



2013 CERTIFICATE OF TRAINING PROGRAMS

BY PRACTITIONERS, FOR PRACTITIONERS

PICK YOUR PATH AND HOW YOU WANT TO LEARN, THAT SIMPLE

TRAINING PROGRAMS FOR:

- Business Process Analyst
- Business Process Manager
- Business Process Designer
- Business Decision Analyst
- Business Architect
- IT Professional

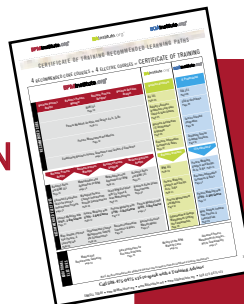
TAKE INDIVIDUAL COURSES OR EARN YOUR CBPMP CERTIFICATION

- Face to Face
- eLearning Live-Online
- eLearning On-Demand

EVENT DATES

BRAINSTORM CHICAGO
BRAINSTORM SAN FRANCISCO
BRAINSTORM DC
BRAINSTORM NEW YORK

May 6-9
June 24-27
September 16-19
November 4-7



2013 HIGHLIGHTS

All Courses Updated
 Role-Based Training Paths

Save Over \$2,500 on Your Certificate

ENROLL TODAY 508-475-0475 X15

2013 CERTIFICATE OF TRAINING PROGRAMS

DEAR COLLEAGUES,

Welcome to our 2013 Training Brochure – your comprehensive guide to the industry's leading Business Process Management, Business Architecture, Service-Oriented Architecture and Business Decision Management/Rules Training.

By Practitioners, For Practitioners

We are more dedicated than ever to continuing to provide the highest quality, progressive courses that support your professional development and assist you in keeping pace with the challenges facing your organization and industry. Our Courses are delivered by Practitioners, for Practitioners.

Training Paths and Certificate of Training Programs

Our Certificate Programs and Training Paths cover Business Process Management, Business Architecture, Decision Management Rules, and Service-Oriented Architecture. Certificate requirements consist of 8 courses, 4 recommended core and 4 recommended electives which allow you to customize your own curriculum. Courses may also be taken individually. See page 3 for recommended paths, core and elective courses.

Independent Research Firm Recognition as Leader

The BPMInstitute.org Training and Certification Program was recently recognized as a category leader in providing professionals online and in-person training, and professional certification.

New CBPMP (SM) Certification Exam

We are thrilled to announce that BPMInstitute.org's Certified Business Process Management Professional (CBPMPSM) program is the latest addition to the extensive resources created to support Business Process Management professionals and process-centric organizations worldwide. Let everybody know you've achieved that mastery with a CBPMPSM certification from BPMInstitute.org!

Flexible Options

You have the flexibility to take training at a live event, on-demand course, live online, or bring training to your location with in-house training. We offer flexible options for group training of any size.

Ways to Save

Individuals, as well as Groups, can save thousands through our Pre-Purchase Program, Professional Membership (for Individuals) and Corporate Sponsorship (for Groups). Full details are available on page 8.

As always, we appreciate your participation and look forward to hosting you and your team in 2013!



Best regards,

GREGG V. ROCK

Editor & Founder

BPMInstitute.org • BAINstitute.org • SOAInstitute.org

grock@bpminstitute.org

WHY CHOOSE OUR TRAINING?

- **INDUSTRY RECOGNITION:** Forrester Research recognized BPMInstitute.org as a category leader in providing professionals online and in-person training, and professional certification.
- **EXPERIENCE:** Our instructors average over 17 years experience
- **FLEXIBILITY:** Courses may be taken individually or earn your Certificate of Training or become a CBPMP (SM).
- **ACCESSIBILITY:** Courses are available Face-to-Face, eLearning On-Demand, eLearning Live Online and In-House
- **MEMBERSHIP:** Complimentary 30-Day Professional Membership
- **GUARANTEE:** Satisfaction is guaranteed – our “no questions asked” policy provides a full credit if we do not meet your expectations
- **CREDIBILITY:** Developed in cooperation with over 60,000 members of our peer-to-peer exchanges
- **VALUE ADD:** Receive complimentary books, white papers and research
- **CUSTOMIZED:** In-House and Custom Training available

WHAT MEMBERS ARE SAYING ABOUT OUR TRAINING:

“Thanks for a wonderful, valuable week. I look forward to future courses and completing my certification.”

“Being relatively new to the BPM world, this provided a good amount of insight into what options I have for moving forward.”

“Time well spent. Lots of valuable information to take back to my company.”

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www.BPMInstitute.org • www.BAINstitute.org • www.SOAInstitute.org

CERTIFICATE OF TRAINING RECOMMENDED LEARNING PATHS

4 RECOMMENDED CORE COURSES + 4 ELECTIVE COURSES = CERTIFICATE OF TRAINING

BPMInstitute.org™						BAInstitute.org™	SOAInstitute.org™
RECOMMENDED CORE	Business Analyst	Business Process Analyst	Business Process Manager	Business Process Designer	Business Decision Analyst	Business Architect	IT Professional
	BPM 101 Page 10					BA 101 Page 24	SOA 101 Page 28
	Process Modeling, Analysis and Design: As Is, To Be Page 11					Building a Business Architecture Page 25	SOA for Architects Page 29
	Process Measurement and Metrics Page 12					Business Process Perspective on Business Architecture Page 26	Service Oriented Integration Page 30
	Establishing Business Process Governance and Centers of Excellence Page 13					Business Architecture / IT Architecture Alignment Page 27	Designing Service Oriented Solutions Page 31
RECOMMENDED ELECTIVES	Business Analyst	Business Process Analyst	Business Process Manager	Business Process Designer	Business Decision Analyst	Business Architect	IT Professional
	Modernizing Requirements Gathering Page 21	Business Rules and BDM 101 Page 21	Methodologies and Approaches for BPM Page 14	Methodologies and Approaches for BPM Page 14	Business Rules and BDM 101 Page 21	BPM 101 Page 10	Process Modeling, Analysis and Design: As Is, To Be Page 11
	Requirements Gathering and Analysis for Agile 2-Day Course Page 22	Advanced Facilitation Skills Page 15	Managing Process Change Page 16	Using BPM Discipline with Six Sigma & Lean Methodologies Page 19	Business Rules Driven Requirements Page 22	Process Modeling, Analysis and Design: As Is, To Be Page 11	Business Information Semantics & Rules Page 27
	Process Modeling with BPMN - 2-Day Course Page 17	Process Modeling with BPMN - 2-Day Course Page 17	Process Modeling with BPMN - 2-Day Course Page 17	Process Modeling with BPMN - 2-Day Course Page 17	Process Modeling with BPMN - 2-Day Course Page 17	Process Measurement and Metrics Page 12	Process Modeling with BPMN - 2-Day Course Page 17
	Advanced Facilitation Skills Page 23	PMAD: A Learning Lab Page 20	Organizational Change Management Page 18	Business Information Semantics & Rules Page 27	Business Decision Maturity Model Page 23	Organizational Change Management Page 18	PMAD: A Learning Lab Page 20
ADDITIONAL ELECTIVES	Customer Experience Modeling & Design Page 32		The Business Process Perspective on Business Architecture Page 33		Executive Level	Moving Up the BPM Maturity Curve Page 34	Advanced Process Management Principles Page 35
ADDITIONAL CERTIFICATIONS	SIX SIGMA YELLOW BELT 2-Day Program		SIX SIGMA GREEN BELT 5-Day Program		SIX SIGMA BLACK BELT 8-Day Program		

NOTE: Any Recommended and/or Additional Electives may be taken to meet the Certificate of Training requirements.

Call 508-475-0475 x15 to speak with a Training Advisor

Certify your knowledge

- and stand out from the crowd



CERTIFICATION REQUIREMENTS

Beginning in 2013, requirements include:

- 4 Years of Business Process experience
- 24 hours Prof Dev in past 2 years
- Undergraduate degree
- Approved application
- Professional references
- Project documentation
- Pass CBPMPSM exam

PREPARE FOR CERTIFICATION

Study materials and references include:

- Process Improvement books
- Articles, webcasts white papers
- Industry standard specifications
- Select Process Frameworks
- Learning Paths for Prof Dev

BPMInstitute.org's Certified Business Process Management Professional (CBPMPSM) program is the latest addition to the extensive resources created to support Business Process Management professionals and process-centric organizations worldwide.

Set yourself apart

Let everybody know you've achieved that mastery with a **CBPMPSM** certification from one of the industry's top BPM educational organizations.

Choose the best

The BPMInstitute.org Training and Certification Program was recently recognized by Forrester Research as a category leader in providing professionals online and in-person training, and professional certification. This makes BPMInstitute.org the natural choice for proven BPM professionals to demonstrate the knowledge they have - or those new to BPM to gain the knowledge they need to succeed with a **CBPMPSM** certification.

How do you know if you are ready?

CBPMPSM certification requires expertise in many areas. Those who will successfully pass the exam will have a minimum of four years of Business Process Management experience and can demonstrate expertise in each area of the BPM certification coverage map.



Register for CBPMPSM Certification Today
visit www.BPMInstitute.org/certification or call 508-475-0475 X15

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Faculty



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ENROLLMENT FEES & DEADLINES

**FACE-TO-FACE**

	Super Early Bird	Early Bird	Late
1-Day Training	\$795	\$895	\$995
2-Day Training	\$1590	\$1790	\$1990
Workshops	\$75	\$125	\$250

To register visit www.BPMInstitute.org/Events

24/7

**ELEARNING**

	Early Bird	Late
Live Online	\$795	\$895
On-Demand	\$595	\$595

* Early Bird ends 30 days prior for eLearning

To enroll visit www.BPMInstitute.org/eLearning

CERTIFICATION

	Member	Non-Member
Exam	\$400	\$500

For exam locations visit
www.BPMInstitute.org/Certification

FACE-TO-FACE EVENT DATES AND DEADLINES

	Super Early Bird	Early Bird
BRAINSTORM CHICAGO May 6-9	2/22	4/5
BRAINSTORM SAN FRANCISCO June 24-27	4/12	5/24
BRAINSTORM DC September 16-19	7/8	8/16
BRAINSTORM NEW YORK November 4-7	8/23	10/4

**Upgrade
Today and Save**

Corporate Sponsors receive 25% off
Professional Members receive 15% off

(see page 8 for details)

**Purchase your Certificate of
Training in Advance and Save
over \$2,500!**

Join the elite group of dedicated
Business and IT professionals who have
already committed to earning their
Certificate of Training in:

- Business Process Management (BPM)
- Business Architecture (BA)
- Service-Oriented Architecture (SOA)

**For a limited time, you can pre-
purchase the 8 Course requirement
for your Certificate of Training for only
\$5,995 (over a \$2,500 savings)**

**Professional Members and Corporate
Sponsors save even more!**

Visit www.BPMInstitute.org/COTP3 for
more information and to enroll



2013 MEMBERSHIP DETAILS

Membership Comparison

Compare all membership benefits

Membership Type	Community	Premium	Pro	Corp
Membership Fee	Free	\$149	\$349	\$9,500
Content				
Participate in Community	Yes	Yes	Yes	Yes
Blog with Approval	Yes	Yes	Yes	Yes
Featured Content	Yes	Yes	Yes	Yes
Unlimited Content		Yes	Yes	Yes
Event Archives		Yes	Yes	Yes
Research Discounts		Yes	Yes	Yes
Exclusive Features				Yes
Company-wide Benefits				Yes
Training & Events				
Discounts	Public Rates	Public Rates	15% Off	25% Off
PME Dinner Invites			Yes	
Exclusive VIP Invites			Yes	Yes
Membership Renewal				
Discounts	Public Rates	15% Off	15% Off	25% Off
Welcome Kit				
Workshop Pass (\$250 value)				
Training Package				
1 First Module (On-Demand) Free		Yes		
6 First Modules (On-Demand) Free			Yes	Yes
\$195 off First On-Demand Course		Yes	Yes	Yes
Individual Training Consultation			Yes	Yes
Company Training Consultation				Yes
Membership Fee	Free	\$149	\$349	\$9,500

PROFESSIONAL MEMBERSHIP

Upgrade to access all the benefits of Professional Membership including:

- 15% off all Training, Events and Purchases
- Unlimited Access to Focused Content
- Free Workshop at BrainStorm Events
- Exclusive Access to Networking Opportunities
- \$195 off first eLearning Course
- Individual Training Consultation
- \$600 in Free Training
- Networking and Collaboration With Passionate BPM Practitioners

Join or Upgrade to Professional Membership today for only \$349!

