

BUSINESS PROCESS EXCELLENCE FOR FINANCIAL SERVICES

Leveraging the latest process excellence tools to increase control, reduce risk and drive growth



Enable high-quality decisions and mitigate operational risk with expert insight to help you to:

- ▶ Engage people at ALL levels of your organization with a progressive new approach to change management (from the creators of the ADKAR model!)
- ▶ Effectively use business process hierarchy tools to predict and ensure optimal business results from BPM and management implementations
- ▶ Leverage the power of data in transforming culture and behaviours
- ▶ Use a Controllorship Management Process to assess compliance and regulatory risks
- ▶ Take advantage of compliance synergies across the enterprise by formulating and designing fully integrated processes
- ▶ Lower the cost of operational risk management with process change and automation

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Exhibitors



"A VERY GOOD EXPERIENCE OVERALL! ALL OF THE IQPC STAFF DID A GREAT JOB!"

JULIAN YBARRA, HEAD OF OPERATIONAL EXCELLENCE, UBS

16 compelling, high impact speakers including:



Brian McGovern
Senior Vice President, Legal Chief Data Officer, Process and Information
American International Group, Inc.



Lesly Regis
AML Compliance Officer
HSBC North America Holdings Inc.



Brian Watson
Sr. Business Partner-Business Process Excellence Office
Federal Reserve Bank of New York



Keven Carpenter
Head of Quality
GE Capital



Leslie Behnke
Vice-President, Process Improvement & Service Quality
TD Canada Trust



Julian Ybarra
US Head of Operational Excellence
UBS



Matthew Morgan
Head of Business Systems and Improvement
Bridgewater Associates



Amy Carroll
Vice President, Operational Risk and Process Management
Janus Capital



Atul Bhatt
Vice President, Business Architecture
Wells Fargo



Sam Chari
Vice President and Head of Operational Risk
AllianceBernstein



Craig Le Clair
Vice President and Principal Analyst
Forrester Research



Danica Natoli
Lean Deployment Leader
Ameriprise Financial Services Inc.

Dear Colleague,

It's been eight years...can you believe it?

Yes, PEX Network's **Business Process Excellence for Financial Services Summit** is on its eighth year! Sometimes, when events have been running that long, they can get a little repetitive, a little redundant, a little stale. So we asked ourselves - and then we asked you - "How can we make this year's event fresh, exciting and inspiring?"

Here is what you had to say:

"I'm overwhelmed to say the least: regulatory compliance processes have added a whole new wave of complexity to my role. I'd really like to hear how other's in similar roles are driving PEX forward while dealing with this new compliance environment."

"I'd like to see global financial institutions showcasing real life - and more importantly SUSTAINED - process improvements that have truly driven breakthrough results."

"Please help me close the gap with my IT department. As a head of process excellence, I constantly struggle with how to align my work with that of IT and the overall business."

"I am struggling to get my organization to truly embrace business process management tools - enterprise wide, not just on a project by project basis."

"I know it's almost a cliché - but I still lack executive endorsement. Surprising given that we are one of the largest banks in the world."

You told us a lot - and we listened. So we are excited to announce this year's BPE for Financial Services forum agenda - promising an inspiring and exciting speaker line-up that will help you make outside-in, customer-centric process excellence a reality for your organization.

Taking place March 11th - 13th in New York City, the conference includes over 20 international experts that will motivate you and help you ensure that your business architecture and business processes work together as key enablers of innovation. Plus, the conference is framed by 3 cutting edge workshops that will help you build line management ownership to drive process transformation efforts.

Business process improvements that are low risk and high impact: Isn't that what every business wants? Whether you are focused on reducing compliance complexities, cost reduction, organizational transformation or revenue growth, this year's **BPE for Financial Services Summit** will provide you with the tools you need to enhance agility and drive breakthrough business performance.

Do not miss this unique opportunity to gain insights from and benchmark with process and operational excellence leaders from around the world!



Leslie Allen

Leslie Allen
Conference Director

"Valuable tools and approaches to increase BPM adoption. Excellent networking opportunities."

Director IT
Architecture, Nationwide
Insurance, Operational
Excellence, UBS

"KEEP UP THE GREAT WORK!"

HEAD OF BPM, FEDERAL
HOME LOAN BANK

"Extremely valuable!"

