



Business Leadership Forum - Banking and Financial Markets Roadmap

At the Information on Demand Conference 2011, this track will feature business leaders presenting their stories of success with Business Analytics and Optimization (BAO). Learn from them, and get inspired by the latest practical ideas and best practices from their experience.

The Business Leadership Forum is organized along two dimensions: one concerning cross-industry themes where clients have invested considerably to address common problems (Theme Tracks). The other dimension, addressed by the Industry Tracks, concerns industry-specific topics on BAO.

In addition to Business Leadership Forum sessions, this roadmap also lists additional sessions of interest to Banking and Financial Markets attendees featured in other programs at the conference, e.g. Business Analytics, Information Management and Enterprise Content Management Forums.

Roadmap table of contents:

- **Pages 1-5: Monday October 24, Theme Track (cross-industry) sessions**
- **Pages 6-8: Tuesday-Wednesday October 25-26, Banking/Financial Markets track sessions**
- **Pages 9-12: Other sessions of interest for Banking/Financial Markets participants**

Please note: This document is accurate at the time of publication, but is subject to change. Please check back often to the conference [website](#) for the most current agenda.

Sunday, October 23

6:00 – 8:00 PM	Expo Grand Opening Reception
8:00 – 10:00 PM	Business Leadership Forum Welcome - Community Reception

Monday, October 24

8:15 – 9:45 AM	Opening General Session
10:15 – 11:15	Business Leadership Forum Keynote
11:30 AM – 12:30 PM	Theme Track Kickoffs <ul style="list-style-type: none"> • The Customer Track – Client Panel • The Finance Track – Client Panel • The Operations Track – Client Panel • The Strategic Foundation Track – Client Panel
12:30 – 2:00PM	Lunch
2:15 – 3:15 PM & 3:30 – 4:30 PM	Theme Track Electives Afternoon Sessions The Theme Track electives offer the opportunity to learn from your peers in other industries - how they addressed key business initiatives with BAO. Specifically, business initiatives include: marketing and sales initiatives to customers; optimizing finance processes; operational efficiency; and establishing a strategic foundation for BAO <i>(Note: some of the sessions listed below will take place on Wednesday October 26, as this Forum lasts 2.5 days ending at lunch on Wednesday. They have not been shown on Wednesday as scheduling is still in</i>

■ [Special / Other Events](#)



	<i>process.)</i>
The Customer Track	
Driving B2B Sales with Predictive Analytics	With nine million domestic prospects alone, ADP needed a better way to identify sales opportunities. Now with several successful B2B predictive selling applications built and deployed, the results are in. In this session, you will get an understanding of the business issues faced by ADP, the people, process and tools used to overcome the issues and the successes or failures encountered when deploying Predictive Analytics in a large scale B2B sales environment.
Maximizing Customer Profitability and Marketing ROI, through Multi Channel Sales Campaigns Optimization	Banco Ita Argentina launched an aggressive new customer acquisition program and set the constrain of simultaneously increasing its Retail Bank's profitability. In order to achieve such goal the Bank had to maximize existing customers profitability and the return on its marketing investments. Using predictive analytics and optimization tools, the Bank run multi-channel sales campaigns, which allowed to increase customer cross-selling and profitability. By offering the right campaign, to the right customer through the right channel, the Bank grew its existing customer profitability by 40% in just one year. The project evolved to find also the right price for each customer obtaining even more profitability to the bank.
Combining Social Media Analytics (CCI) with Preditive Modeling and Other Data Sources	In this session, we will provide an overview of Cognos Consumer Insight and how it can be use to perform analysis of social media such as blogs, newssites, and message boards. We will also cover how this social media data can be integrated into broader customer analytis activities with tools like SPSS to drive more effective marketing actions.
Contact Center, Enhanced Relationships Lead to Proven Financial Results	Increasing levels of customer retention, customer revenue, customer satisfaction, and agent satisfaction are an ongoing challenge of todays contact centers. IBM has developed an analytics-based, optimized, contact center solution that matches agents to customers based on the highest probability of success. This session will demonstrate how the outcome of an analytics-based, optimized contact center delivers an identifiable change in business performance, unique and new customer and agent insights and personalized agent/customer interaction that ultimately lead to greatly increased sales, retention and collections.
Getting Business Value from Watson	Will the innovative algorithms and natural language processing capabilities of Watson have a significant impact on how businesses use and apply analytics. And if so, what kind of impact will that be, and when would it start to happen. In this presentation, you will hear about the analytical innovations behind Watson and how they might change the way companies use descriptive, predictive, and prescriptive analytics to improve their performance. You will also see how deep question and answer technology correlates to the results of a study asking 3,000 corporate executives how they see the analytics space evolving over the next few years.
Applying Science to the Art of Marketing with Customer, Marketing and Sales Analytics	Customer, Marketing and Sales Analytics helps companies better integrate and more effectively manage their value chain by taking real-time actions leading to greater customer loyalty, revenue, margins and agility. Join leading companies and IBM experts to learn how you can apply analytics to bring science to the art of marketing to gain greater insight into your customers that will enable you to outperform the competition.
The Finance Track	