Visit www.BPMInstitute.org/Professional or call 508-475-0475 x15

CORPORATE SPONSORSHIP

Corporate Sponsors receive 25% off all Training
Corporate Sponsorship is a company designation that provides benefits to both the company and its employees.

In addition to the lowest possible Training and Event rates – Corporate Sponsors also receive:

- (8) 1-Day Training Courses
- (8) Professional Memberships
- (8) Innovation Workshops
- Private Corporate Group in Community

Annual Corporate Sponsorship is available for only \$9,500 (over a \$12,750 value!)

Join today at www.BPMInstitute.org/Corporate or call 508-475-0475 x15

**For additional information on Memberships,
 visit www.BPMInstitute.org/Membership or call 508-475-0475 x15
 to speak with a representative**

CORPORATE SPONSORSHIP

Corporate Sponsors receive 25% off all Public Training

Simply provide your Corporate Sponsorship Code during enrollment.

Request your Code at www.BPMInstitute.org/membership/request-your-cm-code

ADP, Inc.	Transportation (MA)	Jewelers Mutual Insurance	State Farm Insurance Company	- US Navy
Aetna, Inc.	Consolidated Edison, Inc.	JPMorgan Chase	State of Arizona (AZ)	US Department of Energy
- Coventry Health Care	Cornell University	Kaiser Permanente	- Arizona Corporation Commission (AZ)	- Argonne National Laboratory
- Schaller Anderson of Arizona	CSAA	KPMG International	State of California (CA)	- Battelle Pacific Northwest Nat. Lab
AFCARMHC	CUMIS Group Limited	Kraft Foods	- CalPERS (CA)	- Fermilab
Allstate Insurance Company	CVS Caremark	Lawrence Livermore National Lab	- Orange County Treasurer-Tax Collector (CA)	- Lawrence Berkeley National Laboratory
Alticor Inc.	DAI	LCEC	- State Compensation Insurance Fund (CA)	- Los Alamos National Lab
- Amway International, Inc.	Daiichi Sankyo Co., Ltd.	Liberty Mutual Insurance Company	- University of California (CA)	- National Nuclear Security Administration
AMD	- Daiichi Sankyo, Inc.	- Safeco Insurance	State of Illinois (IL)	- Oak Ridge National Laboratory
American Board of Internal Medicine	Daimler AG	Manitoba Lotteries Corporation	- City Colleges of Chicago (IL)	- Princeton Plasma Physics Lab
American Family Insurance	Dell, Inc.	Manulife Financial	- State of New York (NY)	US Department of Health & Human Services (HHS)
American Home Shield	Deloitte Touche Tohmatsu	Mattel, Inc.	- New York City (NY)	- Centers for Disease Control and Prevention (CDC)
American International Group, Inc.	DESE Research, Inc.	McKinsey & Company	- Office of the State Comptroller (NY)	- Food and Drug Administration (FDA)
- Chartis Insurance	Desjardins Group	Merck & Co., Inc.	- Department of Housing Preservation & Development (NY)	- National Institutes of Health (NIH)
American Student Assistance	Devon Energy Corporation	- Merck Sharp & Dohme, Corp.	- NYC Administration for Childrens Services MIS (NY)	US Department of Homeland Security
Ameritas Life Insurance Corp	Digicel Jamaica Limited	- Schering-Plough Corporation	- NY State and Local Retirement System (NY)	- Federal Emergency Management Agency
Anixter, Inc.	DIRECTV	MetLife, Inc.	State of Washington (WA)	- Office of Inspector General
Archer Daniels Midland	District of Columbia (DC)	Michigan Farm Bureau	- Administrative Office of the Courts (WA)	- Transportation Security Administration (TSA)
AstraZeneca International	du	- Farm Bureau Insurance of Michigan	- Department of Labor and Industries (WA)	- US Citizenship and Immigration Services (USCIS)
- MedImmune, LLC	Eisai Medical Research	MITRE Corporation	- Pierce Transit (WA)	- US Coast Guard
Austin Energy	Eli Lilly and Company	Nationwide	Televisa	- US Customs and Border Protection
Autodesk, Inc.	EMC Corporation	- Scottsdale Insurance Company	The Boeing Company	- US Immigration and Customs Enforcement (ICE)
Banco de Credito del Peru	Entel S. A.	NAVTEQ	The Department of National Defence and the Canadian Forces	- US Secret Service
Bank Indonesia	Erie Insurance Group	New York Life Insurance Company	The Toronto-Dominion Bank	US Department of Justice
Bank of America	Ernst & Young	Nigerian Communications Commission	- TD Bank Group	- Federal Bureau of Investigation
Bank of Tanzania	Express Scripts Holding Company	Commission	- TD Bank	US Department of Treasury
Barclays Global Investors	- Express Scripts, Inc.	niSource, Inc.	- Commerce Bank, NA	- Office of the Comptroller of the Currency
Barrick Gold Corporation	- Medco Health Solutions	Nordea	The Travelers Companies, Inc.	- Office of Thrift Supervision
Blue Cross Blue Shield of Kansas	Fannie Mae	Nu Skin Enterprises, Inc.	The Vanguard Group, Inc.	US Department of Veterans Affairs
Blue Cross Life Insurance Company of Canada	Federal Aviation Administration	Panama Canal Authority	The Williams Companies, Inc.	- Health Eligibility Center
Bonneville Power Administration	Federal Deposit Insurance Corporation	Pershing LLC	Think Finance	US Postal Service
Bristol-Myers Squibb	Federal Reserve Bank	Pertamina	Thrivent Financial For Lutherans	US Social Security Administration
Brocade Communications	- Federal Reserve Bank of Richmond	PricewaterhouseCoopers	U.S. Cellular	USAA
C.H. Robinson Worldwide, Inc.	- Federal Reserve Bank of St. Louis	Progressive Insurance	United Telecommunications Services	Valero Energy Corporation
California ISO	Fidelity Investments	QVC, Inc.	UnitedHealth Group	WellPoint, Inc.
Canadian Crown Corporations	- HR Access Solutions	RadiSys Corporation	- OptumHealth	- American Imaging Management
- SaskPower	- XTRAC LLC - A Fidelity Investments Co.	Ramtron International Corporation	- OptumHealth Behavioral Solutions	- Anthem Blue Cross and Blue Shield
Capital District Physicians Health Plan (CDPHP)	Forest Laboratories, Inc.	Raytheon	- OptumHealth Care Solutions	- Empire Blue Cross Blue Shield
Capital One Financial Services	Freddie Mac	Republic of Turkey	- OptumHealth Financial Services	- Health Management Corporation
Carhartt, Inc.	GCI	Research in Motion Limited	University of Michigan	Wells Fargo & Company
CenturyTel, Inc.	General Services Administration	Roche	US Department of Commerce	- Rural Community Insurance Services
Ceridian	Georgia State University	- Chugai Pharma USA, LLC.	- US Patent & Trademark Office	- Wachovia Corporation
CGI Group, Inc.	GMAC-RFC	- Chugai Pharmaceutical Co., Ltd.	US Department of Defense	Yum Brands, Inc.
- CGI Federal	Hartford Financial Services Group, Inc.	- Genentech, Inc.	- Military Health System	Zenith Insurance Company
- Logica Inc.	Hewlett-Packard Company	Rochester Institute of Technology	- Missile & Space Intelligence Center	Zurich North America
CGN & Associates	- EDS	Rockwell Automation	- Navy Federal Credit Union	
Charles Schwab & Co., Inc.	- Mphasis an EDS Company	Salt River Project	- TRICARE Management Activity	
Chevron Corporation	Highmark, Inc.	Sandia National Laboratories	- US Air Force	
Chubb Insurance	Humana, Inc.	Saudi Aramco	- US Army	
Church of Jesus Christ of Latter Day Saints	iHealth Technologies	Savannah State University	- US Marine Corps	
Cigna Healthcare	Industrial Scientific Corporation	Sella.it		
Cisco Systems, Inc.	Information and Communications University (Korea)	Siemens		
Collaborative Consulting, LLC	Intel Corporation	- Siemens Medical Solutions		
College of American Pathologists	Intermountain Power Service Corporation (IPSC)	- Siemens Wind Power		
Commonwealth of Massachusetts (MA)	Internal Revenue Service	Silicon Valley Bank		
- Massachusetts Department of Revenue (MA)	Intuit	Sirius XM Radio Inc.		
- Massachusetts Department of	Iron Mountain	SITA		
		Southern California Edison		
		Spectra Energy		
		Union Gas Limited		
		Standard Insurance Company		

For information on how to become a Corporate Sponsor,

visit www.BPMInstitute.org/Corporate

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As of 12/15/2012

Visit www.BPMInstitute.org/BPM101 for course delivery schedule

BPM 101: An Introduction to Business Process Management

COURSE DESCRIPTION:

BPMInstitute.org defines Business Process Management (BPM) as the deliberative, collaborative, and increasingly technology-aided definition, improvement and management of a firm's end-to-end enterprise business processes in order to achieve three outcomes crucial to a performance-based, customer-driven firm: 1) clarity on strategic direction, 2) alignment of the firm's resources, and 3) increased discipline in daily operations.

BPM 101 is the first course of the BPM curriculum. It provides an overview of BPM as both a management discipline and as a set of enabling technologies, and establishes the foundation for the courses that follow. The course teaches the student the key concepts, terms, methodologies, techniques, and technologies in BPM. It describes what a process is, what process modeling, analysis and design is, and what process management is. It provides an overview of the tools and technologies used to support the BPM discipline including process modeling tools and a BPM platform known as a Business Process Management Suite. Students will learn about the practices and the technologies that are making "process thinking" a new approach to solving business problems and continuously improving organizational performance.

Instructors



TOM DWYER
Vice President, Research
BrainStorm Group &
Editorial Director
BPMInstitute.org

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BPMInstitute.org™
Faculty

COURSE OBJECTIVES:

- Understand the key terms and concepts in BPM
- Learn the major methodologies and techniques for implementing BPM
- Discover the various technologies that support BPM

COURSE OUTLINE:

Introduction to BPM – The Value Proposition
BPM Concepts and Principles

- Understanding Process
- Process Modeling
- Process Analysis and Design
- Process Improvement Methodologies
- Process Management

Transforming to a Process-Managed Enterprise
Introduction to BPM Tools and Technologies

- Modeling tools
- Business Process Management Suite

The BPM Community

TARGET AUDIENCE/WHO SHOULD ATTEND:

- Those who are new to BPM or have only had a limited exposure
- Business Analysts, Project Managers, Middle- and Senior-level Line-of-business managers

UNIQUE VALUE OF COURSE:

- A combination of theoretical and practical information
- Actionable insight into BPM and its contribution to improving organizational performance
- Students will learn how to be process thinkers

ALUMNI FEEDBACK

"This general overview of BPM is invaluable to me as I begin mapping processes within my organization."

"Great fundamental information about BPM; provided context and navigation for various methodologies and tools."

"Great, clear and effective interaction and delivery. Provided a well balanced and constructive mix of business and technical perspectives. Well done."

Available Delivery Methods

 FACE-TO-FACE	 eLEARNING: ON-DEMAND
 eLEARNING: LIVE ONLINE	 IN-HOUSE

Produced in Cooperation with:

BPMInstitute.org™

Visit www.BPMInstitute.org/PMAD for course delivery schedule

RECOMMENDED PRIOR COURSE(S)
BPM 101

Process Modeling, Analysis and Design: As Is, To Be

COURSE DESCRIPTION:

Modeling, analysis and design skills are essential to BPM success. In this course you will acquire a solid understanding of practical techniques for modeling, analysis and design. The section of this lesson on modeling provides insight on how to depict business processes via maps and models in order to prepare for the analysis and improvement of business process performance. You will learn the significance of creating the right context for process modeling and the definition of clear boundaries.

The section on analysis examines various perspectives for analysis, including a focus on time, quality, and cost. You will learn the importance of concisely capturing process issues, methods of prioritization, and the value of impact analysis. The section on design examines the properties of a good process, and outlines essential design principles. You will learn the key components of a solid process design, the pitfalls to avoid and the key elements in making the transition to implementation.

Instructors



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COURSE OBJECTIVES:

- Understand how to model business processes at various levels of detail
- Be able to rapidly and effectively analyze the “as-is” process
- Understand how to present the results of process analysis in a compelling way
- Be able to develop effective process designs
- Be able to apply critical success factors in process analysis and design

COURSE OUTLINE:

- Modeling
 - Key principles of Modeling
 - Process maps and types of information captured in a model
 - Data gathering techniques
 - Using simulation
 - Modeling pitfalls and how to avoid them
- Analysis
 - Prerequisites
 - Key steps
 - How to identify a broken process
 - Selecting a process for redesign
 - Analysis pitfalls and how to avoid them
- Design
 - Prerequisites
 - Key steps
 - Process team formation
 - Benchmarking
 - Design principles
 - Design pitfalls and how to avoid them

TARGET AUDIENCE/WHO SHOULD ATTEND:

- Business Analysts
- Process improvement team members
- Managers and supervisors

UNIQUE VALUE OF COURSE:

Provides attendees a thorough understanding of current approaches to process modeling, analysis and design.

