

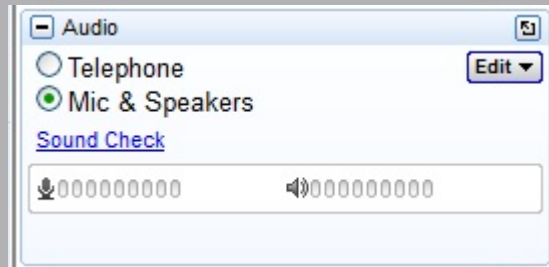
Welcome to the webinar.

We will begin shortly.

There are two methods for listening to this webinar.

- Select Audio from the tool box on the right side of your screen, and select either Telephone to call in and listen using your telephone, or Mic & Speakers to use your computer's speakers.
- For telephone access, please use the phone number provided in your webinar confirmation e-mail or the number provided in the tool box. When you dial In, you will be prompted to enter your Access Code and Audio PIN.
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FOR DEMONSTRATION PURPOSES





Preparing For Digital Transformation

Hosted by: Marlaina Lombardi, IIBA

Presented by: Joe Dickman, Vizuri, David Gaudin, Signavio, Phil Simpson

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OUR DRIVER

“Unite a
community of
professionals to
create better
business
outcomes”

- IIBA Core Purpose





Welcome!

Preparing For Digital Transformation

Introductions



Joe Dickman – SVP, Vizuri

Business leader working with organizations to understand how to leverage innovation for increased business agility. Specializes in insurance, healthcare, financial service, retail, and logistics.



David Gaudin – SVP Sales, Signavio, Inc.

Sales leader responsible for the Americas territory. Helping customers find a smarter way to continuously translate between strategy and execution as they journey toward IT and Business Transformation.



Phil Simpson – Product Marketing Manager, Red Hat, Inc.

Marketing for Red Hat BPM and business rules products, & proud IIBA member!

AGENDA

Planning for Digital Transformation

Joe Dickman, CEO Vizuri

Capturing & Managing Business Logic

David Gaudin, SVP Sales, Signavio

Building Business Applications

Phil Simpson, Product Marketing Manager, Red Hat

How we define Digital Transformation (DX)

Digital Transformation

“The use of technology to radically improve performance or reach of enterprises... to change customer relationships, internal processes and value propositions”^[1]

Customer Understanding

- Specific Geographies
- Market Segments
- Lifestyle and Consumer Behaviors

Customer Touch Points

- Multiple Communication Channels
- Integration across internal and external processes
- Integrating with customers in the channel they desire using their preferred device

Process Digitization

- Automated Banking Operations
- Airline Reservation, Ticketing, and Boarding Passes
- Seamless transactions across multiple trading partners

^[1]Source: Westerman, G., & Bonnet, D., & McAfee, A. (2014). *The Nine Elements of Digital Transformation*. MIT Sloan.

Why should you care about Digital Transformation?

“...Because we have to **compete** against new **disruptive startups** that are hiring kids fresh out of college drinking loads of Mountain Dew!”

(CIO @ Global Insurer)



Three Pillars of Digital Transformation

“Knowledge Management is a **discipline** that promotes an **integrated approach to identifying, capturing, evaluating, retrieving, and sharing all of an enterprise's information assets**. These assets may include databases, documents, policies, procedures, and previously un-captured expertise and experience in individual workers.”¹



Infrastructure Management

- CI/CD
- Repeatable provisioning
- Self-service
- Governance
- On-Premise / Hybrid / Cloud



API Management

- Microservices
- 3rd Party / Internal
- Security
- Monetization
- Death Star Architectures



Knowledge Management

- Rules / Decision
- Business Processes
- Predictive Analytics
- Machine Learning
- Unprecedented amounts of data

¹ Source: Koenig, M.E.D. (2012). What is KM? Knowledge Management Explained, <http://www.kmworld.com/>

Building a Bridge between Business and IT

Expectation



Closing the
“**communication gap**”
has some challenges.

Outcome



- Lack of a **Shared Vocabulary**
- Different understanding and **perspective of the problem**
- Different **goals and objectives**
- Lack of **visibility across the entire business**
- **Distrust** by the Business that IT will deliver on their objectives

Knowledge-Based Life Cycle

A **Knowledge-Based System (KBS)** focuses on using knowledge-based **techniques** to **support** human **decision-making, learning** and **action**¹

Knowledge-Based IT (KB-IT) is the application of KBS techniques **aligning Business and IT**

- Design process
- Models and methods (e.g. Concept, Domain, etc.)
- Software tools (e.g. BPMS, BRMS)
- Decision-support mechanisms
- Digital representation, and
- System architectures

¹Source: Gupta, H., & Lu, S. (2012). *Knowledge-based Systems, Volume(31)*, pp. 1-211.



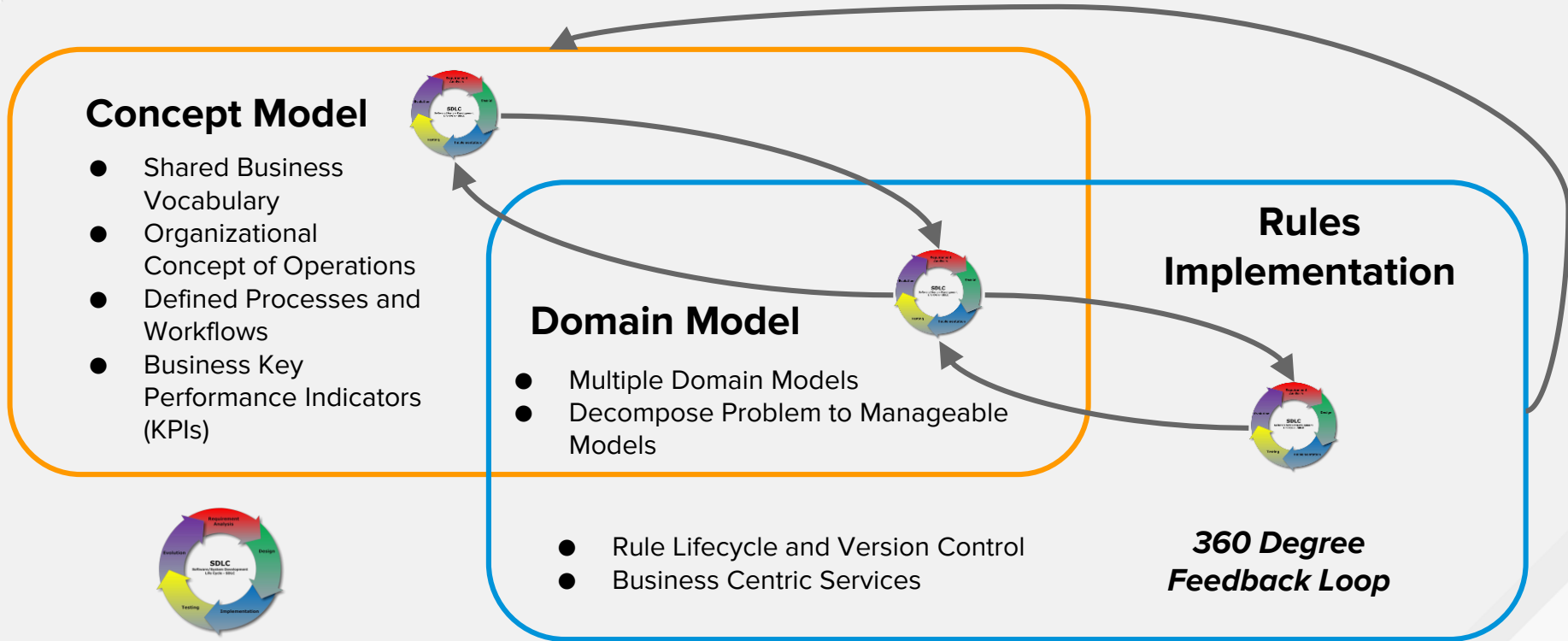
Knowledge-Based IT (KB-IT)