■ Special / Other Events



	<p>The Journey to a Value Integrator: Applying Real-time Data & Analytics to Optimize Business Outcome</p> <p>In the midst of the crisis through today, CFOs are being called into more frequent boardroom and executive level. Today's CFO provides their enterprises with a competitive edge and help the business make not just faster, but smarter decisions. Learn how leading organizations drive value through a combination of finance efficiency through data and process standards, and business insight through analytics. Hear from leading experts about new tools and disciplines to help finance organizations improve the way they: Measure and monitor business performance Manage enterprise risk Drive information integration Enable sustainable financial governance</p> <p>A Deep Dive into the Benefits of Using an Integrated GRC Solution</p> <p>An overview of the Open Pages suite which combines powerful document and process management with rich interactive reporting capabilities in a flexible, adaptable easy-to-use environment, enabling CEOs, CFOs, managers, independent auditors and audit committees to perform all necessary activities for complying with financial reporting regulations in a simple and efficient manner. A deep dive and discussion of the benefits of implementing OpenPages ORM and IAM at Financial Institutions.</p> <p>Transforming Finance through Analytics</p> <p>While signs of recovery from the global recession abound, heightened uncertainty is now part of the normal course of business. Surviving and thriving in the recovery means anticipating and shaping business outcomes, and driving transparency to manage risk and improve decision making. This session will highlight Qualcomms success in using a range of IBM solutions, and their recent shift from IBM Cognos Planning to IBM Cognos TM1, to increase visibility into the drivers of revenue, profit and working capital and to improve the management of capital expenditures, project cost planning, and consolidated reporting for divisional P&Ls.</p> <p>Enabling Risk-based Decisions: Case Studies in Risk Management</p> <p>Typically risk management has been the responsibility of the office of finance, but as business & economic complexity accelerates business users in every department need a better understanding of real and potential impacts of risk on their decisions. But how do you get departmental users engaged and incorporating risk insight into daily decisions? This session will explore how the University of California and Argos Risk have each engaged business users in the risk management process through building an easy to use and customized, risk dashboard and reporting solution. They will discuss the key success factors to drive adoption and use and how system-wide visibility combined with user flexibility can drive quantifiable ROI for the business</p> <p>Fighting Fraud with Advanced Analytics</p> <p>Fraudulent claims are becoming one of the biggest financial and criminal threats to insurers, government agencies, utilities and many other industries. Learn how advanced analytics and modeling can help identify patterns, behaviors and the bad guys in submitting fraudulent claims. Learn how MetLife is using predictive analytics with SPSS and Netezza to identify and fight fraud and how the State of North Carolina has saved their state millions of dollars in more effective identification of fraudulent claims.</p> <p>Embracing Analytics to Transform Financial Management: A Case Study on the IBM Office of Finance</p> <p>In today's complex business environment, the office of Finance is being called upon to play an increasing role in making critical business decisions. Leading finance organizations are leveraging business analytics to improve their ability to assess performance gaps, manage risk, deliver transparency and help shape and anticipate business outcomes to drive decision making. Learn how the IBM Office of Finance is embracing Business Analytics and Optimization to help them progress on their journey to becoming a value integrator.</p>
	<p>The Operations Track</p>