ALUMNI FEEDBACK

“Excellent, just the right balance between depth and breadth.”

“Great variety of tools and techniques to take back to my company and use.”

“This course helped to define the errors in our current process model. I can already see where the info can be applied.”

Available Delivery Methods

 FACE-TO-FACE	 eLEARNING: ON-DEMAND
 eLEARNING: LIVE ONLINE	 IN-HOUSE

Produced in Cooperation with:

BPMInstitute.org™

Visit www.BPMInstitute.org/PMM for course delivery schedule

RECOMMENDED PRIOR COURSE(S)
BPM 101, PMAD

Process Measurement and Metrics

COURSE DESCRIPTION:

Process measurement skills are essential to BPM success. In this course you will acquire a solid understanding of practical measurement techniques as applied to the analysis and design of business processes.

Determining what to measure and defining clear measurement criteria are at the basis of success in process measurement. This session presents key concepts and tools on the basic principles of process measurement, and how to apply these principles at both the organizational level and the business process level. You will learn how to apply process measurement to both the analysis and design of business processes, and what are the critical success factors and the pitfalls to avoid. Participants will practice key process measurement skills on case studies and apply these to their own organization through connections exercises.

Instructors



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BPMInstitute.org

OR

BPMInstitute.org™
Faculty

COURSE OBJECTIVES:

- Understand how to measure business processes at various levels of detail
- Be able to rapidly and effectively build a measures framework for monitoring, control, and/or improvement
- Understand how to present the results of process measurement in a compelling way
- Using process metrics to develop effective process designs
- Understand the pitfalls to avoid in process measurement

COURSE OUTLINE:

- Process Measurement Overview
 - What is process measurement?
 - Why measure business processes?
 - Various approaches to measurement
- Basic Principles
 - PDCA Foundation
 - Decomposing business processes
 - Key indicators: Time, Quality, Cost, Productivity
 - SMART goals
 - Data gathering methods
 - Pitfalls and how to avoid them
- Process measurement at the organization level
 - When you have a scorecard
 - When you do not have a scorecard
- Process measurement at the process level
 - Decomposing business processes
 - The key questions: Why, What, Where, When and Who
- Summary

TARGET AUDIENCE/WHO SHOULD ATTEND:

- BPM practitioners
- Business Analysts
- IT Managers
- Business Managers

UNIQUE VALUE OF COURSE:

The student will apply the concepts learned through a series of case study exercises that provide awareness of the common problems encountered when developing meaningful, customer-focused metrics.

ALUMNI FEEDBACK

“Loved that it was interactive. The hands-on made the course invaluable, as well as using our own current processes as the case studies.”

“Excellent delivery of materials with many useful templates/worksheets that can be leveraged.”

“Excellent. Lots of info and options. Time for discussions.”

Available Delivery Methods

 FACE-TO-FACE	 eLEARNING: ON-DEMAND
 eLEARNING: LIVE ONLINE	 IN-HOUSE

Produced in Cooperation with:

BPMInstitute.org™

Visit www.BPMInstitute.org/BPMCOE for course delivery schedule

RECOMMENDED PRIOR COURSE(S)
BPM 101

Establishing Business Process Governance and Centers of Excellence

COURSE DESCRIPTION:

As process management begins to blur the traditional boundaries of the organization, a more transparent and accurate decision making process is necessary.

This course builds a comprehensive understanding of how to best address this challenge with a focus on developing a firm understanding of the emerging roles of process owner, process council, and the process office. It instructs the student how to define the function of process governance in his/her organization.

This course develops the essential elements that are needed to successfully justify, launch and to then evolve the process office in an organization. It will describe the mission and charter for a Center of Excellence (CoE) and present advice for successfully establishing a CoE. It instructs the student how to build a Mission and a Charter for the process office.

Instructors



TOM DWYER
Vice President, Research
BrainStorm Group &
Editorial Director
BPMInstitute.org

OR

BPMInstitute.org™
Faculty

COURSE OBJECTIVES:

- Introduce the broad concepts of BPM Governance
- Understand the value, opportunities and challenges of establishing BPM Governance
- Understand how establishing a BPM CoE facilitates the introduction and adoption of BPM Governance
- Explore the best practices for designing and deploying BPM Governance and CoE

COURSE OUTLINE:

- Advanced Process Management Principles
- Process Governance
 - What & Why
 - Key components
 - Success factors
 - Governance responsibilities
 - Sample Governance Organizational Structure
- Center of Excellence
 - What & Why
 - If and When
 - Success factors
 - Pitfalls
 - Sample CoE Charter
- Lab Exercise
- Summary

TARGET AUDIENCE/WHO SHOULD ATTEND:

Executives, Managers, Business Analysts, Business Architects

UNIQUE VALUE OF COURSE:

Attendees will learn a phased approach to adopting BPM Governance including cross-functional management, standardization, alignment, readiness assessment, and roadmap planning. This workshop is based on case studies from real-world experience of early adopters of BPM Governance and Centers of Excellence. It is a business-oriented, overview of BPM Governance providing actionable information for both business and IT professionals.

ALUMNI FEEDBACK

“Exactly the details and structure I needed to get started in developing our COE.”

“The examples were wonderful to help explain possible structures. I look forward to getting this information out to those I work with.”

“Great course, real life examples and tools that can be implemented right away.”

Available Delivery Methods

 FACE-TO-FACE	 eLEARNING: ON-DEMAND
 eLEARNING: LIVE ONLINE	 IN-HOUSE

Produced in Cooperation with:

BPMInstitute.org™

Visit www.BPMInstitute.org/BPMETH for course delivery schedule

RECOMMENDED PRIOR COURSE(S)

BPM 101

Methodologies and Approaches for BPM

COURSE DESCRIPTION:

Embracing a set of methods and standard approaches are critical for accelerating BPM adoption across an organization. This advanced course is designed to expose the student to a broad array of methods used during different phases of a BPM program. The course is also meant to demystify much of the hype around using Six Sigma and Lean while managing business processes. Throughout the course case studies are presented to guide the student through the best use of approaches such as iterative and water-fall, and techniques such as the use of work-out-sessions and face-to-face interviews. The course places special emphasis on business-facing process discovery, modeling, simulation, and deployment techniques. The goal is to instill confidence within the student regarding where and when to best apply any given method or tool. Since the course is focused on process management methods the student should have a basic understanding of BPM prior to attending. This basic understanding can be obtained by attending BPM 101.

Instructors



TOM DWYER
Vice President, Research
BrainStorm Group &
Editorial Director
BPMInstitute.org

OR

BPMInstitute.org™
Faculty

COURSE OBJECTIVES:

- Deliver a comprehensive overview of how process methods are being used in industry today
- Build confidence with selecting the best method for dealing with various process management challenges
- Provide case studies that depict best practices and identify pitfalls
- Enable students to build a tool box of methods to address approaches to their own unique situation
- Learn techniques for how to govern the use of methods across an organization

COURSE OUTLINE:

- Examine why methods are valuable and relationships with frameworks and architectures
- Provide an overview of the proven methods used during BPM initiatives
- Discuss the differences between business / technology-driven BPM approaches
- Learn why iterative methods to process discovery, design, and improvement are popular for BPM
- Understand when a water-fall approach is the most appropriate for a BPM project
- Know when to leverage work-out-sessions and face-to-face interviews to determine process
- Establish how methodologies are maintained and governed

TARGET AUDIENCE/WHO SHOULD ATTEND:

- Business/Process Analysts chartered with developing standard approaches to process management
- Business and technical leaders seeking to learn more effective ways to manage process
- Technical developers seeking to better understand how business' are approaching process solutions
- Business Architects that want to understand basic process management principles

UNIQUE VALUE OF COURSE:

- Drive greater efficiency across an organization as process management becomes more pervasive
- Demystify the rumors that BPM is a method of its own and runs counter to other proven approaches
- Allow organizations to craft their own procedures for process discovery, modeling, and on-going management

ALUMNI FEEDBACK

"Extremely positive approach and responsiveness to direct inquiries from students... A+."

"Fantastic illustration of the different methods, approaches and tools."

"The instructor has a vast knowledge of BPM and incorporated many examples for additional clarity. Great instructor, great class"

Available Delivery Methods

 FACE-TO-FACE	 eLEARNING: ON-DEMAND
 eLEARNING: LIVE ONLINE	 IN-HOUSE

Produced in Cooperation with:

BPMInstitute.org™

Visit www.BPMInstitute.org/FAC for course delivery schedule

RECOMMENDED PRIOR COURSE(S)
BPM 101

Advanced Facilitation Skills

COURSE DESCRIPTION:

Whether you are developing a business architecture, creating a process model, leading an improvement team, or running a meeting, great facilitation skills are crucial. You need to be able to keep people engaged, elicit the necessary information, create shared understanding and build consensus all while keeping them focused on the intended goal. Not an easy task.

This 1-day interactive workshop focuses on you – the facilitator. We'll play with models and techniques that will help you better handle tough issues like managing conflict that arises during meetings, getting folks to make and own decisions, staying on topic and more. So if you're a project manager, business analyst, architect or leader with a desire to be more collaborative, this workshop is your first step on the road to your own process improvement.

Instructors



TAMMY ADAMS
Managing Partner
Chaosity, LLC

OR

BPMInstitute.org™
Faculty

COURSE OBJECTIVES:

- To help you assess your strengths and weaknesses as a facilitator.
- To build confidence in your ability to run productive meetings that achieve their stated goals.
- To augment your tool box with techniques to better enhance collaboration.

COURSE OUTLINE:

- What's the role of a process facilitator?
- How can you help your team make decisions?
- How can you manage conflict that arises?
- How can you design meetings that produce results?
- How do you keep people engaged and on-track during the work sessions?

TARGET AUDIENCE/WHO SHOULD ATTEND:

This course is designed for anyone who finds themselves in the role of facilitating a meeting, leading a core team, or just needing additional skills to enhance collaboration.

UNIQUE VALUE OF COURSE:

- It transforms bad meetings into highly success and productive ones (or no meeting at all). We've all experienced bad meetings – some of our own doing. Project Managers, Business Analysts and Architects often find themselves in situations where they are expected by default to know how to facilitate meetings – whether they have the skills or not.
- It focuses on the skills needed to elicit knowledge from others while building a shared understanding and agreement. We're taught how to do the work ourselves, but how can we create a value stream model or process map if we're not the ones with the subject matter knowledge?
- It's taught by a Certified Professional Facilitator with real-world knowledge and experience stemming from over 15+ years facilitating work sessions. So what you'll learn is not merely theory, but lessons you can immediately apply to your organization.

Co-author of:
"The Project
Meeting
Facilitator"



ALUMNI FEEDBACK

"The hands-on experience was great. To be able to practice facilitation and receive direct feedback was exceptional."

"The instructor had great methods to share and putting them to practice in groups helped understand it better. Very valuable information."

"By far, this is the best course I have attended in several years. The instructor is an excellent Facilitator."

Available Delivery Methods

 FACE-TO-FACE	 eLEARNING: ON-DEMAND
 eLEARNING: LIVE ONLINE	 IN-HOUSE

Produced in Cooperation with:



Visit www.BPMInstitute.org/PCMM for course delivery schedule

RECOMMENDED PRIOR COURSE(S)
BPM 101

Managing Process Change

COURSE DESCRIPTION:

How do you manage business process change? Is there a one-size fits all approach or do you need a set of tools? What is a best-practice approach to managing process change today? From Improvement to Reengineering, this course will cover the major methodologies used to implement process transformation and examine the challenges, benefits and risks of each approach. A strategic framework for planning process change and developing a business transformation roadmap will help students be prepared to manage all of the change initiatives in their businesses whether they are tightly focused operational improvements or strategic, large scale multi-phased programs.