Vice President, Citigroup

16 compelling, high impact speakers including:



Brian McGovern
Senior Vice President, Legal Chief Data
Officer, Process and Information
American International Group, Inc.



Lesly Regis
AML Compliance Officer
HSBC North America Holdings Inc.



Brian Watson
Sr. Business Partner-Business
Process Excellence Office
Federal Reserve Bank of New York



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Head of Quality
GE Capital



Julian Ybarra
US Head of Operational Excellence
UBS



Matthew Morgan
Head of Business Systems and Improvement
Bridgewater Associates



Amy Carroll
Vice President, Operational Risk and Process
Management
Janus Capital



Atul Bhatt
Vice President, Business Architecture
Wells Fargo



Sam Chari
Vice President and Head of
Operational Risk
AllianceBernstein



Leslie Behnke
Vice-President, Process Improvement &
Service Quality
TD Canada Trust



Danica Natoli
Lean Deployment Leader
Ameriprise Financial Services Inc.



Craig Le Clair
Vice President and Principal Analyst
Forrester Research



Doreen Bentson
Quality Leader
GE Capital

Pre-Conference Workshop Day

Tuesday 11th March 2014

Business Process Excellence for Financial Services will be hosting pre-conference workshops to help you focus on developing key areas of business process excellence to deliver value and ROI for your financial services organization. These sessions will be interactive as the latest ideas and solutions are debated, discussed and work shopped.

10.00 – 10.30

Check In for Workshop Attendees

10.30 – 12.30

WORKSHOP A:

Best Practices Audit: The Why, What and How of Change Management

In a world where change comes fast and frequent, managing changes impacting your organization can be a daunting task. Fortunately, you can capitalize on lessons learned from nearly 3,500 professionals who have come before you. Using the foundation of Prosci's Best Practices in Change Management benchmarking report, we will dive into data from over 15 years of research with leading organizations around the world. This hands-on workshop provides specific models and checklists for managing change to maximize results. How do your change management activities measure up?

Areas to be covered include:

- Why we do change management: Producing bottom-line results by focusing on people
- What a structured approach looks like: Examining the Prosci® ADKAR® Model and 3-Phase Process
- How you measure up: Auditing your changes against the top 7 contributors to success

Tim Creasey, Chief Development Officer, Prosci

Tim Creasey is a dynamic presenter, researcher and thought-leader on managing the people side of projects and initiatives to deliver results and outcomes. His work forms the foundation of the largest body of knowledge in the world on managing the people side of change. Through conference presentation, webinars, tutorials and tools, he has advanced the discipline of change management by moving it out of the "soft and fuzzy" realm toward a structured, rigorous approach for driving benefit realization and value creation on projects. Tim coauthored the book *Change Management: The People Side of Change*, led Prosci's last six benchmarking studies, and was instrumental in the development of Prosci's integrated approach to change management and has recently worked to support leading

organizations in creating change adaptability and capability as a core competency. Tim is Prosci's Chief Development Officer and resides in Boise, ID.

12.30 – 1.00

Networking luncheon for workshop attendees

1.00 – 4.00

WORKSHOP B:

Driving competitive advantage through customer-centric business operations with IBM Smarter Process

On a Smarter Planet, business leaders within the financial services industry are reinventing their operations to be customer-centric with processes that are instant, seamless and insightful with a view to increase the value of every customer interaction. This workshop will provide hands-on experience with IBM Smarter Process Solutions through scenarios and demos that will highlight real-life use cases to illustrate the power of reinventing your business operations to drive better customer engagement.

4.00 – 4.15

Refreshment break

4.15 – 6.15

WORKSHOP C:

Leadership Advancement: Learn Strategic Transformation Key Success Factors, Processes, Procedures

This session explores how you can think like C-level leaders in leading higher level, strategic transformations that are vital to be in place for tactical process improvements to have maximum possible value. Needed transformation planning processes and tools are reviewed and examples given. Forecasting, planning, and execution principles are reviewed. A C-level case study problem will be presented for roundtables discussion and report outs.

Takeaways include:

- Ideas that can be brought to top management, that will expose the presenter as offering value add insights, and wanting to grow;
- Examples of tools for transformation planning;
- A free Strategic Transformation Checklist (self-audit) for all attendees;
- Further idea discussions with the presenter and author, Larry Duckworth, on the 12th;
- Via a cards drawing, an autographed copy of *Primordial Leadership@* ("Like getting a mini-MBA.") will be given away;
- The opportunity to acquire an autographed copy of *Primordial Leadership@*.