	<p>Revolutionize Your Business Processes with Streaming Analytics (Panel Discussion)</p> <p>It seems everyone is talking about real-time analytics, but how many can say they digest and analyze data with microsecond latencies? Speed and intelligence can have profound impact on how you do business. You can respond to events as they happen rather than analyzing and acting after the fact. Prevent customer satisfaction issues rather than remediating them. Anticipate and address asset failures rather than fixing them. Identify subtle trends in financial markets that can lead to big opportunities. Hear our business partners and customers how they are using Business Analytics and Optimization innovations including InfoSphere Streams - and their vision for the future of real-time data analysis. (Northrup Grumann, Terra Echoes, University of Ontario IT)</p> <p>Advanced Condition Monitoring at Caterpillar</p> <p>Companies like Caterpillar who lease and sell heavy equipment are constantly looking to increase machine up-times and the overall life of their equipment to maximize productivity and minimize costs. In this session, you'll learn how IBM is working with Caterpillar to leverage advanced predictive modeling techniques, based on Business Analytics and Optimization technologies including predictive analytics from SPSS, to identify ways to increase up times and overall life of heavy equipments.</p> <p>Driving Operational Excellence Through an Optimized Sales & Operations Planning Process</p> <p>The challenge of meeting customer demand while balancing operational constraints and meeting financial goals has never been greater. Organizations struggle to align demand, supply, and finance plans. This session explores best practices in Sales and Operations Planning (S&OP), and demonstrates how Business Analytics and Optimization capabilities enable a collaborative process. Come hear how progressive manufacturers link strategy to execution in order to meet customer demand, reduce cost, and drive competitive differentiation</p> <p>Achieving Operational Efficiencies with Business Analytics and Optimization</p> <p>This session covers today's critical topics facing business leaders responsible for operational aspects of their business, for example: business process optimization, supply chain management, asset tracking and management.</p>
	<p>The Strategic Foundation Track</p> <p>How Vanguard, a Leading Financial Firm, Maintains its Competitive Advantage by Leveraging BPM and ECM</p> <p>Vanguard is one of the world's leading investment management firms, and a key player in the highly competitive full service 401(k) recordkeeping business as evidenced by its #1 ranking in the most recent Boston Research Group survey. One of the factors contributing to Vanguards success has been a large scale people, process and technology program focused on eliminating manual processing, increasing quality, and reducing costs. By leveraging IBMs BPM Software and Services and other enabling technologies, Vanguard has witnessed impressive results, which have prompted other business value driven ECM initiatives. This session will present a business leadership perspective of Vanguards business process history and a roadmap for the future.</p> <p>IBM Watson, Big Data, and Better Business Outcomes - A Strategic Foundation for Analytics</p> <p>As IBM Watson demonstrates, todays winners are those who can analyze large volumes of information in real time. In business, such organizations can find insights, answer questions, and take actions faster than their competitors. To ingest huge amounts of both new and emerging information types, IBM Watson uses the Hadoop framework, the same technology now available to our customers within the IBM Big Data platform. Join Anjul Bhambri, Vice President, IBM Big Data Initiatives, to learn how organizations are applying Big Data management strategies to realize the IBM Watson vision today.</p>



	<p>Business Intelligence Center of Excellence - Case Study</p> <p>Building an Information Management Foundation to quickly analyze information and optimize Business Outcomes</p> <p>Watson Innovation Workshop for Retail</p> <p>Watson Innovation Workshop for Healthcare</p> <p>The Ten Rules of Successful Information Governance</p> <p>Toward the Segment of One - Making Cross Domain Master Data Management a Reality</p> <p>Enabling Analytics with Real-time Data Integration</p> <p>Developing an Integrated ECM Strategy to Improve Business Value</p>	<p>In this session speakers will share the customer case study of implementing BI Center of Excellence for Printpack Inc that uses IBM P-series hardware and Oracle ERP applications. The session will take the attendee through the value proposition of BI Center of Excellence and how to strategize and implment it. In this case study of a manufacturing company, the crawl, walk and run steps will be discussed in details. The speakers will take the audience through the journey of BI and Performance Management maturity assessment to determine the focus of the BI CoE. The focus of this session is at the People, Process and Tools level to lay the solid foundation for the CoE using the successful customer case study.</p> <p>More industry leading organizations are approaching their technical and infrastructure investments in new ways. Large scale people, process and technology programs, which are focused on eliminating manual processing, increasing quality, and reducing costs are becoming more critical within the demands of competitive business environments. IBMs BAO capabilities and Information Management Foundation ensures a combination of hardware, software and services to support impressive results. This session presents a business leadership perspective on the importance of a Strategic Foundation, and developing a roadmap for the future.</p> <p>This hands-on workshop is limited-enrollment. It is a small, interactive workshop to learn about IBM Watson technologies and their application to organizations in this industry.</p> <p>This hands-on workshop is limited-enrollment. It is a small, interactive workshop to learn about IBM Watson technologies and their application to organizations in this industry.</p> <p>Information Governance can be a complex undertaking. Many organizations begin their Governance efforts without recognizing that there are ten rules for successful Information Governance. The session will review these core requirements and will include both IBM and client perspectives on how companies can design and execute succesful Information Governance initiatives.</p> <p>The banking industry has focused on becoming more customer centric by establishing its 360 degree view of its customers, but has retained its highly segmented approach to developing products for those customers. Bank of America is breaking out of the pack by using its investment in MDM as a platform for product authoring, packaging and pricing to enable flexible and streamlined customization of product bundles for its customers. This break through approach will enable it to approach the magical "segment of one" for creation and effective marketing of a product bundle which exactly fits the needs of the individual customer and assure lifetime customer retention. Join us in see how Bank of America is making a breakout step toward that goal!</p> <p>Leading organizations are looking for holistic solutions for their analytic requirements, rather than patchwork software, platforms, and services. Stone Soup is a set of Industry-based solutions that provide end-to-end solution accelerators to quickly implement Business Analytic capabilities. Join this session to hear case studies where the solution has been implemented successfully.</p> <p>The unstructured content explosion has created information chaos across the enterprise, emphasizing the need for new ways to harness the power insight and analytics. ECM is a key part of becoming an analytics-driven organization. That transformation involves creating an ECM strategy, establishing a flexible platform, and applying best practices to guide your investments and ensure alignment with business value. Learn how the IBM ECM Strategy & Roadmap can help you develop strategic recommendations and tactical plans to accelerate your business value. Join this session to hear how Henkel KGaA has defined an effective global strategy for Information and Collaboration Management.</p>
<p>5:00 – 7:00 PM</p>	<p>EXPO Reception</p>	