The Process Transformation Continuum:
From Improvement to Innovation; from Reactionary Change to Revolutionary Change to Continuous Change

- Process Improvement
- Process Redesign
- Business Process Reengineering
- Business Process Management
- Enterprise Process Management

Instructors



BRETT CHAMPLIN
CCP, CDMP, CBPP
Past President, ABPMP
International
Management Consultant

OR

BPMInstitute.org™
Faculty

COURSE OBJECTIVES:

- Understand the opportunities and options for leading business process change
- Learn the major methodologies and techniques for managing business process transformation
- Learn a framework for process assessment, transformation and continual change management

COURSE OUTLINE:

- Planning Process Change
- Process Maturity Assessment
- Designing Process Change
- Developing the Roadmap for Business Transformation
- Managing Process Change
- Process Portfolio Management

TARGET AUDIENCE/WHO SHOULD ATTEND:

- Those who want to understand best practice approaches to process change
- Those who want to learn a set of complimentary approaches to business transformation
- Those who are responsible for business process transformation management in their organization

UNIQUE VALUE OF COURSE:

- Learn best practices in process management
- Be prepared to lead process transformation efforts in your organization
- Understand how to match your process transformation approach to your business strategy

ALUMNI FEEDBACK

“Great session! Very informative and interactive.”

“This course is eye-opening. I would recommend to anyone struggling with Methodologies, Process Improvement, etc.”

“Excellent material - universal in nature - the information in this course will not “date”. Core concepts relevant today & applicable immediately.”

Available Delivery Methods

 FACE-TO-FACE	 eLEARNING: ON-DEMAND
 eLEARNING: LIVE ONLINE	 IN-HOUSE

Visit www.BPMInstitute.org/BPMN2 for course delivery schedule

RECOMMENDED PRIOR COURSE(S)
BPM 101, PMAD

Process Modeling With BPMN 2-Day Training Course

COURSE DESCRIPTION:

The Business Process Modeling Notation (BPMN) is a standard for business process modeling, and provides a graphical notation for specifying business processes in a Business Process Diagram (BPD). It is based on flowcharting techniques similar to activity diagrams from the Unified Modeling Language (UML). The objective of BPMN is to support business process management for both technical users and business users by providing a notation that is intuitive to business users yet able to represent complex process semantics. The BPMN specification also provides a mapping between the graphics of the notation to the underlying constructs of execution languages, such as Business Process Execution Language (BPEL).

The primary goal of BPMN is to provide a standard notation that is readily understandable by all business stakeholders. These business stakeholders include the business analysts who create and refine the processes, the technical developers responsible for implementing the processes, and the business managers who monitor and manage the processes. Consequently, BPMN is intended to serve as a common language to bridge the communication gap that frequently occurs between business process design and implementation.

This course starts with the definition of BPMN, an explanation of its history and the principles behind its design. It then explains two groups of elements, including use cases and selected examples. The course covers elements from the latest release – BPMN 2.0. Students are presented exercises and required to use a BPMN modeling tool – running on Microsoft Windows – to create the exercise answers.

Instructors



TOM DWYER
Vice President, Research
BrainStorm Group &
Editorial Director
BPMInstitute.org

OR

BPMInstitute.org™
Faculty

COURSE OBJECTIVES:

- Understand the value that BPMN brings to process modeling
- Understand the opportunities and challenges of adopting BPMN
- Learn the semantics of the BPMN shapes and how best to use them
- Explore the best practices for using BPMN to model processes

COURSE OUTLINE:

- Overview of BPMN
 - Definition
 - History
- Overview of BPMN Elements
 - The Business Process Diagram and its semantics
 - Three levels of BPMN
- Group A BPMN Elements
 - Events, Activities, Connecting Objects, Gateways, Swimlanes
 - Basic Workflow Patterns
 - Exercises
- Group B BPMN Elements
 - Events, Activities, Gateways
 - Error & Escalation
 - Event Sub-process
 - Exercises
- Summary

TARGET AUDIENCE/WHO SHOULD ATTEND:

- Business Analysts
- Business Architects
- Software Architects
- Process Designers

UNIQUE VALUE OF COURSE:

Attendees will learn a structured approach to using BPMN. Their knowledge is enhanced by using a software tool to provide hands-on practice.

ALUMNI FEEDBACK

“The course was very thorough and informative! It was a very detailed learning structure for the BPMN Modeling Language. Thank you!”

“As a business analyst looking to understand BPM and also take away practical skills, this class was excellent.”

“Perfect... Right on target!”

“Great course, I will definitely be switching from flowcharting to BPMN for diagramming.”

Available Delivery Methods

 FACE-TO-FACE	 eLEARNING: ON-DEMAND
 eLEARNING: LIVE ONLINE	 IN-HOUSE

Produced in Cooperation with:

BPMInstitute.org™

Visit www.BPMInstitute.org/OCM for course delivery schedule

RECOMMENDED PRIOR COURSE(S)

BPM 101, BA 101

Organizational Change Management: Getting the Fundamentals

COURSE DESCRIPTION:

Change is the heart and soul of our business environments; making sure that the workforce is ready to meet the demands of the changing work place is fundamental to ongoing business success. Yet many business change initiatives struggle in achieving success and up to 70% fail for one key reason — a failure to recognize and manage the impact of the changes on their organization. Many organizations create and implement communication plans so why are so many still failing? This Organizational Change Management (OCM) course is designed for participants with an interest in learning different fundamental concepts of organizational change and want an opportunity to experience analyzing an organization's requirements for developing and running a change management program. Through exercises, a case study framework and practical examples, participants will take away a clear understanding of the dynamics of organizational change, and a collection of practical models for their projects and organizational change toolkit.

Instructors



DEBORAH TURTURICI
Senior Principal
Senior Business Architect
Collaborative Consulting, LLC

OR

BPMInstitute.org™
Faculty

COURSE OBJECTIVES:

- Using the knowledge gained, be able to contribute to effective change in your organization
- Gain an understanding of OCM fundamentals
- Gain an understanding of holistic OCM concepts, techniques and artifacts used during change management efforts
- Articulate best practices in the structure and execution of a change management program
- Gain a hands-on perspective in developing a change management approach

COURSE OUTLINE:

- Business Architecture and BPM Foundations for Change
- Fundamentals of organizational change management
- Framework models and resistance factors
- Holistic change management levers for planning
- Managing a change program

TARGET AUDIENCE/WHO SHOULD ATTEND:

- Anyone involved in the planning, execution, or governance of business or technical initiatives
- Anyone wanting to gain a better understanding of organizational change management concepts, strategies and methodologies
- Anyone wanting to improve their personal effectiveness within a organizational change management program or center of excellence

UNIQUE VALUE OF COURSE:

- A repeatable framework for Organizational Change Management
- Real world case study to demonstrate the concepts
- Hands-on exercises to reinforce the concepts
- Instructors who have helped companies establish Organizational Change Management structures in their operations, and successfully executed Organizational Change Management programs

ALUMNI FEEDBACK

"This course delivered. It gave me the skills needed to initiate a change management plan, complete an impact assessment, and create a communication plan."

"Thanks to this course, I can finally connect the work currently being done in my organization with the overall methodologies!"

"This course was excellent...I was very impressed. The tools utilized to conduct the course made it very interactive."

Available Delivery Methods

 FACE-TO-FACE	 eLEARNING: ON-DEMAND
 eLEARNING: LIVE ONLINE	 IN-HOUSE

Produced in Cooperation with:



BPMInstitute.org™

Visit www.BPMInstitute.org/SSYB for course delivery schedule

RECOMMENDED PRIOR COURSE(S)
BPM 101

Six Sigma Yellow Belt Certification

COURSE DESCRIPTION:

The Yellow Belt certification offered requires two days of training with certification issued upon successful completion of the course, as well as, a written exam (minimum acceptable score 70%). The training offers an understanding of the basic methodologies used for Six Sigma. The course covers some of the basic improvement techniques and the metrics required. For most organizations, a Yellow Belt is an individual that is a subject matter expert (SME) or a core team member on a single project or multiple projects. This program gives employees a greater knowledge of process improvement. This is accomplished through the introduction of process management. Students are also familiarized with the basic tools of Six Sigma. The purpose of the training is to provide individuals with the tools needed to be a valuable asset to the organization's goals and objectives.

The Yellow Belt Certification Course will develop:

- The proficiency of personnel as Six Sigma supporters
- The acceptance of Six Sigma as a benefit to employees and the company
- A better understanding of daily tasks that will translate into better quality, reduced waste, and improved cycle times

Yellow Belts play an important support role in the Six Sigma process. Yellow Belts are tasked with gathering accurate data and sharing their expertise in the problem-solving process. Their understanding of the process is a vital part of improvement methodology. Yellow Belts are tasked with identifying, controlling, and monitoring potential profit loss areas and reporting this information to the Green Belts and Black Belts within the organization.

COURSE OBJECTIVES:

- Create an awareness of Six Sigma within the organization – what it is, what it is not, and its benefits and impact.
- Provide insight into Six sigma through classroom exercises and practical application.
- Provide an overview of the Six Sigma concepts and the Define-Measure-Analyze-Improve-Control (DMAIC) process, and learn to apply basic process improvement methods within each step of the DMAIC framework.
- Provide basic understanding lean principles.
- Prepare you to be an effective team member on a Six Sigma project

COURSE OUTLINE:

- Introductions and Getting Started
- What Is Six Sigma?
- Six Sigma Terminology
- Six Sigma Roles and Responsibilities
- The DMAIC Process
- Opportunities and Challenges of Six Sigma
- The Six Sigma Toolkit
- Six Sigma Success Stories
- Leadership for Six Sigma
- How to Thrive as a Six Sigma Team Member

TARGET AUDIENCE/WHO SHOULD ATTEND:

- Professionals interested in a fundamental knowledge Six Sigma and Lean.
- Professionals that would like to enhance their careers by participating in Six Sigma process improvement team

UNIQUE VALUE OF COURSE:

- Teach you how to think differently and do things differently when solving problems and improving processes.
- Emphasize the role that the Yellow Belt should play in supporting projects that are led by Green Belts and Black Belts.

ALUMNI FEEDBACK

“Excellent performance and development of the course.”

“Excellent instructor.”

“The exercises and real world discussions were most helpful.”

Instructors



MARVIN WURTZEL
Principal Consultant
Marvin M. Wurtzel &
Associates

OR

BPMInstitute.org™
Faculty

Available Delivery Methods

 FACE-TO-FACE	 eLEARNING: ON-DEMAND
 eLEARNING: LIVE ONLINE	 IN-HOUSE

Produced in Cooperation with:

MARVIN M. WURTZEL & ASSOCIATES

BPMInstitute.org™

Visit www.BPMInstitute.org/LAB for course delivery schedule

RECOMMENDED PRIOR COURSE(S)

BPM 101, PMAD

Map, Analyze, Improve Your Process: A Learning Lab

COURSE DESCRIPTION:

If you are wondering how to focus your BPM efforts this course is for you. Process modeling can take 6 months and the analysis another 6 months after that. But it doesn't have to. This course demonstrates a structured approach that gets results faster and more effectively. You will learn how to find and work with a sponsor, how to use three guiding lights to keep you on track with your improvement objectives, and how to get the right cross-functional team to participate and work toward a common goal. This course is a learning laboratory where you will practice—modeling your as-is process, selecting the right analysis tools for your efforts, redesigning an improved to-be process using 17 critical rules, and how computer simulation will help you in your recommendations. This structured approach will accelerate your BPM effort and significantly increase the likelihood of successful implementation. The approach focuses your efforts and lets you know what is required for every process, what the specific needs are for your process, and what is just nice to have.

This course is oriented to individuals or teams who will be engaged in modeling and analyzing processes in their organization. It provides a structured methodology for process mapping, analysis, and improvement expressed in a basic form of BPMN easily understood by business users. It is closely aligned with other BPM Institute offerings in process modeling, measurement, analysis and design. Today, use of software tools is essential for sharing, preserving, and reusing the maps and analyses you create, and for aligning business and IT. We discuss different tools in the training, and you can use them in exercises in class.

Instructors



SHELLEY SWEET
President
I-4 Process Consulting

OR

BPMInstitute.org™
Faculty

COURSE OBJECTIVES:

- Document current state processes in a common visual language
- Enable department, upstream and down stream departments, and IT collaboration for process improvement efforts
- Analyze BPM diagrams to detect problems and suggest potential improvements
- Integrate problems visually on a visual analysis model
- Describe proposed to-be processes in diagrams usable by both business and IT
- Build models that will flow seamlessly to the next stages of modeling for automated implementation

COURSE OUTLINE:

- Communication and mis-communication: Getting everyone on the same page
- The Process Model Teams and Roles
- Selecting the right process to work on first: Learning Lab
- Building maps using swim lanes, Visio and BPMN at Level 1: Learning Lab
- The Happy Path and significant exception paths – how many should you do? Customer Experience and what's "value added"
- Evaluating the current process – employee concerns, time, waiting, bottlenecks, errors, rework, cost: Learning Lab
- Visualizing work and information flow problems on the model: A visual analysis model
- Redesigning the Process -5 overriding rules for redesign and 17 techniques to get there
- Building the redesigned model: Learning Lab

TARGET AUDIENCE/WHO SHOULD ATTEND:

- Business analysts and Architects, requirements analysts, process analysts

UNIQUE VALUE OF COURSE:

- Use a structured roadmap for BPM and identify the choice points for your process
- Translate traditional paper-based mapping and analysis techniques to software tools
- Apply tools and methods to your own work processes in a Learning Lab
- Engage business and IT together from the beginning in improving processes





ALUMNI FEEDBACK

"Great class! The hands-on interactive training and ability to walk through a real process of my own was invaluable."