An IT Solution where **Knowledge** becomes a **strategic imperative** to **drive strategy** that **affects business** outcomes

Knowledge-Based IT (KB-IT) is the application of KBS techniques to **enable** people and organizations to **create, share, collaborate, use and reuse Knowledge**

The emphasis of **KB-IT is to package Knowledge** in a standardized way that can be broadly disseminated in a simple, secure and compliant manner

Knowledge-Based Life Cycle

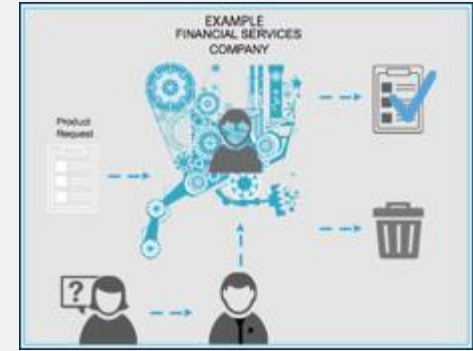


Technologies Powering Digital Transformation

Business Process Management Systems (BPMS) and **Business Rules Management Systems (BRMS)** enable Competitive Advantage

BPMS provides a systematic approach to making an organization's workflow more effective, efficient, and capable of adapting to ever-changing business conditions

BRMS enables organizational policies, and the operational decisions associated with those policies, to be defined, deployed, monitored and maintained separately from core application code



¹Source: Fujita, H., & Lu, J. (2012). *Knowledge-based Systems, Volume(31)*, pp. 1-211.

Vizuri Overview

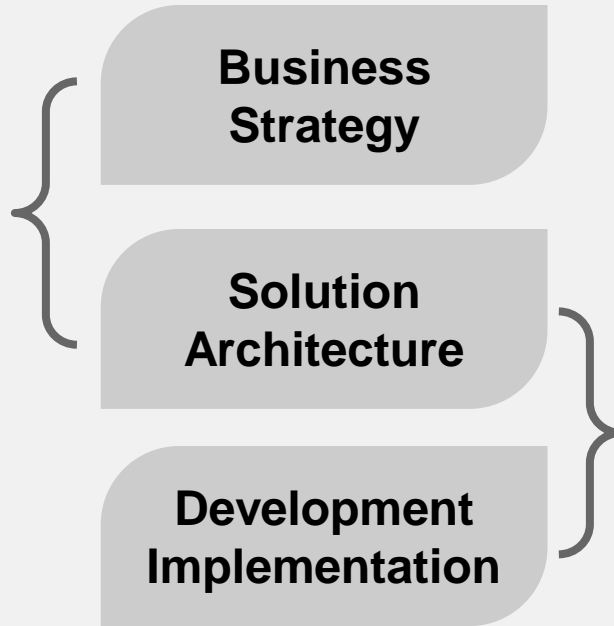
- Expert Java EE & Open Source Solution Provider
- Premier Red Hat Business Partner
- Preferred JBoss Certified Systems Integrator
- 4 Red Hat Innovation Awards
- 5 Time JBoss Middleware Partner of the Year
- Certified Resources
- Sponsor DC JBoss Users Group



Vizuri Core Strength

Bridging Business and Tech

- Identify strategic business drivers
- Understand customer's business
- Evaluate architectural alternatives
- Design solutions using proven, innovative, and adaptable technologies
- Validate designs through iterative prototyping



Building Extensible Solutions

- Reference Architecture
- Continuous Delivery
- Design Patterns
- Performance
- Scalability
- Resiliency

Capturing & Managing Business Logic

David Gaudin, SVP Sales, Signavio

david.gaudin@signavio.com



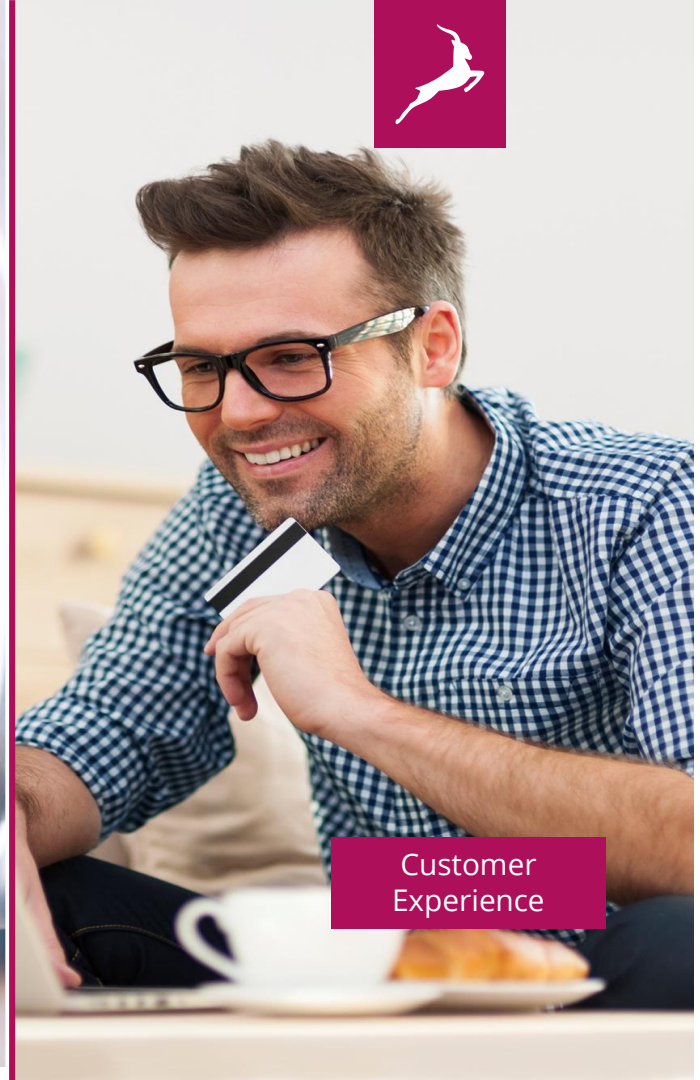
Today's World



Everything is
Constantly
Changing

Technology
Evolution

Customer
Experience



Everything is Pressure Building



Risk & Security



Talent Retention



Regulatory Complexity



The need to pursue a dramatically
new and different way of delivering
value to customers