■ Special / Other Events



Tuesday, October 25

8:15 – 9:30 AM	General Session				
10:15 – 11:15 AM	<p>Banking and Financial Markets Industry Kickoff IBM industry leaders set the stage for the track by laying out IBM’s vision and strategy for BAO to solve the top business problems faced by organizations in the Banking and Financial Markets industry.</p> <p>“Banking & Financial Markets Industry Perspective:Using Analytics & Optimization to Drive Business Results For the Banking and Financial Markets Industries - Learn how to plan and leverage information & analytical tools to align and support the three imperatives of Growth, Risk and Operational Efficiency. Gain insight from others experience in Information Management and Business Analytics projects that provide trusted information and enable better decision making. Learn how IBM's solutions & implementation accelerators are helping clients apply analytics to financial planning, business modeling, strategy selection and initiative planning capabilities. This session will enable a better understanding of BAO breakthrough capabilities and proven approaches which have helped smarter organizations around the world to drive better business outcomes.”</p>				
11:30 AM – 12:30 PM	<p>Banking and Financial Markets Client Panel Client speakers share best practices and lessons learned from their BAO projects, bringing to life the topics discussed in the prior session’s kickoff. “Join us for this chat with Banking and Financial Markets industry leaders and learn from their experiences as they share stories, points of view and wisdom about industry hot topics. Don't miss these financial industry professionals discuss thought-provoking topics including: Customer Analytics and Service Optimization, Risk Management & Insight and Gaining Operational Efficiencies.”</p>				
12:30 – 2:00 PM	<p>Industry Lunch – Business Analytics Forum You are invited to join your industry peers for networking and socializing at this event sponsored by the Business Analytics Forum.</p>				
1:45 – 2:45 3:00 – 4:00 4:30 – 5:30 PM	<p>Banking and Financial Markets Industry Track Afternoon Elective Sessions Learn from your industry peers how BAO addresses the most critical business problems faced today <i>(Note: some of the sessions listed below will take place on Wednesday October 26, as this Forum lasts 2.5 days ending at lunch on Wednesday. They have not been shown on Wednesday as scheduling is still in process.)</i></p> <table border="1" data-bbox="375 1291 1520 1738"> <tr> <td data-bbox="375 1291 756 1581">Setting the Standard for Superior Customer Service at Northern Trust Bank of Chicago</td> <td data-bbox="756 1291 1520 1581">Northern Trust Bank of Chicago manages the financial portfolios for the worlds wealthiest 200 families. High customer satisfaction is imperative to their model and it requires their associates to have complete insight and understanding of their customers, their assets and their relationships to provide this superior service. Learn how Northern Trust is changing the way they do business in 2011 by implementing a single-view of their customer using InfoSphere MDM solutions with oversight and guidance from their Governance Czar.</td> </tr> <tr> <td data-bbox="375 1581 756 1738">Building an Integrated Management Reporting System - an Operations-lead Initiative</td> <td data-bbox="756 1581 1520 1738">Morgan Stanley will describe their strategic initiative lead by business operations execs to build and deploy a management reporting solution. They will discuss how they use metrics to measure risk and attribute costs to specific drivers. Cognos BI is the tool-of-choice to deliver this robust reporting solution.</td> </tr> </table>	Setting the Standard for Superior Customer Service at Northern Trust Bank of Chicago	Northern Trust Bank of Chicago manages the financial portfolios for the worlds wealthiest 200 families. High customer satisfaction is imperative to their model and it requires their associates to have complete insight and understanding of their customers, their assets and their relationships to provide this superior service. Learn how Northern Trust is changing the way they do business in 2011 by implementing a single-view of their customer using InfoSphere MDM solutions with oversight and guidance from their Governance Czar.	Building an Integrated Management Reporting System - an Operations-lead Initiative	Morgan Stanley will describe their strategic initiative lead by business operations execs to build and deploy a management reporting solution. They will discuss how they use metrics to measure risk and attribute costs to specific drivers. Cognos BI is the tool-of-choice to deliver this robust reporting solution.
Setting the Standard for Superior Customer Service at Northern Trust Bank of Chicago	Northern Trust Bank of Chicago manages the financial portfolios for the worlds wealthiest 200 families. High customer satisfaction is imperative to their model and it requires their associates to have complete insight and understanding of their customers, their assets and their relationships to provide this superior service. Learn how Northern Trust is changing the way they do business in 2011 by implementing a single-view of their customer using InfoSphere MDM solutions with oversight and guidance from their Governance Czar.				
Building an Integrated Management Reporting System - an Operations-lead Initiative	Morgan Stanley will describe their strategic initiative lead by business operations execs to build and deploy a management reporting solution. They will discuss how they use metrics to measure risk and attribute costs to specific drivers. Cognos BI is the tool-of-choice to deliver this robust reporting solution.				