"Enjoyed the interaction and hands on approach."

"Step by step, practical approaches to mapping and analyzing process flows."

Available Delivery Methods

 FACE-TO-FACE	 eLEARNING: ON-DEMAND
 eLEARNING: LIVE ONLINE	 IN-HOUSE

Produced in Cooperation with:

I4 Process

Visit www.BPMInstitute.org/BDM101 for course delivery schedule

Business Rules and BDM 101: Incorporating Business Rules and Decisions into BPM, BDM and SOA

COURSE DESCRIPTION:

This intensive business rule tutorial is specifically targeted at both non-technical and technical audiences and is excellent for entire project teams. Attendees may be those involved in purely business-oriented business rule projects or projects targeted for system development. Aimed at project managers and key project people, this tutorial is the fastest and simplest way to get started on a business rules project. The course introduces the discipline of Business Decision Management (BDM) where business rules are managed in the context of Business Processes. Organizations need not purchase any new software (rule repository software or business rule engine software) to produce the deliverables in this course. This course is deliberately integrated with and references the BPMInstitute.org course that focuses on "Business Rules Driven Requirements: Using the Decision Model to Enhance Model Based Business Requirements and Testing."

Instructors



LARRY GOLDBERG
Managing Partner
Knowledge Partners
International

OR

BPMInstitute.org™
Faculty

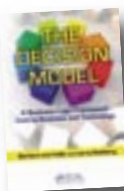
Co-author of:

"The Business Rules Revolution"



And:

"The Decision Model"



COURSE OBJECTIVES:

Improve your skills and your projects by learning the basics of how to integrate a business rules approach:

- Rapidly build business rules, and model them into Decision Models
- Normalize and Analyze business rules for logical and business integrity
- Integrate the Decision Model of business rules into your business process models, use cases and data models
- Use the Decision Model to enhance your Service Oriented Architecture (SOA)
- Create business rules driven business requirements
- Create business rules based application testing
- Select and execute a business rule project

COURSE OUTLINE:

- From Business Rules to a Decision Model
- The Decision Model as the Solution
- Project Methodology
- Wrap up

TARGET AUDIENCE/WHO SHOULD ATTEND:

- Business or Enterprise Architect who wishes to gain an insight into the solution to the Business Rule problem in enterprise systems
- Project manager – leading a business rules or BPM project
- Business SME or Business Rule steward – providing input to rules or actually authoring initial rules prior to turning them over to IT
- Business analyst – documenting or evolving Business Rules or creating supporting documentation
- Use case writer – authoring "Business Rules-lite" use cases
- Requirements analyst – integrating requirements and models with Business Decisions and Business Rules
- Business process analyst – designing processes powered by Business Decisions and Business Rules
- Business process owner/steward – providing expertise in Business Processes and BDM/Business Rules

UNIQUE VALUE OF COURSE:

This is the only business rule course available today that incorporates the Decision Model: this model provides significant time and cost saving on gathering and managing business rules; it also improves the quality of business rules, and enhances their maintainability. In addition, implementing business rules as a component of the business requirements and scenario testing is an opportunity to make dramatic improvements in classic, unified and agile development methodologies.

ALUMNI FEEDBACK

*"Larry is a great instructor.
Very knowledgeable."*

*"To get BDM from 'the source'
was most valuable."*

*"This course provided a method
to close the gap between process
modeling and data modeling."*

Available Delivery Methods

 FACE-TO-FACE	 eLEARNING: ON-DEMAND
 eLEARNING: LIVE ONLINE	 IN-HOUSE

Produced in Cooperation with:



Visit www.BPMInstitute.org/BRDR for course delivery schedule

RECOMMENDED PRIOR COURSE(S)
BDM 101

Business Rules Driven Requirements: Using the Decision Model to Enhance Model Based Business Requirements and Testing

COURSE DESCRIPTION:

This tutorial provides a powerful way to enhance existing model-based Business Requirements methods – adding a new model called the Decision Model to the catalog of business requirements. This significantly improves requirements in classic waterfall, unified method projects, and Agile Methods. The course is deliberately integrated with and references the BPMInstitute.org course that focuses on “Business Rules and BDM 101: Incorporating Business Rules into BPM, BDM and SOA” This intensive business rule tutorial is specifically targeted at both non-technical and technical audiences and is excellent for entire project teams. Aimed at business analysts, business engineers, testers, project managers, key project people, and business- and solution-architects. Developers concerned with the quality and alignment of their code with requirements would find it valuable. The course also includes material for the serious Agile method team.

Instructors



LARRY GOLDBERG
Managing Partner
Knowledge Partners
International

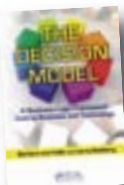
OR

BPMInstitute.org™
Faculty

Co-author of:
“The Business
Rules Revolution”



And:
“The Decision
Model”



COURSE OBJECTIVES:

Improve your skills and your projects by learning the basics of how to integrate business rules into business requirements in a manner that will allow meaningful testing of the business rules, traceability of rules from the business objectives to implementation and defined business metrics. Learn the importance of testing business logic, and discover the means to execute these tests using reliable standards.

COURSE OUTLINE:

- From “Business Rules” to a “Decision Model”
- Building Complete Requirements
- The Relationship between the Decision Model and other models
- Testing Logic in Programs
- Opportunities arising from using Decision Models as Requirements

TARGET AUDIENCE/WHO SHOULD ATTEND:

- Business or Enterprise Architect who wishes to gain an insight into the role of business rules in enterprise systems and their requirements
- Project manager
- Business SME or Business Rule steward
- Business analyst – documenting or evolving requirements or supporting documentation
- Use case writer – authoring “Business Rules-lite” use cases
- Requirements analyst – integrating requirements and models with Business Decisions and Business Rules
- Business process analyst – designing processes powered by Business Decisions and Business Rules
- Business process owner/steward – providing expertise in Business Processes and Business Rules
- Developer – understanding requirements for development purposes.
- Testers – implementing test cases to test the business logic in applications

UNIQUE VALUE OF COURSE:

This is the only requirements course available today that incorporates the Decision Model: this model provides significant time and cost saving on gathering and managing business rules; it also improves the quality of business rules, and enhances their maintainability and their applicability to business requirements and testing.

ALUMNI FEEDBACK

*“Excellent delivery.
Instructor made sure that
there was ample class
participation.”*

*“Excellent explanation of
rule families and decision
models. And the rationale for
modeling concurrently with
process models before writing
requirements.”*

*“Excellent course - very useful
and practical information.”*

Available Delivery Methods

 FACE-TO-FACE	 eLEARNING: ON-DEMAND
 eLEARNING: LIVE ONLINE	 IN-HOUSE

Produced in Cooperation with:



Visit www.BPMInstitute.org/BDMM for course delivery schedule

RECOMMENDED PRIOR COURSE(S)
BDM 101, BRDR

Business Decision Maturity Model (BDMM): The Executive Tool for Achieving Organizational Business Decision Maturity

COURSE DESCRIPTION:

This course is specifically for business and I/T executives and architects interested in aligning business objectives with optimum business decision management practices. Its premise is that "The quality of a business is related not only to the quality of its business processes and software infrastructure but also to the quality of the business decisions that drive both of these."

"Business Decision Management itself is gaining momentum," according to Harvard Business Review (Tom Davenport, "Make Better Decisions," HBR, Nov 2009).

The course begins by explaining the critical nature and implications of business decisions on the integrity, success, and survival of a business, both in normal and chaotic times. After explaining the three characteristics that contribute to the business value of a business decision, the course introduces the BDMM. The BDMM defines the maturity levels for the process of managing important business decisions, in software and otherwise.

The BDMM is widely used by organizations to assess current state and a realistic target state, and to achieve the latter in step-by-step increments. This course references The Decision Model, a platform and technology independent model for business rules and logic described in the recent book, "The Decision Model: A Framework for Business Logic Linking Business and Technology," (von Halle and Goldberg, 2009, Taylor & Francis LLC, ISBN 1420082817). Opher Etzion, Ph.D., IBM Master Inventor, states, "This book can become one of the classic books of a new era in computing that will have much traction in the next few years."

Instructors



LARRY GOLDBERG
Managing Partner
Knowledge Partners
International

OR

BPMInstitute.org™
Faculty

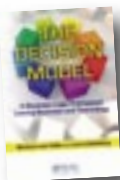
Co-author of:

"The Business Rules Revolution"



And:

"The Decision Model"



COURSE OBJECTIVES:

Improve your ability to identify the importance of business decision management and how you can build a roadmap for your organization:

- Measure your organizational or project objectives against BDMM levels
- Understand and calculate the value of improving in levels
- Establish a roadmap to achieve optimum maturity for reaching objectives

COURSE OUTLINE:

- The Tangible Value of Business Decisions to an Enterprise
- Why a New Maturity Model
- Unique Features of the BDMM
- Details of the BDMM
- Using the BDMM as an Organizational Tool

TARGET AUDIENCE/WHO SHOULD ATTEND:

This uniquely practical workshop is valuable for executives, managers, and architects on the business or technical side, involved in planning, leading, or participating in a business rules project or an enterprise strategy. The attendee gains practical insights by understanding how other organizations have applied the BDMM in achieving their business decision management goals.

UNIQUE VALUE OF COURSE:

This is the only business rule course available today that introduces the BDMM as a means for establishing a Business Decision Management Maturity Roadmap. The BDMM results in identifying the fastest path toward elevating business rule management to business decision management while managing cost and organizational change.

ALUMNI FEEDBACK

"This course material covered exactly what I was looking for and was very well presented."

"I really enjoyed this course! Excellent hands on experience."

Available Delivery Methods

 FACE-TO-FACE	 eLEARNING: ON-DEMAND
 eLEARNING: LIVE ONLINE	 IN-HOUSE

Produced in Cooperation with:



Visit www.BPMInstitute.org/BA101 for course delivery schedule

BA 101: Introduction to Business Architecture

COURSE DESCRIPTION:

What does Business Architecture mean to your organization? Most organizations lack a well articulated blueprint of their business. While everyone can see their small piece of the puzzle, no one has visibility into the enterprise as a whole. This in turn constrains the organization's collective ability to visualize the root cause of critical issues and rapidly craft viable solutions. To address this lack of enterprise visibility, organizations must be able to visualize their business through formal business architecture.

How do you enable a business architecture to create value for the organization? What pieces need to be in place to ensure its success? What skills and techniques need to accompany a successful BA effort? These questions and many others need to be carefully considered while embarking on the journey of creating a business architecture within your organization.

An organization's business model, goals, organizational structure and other constraints need to be considered when looking at how business architecture can become a value added, business focused discipline within the organization. This course addresses these questions and considerations by discussing business architecture fundamentals and the array of different ways that today's organization's moving ahead with their BA efforts.

Instructors



WHYNDE MELARAGNO
President
Strategic Value Partners

OR

BAInstitute.org™
Faculty

COURSE OBJECTIVES:

- Identify and define the important components that make up a Business Architecture
- Consider the different approaches organizations have for their Business Architecture initiatives
- Understand how to tailor a Business Architecture for multiple purposes
- Identify the appropriate use of Notations, Tools and Metamodels
- Assess the maturity of Business Architecture within in an organization
- Consider the critical success factors and a roadmap for an organization's Business Architecture effort
- Understand the organizational structures and associated roles for business architecture initiatives
- Understand the pitfalls and mismatches that can be associated with progressing a business architecture

COURSE OUTLINE:

- Why do we create Business Architectures
- Asking questions of a Business Architecture
- What, Where, When, Why and How of Business Architecture
- The Models of Business Architecture: Motivations, Analytics & Specifications
- The Role of Standards, Notations, Metamodels and Tools
- Business Architecture Archetypes
- Leveraging Business Architecture to drive Tactics, Strategies & Decision Making
- Transformation opportunities with Business Architecture
- Organizational and Skillset considerations
- Connecting Business Architecture with IT Automation
- Roadmaps to maturing Business Architecture capabilities and value

TARGET AUDIENCE/WHO SHOULD ATTEND:

- VP/Director Executives, Strategic Planners
- Business/IT Consultants
- BPM Consultants
- Business Managers, Operational Managers
- Business Process Analysts
- Business Architects

ALUMNI FEEDBACK

"Solid foundation. Gave me the skills to begin to evaluate the state of our business architecture practice."

