model Driven Development (AMDD): Practices for Scaling Agile Software Development

Scott Ambler
IBM | Practice Leader Agile Development

This interactive workshop explores the differences between modeling on waterfall development, mini-waterfall development, and agile development projects. It defines what it means for a model to be agile and presents numerous examples. The Agile Model Driven Development (AMDD) approach is then described, showing how AM fits in with implementation techniques such as Test Driven Development (TDD) and refactoring. What you will learn:

- Modeling helps to scale agile software development
- Strive for executable specifications over static specifications
- Agile approaches to business rules efforts work and should be preferred over traditional approaches
selecting a platform for business rules applications requires much more than consideration of deep technical features. Features for business analysts and operations staff, fit with other systems within an IT landscape, standards support, fit to application requirements, and vendor strategy are also vital elements of any product selection. Forrester Research has developed a set of detailed criteria on product features and vendor characteristics to guide its clients’ selection of business rules engine. These criteria are at the heart of Forrester’s Wave research methodology for comparing products, and form the basis for a comparison of business rules platform vendors that was published in late 2007. Come to this tutorial to learn how to use the Forrester evaluation criteria and approach to select the best business rules platform for your organization. What you will learn:

- How to evaluate business rules platforms with criteria tailored to your organization’s requirements
- How to evaluate business rules platform vendors with criteria tailored to your organization’s requirements

Top 10 Data Mining Mistakes (and how to avoid them)

Discovering useful business rules is a form of “data mining”, which has proven capable of enormous returns in many fields and industries. But, it is easy to go too far in one’s analysis and “torture the data until it confesses” or otherwise doom the rules to fail where they really matter: on new situations. A key to achieving quality is to avoid “worst practices”. Dr. Elder will share his (often humorous) stories from real-world applications highlighting common, but deadly, mistakes. Come learn how to achieve success by laughing (or gasping) at stories of barely averted disaster.

- How to find useful patterns in your data worthy of rules
- Data Mining Best Practices by learning their flip side: worst practices
- The tremendous value of learning from data

Optimization Technology and Business Innovation

Many business challenges in diverse areas such as production planning, supply chain management, foreign exchange and commodity trading, asset-liability management, portfolio optimization, corporate risk management, and yield management involve choosing an appropriate decision from many possible strategies so as to improve Key Performance Indicators such as profit, cost, inventory or risk. In a growing number of companies, these decisions are made using decision support systems that combine information, modeling frameworks, optimization technology and easy-to-use user interfaces. This allows companies to make effective decisions in real time, consider a large range of business drivers, optimize across regions and business processes, and identify risk mitigation strategies and recovery processes.

- A review of basic optimization concepts
- The role of optimization; and
- Applications of optimization models that are widely used across industries.

Our objective is to review the technology, processes and impact on the enterprise.
Redefining Online Travel: Hotwire’s Business Rules-Based Approach to Serving the Price-Savvy Travel Customer

Darren Koch
Hotwire | Sr. Manager, Revenue Management

Audience Subject Familiarity: Some
Main Presentation Focus: Business & Technology

Hotwire is a pioneer in the online travel-booking industry, negotiating deep discounts from its suppliers to help travelers get the best price on unsold airline seats, hotel rooms and rental cars. In order to handle the complexity and variety of its products, Hotwire adopted a rules-based approach for managing real-time pricing decisions to customers. What you will learn:

- Why Hotwire chose to use a business rules management system, along with lessons learned in the migration to this system
- How Hotwire brings predictive analytics and business rules together to optimize pricing for each customer transaction

Who’s Contacting Us and Why? The Application of Customer-Centric Intelligence and Models in the Contact Center

Gary W. Class
Wells Fargo | Senior Vice President

Audience Subject Familiarity: Some
Main Presentation Focus: Business & Technology

A true customer-centric approach to evaluating overall contact center and agent performance must take into account the behavior & propensities of the clients who are calling in or e-mailing. The ability of the contact center to provide quality customer service can be directly related to financial metrics via the impact on customer loyalty and retention. What you will learn:

- How Wells Fargo leverages detailed customer interaction data from the internet and call center to understand who is calling them and why
- The power of developing and deploying a customer-centric profile
- The treasure buried in interaction data and end-user supplied text

Beyond Subject Matter Expertise: Sourcing and Managing Business Rules for the Adaptive Enterprise

Steve Demuth
ILOG | Director of Business Rule Product Management

Audience Subject Familiarity: Expert
Main Presentation Focus: Business & Technology

Subject matter experts are the ultimate source of business decision logic, but this has led to a division between the specification of knowledge and the use of rules as operational constructs. It is increasingly clear that the world is not that simple. Business rules serve both modeling and operational functions, and business rules often come from sources other than subject matter experts. What you will learn:

- The future of business rules as the centerpiece of an adaptive enterprise
- Bringing modeling, business analysis, predictive analytics, operational and decisioning together into a coherent whole
- Best practices for decision logic

Sun’s Risk Analysis System: A Study in Risk Mitigation

Rex Martin Ph.D.
Sun Microsystems™, Inc. | Principal Engineer and Senior Architect

Audience Subject Familiarity: Some
Main Presentation Focus: Business & Technology

Through the use of an advanced decision management platform built using an industry-leading business rules management system, Sun Microsystems deployed a global technical product risk management solution that went live in five months and is now used by 9,000 users around the world. By mitigating risks identified by the solution, these customers saw a 67% reduction in severe incidents, a 10x reduction in unplanned outages, and increases in system availability. Find out how Sun:

- Developed an advanced global decision management platform
- Improved development time, kept simplicity, and innovated rapidly
- Programmatically create/maintain rules from reference sources

It’s a Data World After All: Why the Business Should Care About Data Requirements

Pat Wilson
Walt Disney World Co. | Information Technology Specialist

Audience Subject Familiarity: None
Main Presentation Focus: Business

Most business people don’t think much about data, they think about results. Today’s competitive world is driven by analytics. In the data world, business requirements take on a new face and the approach to requirements creates unique challenges. Using a business rules approach helps meet those challenges and brings value to the business. What you will learn:

- Common requirements approaches and pitfalls
- How to adapt the business rule approach for data projects
- How IT and business teams benefit from the business rule approach
- Writing clear and complete business data requirements
- Create reusable data requirements documentation