Lawrence D. (Larry) Duckworth, CEO-In-Residence, EGL Holdings, Inc.

Larry Duckworth is a regular, highly regarded transformation and change management presenter for PEX Network, and is the author of the "mini-MBA" book *Primordial Leadership@*. Mr. Duckworth brings both professional leadership and performance improvement expertises and experiences to *BusinessExcel, LLC* and to *EGL Holdings* as a *Business Excellence consultant and CEO-In-Residence* (www.eglholdings.com). Mr. Duckworth has more than 25 years of experience leading fast growth, customer-focused public, private, domestic and global products and services companies in multiple industries. He has performed roles in Manufacturing, Supply Chain, Construction, Retail, Services, Transportation, Computers and Software, Financial Services, Government, and Education. He has led both fast growth companies and turn-arounds both domestically and internationally. Mr. Duckworth has been President of The Quality Group, a leading Lean Six Sigma education company. He has a Bachelors Degree in Economics with Honors Convocation and an MBA in Marketing and Finance; and is an inductee to the Beta Gamma Sigma national business honorary, the Phi Beta Kappa of business schools. He served three years in the U.S. Army, stationed with NATO's Allied Forces Central Europe command in the Netherlands, and was awarded the Joint Services Commendation Medal "for extremely meritorious service."

Conference Day One Wednesday 12th March 2014

7.30 – 8.30

Check In

8.30 – 8.45

Chairman's Opening Address

8.45 – 9.30

CASE STUDY

Reinventing business operations for superior customer engagement with IBM Smarter Process

As the adoption of disruptive technologies like Mobile, Big Data, Cloud and Social continue to transform the financial services industry, leading organizations are driving competitive advantage through improved business operations. This session will explore how IBM Smarter Process Solutions can help companies reinvent business operations to be customer-centric and build customer loyalty through operational excellence.

9.30 – 10.15

Advancing E2E Thinking

- Establishing a Quality Delivery Model focusing on speed, accuracy, cost and risk avoidance
- Building the Foundation for E2E Thinking: getting traction, sustaining the benefits
- Shifting the organization and prioritizing initiatives with an E2E perspective
- The E2E Cultural Journey

Leslie Behnke

Vice-President, Process Improvement & Service Quality

TD Canada Trust

10.15 – 10.45

Networking Break

10.45 – 11.30

CASE STUDY

Rapid process improvement: Empowering employee collaboration and workflow at AIG

- Streamlining processes within legal and all of the departments, business units, including external vendors that interact with them
- Achieving complete process transparency, reducing the time required to get work complete and delivering dashboard metrics for leaders
- Delivering automated processes that improve resource utilization, enhance efficiency and effect change within 1-3 week without requiring IT development time (a significant cycle time reduction that could potentially take 6 months, or any expensive alternative investment)
- Tangible results: streamlined and automated a request process that resulted in a simplified process with five fewer steps, elimination of email traffic, and creation of a central repository for collaboration. Additionally, a potential delay of 2 weeks is avoided through elimination of the legacy process

Brian McGovern

Senior Vice President, Legal Chief Data Officer, Process and Information

American International Group, Inc.

Nancy Scott

Vice President, Process Excellence, Global Legal Compliance, Regulatory and Government Affairs

American International Group, Inc

11.30 – 12.15

Navigating the "New BPM" Landscape: Apps That Tame Business Process and Empower Knowledge Workers

Business process management (BPM) is a top initiative at most global companies. Unfortunately, it is nearly impossible to "tame" the chaos because of a lack of visibility and use of antiquated systems. Smart Process Apps are the "new" tools for the 21st century knowledge worker because of their flexibility, ease of use and low deployment costs. This session will highlight how the right tools allow knowledge workers to focus on "process results" rather than difficult technology. This session will highlight:

- The simplicity of creating business Apps and how it facilitates a rapid development and "learn by doing" mentality
- The importance of delivering world-class customer value that supports all points of interactions between knowledge workers
- How App Builder clients have strategically integrated existing processes into simplified process structure using UTBMS phases for litigation and compliance/transactions
- The difference between a standard development toolset and custom development through IT
- The strategic value and ROI of moving process initiation and approval out of email to gain increased transparency

Paul Zengilowski

Onit

12.15 – 1.15

Networking Lunch

Continued Overleaf

Conference Day One Wednesday 12th March 2014 Continued...