"I thought this class may be too 'beginner' for me but I am SO happy I attended. I got so much out of the course material and interaction with my peers."

Available Delivery Methods

 FACE-TO-FACE	 eLEARNING: ON-DEMAND
 eLEARNING: LIVE ONLINE	 IN-HOUSE

Produced in Cooperation with:



Visit www.BPMInstitute.org/BAI for course delivery schedule

RECOMMENDED PRIOR COURSE(S)

BA 101

Building a Business Architecture using Value Chains & Value Streams

COURSE DESCRIPTION:

The Building a Business Architecture Using Value Chains and Value Streams class describes an approach and method for building an architecture of the business. It explains how to build and integrate your customer centric cross-functional business processes, which are sometimes called value streams. It formally captures the intellectual capital from your BPM initiatives in an “architectural type” blueprint or model of the business that is available for strategic planning and IT architecture integration. Consequently, the business and IT teams can work in harmony with the insight gleaned from the Business Architecture to create higher profits, superior customer service and a competitive advantage for their enterprise.

This class is supported with a high level case study, illustrating all of the BA models needed to derive and engineer the other enterprise architectures. These very same BA models are also used in value chain analysis for purposes of achieving a competitive advantage for the enterprise. Additional analysis of the BA models illustrates how and where to capture “feedback” information that is used in business intelligence initiatives. Lastly, examples of capability mapping are presented with the value streams and business processes in the BA models. The dominant theme of the BA is a customer centric focus coupled with a holistic view of the enterprise, to deliver a value creating system.

Instructors



WILLIAM ULRICH
President
TSG, Inc.

COURSE OBJECTIVES:

- To understand the concepts of integrating enterprise architectures, specifically the Business Architecture
- To understand the formal links and relationships of the Business Architecture
- To get exposure to innovative thinking using the Business Architecture
- To illustrate value chain analysis for competitive advantage purposes
- To illustrate business analytics for business intelligence initiatives
- To articulate the benefits of integrating enterprise architectures
- To examine the Business Architecture models from a case study available on the web

BAInstitute.org™
Faculty

Co-author of:
“Business
Architecture: The
Art and Practice
of Business
Transformation”



COURSE OUTLINE:

- Integrating the Business Architecture with the Strategy
- Business Architecture Innovation
- Enterprise Business Architecture – Modeling Language (EBA-ML)
- Understanding Value Streams
- Value Chain Analysis
- Business Intelligence Considerations
- Balancing and Leveling Business Architecture Models
- Business Architecture Case Study and Model Review

TARGET AUDIENCE/WHO SHOULD ATTEND:

- C-level Executives, VP/Director Executives, Strategic Planners
- Business/IT Consultants, BPM Consultants, BPR Consultants
- Business Managers, Operational Managers, Technology Managers
- Business Analysts, Systems Analysts, UML/RUP Analysts, Process Analysts
- Business Designers, Business Architects, Technology Designers, IT Architects, Security Architects
- Software Developers, Packaged Software Developers

ALUMNI FEEDBACK

“The most valuable part for me was the examples and model diagrams used to validate the concept and also show how it applies to different organizations.”

“The level of knowledge of the instructor and relevant examples were invaluable.”

“Great balance between theory/ concept and applied learning!”

Available Delivery Methods

 FACE-TO-FACE	 eLEARNING: ON-DEMAND
 eLEARNING: LIVE ONLINE	 IN-HOUSE

Produced in Cooperation with:



Visit www.BPMInstitute.org/BIZIT for course delivery schedule

RECOMMENDED PRIOR COURSE(S)

BA 101

Business Architecture / IT Architecture Alignment: Cross-Disciplinary Alignment Strategies for Business & IT

COURSE DESCRIPTION:

Most organizations lack a well articulated blueprint of their business. While everyone can see their small piece of the puzzle, no one has visibility into the enterprise as a whole. This in turn constrains the organization's collective ability to visualize the root cause of critical issues and rapidly craft viable solutions. To address this lack of enterprise visibility, organizations must be able to visualize their business through formal business architecture. Yet, this is only one piece of the puzzle.

Just as the business functions within a series of silo-based vacuums, information technology implements various aspects of the business within a parallel series of silo based application and data architectures. Where there is no blueprint of a business, there is no corresponding blueprint of how the business relies on and is intertwined with IT architecture. As a result, it is difficult to determine the impact of key decisions, deploy cross-functional initiatives, optimize key resources and funding, and streamline communication and deployments between business and IT. Strategic and tactical requirements drive solutions that are then reflected in the future state business architecture. The future state business architecture, in turn, allows IT to more concisely articulate the future state IT architecture. Business and IT can then craft a collaborative approach for keeping business and IT synchronized through various business / IT transformations.

This training course provides attendees with the ability to map out formal blueprints of their business and IT architectures and use these blueprints to drive strategy, solution oriented roadmaps, funding and project deployments. Discussions draw upon on state-of-the-practice work by a number of organizations in business architecture and business / IT alignment. In addition, the sessions deliver state-of-the-art insights on business architecture as it is evolving from a standards and vendor perspective.

Instructors



WILLIAM ULRICH
President
TSG, Inc.

OR

BAInstitute.org™
Faculty

COURSE OBJECTIVES:

- Understand the vital impacts of poorly aligned business architectures
- Introduce the concept and essential value of business architecture realignment
- Provide a practical approach to building out a business architecture blueprint and IT architecture blueprint
- Walk through the process of establishing a business architecture / IT architecture mapping
- Present a collaborative governance model to resolve horizontal business / IT challenges
- Deliver a set of "how to get started" guidelines for organizations pursuing business / IT alignment

COURSE OUTLINE:

- I. Business Architecture Alignment: Introduction & Overview
- II. Business Strategy vs. Reality: Impacts of Misalignment
- III. Business Architecture Alignment Process Overview
- IV. Business / IT Collaboration Model: Basis for Business / IT Architecture Alignment
- V. Visualizing Business Architecture
- VI. Visualizing IT Architecture
- VII. Business Architecture Alignment
- VIII. Business / IT Architecture Alignment
- IX. Business / IT Architecture Alignment Scenarios
- X. Launching a Business / IT Architecture Alignment Program

TARGET AUDIENCE/WHO SHOULD ATTEND:

- Business Architects and Analysts
- IT Architects and Analysts
- Aspiring Business Architects
- Managers and Consultants

UNIQUE VALUE OF COURSE:

Attendees will learn to recognize the root cause of business / IT architectural alignment challenges and ways to address those challenges using a pragmatic, phased approach. They will also walk away with governance concepts that prove invaluable regardless of their roles in their respective organizations.

ALUMNI FEEDBACK

"This was an excellent class. Tons of real-world examples were helpful in pulling the concepts together."

"Instructor has a wealth of knowledge and practical experience. Very effective delivery."

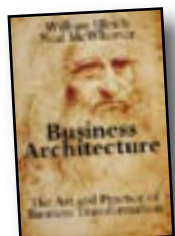
"Fantastic, I really enjoyed this and gained valuable tools I can apply."

Available Delivery Methods

 FACE-TO-FACE	 eLEARNING: ON-DEMAND
 eLEARNING: LIVE ONLINE	 IN-HOUSE

Produced in Cooperation with:

TSG INC.



Visit www.BPMInstitute.org/BISR for course delivery schedule

RECOMMENDED PRIOR COURSE(S)
BA 101

Business Information Semantics & Rules

COURSE DESCRIPTION:

Is your enterprise defining a business transformation led by value chain analysis or a balanced scorecard? Are you having trouble finding data to serve as measures? Are you having a problem communicating the transformation details? These are symptoms of a missing business information architecture. Business information architecture is an aspect of business architecture that defines the terms that business people use to talk about business information, and relates those terms to business strategy, processes, capabilities and organization aspects of the blueprint. Business information architecture also examines the strategic and operational decisions that a business makes and analyzes the information needed to enable the decision.

Business information architecture provides a common vocabulary of business information terms within the business architecture, across multiple lines of business and between business and IT. It allows a direct analysis of the information transformations needed to support a business transformation initiative. In particular, it examines the linkage between strategic and operational decisions and the information that enables them. The linkages between terms in the vocabulary provide support for information impact analysis. The vocabulary can also be linked to other aspects of the business architecture such as business processes, business capabilities, organization, value chains, and so forth. Such linkages support a more thorough analysis of transformation impact. Finally, the vocabulary can be linked to IT information models, allowing the business and IT organizations to jointly plan for change.

Instructors



JIM RHYME
Principal Consultant
Software Renovation
Consulting

OR

BAInstitute.org™
Faculty

COURSE OBJECTIVES:

- Understand the concepts, aspects and uses of business information architecture
- Gain an initial understanding of how to create business information architecture and apply it to a business transformation project
- Learn best practices for creating and sustaining business information architecture
- Understand how to extend the value of business information architecture by linking it to other business and IT architectures
- Learn to "sell" a project to create initial business information architecture to your enterprise

COURSE OUTLINE:

- Business Information Architecture in Business Architecture
- Business Information and Business Decisions, Business view of knowledge
- Conceptual Modeling of Business Strategy and Knowledge
- Business Rules and Actions
- Information Provenance, Lifecycle, Governance
- Business Information Architecture and IT Information Modeling

TARGET AUDIENCE/WHO SHOULD ATTEND:

- Business Architects and Analysts
- IT Architects and Analysts interested in Business Architecture
- Managers / Executives
- Consultants

UNIQUE VALUE OF COURSE:

Business Architecture is the application of model driven analysis to the definition and execution of business strategy and transformation. Business Information Architecture is one of the primary facets of Business Architecture; its roles are to provide the vocabulary for Business Architecture and to link information to business decisions.

ALUMNI FEEDBACK

"Excellent presenter. The ability to present 'complex information' into an easy to understand format is outstanding."

"Very good class! Detailed and effective delivery of a challenging subject."

"Gave lots of information on many types of models, great insight."

Available Delivery Methods

 FACE-TO-FACE	 eLEARNING: ON-DEMAND
 eLEARNING: LIVE ONLINE	 IN-HOUSE

Produced in Cooperation with:
Software Renovation Consulting

Visit www.SOAInstitute.org/SOA101 for course delivery schedule

SOA 101: The Foundation for Cloud Computing

COURSE DESCRIPTION:

Cloud computing is a style of computing in which dynamically scalable and often virtualized resources are provided as a hosted service over the Internet i.e. the cloud. To take advantage of these services, organizations need to understand Service Oriented Architecture (SOA). Recent tactical success in the utilization of Web services and the value proposition of Cloud Computing has brought renewed attention to a strategic commitment to SOA. Early adopters have been investing in SOA for the past five years but now the development of more rigorous methodologies and technologies – and the maturing of standards – are making SOA accessible to everyone. SOA is an example of a software architecture. It can be defined as a software design and implementation methodology for creating loosely coupled, coarse-grained business services. These business services can be independently developed and combined into higher value business processes.

This course starts with an explanation of the business drivers for SOA including Cloud Computing and selected vertical industry initiatives. It will explain the basic concepts of SOA, including business services, a service contract, a service registry and an enterprise service bus. It will describe SOA Governance, Management and Security - and their role in designing SOA for the enterprise. It will explain the fit between SOA and other complementary technologies such as BPM, BR, EP and CC. It will introduce SOA design and development using a model-driven methodology and the process of creating composite applications. It will explain strategies for successfully deploying SOA - including example case studies - to demonstrate the benefits, costs, and risks of the SOA approach. Lastly, it will review approaches to expanding SOA throughout an enterprise.

Instructors



TOM DWYER
Vice President, Research
BrainStorm Group &
Editorial Board Member
SOAInstitute.org

OR



COURSE OBJECTIVES:

- Introduce the broad concepts of SOA
- Understand the value, opportunities and challenges of SOA adoption
- Understand how SOA, BRM and BPM can work together
- Explore the best practices for designing and deploying SOA

COURSE OUTLINE:

- Business Drivers for SOA
- SOA Concepts
 - What is a Service
 - Loose-Coupling and a Service Contract
 - Service-Oriented Integration
 - Enterprise Service Bus
 - Role of the Registry/Repository
 - SOA Governance
 - Service-Oriented Development
 - SOA Security
 - SOA Management
- SOA and Complementary Technologies (e.g. BPM, BR, B2B, EP, CC)
- SOA and Standards
- Expanding SOA throughout the Enterprise
- Strategies for Deploying SOA
- Additional Customer SOA Examples

TARGET AUDIENCE/WHO SHOULD ATTEND:

Architects, Managers, Business Analysts, Executives

UNIQUE VALUE OF COURSE:

Attendees will learn a phased approach to adopting SOA including business process and strategy, SOA readiness assessment, service roadmap planning, designing shared services, and deploying SOA. This course is based on case studies from real-world experience of early adopters of SOA. It is a business-oriented, functional overview of SOA providing actionable information for both business and IT professionals.