■ [Special / Other Events](#)



<p>Transforming Data into Information, to Facilitate Executive Decision Making</p>	<p>Through a close partnership with IBM, State Street was able to bring together information from State Street Global Centers suite of tools leveraging IBM Cognos software. This technology allowed us to move from providing data to delivering rich information to key executives. This new reporting supports our executives, relationship and sales managers with understandable, professional looking reports and a streamlined, automated, report creation and communication process. IBMs solutions and expertise enabled us to get it right.</p>
<p>How Banks can improve customer centricity with advanced customer profitability analytics</p>	<p>Today's banks need to rebuild customer trust and drive stable, long-term growth. Banks believe a customer-centric approach is the best path to build and sustain profitability and the only way to grow wallet share, increase retention and reduce service costs. Learn how IBM Customer Profitability Analytics can help business users understand and manage the interconnected factors that influence profitability such as: profit and loss statements at the individual account level; aggregated customer insight including demographics, relationships, product, and sales/ marketing responses; and more in a self-service, highly visual portal. Discover how business analytics can provide competitive advantage and larger returns for your bank.</p>
<p>Build quantifiable business value with Smarter Risk management</p>	<p>Risk management is about more than just compliance, banks and regulators want risk and capital implications incorporated into every decision. To achieve this ideal, banks need to provide clear risk appetite guidelines and make risk implications of decisions easily understood. A Smarter Risk approach can enhance allocation of capital and resources and turn risk management into a value generating activity, both in terms of optimizing the risk/return equation and making profits more predictable and repeatable. Based on industry research and case studies, IBM has developed a robust model to quantify the value of becoming a risk enabled enterprise. Join this session and learn how to quantify business value and benefits of risk management</p>
<p>Streamlining Processes at US Bank</p>	<p>In this session, you will hear how U.S. Bank has successfully leveraged ECM technology to streamline a very manual paper based Wealth Management and Commercial Loan application process. The new improved process eliminated the paper and significantly reduced cycle times. This presentation will describe the benefits and costs involved in the end solution.</p>
<p>Transforming Operations for Maximum Efficiency at Wells Fargo</p>	<p>Wells Fargo's Home Mortgage division has embarked on a transformation journey to realize cost efficiencies and improve their overall customer and business partner experience. The focus of this presentation is a project to improve the bank's major imaging repository, which captured three million mortgage documents a day. Their goal for the imaging project was to improve the customer lending experience by making the loan process more efficient and effective through the use of images, data and better document management.</p>
<p>5:00 – 7:00 PM</p>	<p>EXPO Reception</p>
<p>7:00 – 11:00 PM</p>	<p>Networking Event</p>

■ [Special / Other Events](#)



Wednesday, October 25

8:15 – 9:30 AM	General Session
10:00 – 11:00 AM 11:30 – 12:30 PM	<p><i>Continuation of Business Leadership Forum Electives</i></p> <p><i>The Business Leadership Forum runs through Wednesday morning of the conference. Some sessions listed in the Monday and Tuesday electives above will be held at this time when scheduling is complete. Check back to the conference website for latest information.</i></p>



Other sessions of interest for the Banking and Financial Markets Industry

The list below represents other sessions of interest planned for the conference. They are cross listed here as Banking and Financial Markets industry sessions, but will be conducted in the Information Management, Enterprise Content Management or Business Analytics forums, and deal primarily with those capability areas of BAO.