Process and Rules: The Collaboration Effect

Kelly Karlen
Blue Cross Blue Shield of Minnesota | Manager, Rules Management Office

Sands McAlees-Callanan
Blue Cross Blue Shield of Minnesota | Senior Process Developer

Audience Subject Familiarity: None
Main Presentation Focus: Business

The Rules Management and Process Development Teams at BCBSMN have teamed up to develop a model that integrates process design and business rule capture, allowing for a collaboration between the teams that effectively and efficiently meets our customers’ needs. The outcomes of this model have resulted in clear, comprehensive documentation that the business utilizes for operational process and decision management, and IT utilizes for data modeling, application requirements and development. What you will learn:

- Process-Rule Development Model
- Roles/ Responsibilities
- Process/ Rule Repositories Co-Management
- Project Outcomes
- Physical Security/ Compliance Event Management
- Incentive Based Benefits
- Lessons Learned
Building a Decision Engine

Chris Collard
Dell, Inc. | Sr. Solutions Architect

Audience Subject Familiarity: Some
Main Presentation Focus: Business

Underestimating the enterprise integration components associated with rules engine implementations can often result in project scope, time and cost overruns. Hear firsthand from Dell how taking into consideration the larger integration implications at the outset of a project, including assessing and addressing impact to the organization, contributed to the project’s success. What you will learn:

• How to measure and assess your organization’s readiness to implement a rules engine environment
• How to prioritize your business rules management implementation milestones
• What the critical success factors are in business rules implementations

Rules for Effective IT/Business Collaboration: Bridging the Gap from IT Coding Business Logic to User-Driven Dynamic Decisioning

Paul Hessinger
InRule Technology, Inc. | Chief Executive Officer

Audience Subject Familiarity: None
Main Presentation Focus: Business & Technology

Supporting a rapidly changing business environment requires a major shift in the way logic-intensive applications are built and maintained. IT can’t do this alone. Dynamic business applications require a more collaborative approach between IT and business decision makers, increasing ownership by process owners and key decision makers. Paul Hessinger will explain the Rules Variability Analysis process that bridges the gap in between IT and the business. What you will learn:

• Establishing clear ownership boundaries
• Reducing the translation errors between business and IT
• Establishing a rule authoring context and vocabulary relating to a unique business domain

Tuesday, October 28 | 2:05 pm – 3:05 pm

“One Size Doesn’t Fit All”

Joe Garrity
The Hartford | Manager, Rules Senior Architect

Kathleen Barrett
The Hartford | Application Development Specialist

Audience Subject Familiarity: Some
Main Presentation Focus: Business & Technology

Using appropriate technologies for the Business problems at hand. Sometimes a rules engine isn’t the best approach. This presentation will discuss how The Hartford has started to implement governance to position the company to utilize the strengths of the multiple rule engine technologies. As well externalization techniques which oftentimes do not require a rules engine. What you will learn:

• How to identify the strengths / weaknesses of the overlapping technologies
• Examples of the guidelines that have been used at The Hartford
• Lessons learned to establish a process to govern the use of the appropriate rules technology

Solving a multi-decade problem for 200,000 users using business rules management

Josh Sharftman
California Association of REALTORS® | Chief Technology Officer

Audience Subject Familiarity: None
Main Presentation Focus: Business & Technology

The California Association of REALTORS®, a century-old trade association, faced the challenge of providing advice and direction to its 200,000 members of what forms from the 150 form library to use to facilitate a real estate transaction. What you will learn:

• How to effectively introduce new BRM solutions to a technology-lagging user community
• How to successfully deploy a BRM solution to 200,000 users
• How BRM solved a previously unsolved multi-decade problem
• Key factors in vendor selection
• How a BRM solution was “wrapped” in a rules-aware user interface framework

Agility Scenarios for Retirement Systems

Mike Froiling
InRule Technology, Inc. | Associate Business Rule Architect

Jordan Masanga
Conceptrics Inc. | Associate Business Rule Architect

California Association of REALTORS® | Chief Technology Officer

Audience Subject Familiarity: Some
Main Presentation Focus: Business & Technology

Retirement systems are not static applications. To succeed, they must meet specific agility challenges, especially the need to quickly accommodate plan changes mandated by legislative action. We identify actual agility challenges that we have encountered in the retirement system world, and the responses required to meet these challenges at the governance, development process and architectural levels. What you will learn:

• Spotting business and technical challenges that require organizational agility
• Designing proven strategies that meet these challenges
• Orchestrating governance, development and architecture to implement effective strategies

Incorporating Syndicated Data into your Information Management environment

William McKnight
WilliamMcKnight.com | Vice President

Audience Subject Familiarity: Some
Main Presentation Focus: Business & Technology

Information Management is increasingly turning its focus to input that comes from outside of the company. These days, we can get much of the information we need through a reverse-append with a syndicated data provider. However, data providers make generalizations to balance the breadth and quality of the data, making this an imperfect science. This seminar will help you consider the tradeoffs (in breadth, depth and accuracy), how to architect for and wisely use external data. What you will learn:

• Assessing the syndicated marketplace
• The origins of syndicated data
• Determining isolation or integration of syndicated data
Building a Servicing Backbone with Rules and Process

Stephen Zisk
Pegasystems, Inc. | BPM Product Marketing Manager

Audience Subject Familiarity: Some
Main Presentation Focus: Business & Technology

Enterprises provide service to customers across a heterogeneous information landscape. Servicing Backbones provide high-quality user experience with fewer resources, helping meet business goals. Success requires a rules-based approach. Business rules are integrated into process behavior and event handling, not just decision management, requiring a unified and integrated approach.

An effective servicing backbone that contributes to loyalty, retention, and repeat business is built by refactoring rules, processes, and services in the context of business requirements and change. What you will learn:

- Servicing Backbone features and benefits
- Fit in the enterprise infrastructure
- The role of rules and process

Mixing Rules and Process

Sandy Kemsley
Kemsley Design | BPM Analyst and System Architect

Audience Subject Familiarity: Some
Main Presentation Focus: Business & Technology

There are many techniques for combining rules or decisioning capability with business process management (BPM), ranging from using simple expression engines embedded within a BPM system to a full integration between separate BRM and BPM systems.