ALUMNI FEEDBACK

“Good introduction to a BIG subject (SOA).”

“Instructor was thoroughly knowledgeable.”

“Great job, excited to take the knowledge into my company.”

Available Delivery Methods

 FACE-TO-FACE	 eLEARNING: ON-DEMAND
 eLEARNING: LIVE ONLINE	 IN-HOUSE

Produced in Cooperation with:

SOAInstitute.org™

Visit www.SOAInstitute.org/SOAA for course delivery schedule

SOA for Architects

COURSE DESCRIPTION:

Defining a Service Oriented Architecture (SOA) is the current challenge of many enterprise IT organizations. The emergent popularity of Web services, and the ease of implementation, has enabled most organizations to adopt an incremental approach to SOA via Web services. However, the larger architectural issues must be analyzed and addressed in order to expand SOA. SOA is first and foremost, an enterprise architecture discipline. Service oriented practitioners agree that the 'service' is the new unit of planning and management in an EA framework. The same practitioners will also note that SOA reference architectures, policies and guidance are essential to a successful program.

This course sets the context for describing an SOA from an architectural perspective and provides a detailed understanding of the elements that comprise SOA, as well as techniques and practices for creating organization-wide software integration solutions using SOA concepts. This session will describe how to develop an application architecture as a collection of loosely-coupled business services. The lesson enables architects to identify integration patterns best suited for Web services technologies and explore Web services design best practices.

Instructors



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OR

SOAInstitute.org™
Faculty

COURSE OBJECTIVES:

- Learn the different paths to implementing SOA
- Learn how to devise a comprehensive architecture for a new SOA based solution
- Understand the roles and processes used to create Service Oriented Architectures
- Understand a SOA reference architecture
- Learn how to model business processes and identify services

COURSE OUTLINE:

- Defining SOA and its Business Impact
 - Principles
 - Usage Scenarios
- Service Enablement Technologies
 - WSDL, SOAP, UDDI
 - REST
- Architectural Patterns and Reference Architecture
 - Registry
 - Intermediary
 - IMPACT Reference Architecture
- WS-* Extended Specifications
 - Security
 - Reliability
 - Transaction Management
 - Interoperability
- Intro to Process Driven Services
 - Types of Process Engines
 - The role of WS-BPEL
- Managing the Process Lifecycle
- Harmony SOA Methodology
 - Service Lifecycle and Method Overview
 - Focus on Analysis
 - Focus on Design
 - Governance
- Enterprise SOA
 - Maturity Model
 - Adoption Strategies
 - Real-World Examples and Challenges

TARGET AUDIENCE/WHO SHOULD ATTEND:

- Application Architects
- Enterprise Architects
- Technical Leads

UNIQUE VALUE OF COURSE:

SOA for Architects focuses on the needs of enterprise and project architects. The course creates a common understanding of SOA ideas, patterns, and technologies to enable architects to make informed decisions about their SOA projects.

ALUMNI FEEDBACK

"Subject matter is relevant to the tools that are available for information exchange."

"Tons of practical examples and excellent instruction"

"Instructor was very knowledgeable and well-prepared."

Available Delivery Methods

<p>FACE-TO-FACE</p>	<p>eLEARNING: ON-DEMAND</p>
<p>eLEARNING: LIVE ONLINE</p>	<p>IN-HOUSE</p>

Produced in Cooperation with:



Visit www.SOAInstitute.org/SOAI for course delivery schedule

RECOMMENDED PRIOR COURSE(S) SOAA

Service Oriented Integration (SOI) - Standards, Technologies, and Best Practices

COURSE DESCRIPTION:

This seminar starts with an overview of the concepts of SOA and its relationship to event based architectures. It outlines the key issues and guidelines that architects should consider when defining an integration architecture based on services. This seminar will then provide you with an understanding how the concepts of Service Oriented Architectures relate to Web Service technologies and the commercial platforms that can support service based business processes.

One of the key points of the seminar is a case study that illustrates how SOA concepts taught in the seminar have been applied in a real project implementation. Without best practices based approach that is rooted in experience with SOI projects companies can not reap the benefits that service oriented integration promises. Too often companies end up with silos of services that are too difficult to integrate and manage. The case study explains the key architectural and design decisions that have been made in the project and how these decisions were applied. The end result is an integration architecture and a set of services that were reused beyond one particular project.

Instructors



???

OR

SOAInstitute.org™
Faculty

COURSE OBJECTIVES:

- Understand how to employ a Service-Oriented Architecture for integration of your application portfolio
- Be able to define practical guidelines that can help different project teams make the best architecture and technology choices
- Learn how services can enable and facilitate integration of applications within your enterprise and across a B2B value chain
- Distinguish between hype and reality so that you can put the technology to its optimal use in your organization

COURSE OUTLINE:

- Introduction to Service Oriented Architecture
- Guiding Principles for Service Oriented Integration
- Overview of the Key SOA Integration Platforms
- Case Study and Conclusions
 - Project Overview
 - Three Dimensions of Business Partner Integration
 - Service Oriented Integration Architecture
 - Defining Service Layers
 - Verifying SOA Principles
 - Designing Service Interfaces
 - Designing The Schemas
 - Designing Concrete Service Interfaces
 - WSDL and XML Schema
 - Do we need SOAP?
 - Composing Business Processes with BPEL
 - Conclusions

TARGET AUDIENCE/WHO SHOULD ATTEND:

- Architects
- Designers

UNIQUE VALUE OF COURSE:

There has been a great deal of confusion between concepts, standards, and technologies (SOA, Web Services, ESB, etc). This seminar helps you to clearly distinguish between the hype and the reality and teaches you on how to apply a practical and proven architecture driven approach to service oriented integration.

ALUMNI FEEDBACK

“The instructor has a lot of real world experience.”

“The workshop aspects helped to see a lot of the applications.”

“Instructor was open to questions and group discussions.”

Available Delivery Methods

<p>FACE-TO-FACE</p>	<p>eLEARNING: ON-DEMAND</p>
<p>eLEARNING: LIVE ONLINE</p>	<p>IN-HOUSE</p>

Produced in Cooperation with:

**International Systems Group
(ISG), Inc**

Visit www.SOAInstitute.org/DSOA for course delivery schedule

RECOMMENDED PRIOR COURSE(S) SOAA

Designing Service Oriented Solutions

COURSE DESCRIPTION:

Service Oriented Architecture (SOA) has emerged as the dominant architectural style, especially for enterprise solutions. The potential benefits of SOA in terms of flexibility, agility, cost, and time to market have secured its position, and most software organizations are planning to or are currently adopting SOA.

This course answers the following questions: What is the relationship between BPM, Business Rules and SOA? Where does one leave off and another begin? And, more importantly, What makes a good service? How do you design service interfaces?? How big should a service be? What are the important characteristics of a service? What are the different types of services and the relationships between them? How do services fit into end-to-end enterprise solutions?

This course starts with the basic concepts of SOA: architecture; services, business processes and semantics. We will explain the difference between simply building services, and a true service-oriented architecture that addresses how to build services that can be combined together to support enterprise processes. In addition, we will address the organizational issues of independent producer and consumer groups and SOA governance. Then, we will go into details of the design of an SOA application, from business analysis to service design, including how to drive service design from business process models. We will present a service hierarchy and inventory that addresses the important questions of granularity, scope, and ownership. Finally, the course will address service implementation and information processing, showing how to design services and solutions that deliver the value that SOA promises.

Instructors



MIKE ROSEN
Editorial Director
SOAInstitute.org

OR

SOAInstitute.org™
Faculty

Author of:
"SOA Applied:
Architecture and
Design Strategy"



COURSE OBJECTIVES:

- Understand the architectural and design considerations that are critical to SOA success
- Learn a methodology for designing SOA solutions and how to apply it to different types of solutions
- Understand the relationship between the business and information models and service design
- Be able to factor size, scope, ownership and other issues into proper service design
- Get practical experience in applying these techniques during the workshops
- Be exposed to examples of best practices in SOA design and where to get additional information

COURSE OUTLINE:

- SOA Concept Review
- Architecture and Design Considerations for SOA Solutions
- Conceptual Architecture
- Business Model for SOA
- Information Model for SOA
- Identifying Service Candidates
- Service Interface Design
- Service Document Design
- Factoring granularity, scope, ownership, implementation into service types
- Service Implementation Design
- Information Transformation Techniques
- Case Study

TARGET AUDIENCE/WHO SHOULD ATTEND:

Architects, Designers, Project leaders and Managers

UNIQUE VALUE OF COURSE:

This course describes a proven design methodology for going from business requirements through to implementation of services and the applications that they support. It provides answers to the most common questions about SOA design including:

- What makes a good service? - How to identify services?
- How big should a service be? - How to expose existing applications as services?
- How to structure services to support BPM and BR systems?


ALUMNI FEEDBACK

"The open discussion technique, fully cycle of SOA with a real life example tie-in was most valuable."

"Great overview of many concepts. Instructor was excellent at explaining complex concepts in a simple way."

"Great overview in SOA."

Available Delivery Methods

 FACE-TO-FACE	 eLEARNING: ON-DEMAND
 eLEARNING: LIVE ONLINE	 IN-HOUSE

Visit www.BPMInstitute.org/REQM for course delivery schedule

Modernizing Requirements Gathering: Reshaping the Approach to Business Analysis

COURSE DESCRIPTION:

Today's conventional approach to requirements analysis and engineering is limited in its value as organizations attempt to address demands for increased innovation, rapid product and service rollout, outsourcing and new technology enablers such as BPMS, business rules engines and SOA.

Additionally, the agile development movement and IT-centric methods for analyzing and designing software solutions don't accurately represent how business processes, rules, events, knowledge and human to system interaction fit together. This prevents the creation of a cohesive business solution design that can be understood by the business analysts and their stakeholders.

The inability to preserve business concepts throughout the business/IT change lifecycle leaves the business community to continually rely on their IT counterparts to understand the details of how their business operates, resulting in a cycle of rework that is incompatible with agility.

This one-day course provides students with an introduction to defining requirements and representing business behavior scenarios at a level above technical software designs. It provides business analysts a way to make a transition from their "go-between" role for business and IT to a valued advocate for the business that has an instrumental role in designing key aspects of a business solution with a service-based product mindset.

This new perspective for the business analyst results in the creation of higher quality requirements and specifications that can be validated for completeness and consistency. Which results in reduced downstream risk, change requests and production defects in the business and software change lifecycle.

Instructors



DAVID HEIDT
Business Analysis
Practice Leader
Enterprise Agility

OR

BAInstitute.org™
Faculty

COURSE OBJECTIVES:

- Identify why the way requirements are done today is a misfit for most organizations
- Understand the concept of business-level specifications
- Understand how to make a top-down business case for changing the role of the BA and the requirements process
- Understand the BA BoK 2.0, business specification techniques and the delta between them
- Have a grasp of how the elements of a business-level specification fit together
- Understand how to incrementally adapt current state BA work products for better requirements and business level specifications
- Be able to utilize a business analysis strategic roadmap and project archetypes for guiding the organization towards increased business agility and reduced IT rework

COURSE OUTLINE:

- What is the Problem with Today's Requirements Approaches?
- Reshaping the Role of the Business Analyst
- A Survey of Business Analysis Techniques
- Leveraging the Business Analysis Body of Knowledge 2.0
- Elicit and Capture Requirements with Specifications in Mind
- Leverage Task Design
- Fit together Process, Rules, Event and Knowledge
- Build Organizational Business Analysis Competency
- A Case Study: Apply Techniques for Business Specification
- How to Apply Project Archetypes
- Frameworks and Tools for the Business Analyst

TARGET AUDIENCE/WHO SHOULD ATTEND:

- Business Analysts
- Business Process Analysts
- Business Architects
- Business Process Designers
- VP/Director Executives, Strategic Planners
- Business Managers, Operational Managers

ALUMNI FEEDBACK

"Overall excellent but I really liked the specific requirements discussions."