Business Transformation



Volume

Costs

Complexity

Pace

Struggle to Transform



Aligning new Customer Experiences to Operations

Customer Experience (CX) is king

- Disruptive companies re-define customer experience and shake up entire industries

amazon.com



airbnb

- Better customer experience has become a must-have
E.g. multi-channel commerce, mobile banking, client onboarding

... but implementing it

- Disconnect between front-office and back-office
- Legacy systems & processes
- Many people affected
- Siloed approach
- Misalignment between business & IT



- Unmanageable static documents
(Visio, PowerPoint, Word, Excel)
- Document storage initiatives
(SharePoint, Box, OneDrive)
- Multiple all-day meetings & training sessions
- Uncontrollable volumes of emails
- Post-It notes everywhere
- Tribal knowledge & superheroes prevail



Frequent challenges for BA's and IT



Business Impact

*Traditional
Approach to
Managing Change
as “Initiatives”*

- Time & money wasted
- High complaints
- Poor access to information
- Change initiatives failing
- Rising costs of duplication & re-work
- Knowledge gap between business and IT



How are you keeping up?

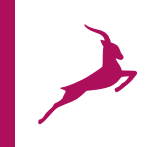




Successful Organizations

- ✓ Business people in the driver seat
- ✓ Align around the customer
- ✓ Get everyone on the same page
- ✓ Build for change
- ✓ Leverage data for process insights
- ✓ ...and keep doing these things faster than the competition.





Co-operators Insurance

“We used Signavio to significantly accelerate, and ensure the success of a major business transformation and system implementation initiative.”

— Jean Francois Gingras,
Director, IT Service
Management

The **Signavio** Business Transformation Suite



- **Signavio Collaboration Hub**
Promotes contribution to and sharing of process knowledge throughout the organization.
- **Signavio Process Manager**
Enables business people to capture, design and improve their business.
- **Signavio Workflow Accelerator**
Automates and speeds up repetitive work, enabling your team to focus on value-added activities.
- **Signavio Process Intelligence**
Provides actionable insight that enables you to make smarter decisions faster.



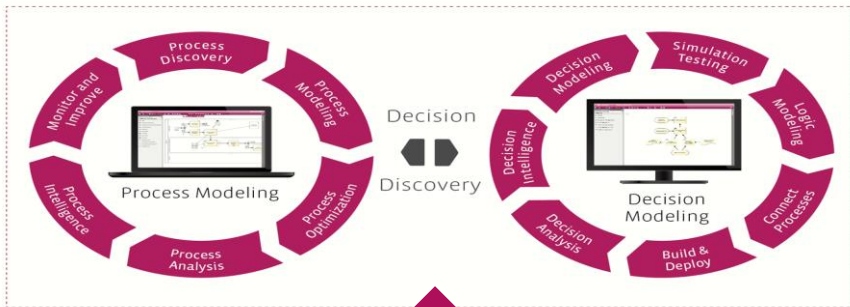
Collaboration:

Transform as
a Team



Business Community

Collaborative Design, Analysis, Validation, Optimization, Governance



IT Community

Develop, Deploy, Run, Monitor

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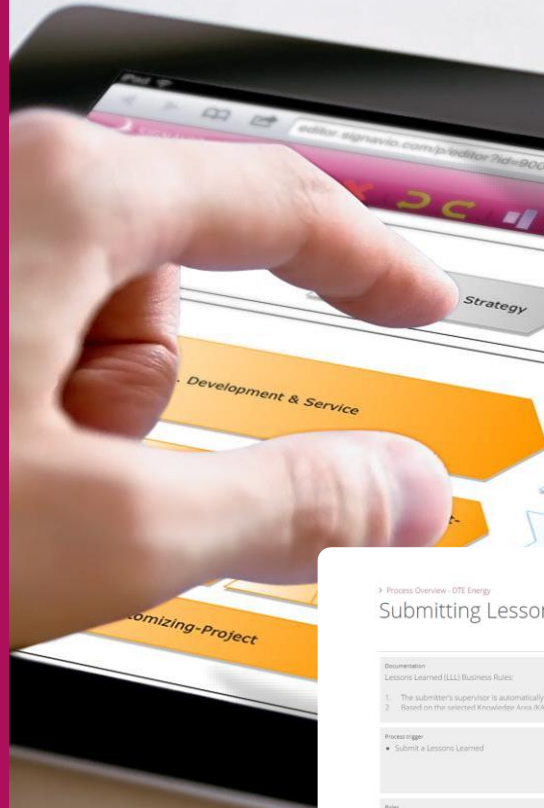
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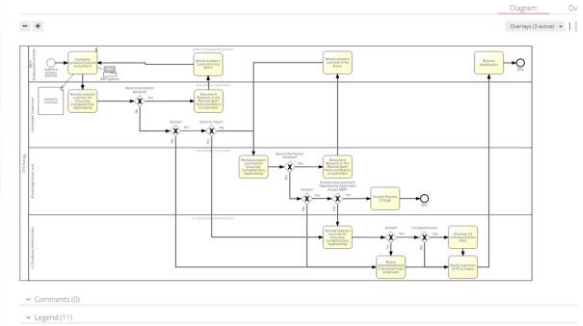
Collaboration Hub



- ✓ Self service portal enabling people to easily find the information they need
- ✓ Provides end to end visibility across roles and departments throughout the enterprise
- ✓ Central point for requesting and managing comments and conversations on improvement
- ✓ Delivers the context, guidance and operating procedures for the tasks performed
- ✓ Ensures everyone is always on the same page and notified about changes