Monday – Thursday, October 24-27

Business Analytics	Extending Business Capabilities at Bank of America Merrill Lynch with IBM Cognos Solutions	The Business Intelligence Services Technology (BIST) group at Bank of America Merrill Lynch supports the reporting and data needs of several hundred users in the firms Global Wealth and Investment Management business division. But satisfying the unique requirements of disparate user communities has been a challenge. This session will show you how the BIST group meets the business requirements of users and improves processes within its Reporting team, using practices developed with IBM Cognos Event Studio, Microsoft Visual Basic Scripting and Microsoft .NET applications. You'll also learn how BIST improved scheduling and reporting for the business community using the capabilities of IBM Cognos SDK.
Business Analytics	Detecting Unusual Internet Banking Transactions	This session will explain the different threats we face in Internet Banking and the limitations of the traditional methods to deal with them. To overcome these limitations we will show how to use predictive analytics to understand the usual behavior of each customer on the electronic channel in order to identify transactions that do not meet that pattern
Enterprise Content Management	IBM Case Manager - improving backoffice operations	Our front office staff need to interact with back office for increased customer service and satisfaction. Our current Case Management system is outdated and need to be replaced with IBM Case Manager to manage 250 case types.
Enterprise Content Management	A Case Management Solution Lifecycle How Rapid Deployment and Standardized Offerings Help Maximize ROI.	SunTrust Bank has adopted a strategic approach to deploying, managing and upgrading case management solutions across departments utilizing standard product offerings. Starting with a credit card application solution created by IBM business partner Vega ECM Solutions, SunTrust has developed a strategy for moving the application through successive stages from BPF to IBM Case Manager. This session provides details, both functional and technical, of how SunTrust has adopted a case management application strategy to upgrade business solutions. Hear how this was achieved, the time and cost savings realized, and some of the interesting challenges encountered with this approach.
Enterprise Content Management	A Shanghai Bank Standardizes on IBM FileNet BPM for Process Banking	Experiences learned using IBM FileNet BPM to re-build Business Loan applications, including BPM planning, application re-build strategy, content and rules integration, and expandability.
Enterprise Content Management	Real World Customer Experiences with IBM FileNet BPM Widget Development	In this session, you will hear how U.S. Bank has successfully leveraged IBM P8 ECM Widgets, BPM, WebSphere Business Space, custom widgets and eForms to streamline Consumer and Commercial Lending business processes. This presentation will describe the many successes and hurdles faced while implementing these systems into production in a large financial institution. The attendee will come away with a good sense of what's involved in implementing Widget technologies.
Enterprise Content Management	Electronic Archive and Decentralized Scanning of Loan Documentation at Bank	Description and experiences from the project. Describing challenges and architectural decisions that has been taken when implementing the document model for loan documentation for all segments. Which customizations were made on top of FileNet products to make the solution user-friendly. Why and how decentralized scanning was implemented.
Enterprise Content Management	Turning Fax into Content	US Bank has large RightFax and IBM ECM environment and many of our business units use fax extensively as a way to drive work processes that start or require unstructured forms from customers. Although it may seem like an anachronism today, fax is still viable in many business cases. We'll talk about a custom system we built to integrate fax and content systems and several business cases where this integration drives business value.



Enterprise Content Management	Deploying Records Management on an Enterprise Scale: Royal Bank of Canada's Experiences With IER and CM8/zOS	Discover the business drivers, deployment experiences, and business benefits achieved with Royal Bank of Canada's first-of-a-kind implementation of IBM InfoSphere Enterprise Records (IER - previously known as FileNet P8 Records Manager - P8RM) to records-enable enterprise content in IBM Content Manager on z/OS. This session will cover: a) The business case for records management -- including paper reduction, compliance, and improved automation of business processes. b) Readiness planning activities involving technology, people, and processes. c) Lessons learned in deploying and operating IER.
Enterprise Content Management	Enterprise Content From The Cloud: FileNet and Salesforce.com	SunTrust Bank has created a hybrid cloud approach merging the salesforce.com platform as a public cloud portal with an on premise FileNet implementation. This strategy provides a central, enterprise document repository that can be leveraged by the thousands of users on salesforce.com within the SunTrust footprint. It provides a simple method for tying the structured data available within specific salesforce.com records with the associated documents in FileNet.
Enterprise Content Management	Content Environment Modernizations: Hype vs Reality	The naive (i.e., the business users, the sales people, perhaps upper management) seem to think that modernizing a content system is simple: copy the data, update and re-point your applications and you're done, right? But you know that the reality is quite different, especially when the only way to pay for the infrastructure work you really need to do is to - sigh - give the users what they want. Find out how Wells Fargo modernized our ECM environment: we replaced our content ingestion system, moved the data and documents, upgraded our IBM Content Manager system, replaced our customized eClient, integrated with a homegrown workflow system (not so modern), and are positioned to make all this much easier if we ever have to do it again!
Information Management	Successfully Migrating from a Sun/Solaris/Oracle Stack to IBM p770/AIX/DB2 9.7	In the last half of 2010 an IBM customer began a project to replace their existing infrastructure of over 250 Sun servers running Solaris with 11 IBM p770 servers running AIX. This server consolidation effort can also be viewed as a migration effort for approximately 40 servers moving directly from Sun, Solaris and Oracle to p770, AIX and DB2 9.7. This session discusses the architectural decisions and operational considerations the customer faced when moving to an entirely new set of hardware and software on an accelerated time-line.
Information Management	Adding Time as a New Dimension for Data	Since a long time, many applications have had requirements to manage data over time. And they did - mainly by coding. DB2 for z/OS has been taught to understand the time dimension of data and hence there is less need for application coding. But, can the support for temporal data be used in real life applications? What challenges arise when DB2 takes another move into the application space? We will share our early experiences with temporal data and present our suggestions for improvement of the DB2 implementation.
Information Management	The Business Value of DB2 10 Top Features - Real Customer Experiences	DB2 10 for z/OS is the latest release of IBM's flagship database, and seeks to reduce operational costs, improve scalability and enhance productivity. A wealth of material exists on the technical changes within DB2 10, but finding descriptions of how those new features will improve your business results can be a challenge. This presentation will provide a high-level overview of the major new features from an IT Executives perspective, with the emphasis on the underlying business value that DB2 10 can deliver using actual customer experiences during the beta programme and beyond.
Information Management	DRDA and DB2 for z/OS: Best Practices	With today's complex n-tier architectures and heterogeneous applications and platforms, optimization and availability can be a challenge, in addition, the ways on which DB2 communicates with its distributed clients is evolving and presents new challenges for monitoring and troubleshooting. This presentation will explore and provide hints and tips on how to monitor and troubleshoot distributed access to DB2 for z/OS.
Information Management	Bank of China Case Study: Next Generation Near Real-time Data Architecture, MDM, and Governance	Bank of China Case Study: Entering the "twelve five" stage in 2011, the global economic and financial development pattern is undergoing profound changes. To accelerate banking transformation in the Chinese financial industry, various commercial banks will continue to reform organizational changes, make great efforts to improve customer services, and enhance their competitive capability for sustainable profit growth. In this presentation, Bank of China will discuss challenges in driving business innovation that calls for a near real-time information architecture, the impact of the Information Agenda team to help BOC in developing their next generation architecture, and how BOC addresses the business innovation in a faster, efficient way.