"All the different requirement tools it makes available for real world application."

"The whole course was good as a refresher as well as proving new information related to structuring processes."

Available Delivery Methods

 FACE-TO-FACE	 eLEARNING: ON-DEMAND
 eLEARNING: LIVE ONLINE	 IN-HOUSE

Produced in Cooperation with:



Visit www.SOAInstitute.org/??? for course delivery schedule

RECOMMENDED PRIOR COURSE(S)

???

The Business Process Perspective on Business Architecture

COURSE DESCRIPTION:

The “Business Process Perspective on Business Architecture” class describes a process-centric approach and method for building an architecture of the business. It explains how to build and integrate your customer centric cross-functional business processes, which are sometimes called value streams. It formally captures the intellectual capital from your Business Process Management initiatives in an “architectural type” blueprint or model of the business that is available for strategic planning and IT architecture integration. Consequently, the business and IT teams can work in harmony with the insight gleaned from this Business Architecture model to create higher profits, superior customer service and a competitive advantage for their enterprise.

This class is supported with a high level case study, illustrating all of the BA models needed to derive and engineer the other enterprise architectures. These very same BA models are also used in value chain analysis for purposes of achieving a competitive advantage for the enterprise. Additional analysis of the BA models illustrates how and where to capture “feedback” information that is used in business intelligence initiatives. The dominant theme of the BA is a customer centric focus coupled with a holistic view of the enterprise, to deliver a value creating system.

Instructor



RALPH WHITTLE
Co-Author of *Enterprise Business Architecture: The Formal Link between Strategy and Results*

COURSE OBJECTIVES:

- To understand the concepts of integrating enterprise architectures, specifically the Business Architecture
- To understand the formal links and relationships of the Business Architecture
- To get exposure to innovative thinking using the Business Architecture
- To illustrate value chain analysis for competitive advantage purposes
- To illustrate business analytics for business intelligence initiatives
- To articulate the benefits of integrating enterprise architectures
- To examine the Business Architecture models from a case study available on the web

COURSE OUTLINE:

- Integrating the Business Architecture with the Strategy
- Business Architecture Innovation
- Business Architecture Modeling using BPMN 2.0
- Understanding Value Chains and Value Streams
- Value Chain Analysis
- Business Intelligence Considerations
- Balancing and Leveling Business Architecture Models
- Business Architecture Case Study and Model Review

TARGET AUDIENCE/WHO SHOULD ATTEND:

- C-level Executives, VP/Director Executives, Strategic Planners
- Business/IT Consultants, Business Process Consultants, BPR Consultants
- Business Managers, Operational Managers, Technology Managers
- Business Analysts, Systems Analysts, UML/RUP Analysts, Process Analysts
- Business Designers, Business Architects, Enterprise Architects, Technology Designers, IT Architects, Security Architects
- Software Developers, Packaged Software Developers

UNIQUE VALUE OF COURSE:

An opportunity to review an actual Business Architecture case study model available on the web.

ALUMNI FEEDBACK

“Ralph was an excellent and charismatic instructor who was able to keep us all engaged and learning for the entire session. Being a teacher is a skill and he has it.”

“Ralph is an excellent instructor. His theory applied to the real world experiences is invaluable.”

Available Delivery Methods

 FACE-TO-FACE	 eLEARNING: ON-DEMAND
 eLEARNING: LIVE ONLINE	 IN-HOUSE

Produced in Cooperation with:

Visit www.SOAInstitute.org/??? for course delivery schedule

RECOMMENDED PRIOR COURSE(S) ???

Practice-Based Business Architecture: Extending & Deploying a Complete Business Architecture

COURSE DESCRIPTION:

It takes one set of skills to establish your business architecture but it takes another set of skills to leverage that business architecture for strategic planning, business design efforts, project deployment and governance. This course provides attendees with practice-based business architecture concepts and skills. This includes extending the basic business architecture through strategy, product, initiative and stakeholder mapping. The course also discusses how to leverage business architecture to benefit related disciplines including business modeling, Lean Six Sigma, business process management and case management. The scenarios and case studies in this course offer practical guidelines on how to leverage business architecture when you return to work. Finally, the course offers advanced guidelines for governing your business architecture.

Instructors



WILLIAM ULRICH
President
TSG, Inc.

OR

SOAInstitute.org™
Faculty

COURSE OBJECTIVES:

- Move beyond the basics to fully incorporate business architecture across a variety of business scenarios and requirements
- Extend business architecture blueprint mapping by building on foundational concepts
- Incorporate business architecture into strategic planning and business model alignment
- Align business architecture with process management, Lean Six Sigma and case management to achieve the cumulative benefits that can be achieved through coordinated use of these disciplines
- Apply what has been learned across various business scenarios
- Learn industry accepted approaches for establishing and governing business architecture including how to setup and manage a team

COURSE OUTLINE:

- Practice-Based Business Architecture: An Introduction
- Strategy Mapping & Business Model Alignment
- Product Mapping, Initiative Mapping & Stakeholder Mapping
- Business Architecture Business Process Alignment
- Business Architecture, Case Management & Dynamic Rules Based Routing
- Business Architecture Usage Scenarios & Case Studies
- Establishing & Managing a Business Architecture Practice

TARGET AUDIENCE/WHO SHOULD ATTEND:

- Business architects
- Business analysts
- Business managers and executives
- Enterprise architects
- Program and portfolio managers
- Business strategists
- IT architects and executives who need to engage with business architecture

UNIQUE VALUE OF COURSE:

There has been a great deal of confusion between concepts, standards, and technologies (SOA, Web Services, ESB, etc). This seminar helps you to clearly distinguish between the hype and the reality and teaches you on how apply a practical and proven architecture driven approach to service oriented integration.

ALUMNI FEEDBACK

"This was an excellent class, very practical and applicable to my work."

"I really enjoyed the course. The networking and discussion with my fellow participants was really valuable."

"It completed my previous courses very well along with what I have seen so far."

Available Delivery Methods

 FACE-TO-FACE	 eLEARNING: ON-DEMAND
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TSG INC.

Visit www.SOAInstitute.org/??? for course delivery schedule

RECOMMENDED PRIOR COURSE(S) ???

Customer Experience Modeling and Design

COURSE DESCRIPTION:

Customer Experience is a broad and yet somewhat vague concept to many. But it is important to understand that how you deliver a customer experience can make a huge differentiation in products, services and company performance in the marketplace.

Many analysts have pointed out how much a single percentage point of improvement in customer satisfaction or customer loyalty or customer retention can make to a company's bottom line. But those things don't just improve through efforts in one area of a business or fixing one kind of transaction. These kinds of improvements can only come through understanding what influences a customer to stay with your service or to recommend your products to a friend.

This class will help you understand how delivering customer experience is not about just being faster, and cheaper and more efficient. You have to understand how you deliver those products and services and how that affects the customer's perception. We will look at how other companies are mapping their customer journeys and using those insights to drive innovation in processes across the enterprise.

Instructors



BRETT CHAMPLIN
CCP, CDMP, CBPP
Past President, ABPMP
International
Management Consultant

OR

BPMInstitute.org™
Faculty

COURSE OBJECTIVES:

- Understand the value that customer experience modeling brings to the business
- Understand the opportunities and challenges of modeling and designing customer experience
- Learn the semantics of the customer experience models
- Learn the best practices for designing customer experience
- Learn how to effectively build a Customer Journey Map for communicating the end-to-end customer experience

COURSE OUTLINE:

- An introduction to Customer Experience concepts, terminology and principles
- Building the business case for customer experience management
- Introduction to tools and techniques:
 - Customer Journey Mapping
 - Event and Touchpoint Modeling
 - Scenario Analysis
- Customer focused process design

TARGET AUDIENCE/WHO SHOULD ATTEND:

- Those who want to learn how to understand, model, and design their customers' experiences
- Business Process Managers
- Business Process Analysts
- Business Modelers
- Business Analysts
- Business Architects

UNIQUE VALUE OF COURSE:

- Learn best practices in customer experience modeling and design
- Provides attendees a thorough understanding of customer experience management
- Be prepared to lead customer experience modeling and design at your organization
- Learn a structured approach to understanding, analyzing and designing processes to focus on customer experience

ALUMNI FEEDBACK

"Lots of good information and ideas for follow up research."

"Excellent performance and development of the course."

Available Delivery Methods

 FACE-TO-FACE	 eLEARNING: ON-DEMAND
 eLEARNING: LIVE ONLINE	 IN-HOUSE

Produced in Cooperation with:

**International Systems Group
(ISG), Inc**

Moving Up the BPM Maturity Curve

EXECUTIVE-LEVEL TRAINING COURSE

How can an organization evolve on the road to process management? That is the principle question that this course addresses. Many companies start their BPM journey by executing one or two projects of small scope. That may be fine at the outset, but in order to address the larger performance issues, companies need to move up the BPM maturity curve from repeatable to defined and then to managed and optimized. This course outlines the key leadership behaviors needed in this respect.

Instructor

ANDREW SPANYI
Managing Director
Spanyi International

OR
BPMInstitute.org™
FACULTY



➤ For more course information visit
www.BPMInstitute.org/CURVE

Advanced Process Management Principles – Key to Sustainability

EXECUTIVE-LEVEL TRAINING COURSE

What do leaders want? In a word – RESULTS! And that is precisely what process management can deliver when practiced at the enterprise level. BPM is not just about technology. It is first and foremost about improving organizational performance. Major initiatives will only be optimized if senior leaders are engaged in applying process management principles and practices at the enterprise level. To make this happen, as many practitioners have learned, requires transforming traditional thought models and behaviors to look at the value that the business creates for customers systemically. This is easier said than done. This is an advanced course and will

Instructor

ANDREW SPANYI
Managing Director
Spanyi International

OR
BPMInstitute.org™
FACULTY



➤ For more course information visit
www.BPMInstitute.org/ADVPM

Getting the Most Out of BPM Tools and Technology

EXECUTIVE-LEVEL TRAINING COURSE

In addition to a management discipline, BPM also provides a wide array of tools and technology. They not only allow a professional to document and analyze a company's process requirements, but also provide a software platform for continuous process improvement. These range from software for process modeling and simulation analysis to business rule definition and management, workflow automation, application integration, and business activity monitoring. Increasingly, these tools are being collected in unified BPM Suites (BPMS) that provide a complete cycle of process modeling, execution, and performance management – with no programming required!

Instructor

TOM DWYER
Vice President, Research
BrainStorm Group &
Editorial Director
BPMInstitute.org



➤ For more course information visit
www.BPMInstitute.org/BPM102

Understanding Cloud Computing and Its Value Proposition in BPM

EXECUTIVE-LEVEL TRAINING COURSE

Enterprises large and small are drawn by the advantages of Cloud Computing – e.g. pay-for-use, self-service, elastic scalability and the elimination of hardware management – resulting in very low barriers to technology entry and exit and high agility. Significant innovations in virtualization, and distributed computing, as well as improved access to high-speed Internet and a weak economy, have accelerated interest in Cloud Computing. Cloud Computing is a style of computing in which dynamically scalable and often virtualized resources are provided as a hosted service over the Internet i.e. the cloud. These services are broadly divided into three

Instructor

TOM DWYER
Vice President, Research
BrainStorm Group &
Editorial Director
BPMInstitute.org



➤ For more course information visit
www.BPMInstitute.org/CLOUD

Using Simulations to Increase Process Efficiency

EXECUTIVE-LEVEL TRAINING COURSE

Organizations always need to figure out how to do more with less. They need to be more productive with fewer people or scale to meet higher volume levels. There are many ways to optimize resources, increase services or production, and impact the bottom line. This course will show you how to streamline processes in service, office, engineering and production environments by 50-150%. Simulations give you the tools to test different models to determine the effectiveness and efficiency of each.

Instructor

SHELLY SWEET
President
I-4 Process Consulting



➤ For more course information visit
www.BPMInstitute.org/SIMUL

Developing a Process-Centric Initiative with BPMS

EXECUTIVE-LEVEL TRAINING COURSE

Are you seeing the promise of BPM? Most companies expected that purchasing a BPMS tool will help drive a process-centric organization. Unfortunately, a majority of companies are not seeing this promise and need best practices to make the dream a reality. In this course you will acquire a solid understanding of the tools needed to develop a corporate BPM Initiative. We will review the current state of BPM using several customer case studies. We will review three pillars that define BPM and how to leverage your initial investment to implement a successful project. Moreover, we will go over how to transform a BPM project to an initiative. Our 6-step process will uncover

Instructor

MICHAEL LIM
Managing Partner
Magnolia Consulting



➤ For more course information visit
www.BPMInstitute.org/BPMS

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