This session takes a close look at what rules functionality that the BPM systems offer, and the key characteristics that identify which rules and decisions should remain in the domain of the BPM system, and which should be entrusted to a full-strength business rules management system. What you will learn:

- The current state of BPM and BRM
- How BPM and BRM interact
- Where your rules belong

Trainer in a Box: Enabling Automated World Class Training with the Prescription Engine

Jon Zerden
Athletes’ Performance | CTO

Brian Stucky
InScope Solutions, Inc. | Vice President, Decision Management Solutions

Audience Subject Familiarity: None
Main Presentation Focus: Business & Technology

Athletes’ Performance has a long history of providing state-of-the-art training to elite athletes around the world. While it is impractical for the general public to use AP’s professional facilities, the Prescription Engine offers the next best thing: a dynamic, customized exercise program tailored to each person using a BRE to support “on the fly” modifications. What you will learn:

- Keys to an iterative approach of knowledge acquisition
- Integration of dynamic decisioning support across various rendering devices including exercise equipment, web, wireless and PDA’s
- Using real-time feedback in an agile business rule implementation

Semantics and Business Rules: Bridging the Gap

Dave McComb
Semantic Arts, Inc. | President

Audience Subject Familiarity: Some
Main Presentation Focus: Business & Technology

Business Rules and Semantics are inextricably linked. Witness the recent interest in efforts like SBVR. But Business Rule Technology and Semantic Technology are not linked at all. This presentation will describe what Semantic Technologies are and will outline how they will integrate with SOA and Business Rules in future systems. What you will learn:

- What you can and can’t do with Semantic Technology
- How to build your rules vocabulary in an Ontology
- How Semantics and Business Rules will fit into future SOAs

Rules and Process Management for Insurers

Owen Williams
Chubb & Son | Vice President of Specialty

Ian Brodie
Fair Isaac Corporation | Client Partner

Audience Subject Familiarity: Some
Main Presentation Focus: Business & Technology

Savvy insurers are using business rules management to reach real objectives around process automation and profit acceleration. Business rules management gives businesses control over how the rules throughout the business are evaluated, centralized and managed. Find out from Chubb & Son how they have been able to improve underwriting decisions. What you will learn:

- Real-life benefits of automating decisions
- How to further leverage business rules management systems
- Achieving competitive advantage

Business Decisions from real-time processing of events

Paul Vincent
TIBCO | CTO, Business Rules and CEP

Audience Subject Familiarity: Some
Main Presentation Focus: Technology

IT has always been about automating the human-based processes carried out in business and government. Automation has in turn led to higher volumes of data arriving from increasing numbers of sources requiring continuous and complex event processing technology or CEP. CEP replaces the data-oriented view with an event-oriented view. CEP impacts and overlaps with many existing business and IT service needs. What you will learn:

- What CEP means, and how it relates to business rules and decisions
- Technologies used in, required for, and associated with CEP
- Use cases and how business problems are better solved using event-driven decisions

The Role of Business Rules in Driving Desired Business Behavior

Peter O’Donoghue
Computer Sciences Corporation | Program Manager

Audience Subject Familiarity: Some
Main Presentation Focus: Business

Organizations in the business of providing privileges and benefits to applicants must strike a balance between performing work efficiently, capturing the right amount of knowledge to support their decisions and ensuring that decisions are compliant with corporate and government directives. This session explores the role of business rules in organizing business processes and knowledge capture to support compliant and defensible decision making. What you will learn:

- How business rules help minimize upfront data capture
- The impact of externalizing rules on process standardization
- The role of rules in organizing process components into an overall case management framework
Enterprise Lexicon Services (ELS)

Jayson Durham
ASIA/R/CHS/ENG / SSC-SD | NAERG/ELS Project Lead

As a vital component of Enterprise Architecture (EA) and Service Oriented Architecture (SOA) frameworks, the business rules approach has demonstrated limited progress towards providing what herein are called “Enterprise Lexicon Services (ELS).” Such services actively manage both text and graphical/symbolic enterprise lexicon elements to provide critical information interoperability capabilities. You will learn:
- Common terminology/vocabulary via lexicon element discovery, subscription, and publication
- Measurement and reporting of element ambiguity via standardized metrics
- Semantic alignment and mitigation via standardized principles, rules, and methods
- Governance and configuration management

Wednesday, October 29 | 9:00 am – 10:00 am

KEYNOTE
Competing on Decisions

Neil Raden
Smart (enough) Systems | Co-Founder

James Taylor
Smart (enough) Systems | Co-Founder

Neil Raden and James Taylor, co-chairs of the EDM summit and authors of “Smart (Enough) Systems” introduce a new competitive concept - Competing on Decisions. Thanks are due to Tom Davenport for raising the awareness of the need for analytics in his book, “Competing on Analytics.” Seeking out the increasingly small margins required by competitive business pressures has brought analytics into vogue, typically requiring vast amounts of digestible data. Getting their arms around this deluge of new and existing information, organizations realize that they can gain analytic insights customers, products, channels, partners and much more. But some companies are already finding that analytics is only a part of the process – the intelligent application of the findings of these new insights can only pay off if the decisions that are made are correct. By becoming decision-centric, by using business rules to control those decisions and by leveraging their data to make the best decisions companies are increasingly competing on decisions. What you will learn:
- What is a decision in a business context?
- Why decisions matter
- Why decisions are different
- How business rules control decisions

Wednesday, October 29 | 10:05 am – 11:05 am

Organizing a Business Rule Harvesting Project – Divide and Conquer

Gladys S.W. Lam
Business Rule Solutions, LLC | Co-founder & Principal

Audience Subject Familiarity: Some
Main Presentation Focus: Business

You are asked to harvest business rules. The rules seem to be everywhere. Where do you begin? There is more than one way to slice a pie. Depending on your objectives, timeline and resource availability, you may need to dive deep in one area, or cover a larger scope but harvest fewer rules. There can be order to the madness. The key is to carve out manageable chunks of work to ensure success. What you will learn:
- Identify different types of rule harvesting projects
- Divide a large project into manageable parts
- Assign roles and responsibilities
- Track progress