1.15 – 2.00

CASE STUDY

Achieving performance transformation during challenging times: Why it's all about balance

- Securing engagement from the top down: engaging employees from the executive level to the front line
- Process Governance: Defining the responsibilities of process owners
- Identify the toolsets you need to create the infrastructure you need to sustain continuous improvement
- Leveraging the power of data in transforming culture and behaviour
- Develop a more self sufficient operational excellence infrastructure through training, new systems and ongoing management
- Compliance: Making sure that you do compliance with process in mind

Keven Carpenter

Quality Leader

GE Capital

Doreen Bentson

Quality Leader

GE Capital

2.00 – 2.45

CASE STUDY

Business Process Management and Business Architecture: Viewing process from a business perspective

Business Architecture (BA) is no longer just an emerging discipline or an “interesting concept.” It is increasingly being leveraged by enterprises to provide tangible value. However, the field itself is far from being mature, unlike Business Process Management (BPM) which has evolved into a robust discipline and practice. BPM’s main focus, however, has been on the evaluation and use of the vendor tools for accomplishing its various aspects. The “business” aspects of BPM often get overshadowed or neglected, resulting in solutions to business problems that are driven primarily by technology tools.

This presentation will examine the relationship between BA and BPM, particularly how BA presents a valuable opportunity to view processes, first and foremost, from their “business” perspective. Given that business processes (and rules, decisions, events, etc.) are key components of business, one of the strategies at Wells Fargo is to position BA as the overarching discipline that includes the existing efforts in BPM and other related areas, especially the “business” aspects of those areas. And as one of the starting steps in this pragmatic approach, Wells Fargo are establishing and socializing clear statements on the following four key aspects of BA: Definition and Components, Value Proposition, Key Activities and Deliverables, Community of Practice.

Atul Bhatt

Vice President, Systems Architect

Wells Fargo

2.45 – 3.15

TECHNOLOGY TEST DRIVES

Five in five – Five minutes insights from five different experts!

Take advantage of this structured learning opportunity to hear from the technology, services and solutions experts that have the answers to your specific process improvement implementation or integration challenges. You will have the opportunity to hand-pick from our leading-edge services and

solution providers which presentations you wish to attend - then you'll have 5 minutes with up to 5 providers to hear directly from them on how they can support your business challenges.

This unique session allows you to find out - within just 5 minutes – whether your company can benefit from a future business relationship with a specific provider.

- Process mapping
- Workflow management software
- Business Activity Monitoring (BAM)
- Cloud based BPM
- Document Management
- Case management
- Process modelling
- Data visualisation/dashboarding
- Business/operational Intelligence
- Case management
- Project and portfolio management
- Social BPM

3.15 – 3:45

Networking Break

3.45 – 4.30

True excellence: Managing change to maximize results

Pop quiz: What is the benefit created by a perfectly optimized process that no one follows? Answer: Not enough. Project results and outcomes rely on more than implementation. The landscape of operational excellence is littered with great ideas that did not translate into business benefits. The primary offender: Not gaining sufficient employee adoption and usage. True excellence requires both a well-designed and delivered solution AND employee adoption and usage of that solution. Managing change is more than just communication and training plans; it is a structured process (complete with deliverables and milestones) that supports operational excellence by engaging the true unit of change – the individual.

- Identify the contribution of the “people side” to project results
- Examine elements of successful individual change
- Integrate change management into a project
- Establish best practices for managing change

Tim Creasey

Chief Development Officer

Prosci

4.30

The Ten Dimensions of Business Agility: Enabling Bottom-Up Decisions in a World of Rapid Change

There has been over 70% turnover of Fortune’s global 500 companies over the past 10 years. Companies dropping off the list were unable to manage an accelerating pace of change. Business agility is the umbrella attribute that enables companies to thrive amidst ongoing change in customer, competitor, and technology change. We identified ten dimensions of business agility. Two relate to market agility, that is, responding to changes in customers. Three address organizational agility, or how people and culture can make an organization more agile. And five address process agility, which define the traditional information-technology elements of agility. Taken together, these ten dimensions comprise the qualities that make agile companies faster and more responsive to both external and internal forces of change. This session presents the results of a Forrester survey of 300 enterprise companies and explains:

- What is agility and why does it matter?
- Why Agile Enterprises Excel In Ten Dimensions (Case Studies)
- Agility Scores For High And Low Performers In Financial Services Industry
- How To Build Your Agility Roadmap

Craig Le Clair

Vice President and Principal Analyst

Forrester Research

5.15

Chairman’s Summary and Close of Day One

Conference Day Two Thursday 13th March 2014

8.00 – 8.30

Check In

8.30 – 8.45

Chairperson's welcome and recap of Day One

8.45 – 9.30

Making BPM success happen: Aligning your strategic objectives with your business' tactical demands

- Selling the idea: Why is getting buy-in into BPM such a challenge?
- Securing the financial support you need by demonstrating that BPM is a key driver for building better business capabilities
- Selecting the vendor
 - Reducing BPM implementation costs by developing a comprehensive requirements strategy
 - Creating a checklist to ensure your requirements are fit-for-purpose for the project you have in mind
- Structuring the BPM support and governance model to ensure sustainability and enhance value
- Application delivery: How does BPM change the development lifecycle (skill sets, requirements, time commitment, administration, design shifts)?

Amy Carroll

Vice President, Operational Risk and Process Management

Janus Capital

9.30 – 10.15

FRBNY CASE STUDY

Driving business process excellence in a mission driven organization: The Federal Reserve Bank of NY story

- The evolution of BPE at FRBNY: From a group level grass roots initiative to a bank wide effort
- Our mission and BPE: How FRBNY is leveraging BPE to support its primary objectives of:
 - Contributing to the development of monetary policy and its execution
 - Supporting financial stability
 - Providing safe and efficient financial services
- Supporting our Financial Supervision Mandate: Managing competing priorities, driving process ownership and using rapid improvement events in an evolving regulatory environment
- Beyond 'Process' – from BPE to BE: Driving business excellence through strategic planning and operating model development
- Change management through table top simulations: Budget process re-engineering
- BPM Toolset: Piloting BPM solutions to drive efficiency and effectiveness

Brian Watson

Sr. Business Partner-Business Process Excellence Office

Federal Reserve Bank of New York

10.15 – 10.45

Networking Break

10.45 – 11.30

Business transformation using a Component Process Hierarchy: Identifying cost savings while aggressively improving the business model

- Understanding the current state of services performed by an organization to quickly make cost saving recommendations
- How to most efficiently and effectively leverage business process hierarchy tools to predict and ensure optimal business results from business process improvement and management implementations
- How to take your entire company and identify its business process components to isolate for strategic , control and execute activities

Julian Ybarra

US Head of Operational Excellence

UBS

11.30 – 12.15

End-to-End Processes: Deutsche Bank's Drive to Transform Its Operations

- Embarking on the journey to build an Enterprise Process Model (EPM)
- Conducting Process Modeling across the EPM
- Using an innovative approach to validate the model and drive cultural change
- Using the model and its attributes to identify areas of improvement for the Account & Report enterprise process group
- Continuing the journey to use the EPM and new ways of working to support real change across the organization

Stewart Miller

Vice-President, Regional Lead (Americas), Center for Process Governance and Improvement,

Deutsche Bank

Jennifer Jillson

Vice-President, Center for Process Governance and Improvement

Deutsche Bank

12.15 – 1.15

Networking Lunch

1.15 – 2.00

Implementing a new process model to connect people, processes, and technology

Bridgewater Associates has been consolidating very rapid growth, resulting in inconsistent processes and unpredictable operational delivery. This presentation will share (1) how they managed change by engaging people; (2) the approach they used to model processes, including the American Productivity and Quality Center (APQC) Process Classification Framework (PCF), and (3) the technology architecture they designed to provide a navigable interface, document metadata, security, and dynamic metrics reporting.

Continued Overleaf

Conference Day Two Thursday 13th March 2014 Continued...

They undertook a massive project to build a single framework that includes document control standards from ISO 9001 and a process hierarchy to connect ~1,000 procedures to a single 3-step metaprocess. They revised their procedures from narrative, text-based formats to swim-lane process flows to improve efficiency, compliance, and the process mindset of our team. The project represents a massive change in culture and mindset for their body of process owners and users. The new system provides a single point of control for all documents; enforces update, compliance, and review; and integrates metrics for automated reporting of KPIs and process parameters.