Submitting Lessons Learned Process



Submitting Lessons Learned Process

Documentation		Process level	
Lessons Learned (LL) Business Rules			
<ol style="list-style-type: none">The submitter's supervisor is automatically denoted in the supervisor field which in turn is added to the review/approval workflow.Based on the selected knowledge Area (KAL) the associated KAL reviewer and sponsor the LL.		Process result	
Process trigger		Process result	
<ul style="list-style-type: none">Submit a Lessons Learned	<ul style="list-style-type: none">Complete Lessons Learned entry FormReview Lessons Learned for Accuracy, Completeness, ApplicabilityDocument Reasons in the "Review Notes" Field and Return for Submission	<ul style="list-style-type: none">EndEnd	
Roles	Input/Output documents	Linked documents	
<ul style="list-style-type: none">Immediate SupervisorKnowledge Area LeadLL Database AdministratorMEP Employee/Submitter	<ul style="list-style-type: none">Lessons Learned	<ul style="list-style-type: none">LL Entry CommentsLessons LearnedLessons Learned Detail Reference DE-11000	
SP Availability	SP Cycle Time	SP Cycle Time Ratio (CTR)	
SP Performance	SP Quality		

Comments (0)



Process Manager: An Intuitive BPM & DMN Solution



Home loan: Customer Journey



Personas

Desired


outcome

Emotions


Touchpoints

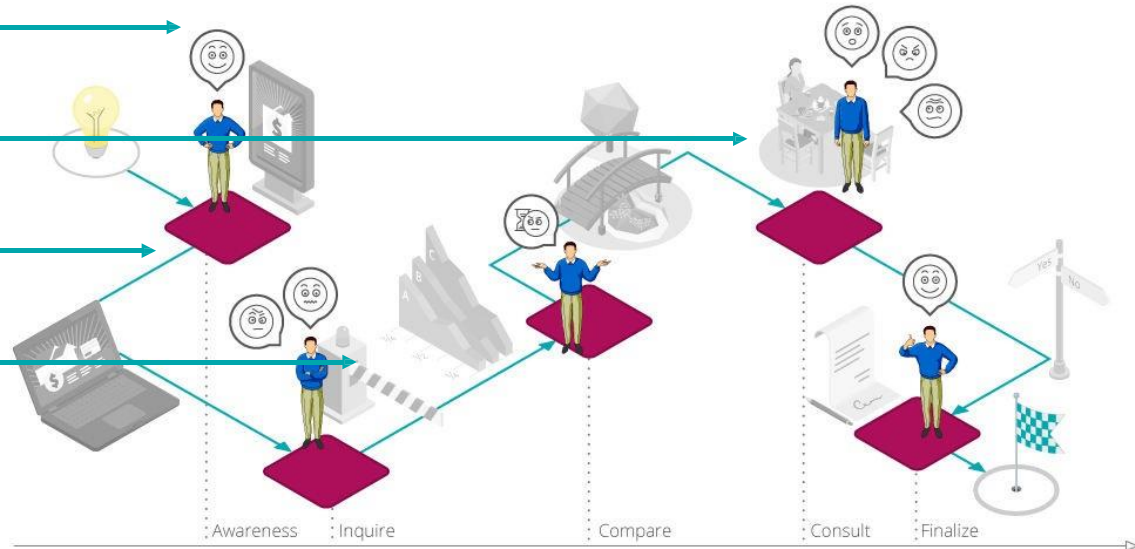
Steps

Moments of

 I am planning to renovate my house, but there is so much to do, that I will need a loan to finance the renovation.



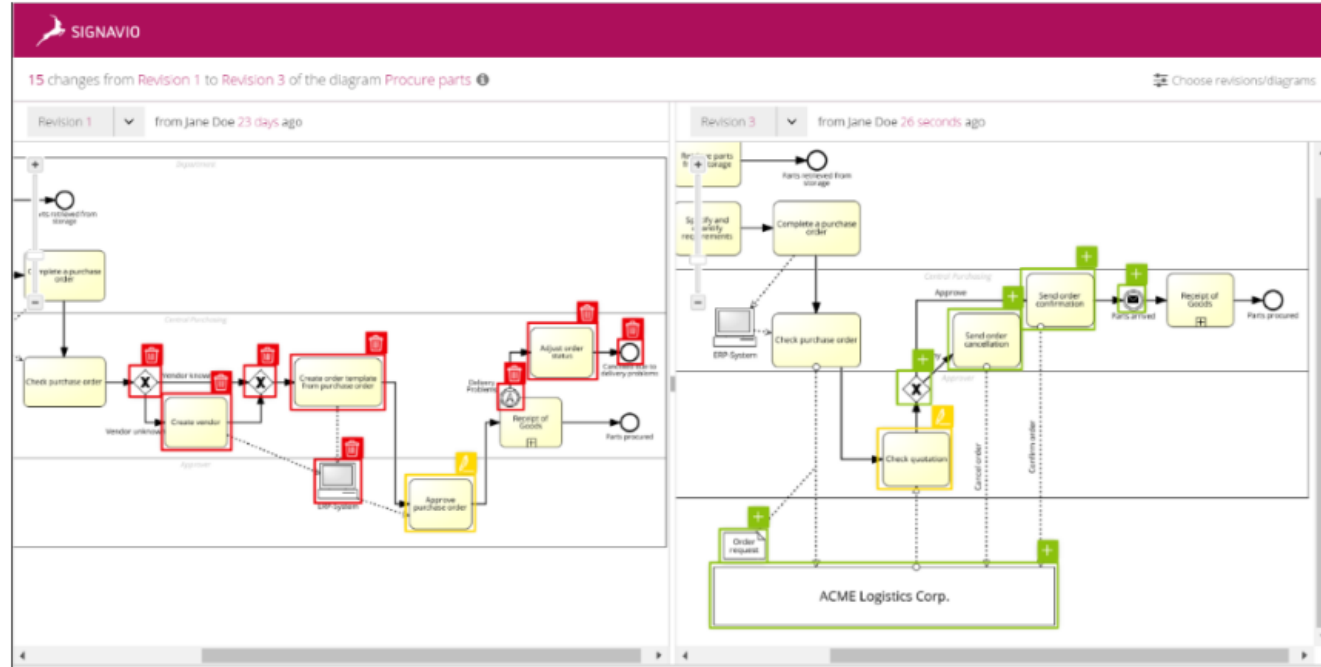
 The customer feels well informed and has closed a loan deal with Superbank.