Integration of a rules engine with Sonic SOA Environment

Gabor Liptak
Kemper | Architect

Audience Subject Familiarity: Expert
Main Presentation Focus: Technology

This technical session details how a rules engine fits into Kemper’s SOA environment (including some discussion on SOA in general and the importance of selecting the right XML representation to be used on the ESB). Explains why Sonic is Kemper’s ESB of choice and how a rules engine is integrated into SOA to become a “building block” to be used with any ESB process. What you will learn:
- Learn about Kemper’s technical environment and challenges
- Learn about Kemper’s use of SOA and rules engine
- How the rules engine was integrated into a SOA environment

Putting Business Rule Repositories in their place: Separating repositories from implementations to empower your SOA

Paul Avilez
Liberty Mutual Insurance Group, Agency Markets | Senior Software Developer

Audience Subject Familiarity: Some
Main Presentation Focus: Business & Technology

A common architecture exercise involves identifying the pieces of the puzzle and placing each under the control of who can best handle the requirements. As rule engines provide more “functionality”, it becomes tempting to skip this exercise. This presentation will discuss ideas and examples of how using a business maintained rule repository, agnostic of the implementation, allows real-time manipulation through our Enterprise Rules Service Framework. What you will learn:
- What should be asked in determining placement of logic?
- How can a repository introduce real-time changes to your service?
- What rule patterns support ease of business use?

Establishing a BI Retail Operational Model as the First Step to Event-Based Decision Retailing

Bruce Mason
Circuit City Stores | Program Manager

Natalie Wilson
Circuit City Stores | Systems Consultant

Audience Subject Familiarity: None
Main Presentation Focus: Business & Technology

The profitability of each retail space is determined by many factors, some measurable and controllable, which define the overall profitability model. By mapping out the relationships between these factors and understanding how the decisions retail associates make affect overall profitability, then organizing BI reports and metrics to provide insight into business acumen and capturing feedback from top performers, events and decisions can be identified to improve profitability of retail space. What you will learn:
- Migrating to an automated event-based decision process
- Pitfalls to avoid in mapping out a business process
- Translating analytic results and intellectual capital to event-based rules

Smarter decisions with rules, analytics and optimization technologies

Carole-Ann Malignon
Fair Isaac Corporation | Vice President, Product Management

Audience Subject Familiarity: Some
Main Presentation Focus: Business & Technology

With today’s business environment growing more turbulent, it is critical for businesses to make smarter decisions across their organization. They can achieve this with Decision Management - the business discipline of automating, improving, optimizing and connecting decisions. Effective Decision Management automates critical operational decisions with business rules, enhances those rules with predictive analytics and leverages state-of-the-art optimization. What you will learn:
- How you can improve your ability to make smarter business decisions
- How Decision Management can address complex operational problems and balance trade-offs and constraints
- How rules, analytics and optimization can work together toward advancing Decision Management
It’s a Wild World – Introducing a Rules Methodology in a Changing Environment

Kathy Gorman  
Insurance Corporation of British Columbia | Manager, Business Transformation Services

Kristen Seer  
Business Rule Solutions, LLC | Senior Consultant

Audience Subject Familiarity: None
Main Presentation Focus: Business

Implementing a business rules methodology is a difficult task. Doing it in conjunction with a complete overhaul of the business analysis function presents even greater challenges. The Insurance Corporation of British Columbia has taken on this challenge in the belief that the role of business analyst is key to enabling the corporation to handle anticipated large-scale business changes. This presentation will discuss implementing a business rule methodology within the context of significant change. What you will learn:

• How to coordinate with other change initiatives
• The importance of sponsorship
• Treating the business analyst as a professional
• Developing the support infrastructure

Rules in tables, spreadsheets and diagrams: Towards High Definition Communication

Jan Vanthienen  
K.U.Leuven | Professor in Business Information Systems

Audience Subject Familiarity: None
Main Presentation Focus: Business & Technology

When modeling and managing complex business logic in real business situations, we want to ensure the quality of the set of business rules from the start. Decision tables have proven a useful aid in modeling and maintaining complex business situations in a simple manner, thereby avoiding common anomalies, such as: redundant, conflicting, subsumed or missing rules. What you will learn:

• Concept, objectives and application areas of rule tables
• The decision table and alternative representations: trees, rules, spreadsheets, diagrams
• Verification and validation by construction
• Experiences with the modeling and representation of business rules by business experts in real business situations (insurance, legislation, credit scoring)

Implementing Complex Decision Services in an SOA Infrastructure

Kevin Forbes  
Healthways Inc. | Enterprise Architect

Audience Subject Familiarity: Some
Main Presentation Focus: Business & Technology

Healthways’ solutions are designed to help healthy individuals stay healthy, mitigate and slow the progression of disease associated with family or lifestyle risk factors and promote the best possible health for those already affected by disease. Hear how Healthways is scaling complex business rules services in SOA to help in their decision management. What you will learn:

• Architecture tips for scaling complex decision services
• Architecture tips for high speed data access
• Powering your decision services with a distributed data grid

From Scores to Strategies - the Use of Analytics in Business Decisions

Lamar Shahbazian  
InfoCentricity | Vice President

Sharon O’Reilly  
KeyBank | Sr. Project Manager

Audience Subject Familiarity: Some
Main Presentation Focus: Business

To make strategic risk management decisions, Financial Services institutions rely heavily on both modeling teams and business analysts. While the modeling staff leverages statistical tools to develop predictive models, business analysts use the data to make decisions that impact the organization’s business objectives. However, the communication between these two groups can be less than optimal. This case study highlights real-life scenarios showing how technology improved communication and collaboration between modeling teams and business managers to produce better business decisions. What you will learn:

• Broaden your analytic perspective
• Integrating scores into decisions
• See example adjustments to policy rules

It’s a Model-Driven, Service-Oriented World

Pedram Abrari  
Corticon Technologies, Inc. | CTO, Founder

Audience Subject Familiarity: Some
Main Presentation Focus: Business & Technology

Imagine a world where: business applications are generated from transparent and agile models instead of being manually coded; model assets are stored in a central knowledge repository; executive dashboards provide real-time gauge of business. You will learn about:

• Model-Driven Architecture and business rules
• Significance of semantic models
• How central knowledge repositories fundamentally change the way you do business

Come hear one of the industry’s brightest luminaries review the foundational requirements for such a world, how close we are today, and what it will take to realize.