This session will provide:

- An overview to process modeling that simultaneously serves two audiences: process architects and users
- An understanding of how to engage a wide variety of people at different levels of the organization and a solid change management approach
- An overview of how to leverage simple technology applications to provide support to document control and dynamic metrics reporting

Matthew Morgan

Head of Business Systems and Improvement

Bridgewater Associates

2.00 – 2.45

BPM CASE STUDY

Using BPM to meet the execution challenge for Risk Assessment & Mitigation

The Controllershship Management Process (CMP) Model provides the means to identify and mitigate risks in any process while helping to drive a compliance culture and address simple or complex process problems through the use of Process Management, Quality Engineering and Six Sigma. The goal is to meet any regulatory mandate, while striving to be "best in class".

In this session, Lesly Regis will discuss a process centric approach to risk assessment and mitigation including how the CMP model can be used to:

- Provide solutions to a wide variety of regulatory and audit findings issues
- Address compliance and regulatory risks by disaggregating the process steps through 'end to end' process mapping and analyzing the controls for improvement and mitigation of risks
- Take pre-emptive actions to address control gaps and high risk findings in the identification and analysis phases
- Share some illustrative examples of use across seven processes ranging from Currency Transactions Reporting (CTR) to High Value Payments (HPV)

Lesly Regis

AML Compliance Officer

HSBC North America Holdings Inc.

2.45 – 3.00

Networking Break

3.00 – 3.45

Reducing operational risk: Implementing an effective risk framework through quantitative analysis, qualitative assessment, process improvement and automation

- **Identifying risk:** Processing information to identify risk challenges
- **Monitoring risk:** Developing and communicating risk assessments
- **Managing risk:** Partnering with the business to improve risk profile

Sam Chari

Vice President and Head of Operational Risk

AllianceBernstein

3.45 – 4.30

Talent development: A path for growing your team

- Sustaining process improvement – a path to growing Master Black Belts internally
- Creating a culture change with continuous improvement: growth and development for EVERYONE in the organization
- Career choices: how does one know if a Green Belt or Black Belt role is right for them?

Danica Natoli

Lean Deployment Leader

Ameriprise Financial

4.30

Chairman's Summary and Conference Closing Remarks



Website: www.processexcellencenetwork.com

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Business Process Excellence for Financial Services is attended by senior officials and decision-makers from industry, bringing together buyers and suppliers in one location. Focused and high-level, the event will be an excellent platform to initiate new business relationships. With tailored networking, sponsors can achieve the face-to-face contact that overcrowded trade shows cannot deliver. Exhibiting and Sponsorship options are extensive, and packages can be tailor-made to suit your individual company's needs. Most packages include complimentary entry passes, targeted marketing to industry officials and executives, and bespoke networking opportunities.

Other features of sponsorship include:

- ▶ Prominent exhibition space in the main conference networking area
- ▶ Participation in comprehensive pre-event marketing campaigns
- ▶ Tailored marketing strategies to suit your organisation's size, capabilities and individual requirement

For more information and to discuss the right opportunity, contact us on +44 (0)207 368 9300 or sponsorship@iqpc.co.uk

ABOUT THE EVENT

PAST ATTENDEES HAVE INCLUDED:

Head of the Transformation Management Office
 VP Business Integrity
 Vice President Global Operations
 Real Estate Corporate Director
 Executive Vice President
 Vice President & Chief Process Officer
 VP Operations
 Senior Director, Finance
 Analyst
 Account Vice President
 SVP, Finance Process Reengineering
 Head of Process Excellence and Risk
 Vice President Business Process Improvement
 Vice President
 Head of Lean Transformation
 Managing Director
 Senior Vice President
 Head of Process Engineering - Commercial Loan Operations
 Vice President, Organisational Excellence Manager
 VP Strategic Initiatives
 Managing Director - Retail banking
 SVP, Enterprise Solutions & Services Division
 Managing Director Operational Excellence
 Vice president
 VP, Finance Engineering
 Director
 Vice President Consumer Banking and Lending
 Vice President Business Transformation
 Director - Process Improvement Program
 Head of Business Process Management
 Vice President, IT Security
 First Level Officer Business Process Excellence
 Vice President - Asset Management
 Senior Vice President, Program Management & Business Architecture
 VP & Research Director
 Head of US Insurance Six Sigma
 Vice President
 SVP Operations & Business Excellence
 Head of BPM Centre of Excellence
 Asst VP Business Process Improvement
 Business Leader, Global Business Process Excellence
 Process Improvement Leader - Group Insurance
 Associate Vice President, Business Excellence
 Assistant Vice President, Business Process Improvement
 Vice President, Process Excellence
 VP, Business Process Officer
 Head of Risk Centralized Operations
 Senior Vice President, Enterprise Business Process Services
 Marketing Operations And Process Improvement Manager
 Vice President Deposit Operations
 VP - Business Excellence Program Lead
 SVP, Head of Business Excellence
 SVP Business Process Management
 Director
 Vice President - Quality
 Operational Excellence - US Leader
 Manager, Business Transformation
 President, Continuous Improvement
 Senior Vice President Enterprise Architecture