Process Manager

Visual
Comparison
& Version
Control





ents)

process

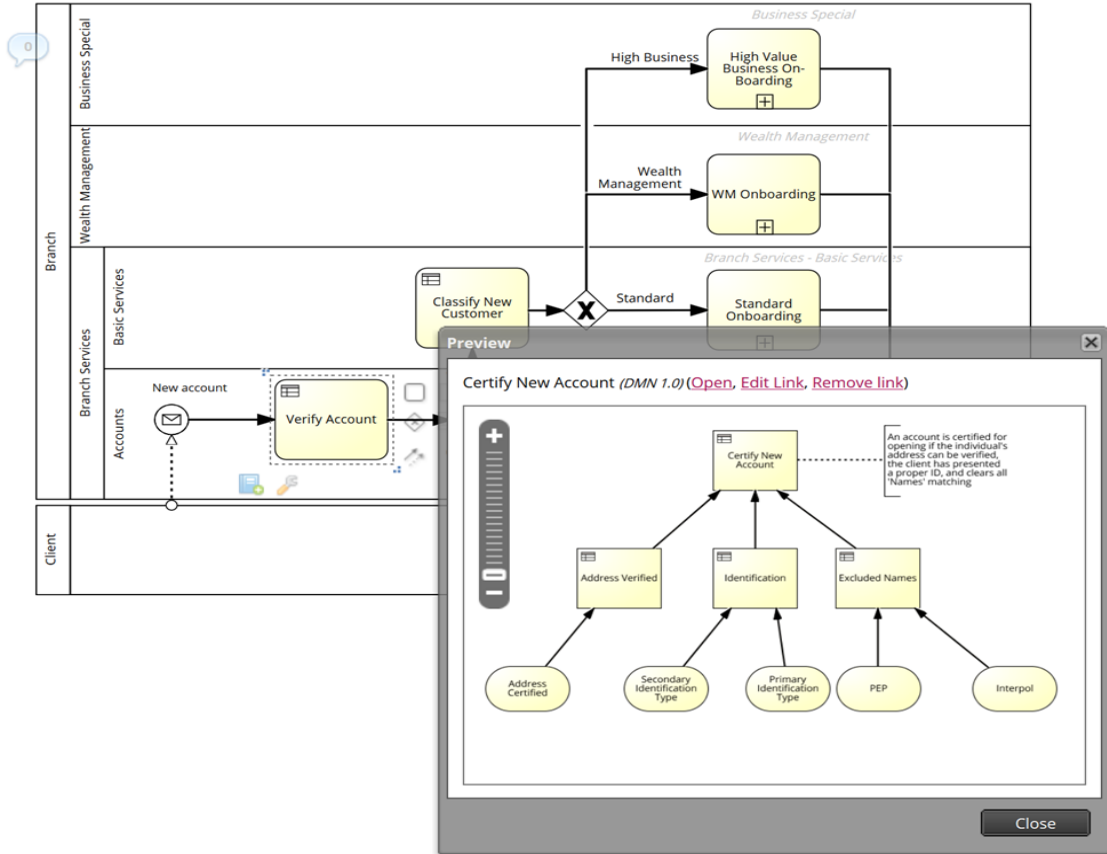
clusive (XOR) gateway

way

w

(indirected)

(unidirectional)



Decision Modeling

determine priority of shipment

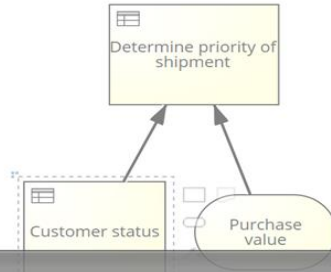


ments)

ource

requirement

requirement



Decision logic: Customer's Status



Decision Table



Literal Expression



Link

Add rule Remove rule Add input Remove column Verify Export					
UC	type of contract	Inputs		Outputs	Annotation
			Cumulative value of annual order	customer's status	
	{Business,Private}		Currency (\$)	{Gold,Silver,Standard}	
1	= Business	≥	\$ 5000	Gold	
2	= Business	<	\$ 5000	Silver	
3	= Private	≥	\$ 4000	Silver	
4	= Private	<	\$ 4000	Standard	
+ Add new row					

Cancel

Apply and close

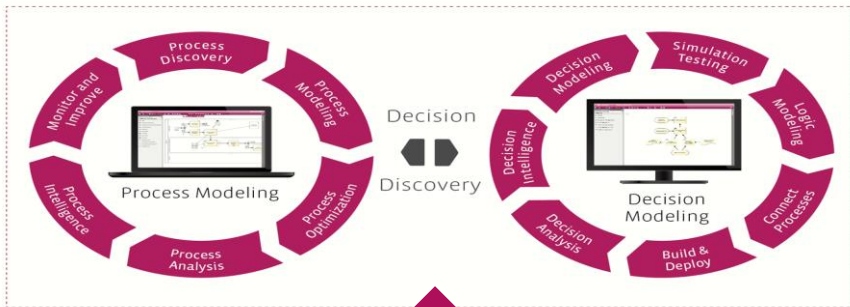


Business Rules & Logic



Business Community

Collaborative Design, Analysis, Validation, Optimization, Governance



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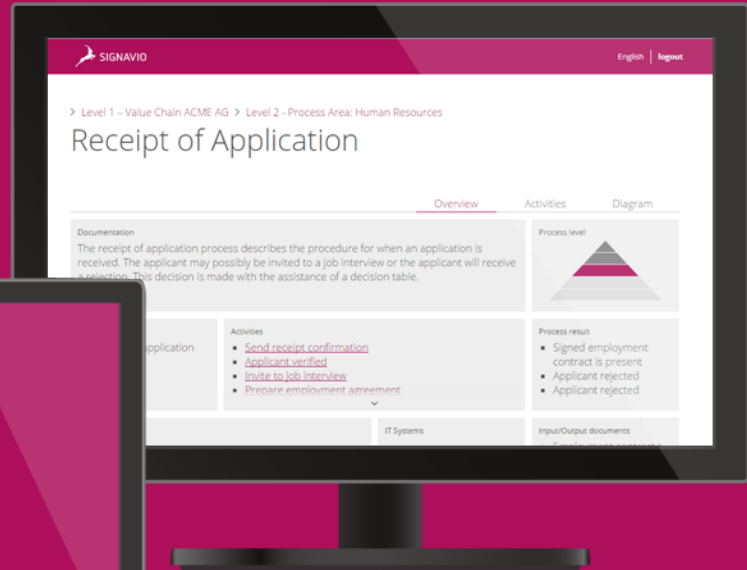