BRMS, BPM, EAI and SOA – Building an Agile Technology Stack for your Enterprise

Michael Krouze  
Charter Solutions | Chief Technology Officer and Director of Management Consulting Services

Audience Subject Familiarity: Some
Main Presentation Focus: Technology

An agile technology stack allows systems to react to business changes with minimum effort and impact on core system code. Business rules management is a key element in the creation of agile systems. This session will examine the roles that BPM, EAI, and SOA play and how business rules management can enhance each. What you will learn:

• How business rules interact with and support BPM, EAI, and SOA in your enterprise
• How different mixes of these technologies provide flexibility and resiliency in your architecture
• The key attributes of your business that you need to know in order to best use these technologies together

Wednesday, October 29 | 11:20 am – 12:20 pm

Wednesday, October 29 | 1:40 pm – 2:40 pm
Vocabulary and Rule Management, the next generation

Silvie Spreeuwenberg  
LibRt | Founder & Director

Rik Gerrits  
RuleArts | Chief Architect

Audience Subject Familiarity: None  
Main Presentation Focus: Business & Technology

Everyone knows that words can have different meanings. Ambiguity results in inappropriate actions when poorly defined words are used in rule sentences. The recently accepted OMG standard ‘Semantics for Business Vocabulary and Rules’ (SBVR) uses the ‘community’ concept to help disambiguate words. It also introduces the notion of ‘adoption’ in that context. What you will learn:

- What is a community and how must an SVBR compliant tool support communities in a practical context?
- What is the meaning of adoption in this context?
- What design decisions have the CTO and Product Manager of RuleArts agreed upon for RuleXpress?

Automated Customer Acquisition Enabled by Business Rules

Don Ames  
HealthCurrents, Inc. | President

Audience Subject Familiarity: None  
Main Presentation Focus: Business & Technology

The land grab has begun. Successful companies are reaching customers in more markets with more products more quickly than ever. Are you one of them? In this session, Mr. Ames reveals key techniques and capabilities needed to turn your company into a market maker instead of a follower. Don’t miss this presentation if selling to your customer involves: making operational decisions; selling into multiple channels; or changing business conditions. What you will learn:

- The key opportunities on which you should focus
- New techniques and technologies to get you in the game
- Best practices to maximize your investment

Predictive Analytics Produces Business Rules That Deliver

Eric Siegel  
Prediction Impact, Inc. | President

Audience Subject Familiarity: None  
Main Presentation Focus: Technology

With three case studies, we illustrate the powerful business benefits delivered online by predictive analytics’ rules, including 1) increasing user response to online content by predicting which content is most appealing for each user, and 2) increasing return visits by targeting retention offers to customers predicted to defect. What you will learn:

- What business rules produced by predictive analytics look like and how they work
- How AB testing results provide experience from which to learn to choose for each customer, rather than going only with one across all customers
- How predictive analytics automatically derives rules for decision automation by learning from experience

Standards for a Business Rules and Decisions Reference and Requirements Architecture

Art Tortolero  
Innovations Software Technology | President

Audience Subject Familiarity: Some  
Main Presentation Focus: Business & Technology

The industry needs a standards requirements and reference architecture to validate that a business decision and rules management system will be implemented correctly and in conformance with the latest guidelines established by leading vendor-agnostic regulatory organizations. You will learn important standards on building a logical and physical architecture. What you will learn:

- What are the best practices for building your logical business rules and decision model?
- How business processes including orchestration and choreography integrate with business rules and decisions
- How different types of business rules and decision tools can interoperate per the current standards

Next Generation Decisioning Methodology

Mark Norton  
Idiom Ltd | Product Director

Audience Subject Familiarity: None  
Main Presentation Focus: Business & Technology

With the declining utility of traditional business rules approaches and the increasing complexity of decisions being made within and between enterprises a new decisioning technology is imperative. In this presentation we will explore how to model business decisions in a way that drives systems towards tight strategic alignment and more effective business execution. What you will learn:

- The benefits of a decision driven approach for both the business and IT
- Architecture of a decision oriented system
- How to model requirements using decisioning to drive tight strategic alignment and more effective business execution

Semantic Processes, Services and Events

Paul Haley  
Automata, Inc. | Founder

Audience Subject Familiarity: Some  
Main Presentation Focus: Business & Technology

Semantic technology provides the most general and flexible form of data modeling along with logical and rule-based capabilities. A new wave of semantic tools and standards, including models of time, events, and processes promise to align enterprise data modeling, application development, service-oriented architecture and business process management more closely with the perspectives of knowledge management and business rules practitioners. What you will learn:

- How semantic standards extend model-driven architecture to knowledge management
- How semantic architectures and models unify SOA and BPM, including events
- How semantics increases the impact of business intelligence and activity monitoring


Alfredo Torrez  
Finance Bureau of the Republic of Honduras | International Consultant

Nestor Alonzo  
Finance Bureau of the Republic of Honduras | Database Administrator (DBA)

Audience familiarity with required: Some  
Main Presentation Focus: Business & Technology

Governmental information systems, especially financial systems, are characterized for implementing controls established by policies and regulations that are highly dynamic. This makes the implementation of such systems subject to sudden changes in its structure of information storage and controls. Since 2005 the Honduran Government has adopted the Integrated Financial Administrative System (SIAFI), which focuses its implementation on a business rules (BR) architecture, enabling it to properly assimilate the dynamics of change. What you will learn:

- How BR work on a real information system
- How BR are used for ensuring information quality
- Techniques used for implementing BR

How to Capture Business Rules using Use Cases

Anthony Phillips  
Ivar Jacobson Consulting | Consultant

Audience Subject Familiarity: None  
Main Presentation Focus: Business

This presentation discusses the requirements gathering process and explains how Use Cases can be used as the starting point to help identify and capture Business Rules. It also gives practical examples of how these rules can be modeled, classified, documented and then stored in a requirement management tool for further analysis and for traceability throughout the systems development process. What you will learn:

- How to capture Business Rules with Use Cases
- How to classify and store Business Rules requirements
- Potential pitfalls of this approach based on real life experiences
Thursday, October 30 | 8:00 am – 9:00 am