Information Management	FDIC Case Study: Automating Data Quality Analysis and Business Rule Testing Using InfoSphere Suite	FDIC Case Study: When a bank fails, the FDIC takes over the bank's assets and attempts to dispose of them through selling to entities such as Limited Liability Corporations (LLCs). Once these assets are transferred, the LLC is bound by FDIC LLC reporting requirements. In this presentation, Mr. Blatchford and Mr. Alter share FDIC's challenges in determining data quality and business rule results from current, growing LLC data. They will discuss how the InfoSphere suite was used to move from a manual, labor intensive process to a more automated, efficient, and proactive approach.
Information Management	Information Management Reference Architectures For Banking & Financial Services	Advanced Data flow & Information Management architectures for Banking and Financial Services. Discusses accelerating Enterprise Information Processing and Data Governance. Presents state of the art in Enterprise Technical Architecture for Distributed Data Integration, Data Quality, MDM, & Stream Analytics. How to manage massive data volumes, real time, low latency, transactional, and large scale batch processing within an integrated architecture. This session presents the best thinking an experience of IBM in the field.
Information Management	Bank of America and IBM discuss shared Service Grid Computing to Optimize Your Enterprise	Bank of America and IBM discuss how to setup and deploy a multi-node shared services Data Integration environment. Demonstration of dynamic allocation of processing across nodes for massive parallel scale up with the IM Suite of products. How to combine processing centers and consolidate SMP proliferation into a more robust common processing environment. Failure recovery restart, HA/DR, and dynamic reconfiguration on the fly will be shown.
Information Management	Political, Economic and Technological Considerations for a Shared Data Integration Platform at RBS Citizens	Experts from RBS Citizens will discuss the political/business side of making the case for a shared, integrated solution and will also address the technology considerations given the very challenging financial/regulatory environment. (security / permission/audit etc). Also, learn about the Total Economic Impact of Information Server.
Information Management	"Push the button" using Information Server: DnB NOR, Norway	DnB NOR, the largest bank in Norway, is implementing a new data integration architecture based on InfoSphere Information Server, Master Information Hub and the iKnow Process Management platform. The solution address business challenges like: Improving Banking Customer Analytics- Accelerating Time-to-Market for new products and services- Regulatory Compliance The Data Integration Hub is based on an Enterprise Information Model supported by a common business glossary, shared metadata repository and enterprise reference data services. Metadata from DataStage, FastTrack, Business Glossary, Data Rules and iKnow is driving an automated process of generating DataStage jobs that implements the business logic.
Information Management	Real Time Massive scale Information Integration at JP Morgan Chase	JP Morgan Chase is a true leader in real-time data integration. The organization was faced with a set of challenges related to processing information. The data needed to be analyzed against a heterogenous set of systems, and it was pertinent that the data delivery could be guaranteed. JPMC adopted InfoSphere DataStage as the application infrastructure component to provide this real-time integration capability. Patrick Glennon, Vice President and Technology Director at JPMC, will review the solution and discuss how DataStage has enabled them to scale to meet increasing data volumes. Also IBM experts will discuss best practices associated with real time massive scale data integration.
Information Management	Business critical system integration with downstream systems at State Bank of India with Information Server	SBI has included CDC as part of its architectural component in the EDW to be able to capture transactional changes quickly, accurately and efficiently. The purpose of deploying CDC is to reduce the latency between source systems and DW resources. The CDC solution is providing a real time applications and the same be supplemented by incremental data service. Log based CDC technology is used to capture real time data without impacting system performance and should be scalable to the largest data volume
Information Management	Understanding our customer is our business at Northern Trust Bank of Chicago	Northern Trust Bank of Chicago manages the financial portfolios for the worlds wealthiest 200 families. High customer satisfaction is imperative to their model and it requires their associates to have complete insight and understanding of their customers, their assets and their relationships to provide this superior service. Northern Trust is changing the way they do business in 2011 by implementing InfoSphere MDM and Information Server 8.5 . From concept, to evaluation, to delivery. Come and learn how Northern Trust IT is serving up a 360 degree trusted view of their clients to support business imperatives.
Information Management	A technical overview of the Benefit of IBM InfoSphere Identity Insight by Comerica Bank	A technical overview of how InfoSphere Identity Insight helps Comerica Bank solve business problems related to recognizing the true identity of someone or something ("who is who") and determining the potential value or danger of relationships ("who knows who") among customers, employees, vendors, and other external forces. The session will highlight key capabilities that have enabled Comerica to help prevent threat and fraud in their organization to help solve regulatory requirements such as Know Your Customers.