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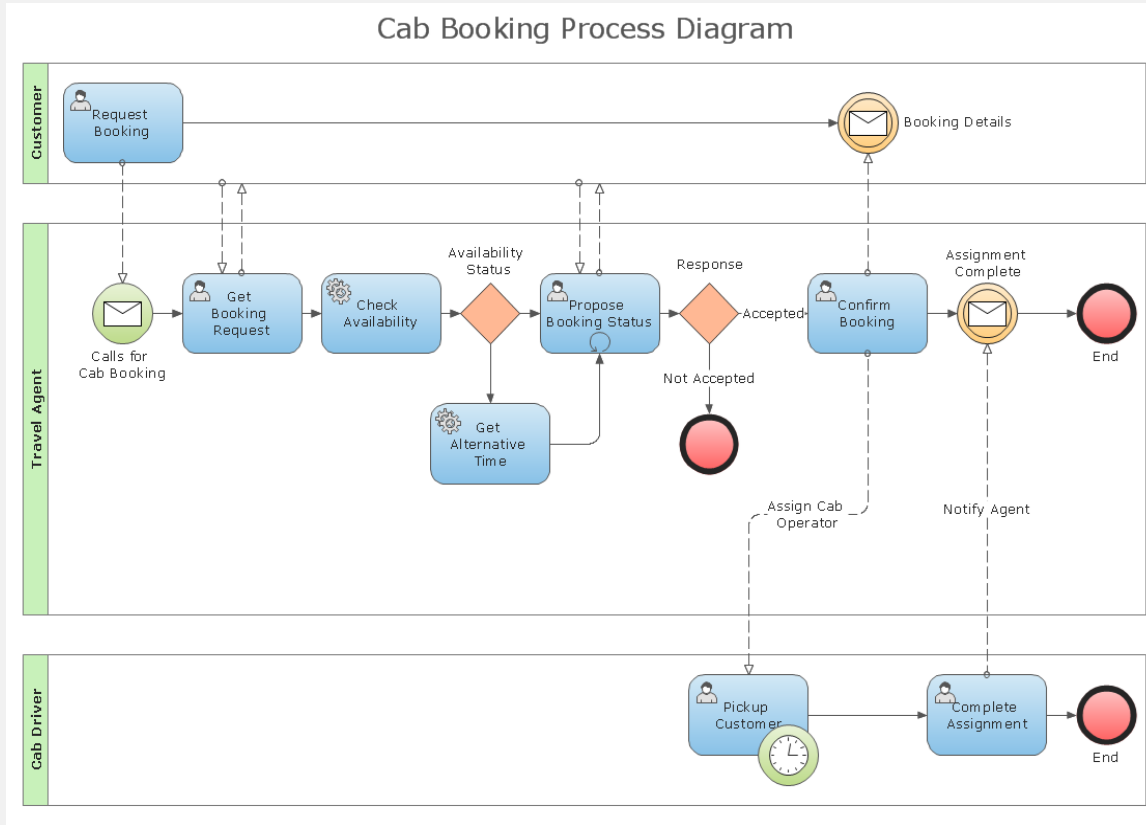