Navy IT Navigates Business Chaos and Survives Budget Cuts While Driving Business Value

William (Bill) Reynolds  
US Navy | Director of Enterprise Engineering & Technology Services

Gary Starling  
Computer Sciences Corporation | Business Process Architect Leader

Audience Subject Familiarity: None  
Main Presentation Focus: Business & Technology

This session is a case study of how a Navy IT organization adapted best practices in a public sector environment to navigate ineffective governance and requirements capability. To meet its challenges, the Execution Management Framework was implemented: a set of core processes that defines and fulfills requests efficiently and effectively. As a result, business rules sharpen organizational focus to deliver the most important business capability at the right time and proactively manage expectations. What you will learn:

- Align work to Business Priorities while addressing funding reductions
- Create ‘business agile’ culture
- Deliver predictable and repeatable products and services

Tools to Rule - Building Blocks of Enterprise Decision Management

Michele Edelman  
Discover Financial Services | Director, Risk Management

Audience Subject Familiarity: Some  
Main Presentation Focus: Business & Technology

This presentation will review key components of decision management including rules engines, analytics, and optimization tools and how Discover Financial Services has built a decision infrastructure over the last five years and will go in the next 36 months. What you will learn:

- Key Business Objectives of decision management
- Key Technical Components of the architecture
- Functional Architecture
- Organizational Roles and Responsibilities
- Key Challenges

SBVR Distilled: Essence of Business Rules

Keri Anderson Healy  
BRCommunity.com | Editor

Audience Subject Familiarity: None  
Main Presentation Focus: Business

Last December, the OMG published “Semantics of Business Vocabulary and Business Rules” (SBVR 1.0), a groundbreaking new standard. However, at over 400 pages it is not a book to curl up with for a weekend of light reading! Are you a business rule practitioner looking for where to begin? This session demystifies what SBVR means by ‘business rules’, getting to the heart of what SBVR is all about and showing how you can put it to work for you. What you will learn:

- What are the keys of SBVR’s approach to business rules?
- How can SBVR be applied to practical business scenarios?
- What is the state of SBVR practice, including some free (and nearly-free) offerings?

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Thursday, October 30 | 9:05 am – 10:05 am

Security of Services

David Read  
Blue Slate Solutions | CTO

Michael Strianese  
Blue Slate Solutions | Program Leader

Audience Subject Familiarity: None  
Main Presentation Focus: Technology

As businesses expand their use of enterprise decisioning tools deployed over SOA, security of the Web services infrastructure must be addressed. Business data and intellectual property is exposed because underlying Web services, like their Web application brethren, can contain vulnerabilities allowing for interception, corruption, modification and destruction of enterprise data. What you will learn:

- About the types of destruction caused when exposed business data is exploited
- What your own security vulnerabilities might be and how to mitigate security vulnerabilities
- Why business leaders should care about web-services security

Good Business Process BREAKS THE RULES!

Kathy A. Long  
Innovative Process Consulting, Inc. | President

Audience Subject Familiarity: Some  
Main Presentation Focus: Business

If Sacred Cows Make the Best Burgers and Elephants Dance then why is it so hard to Move Your Cheese? Does your company spend a lot of time and resources ensuring the accuracy, consistency and validity of its business policies and rules? Every organization is driven by business policies, whether “real” or “assumed”. What you will learn:

- How to identify the “Rules” in Business Process
- To effectively eliminate the “Sacred Cows” from their Processes
- Concepts of consistent communication of “Rules” to efficiently “Move the Cheese” and implement real change

Reducing Risk by Using a Phased-in Approach to Rules Integration

Thayumanavan (Raja) Rasapillai  
Canada Revenue Agency | Senior Programs Officer

Jim Soroffty  
Canada Revenue Agency | Manager, Business Rules Section

Audience Subject Familiarity: None  
Main Presentation Focus: Business & Technology

The Canada Revenue Agency (CRA) has completed two phases of a multi-phased project that is applying a rule-based approach to integrate program objectives and business knowledge within a transformed operational framework. This debt collection management project will manage taxpayer collections and compliance issues holistically, using robust analytics, flexible business rules, and strategic risk management methodology. What you will learn:

- How to reduce risk by using a phased-in approach to Rules integration
- Challenges faced on a new implementation of Business Rules including identified solutions
- Conclusions reached after introducing Business Rules into a large complex business solution
Integrating Predictive Analytics and BRM to Improve Health Plan Member Experience

John Lucker  
Deloitte Consulting LLP | Principal

Mo Masud  
Deloitte Consulting LLP | Principal

Audience Subject Familiarity: Some  
Main Presentation Focus: Business & Technology

Traditionally health plans have applied predictive analytics to focus on high cost high risk members. Often referred to as the 80-20 rule, this approach has often ignored the 80 percent of the population that is profitable. This session will introduce individuals to an innovative application of predictive analytics and BRM to segment and manage a health plan's population across the full spectrum of risk. What you will learn:

• Leveraging predictive analytics to solve new problems in the health insurance industry
• Improving the precision of health plan outreach and medical management activities through BRM
• The business value of improving the health plan member experience

SBVR Distilled: Essence of Business Vocabulary

Keri Anderson Healy  
BRCommunity.com | Editor

Last December, the OMG published “Semantics of Business Vocabulary and Business Rules” (SBVR 1.0), a groundbreaking new standard. In this session we continue the quest to demystify SBVR, examining what ‘business vocabulary’ means in SBVR… just enough vocabulary for the business rule approach. What you will learn:

• What are the keys of SBVR’s approach to business vocabulary?
• How can SBVR be applied to practical business scenarios?
• What is the state of SBVR practice, including some free (and nearly-free) offerings?