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Onit was formed by legal software industry experts Eric M. Elfman and Eric A. Smith, co-founders of Datacert, a leading provider of enterprise spend management software. Launched in early 2010, Onit deploys Smart Process Apps to simplify business process automation and improve business productivity across all departments and industries. The Onit App Builder allows business users to drive efficiency and productivity by combining business process management, project management and information management into one easy to use tool so the user can create their own Onit Apps without having to rely on IT for support. Businesses have processes for everything – whether it's hiring a vendor or law firm, terminating an employee, submitting a contract for review, requesting a trademark request, obtaining an NDA, etc. Most of these processes are manual, paper intensive and cumbersome. With Onit Apps, processes are automated in a few clicks, responsible parties are notified immediately, and data collection is centralized. Onit doesn't require any software to download or resources from IT.

EXHIBITORS



www.activeops.com

Active Operations Management is an innovative approach to operations management, focusing front-line managers and their staff on the achievement of quality and service levels at the optimum cost. AOM transforms the typical top-down, data-driven, command-and-control management style into a collaborative, method-driven, bottom-up culture, where good decisions are made daily at the heart of the operation. The AOM Method empowers managers to drive performance improvements and is a firm foundation for other business improvement programs. AOM Skills equip managers with the relevant competencies and behaviors to actively manage their staff at an individual level, make better informed decisions, and provide a framework for effective communication and feedback. AOM Tools convert data into information and, together with the AOM Method, provide skilled managers with the intelligence and ability to make confident decisions. Clients achieve a minimum 10% productivity improvement within 12 months guaranteed!



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iGrafX process management and analysis solutions empower organizations to achieve maximum performance. iGrafX captures and communicates the alignment of strategy, people, processes and technology, and unites the entire organization around delivering business value. iGrafX delivers strategic and operational decision support to enable our customers to become and remain world class competitors.



Signavio offers a web-based solution for modeling business processes using BPMN 2.0. Besides professional process modeling, the Signavio Process Portal offers organizations the ability to include all process participants in process design and optimization. Using the Signavio's Process Editor QuickModel (spreadsheet like process capture and design) functionality, even colleagues without experience in BPMN 2.0 can participate in modeling business processes. Signavio is the pioneer in collaborative process design. Thanks to the company's Software as a Service Edition you can start with professional business process management right away, without having to install anything.



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Appian's market leading Business Process Management (BPM) Suite seamlessly integrates work automation with native mobile and social capabilities. All the data, all the processes, all the documents and all the collaborations – in one environment, on any device, through a simple social interface. The Appian BPM Suite is available on-premise and in the cloud, with complete portability. More than 3.5 million users, from Fortune 100 companies to the mid-market and small businesses worldwide, trust Appian to power their critical business processes.



DST is focused on helping organizations deliver the outcomes their customer deserve and the results their business demands. We do this by enhancing an organization's work experience and processes to better connect with and serve their customers. Through our combination of process expertise, industry knowledge and enabling software, we can help you transform your business processes to deliver superior customer experiences, increase efficiency, reduce risk and increase operational visibility. Organizations worldwide use AWD, our intelligent business process and case management application, to align people, processes and technology to execute intelligent, effective operations. AWD provides ONE platform that supports the different process styles and personas that exist within and outside the walls of your organization.



MatsSoft is an innovative, independent software company with a passion for business simplification and improving customer experience. Our iPBM platform "MATS" empowers business people to create and continuously improve customer-centric, agile business solutions. MATS transforms how business processes are built, used and measured; connecting people with processes for a richer customer experience and better business outcomes. Established in 2007, we now serve customers throughout the world from our offices in UK and USA, and via our growing network of alliance partners.

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