www.signavio.com

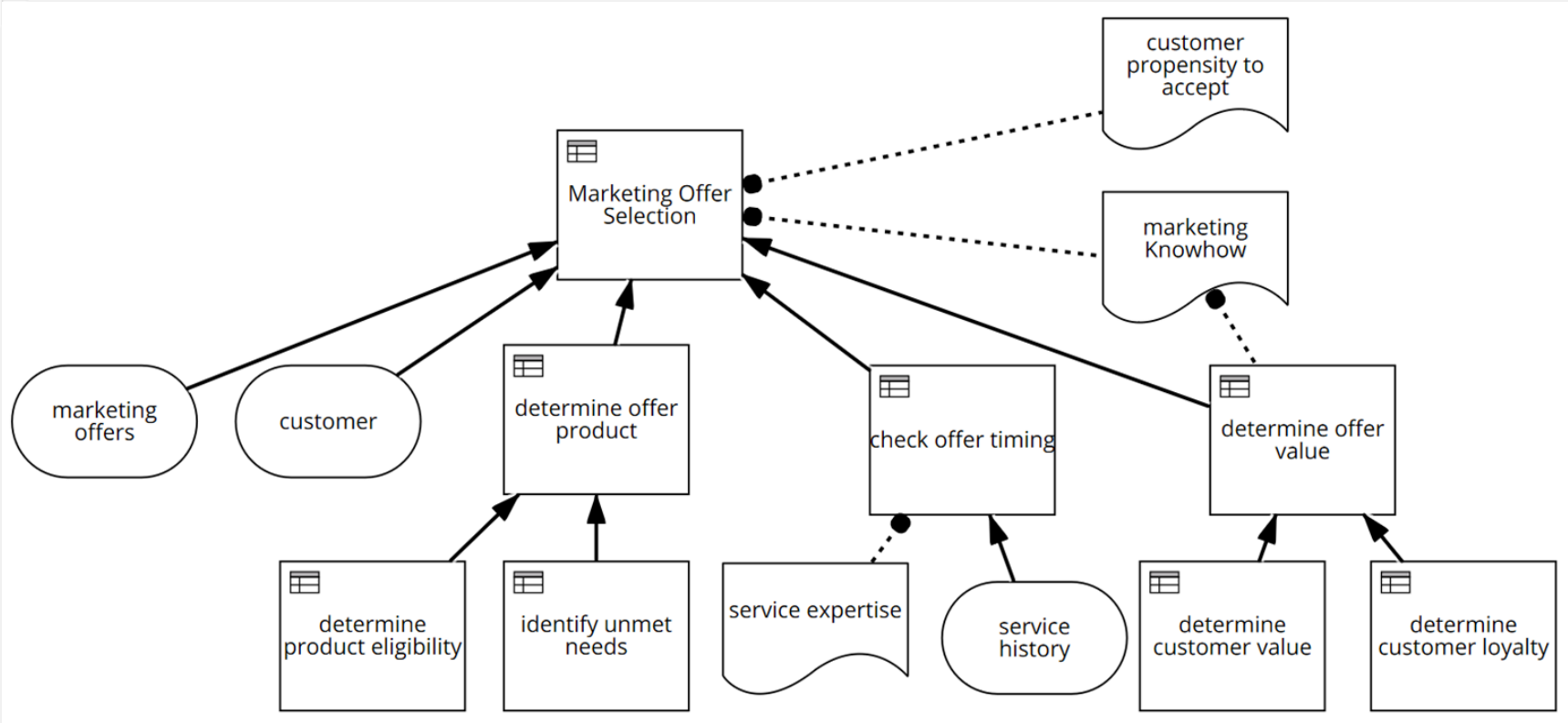
Building Applications from Models

Phil Simpson
Red Hat

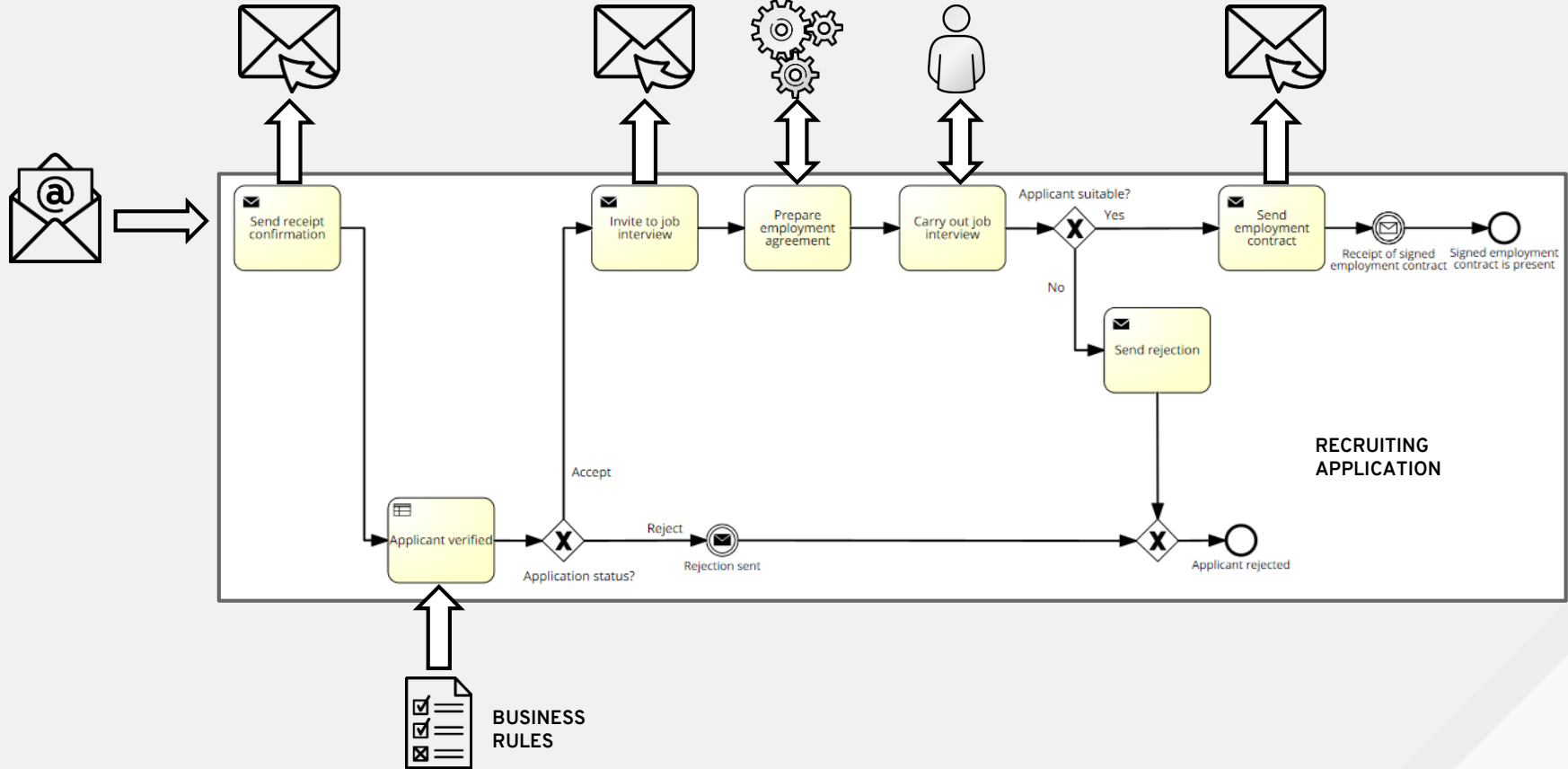
SO YOU HAVE A MODEL, NOW WHAT?



SO YOU HAVE A MODEL, NOW WHAT?



PROCESS-DRIVEN APPLICATIONS



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500**
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~10,500
EMPLOYEES