■ Special / Other Events



Information Management	Master Data Management at Bank of America	In this session, Bank of America will discuss the value of IBM's MDM business services, and specifically how those pre-built business services helped reduce the project cost, time, and risk with Bank of America's single view of a customer project. Lead architect Sushil Golani and IBM STSM David Borean will discuss the definition of an MDM business service, the architecture of a SOA-based MDM system, and how SOA is integrated with BPM for cross-application processes and individual applications.
Information Management	IBM MDM Portfolio - Product Strategy & Roadmap	The session will provide future direction of InfoSphere MDM product strategy and roadmap. This session requires a general understanding of Master Data Management and attendees will leave with an understanding of future trends, current product portfolio capabilities as well as product evolution to meet the needs of tomorrow.
Information Management	Reference Data Management: A practical example	DnB NOR is Norway's largest bank and financial institution. Hear about the challenges that banks face today to manage reference data and how DnB NOR are embracing a master data management approach to managing their reference data.
Information Solutions Architecture	DTCC Case Study: Master Data Redesign; Impact to Business Transformation in Financial Markets	DTCC Case Study: Master Data Redesign; Impact to Business Transformation in Financial Markets. This session will show advanced capabilities for enterprise synchronization of Master Data within an enterprise. Including the ability to do massive scaleup to achieve fundamental new capability as a stepping stone to the information agenda. John Yelle Director of Architecture DTCC & Ron Jordan, Chief Data Officer of DTC will give his views
Information Management	Real Time Massive scale Information Integration at JP Morgan Chase	JP Morgan Chase is a true leader in real-time data integration. The organization was faced with a set of challenges related to processing information. The data needed to be analyzed against a heterogenous set of systems, and it was pertinent that the data delivery could be guaranteed. JPMC adopted InfoSphere DataStage as the application infrastructure component to provide this real-time integration capability. Patrick Glennon, Vice President and Technology Director at JPMC, will review the solution and discuss how DataStage has enabled them to scale to meet increasing data volumes. Also IBM experts will discuss best practices associated with real time massive scale data integration.
Information Management	Demand management within BI	This session will show how Commerzbank coped with the increasing demands of their Line of Business and got clear on how this Demandmanagement within BI should be covered. The session will be held in a discussion style together with IBM and the BICC Manager of Commerzbank
Information Management	IBM's Data Federation technology helps Cisco and Fidelity maximize business outcomes	Cisco's acquisition strategy is recognized as best-in-world. Each acquisition has the potential for tremendous cost savings through increased economies of scale - A particularly important opportunity for Cisco's supply chain. In this presentation, learn how Cisco leveraged the power of data federation to recognize huge savings in component spend across newly acquired companies. At Fidelity, Critical business data is captured at various points during a typical business process, however it is not always stored in an ODS. Learn how Fidelity tackled the challenge associated with exposing not only relational but also non-relational raw data to business applications, and to turn it into meaningful information.
Information management	Raymond James Customer Use Case: Using the Financial Markets Data Warehouse for a Real Time Data Capture	Raymond James Customer Use Case: This will be an overview of how the Financial Markets Data Warehouse Industry Model is being used to design / model / create a data store for real time data. By using a bottom up approach detailed element requirements are being used to identify entity and attribute scope items to include in the data store. Analysis is then done to determine logical to physical transformations and to provide coverage. How the use of extend and harvest within the tool is being used to manage incremental changes to support Agile SCRUM development.