Audience Subject Familiarity: None  
Main Presentation Focus: Business & Technology

The “OMG Certified Expert in BPM” Exam and the Role of Business Rules

Tom Debevoise  
Tipping Point Solutions | Chief Technology Officer

Jon Siegel  
Object Management Group | Vice President, Technology Transfer

Audience Subject Familiarity: Some  
Main Presentation Focus: Business & Technology

The OMG and UML Technology Institute (UTI) have developed the “OMG Certified Expert in BPM” (OCBEB), to certify practitioners in Business Process Management (BPM). Above the Fundamental level, certification divides into two tracks “Business and Technical” for Intermediate and Advanced certifications. At each track and level, Business Rules play important roles. The exam authoring team includes important BPM/BR thought leaders from different backgrounds. What you will learn:

• The extent and nature of the material covered in these important exams
• How business rules participates in organizations’ process maturity, architecture and governance
• The importance of enterprise decision management

Let the Lawyers Write the Rules

Terry Moriarty  
Inastrol | President

Audience Subject Familiarity: None  
Main Presentation Focus: Business & Technology

The business rules community has long advocated that harvesting and authoring business rules should be a business driven process. But the business has often been reluctant to take on this responsibility. One Australian Government Department has stepped up. That’s right. The lawyers and policy makers are writing the business rules and developing the business terms, concepts and definitions. All from the enterprise perspective. What you will learn:

• How Legislation and Policy translate into business rules
• How a Business Rules Repository and Engine can integrate
• How data availability and quality impacts the implementation of business rules

New Approaches to Creating, Visualizing and Comparing Strategies

Stuart Crawford  
Fair Isaac Corporation | Vice President, Research

Audience Subject Familiarity: Some  
Main Presentation Focus: Business & Technology

Rulesets are the bread and butter of decision management, but complex rulesets (even when represented as trees or tables) can get unwieldy, quickly becoming difficult to understand and maintain. What you will learn:

• Two new visual representations for rulesets that makes them much easier to understand and maintain
• How using a rule execution log for the dynamic highlighting of these new representations reveals insight into how the rulesets perform
• A mechanism for ascertaining the logical differences between two rulesets (not just the structural differences), thus allowing the analyst to focus solely on the differences that really matter

Thursday, October 30 | 10:20 am – 11:20 am

A Case Study for Business Rules in Mortgage Lending - Minnesota Housing

Meg Lattery  
Minnesota Housing | Project Manager

Bruno Trimouille  
ILOG | Director of Market Development, Financial Services

Audience Subject Familiarity: Some  
Main Presentation Focus: Business & Technology

Minnesota Housing used a rules-based application to transform the way they do business. They shifted their paper-intensive loan process to an automated web-based program. The project reduced the time required to determine loan eligibility from two-weeks to 15 minutes and connected the company with lenders in a seamless process. What you will learn:

• The business case for using business rules
• Getting started using business rules; A walkthrough of Minnesota Housing’s implementation
• Best practices and lessons learned from the Minnesota Housing Project
• Rules for the long haul - after implementation
Thursday, October 30 | 10:20 am – 11:20 am

Business People Don’t Set Variables and Call Functions - Business Rules in Business Language

Don Baisley
Microsoft | Software Architect

Audience Subject Familiarity: None
Main Presentation Focus: Business & Technology

Business rules written by business people differ from rule engine rules that set variables and call functions, but they can be formally understood and can drive software services. These rules are lasting business assets that need not change with technology. They are inherently independent of programming problems like changing APIs and concerns about rule engine firing order.

What you will learn:
- How business rules understood by business people differ from rules used to program rule engines
- Challenges to writing business rules clearly
- Ideas for business rules in business language driving software services

Thursday, October 30 | 11:25 am – 12:25 pm


Rex Bosma
European Patent Office | Project Manager

Jacob Feldman
OpenRules, Inc. | Chief Technology Officer

Audience Subject Familiarity: Some
Main Presentation Focus: Business & Technology

European Patent Office receives patent bibliographic data from over 80 countries, unpacks, cleanses, validates, formats, and loads it into the world leading Patent Information Repository. Patent data is analyzed and formatted according to complex parsing and conversion rules, which greatly depend on the issuing country. The business rules transform patent data to make it compliant with the existing international standards. We have successfully applied the open source BRMS “OpenRules” to create an enterprise-level rules repository maintained by EPO business analysts. What you will learn:
- Complex document processing rules
- Use of regular expressions within rules
- Multi-country support

Increasing the IQ of Processes for Profitability

Jim Sinur
Global 360 | Chief Strategy Officer

Business processes are evolving to cater to the needs of knowledge workers in order to deliver concrete business benefits in a shifting business climate. Applied process intelligence in the collaborative world of knowledge work that spans disciplines and organizational boundaries is essential for survival going forward.

Business and People Issues In Implementing Business Rule Management for Decision Makers

Frank Habraken
CSC Australia | Program Manager

Audience Subject Familiarity: None
Main Presentation Focus: Business

This case study will present the business and people issues encountered by a large Australian federal government department in implementing business rules management for decision makers in legal, policy and operational areas. This implementation is business driven and uses legal and policy staff to do the business rule and semantic analysis and management. You will learn the issues and benefits of business rule management in terms of:
- Business Lifecycle and Transformation
- Cultural and Organizational change
- Enterprise Governance
- Legislative and policy development
- Direct business people involvement

Event Processing: Leveraging Key Business Events to Drive Better and Faster Decisions

Michael Lock
Aberdeen Group | Research Analyst

Audience Subject Familiarity: Some
Main Presentation Focus: Business & Technology

Given the asynchronous nature of today’s business world, seamless business processes are predicated upon an architecture that can respond to discrete events in real-time. Focused on driving enhanced customer satisfaction, organizations are deploying Event Driven Architectures (EDA) and solutions such as Complex Event Processing (CEP) to combat numerous business challenges. This presentation is based on primary data from executives at more than 200 organizations. What you will learn:
- Measurable business results to be achieved via event processing technology
- Industry best practices for implementing event processing solutions
- Key steps to promote smoother deployment of event processing tools

A Model-driven Approach to Business

Fred Waskiewicz
OMG | Director of Standards and Liaisons

Audience Subject Familiarity: Some
Main Presentation Focus: Business & Technology

Models serve as the blueprints to understanding the processes of an enterprise and the business rules that govern them. They also serve as the specifications that drive the development of the IT systems that automate and execute those processes. This talk advocates a model-driven approach to defining and automating business, citing OMG’s suite of business modeling specifications as a fundamental driver. What you will learn:
- Models serve as an effective means of specifying and documenting the systems implementing processes and executing business rules
- A model-driven approach improves response time to ever-changing business needs
- Models provide a foundation for effective communication between business and IT
Thursday, October 30 | 1:45 pm – 2:45 pm