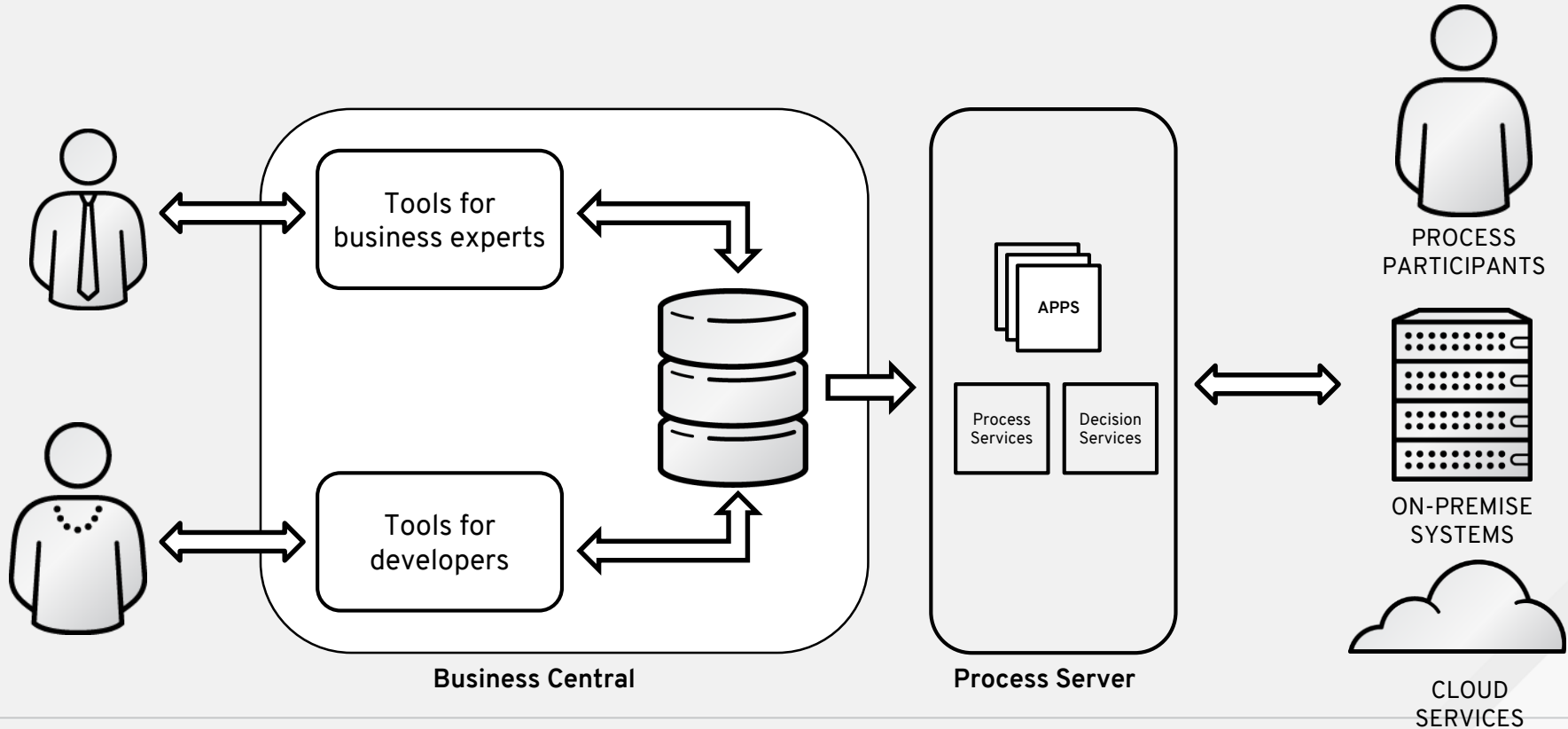
S&P
500
COMPANY

THE FIRST
**\$2
BILLION**
**OPEN
SOURCE
COMPANY**
IN THE WORLD

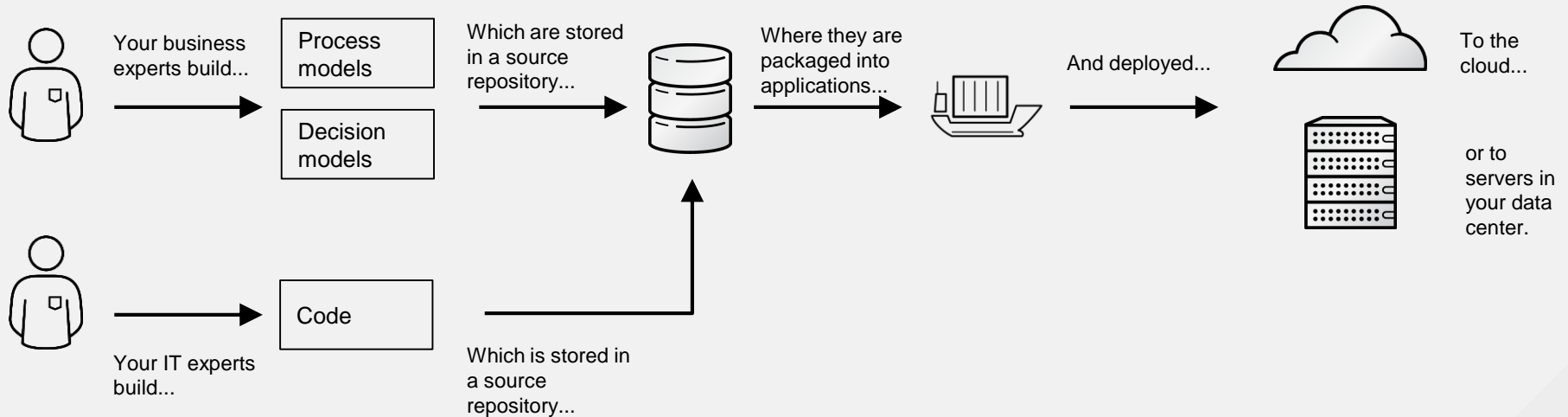
85 **35**
OFFICES COUNTRIES

NYSE
RHT

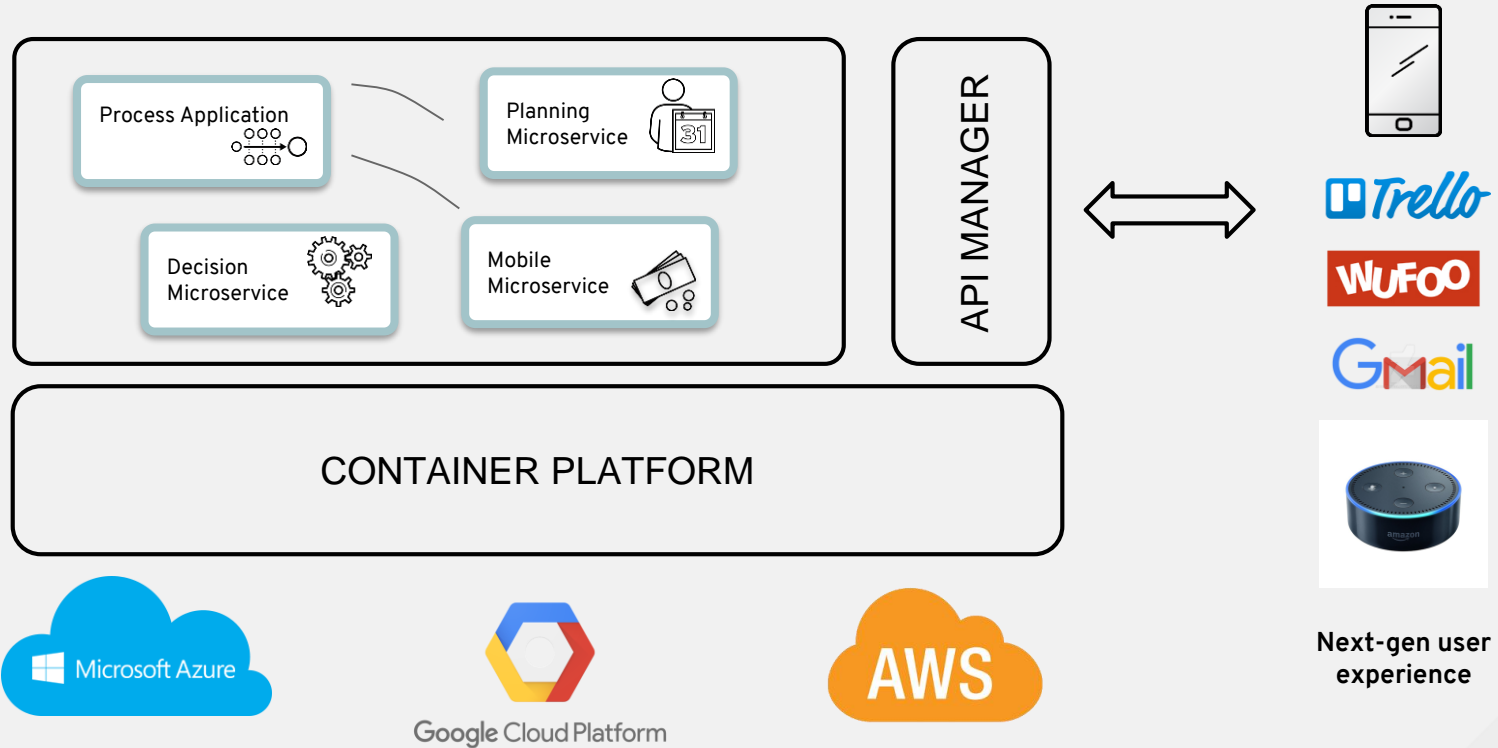
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GOAL: A CLOUD-NATIVE, MICROSERVICES APP



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Designing for the Knowledge Lifecycle

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Presented by: Ben-Johan van der Walt, Joe Dickman



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