Agile Deployment of Predictive Analytics Using Amazon EC2

Michael Zeller
Zementis | CEO
Audience Subject Familiarity: Some
Main Presentation Focus: Business & Technology

Organizations increasingly recognize the value that predictive analytics offers to their business. The complexity of development, integration, and deployment of predictive models, however, is often considered cost-prohibitive for projects. In light of mature open source solutions, open standards, and SOA principles we propose an agile model development life cycle that allows us to quickly leverage predictive analytics in operational environments. We demonstrate how to move complex decision models from the scientist’s desktop into a scalable production environment hosted on Amazon’s EC2. What you will learn:

- Leverage predictive analytics in real-time
- Accelerate time-to-market for decision models
- Reduce cost with SaaS

Business Rules – Standards are here

John Hall
Model Systems | Director
Audience Subject Familiarity: None
Main Presentation Focus: Business & Technology

Standards have two major impacts on business rules - more and better tools to support use of business rules, and improved interoperability and interchange. Several important standards have appeared since the 2007 Business Rules Forum: Business-oriented standards, including: SBVR, and the Business Motivation Model (OMG), IS-oriented standards for business rules, including: Rule Interchange Format for the Semantic Web (W3C), with more in the pipeline from OMG and RuleML; Related aspects of business and system modeling, including: business process modeling, organization structure, regulatory compliance. What you will learn:

- Emerging standards and how they fit together
- Emerging tools to support them
- What happens next?

Thursday, October 30 | 2:50 pm – 3:50 pm

Lessons Learned - Practical Tips for Integrating BREs in a SOA-environment: An Automated Underwriting Example

Donald Searing, Ph.D.
Colibrium Partners, LLC | Managing Consultant
Audience Subject Familiarity: Some
Main Presentation Focus: Business & Technology

We will present our lessons learned the hard way from the development of an Automated Underwriting proof of concept system in a SOA-environment implemented on multiple BRMS systems. What you will learn:

- Practical business rules patterns for cross-system deployment
- Tips for implementation of a system in a SOA-environment
- Comparative information between BRMS systems

Using EDM to Allocate Marketing Resources

David Raab
Raab Associates Inc. | Principal
Audience Subject Familiarity: None
Main Presentation Focus: Business & Technology

Marketing is painfully evolving from a black art to a rigorous science. EDM lets marketers continuously reallocate funds to the most productive use. This session will describe the allocation process, key implementation challenges, and solutions to these challenges. It will include examples of systems developed by several leaders in the field. What you will learn:

- The three most important obstacles to effective marketing performance measurement, and how to overcome them
- How to convince your Chief Financial Officer that marketing is spending the company’s money effectively
- Vendors with packaged solutions to help accelerate your process

Documenting Business Rules Using Off the Shelf Requirements Software: Not Business Requirements As Usual

Giovanni Diviacchi
Fannie Mae | Senior Business Analyst
Audience Subject Familiarity: Some
Main Presentation Focus: Business

A practical use case study on moving our business rules from a 400 page Microsoft Word document to DOORS. Our objectives for documenting rules in DOORS were two-fold. First, to generate customer reports, one for internal customers, and one for external customers. Second, to quantify our rules to help us conduct more in-depth rule analysis. What you will learn:

- Some things to think about when deciding between a dedicated business rule documentation software tool versus a dedicated requirements documentation software tool
- What to look for when adapting requirements software for capturing business rules
- Some ideas on how to help your staff adapt to the new software

The Rules of Rules: Automating Project Tailoring for Process and Rule Best Practices

Vanessa Carter
IRS | Director of Asset Mgmt, Business Rules & Requirements
Art Moore
Clear Systems LLC | President

Audience Subject Familiarity: None
Main Presentation Focus: Business & Technology

Faced with assisting an entire portfolio of projects to incorporate best practices for integrated process, requirements, decision and rules analysis and management, the IRS’s center of excellence took its own medicine. Establishing the decisions and rules for tailoring these best practices into projects based on project characteristics, the Business Rules and Requirements Management Office automated them into a rule-driven Q&A using rule technology for consistent application and broad access. What you will learn:

- Leveraging rule technology to disseminate best practices
- Achieving consistent application through a rules driven approach to methodology
- Key decisions in tailoring the project life cycle
**Registration Form**

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- Monday, Oct. 27: AM: Gladys S.W. Lam, Roger Burton, Scott Ambler
- PM: John Rymer, John Elder, David Simchi-Levi

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“Discovering useful business rules is a form of ‘data mining’, which has proven capable of enormous returns in many fields and industries.”

John Elder, data mining expert and part of the experienced team giving tutorials at this year’s events.

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Hear from industry experts Roger Burlton, Sandy Kemsley, Jim Sinur.
Identifying, automating and managing the decisions within a process are critical next steps for greater efficiency and effectiveness in organizations today. For smarter, simpler and more agile processes, you need business rules and enterprise decisioning. Companies presenting this year include BCBS MN, California Assoc. of Realtors, European Patent Office, Hartford, U.S. Navy.

Learn more at businessrulesforum.com/bpm

### COMPLIANCE
Case studies like Australian Dept of Immigration and Citizenship, Bank of America, Fannie Mae, IRS and Revenue Canada demonstrate broad-based, built-in compliance, business ownership of the rules of record and effective deployment of business policy. Rethink business governance with business rules.

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### SERVICE-ORIENTED ARCHITECTURE (SOA)
SOA and Business Rules - Building a Powerful, Flexible Application Platform. A special tutorial by Michael Krouze and presentations from Athletes’ Performance, Dell, Kemper and Liberty Mutual will show how to:
- Dynamically reconfigure systems – and businesses
- Meet the challenge of continuous change
- Use business rules to deliver agile decision services

Learn more at businessrulesforum.com/soa

### LEGACY MIGRATION
Legacy migration projects often focus almost exclusively on technology platforms, but that’s only one part of the real problem. Learn how other organizations are harnessing business rules and related technologies for real solutions that minimize risk:
- Harvest decision logic
- Revitalize your legacies
- Enable robust legacy modernization

Learn more at businessrulesforum.com/legacy

### AGILE
Start with a tutorial from Agile expert Scott Ambler and learn how to:
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