



Business Agility in the Insurance Industry Workshop

From Fragile To Agile: SOA, Business Modeling & Architecture-Driven Modernization in the Insurance Industry

February 11-13, 2008
Stamford, CT

[REGISTRATION](#)

[HOTEL INFORMATION](#)

[DEMONSTRATIONS](#)

[INDEX](#)

Agenda

Monday, February 11, 2008

“Model Driven Architecture – the Foundation of Business Agility”

09:00-9:15 Welcome and Opening Remarks

Dr. Richard Soley, CEO and Chairman, Object Management Group

Why OMG is involved in the Insurance domain and what value it brings to the industry.

Workshop Agenda Review

Dr. Harsh Sharma, OMG Service Oriented Architecture SIG Co-Chair

09:15-10:15 Keynote Presentation: Business Agility in Insurance

James Bisker, Global Insurance Industry Leader for IBM Institute for Business Value

What does Business Agility mean to an Insurance business, what is driving it, what is the “Secret Sauce”? Can standards help?

10:15-10:30 Morning Refreshments

10:30-11:15 Update on OMG’s Insurance Working Group Activity

Harsh Sharma, OMG SOA SIG Co-Chair & Gail Austin, Gail Austin Consulting LLC

Summary of Mission, standards in development including the P&C Business Glossary and Information Models in development as well as proposed P&C Business Services Request for Proposal

11:15-12:00 Update on OMG’s Financial Services Standards

Mark Eisner, CTO, Firestar Software - Co-Chair, OMG Finance Domain Task Force

A debrief on OMG financial services standards pertinent to the Insurance Industry (e.g., Payments Processing.)

12:00-13:00 Lunch

“Modeling as the ‘DNA’ of Business Agility”

13:00-13:45 **OMG’s Model Driven Architecture (MDA) and Why It Matters to Insurance**

Fred Waskiewicz, Director of Standards, OMG

What is MDA, what Business and IT challenges does it address, summary of core MDA standards, Myths and Facts about MDA, who is using it and MDA Maturity Curve.

13:45-14:30 **Creating Model Driven SOA Insurance Solutions using Industry Standards**

Sridhar Iyengar, Distinguished Engineer, IBM

Creating industry specific business solutions in a repeatable manner has been a significant challenge in our industry. This session covers how Modeling & SOA standards from OMG, W3C and OASIS are at the core of tools and methods used by IBM and its customers to create industry specific SOA Solutions. These teams use and extend the tools & methods that make up the IBM Rational Software Delivery Platform to create software assets (Modeling Frameworks, Patterns and Transformations). These assets lend themselves not only to continuous refinements but also delivery of the final business solution. Using examples from Insurance and Retail Industries, the presentation shows a pragmatic use of both architectural frameworks: MDA and SOA. Standards covered in this session and include UML, MOF, XMI, RAS, SPEM, BPMN, SCA, SDO and BPEL in the context of building a SOA Solution.

14:30-14:45 Afternoon Refreshments

14:45-15:30 **Case Study: MDA as the Backbone for Insurance Information Management**

Pete Rivett, CTO, Adaptive

This session will present how several of OMG’s MDA-based standards are being used at Insurance customers as the basis for an integrated information and governance architecture, covering the Business Context (Business Motivation and Business Process Definition) , Governance Workflow, Reference Data Model (UML), Business Vocabulary in addition to the Information Resources themselves (Common Warehouse Metamodel). It will also cover how OMG’s MetaObject Facility and XMI standards are used for the integration and for extensions such as for Stewardship support.

15:30-16:15 **Regulatory Compliance and Business Agility**

Speaker: Said Tabet, Chief Architect, GRC-GRID Project

The insurance industry is regulated by a large number of changing and ambiguous state and federal regulations. Insurance companies cannot improve their business process management (BPM) and claim agility without an efficient integration of their regulatory requirements. This talk will address the challenges around the integration of regulatory compliance requirements, their impact on insurance business processes, and the standards currently under consideration at the OMG. It stresses that compliance is not an afterthought; it has to be a complete part of your SOA and BPM approach in order to mitigate some of the highest risks facing your day-to-day business.

16:15-16:30 **Day 1 Wrap-up and Adjourn**

Tuesday, February 12, 2008

“SOA, BPM and Regulatory Compliance: Pillars of Business Agility”

09:00-09:10 **Recap of Day 1 and Day 2 Preview**

Harsh Sharma, OMG Service Oriented Architecture SIG Co-Chair

09:10-10:00 **SOA Adoption in Insurance: Current State, Future and Challenges**

Speakers: Karen Furtado, Insurance Practice Director, Collaborative Consulting and Peter Salvitti, Director National Architecture Practice, Collaborative Consulting

SOA adoption in Insurance compared to other industries, success stories/challenges preventing

further adoption as well as what will it take to promote deeper penetration of SOA including reuse of Services.

10:00-10:30

OMG's Approach to SOA

Pete Rivett, CTO, Adaptive / OMG Architecture Board Member
Harsh Sharma, OMG Service Oriented Architecture SIG Co-Chair

OMG is applying a Model Driven approach to Business, Architecture and Technology Dimensions of SOA. Learn about OMG SOA AB Special Interest Group's modeling standards in development for SOA and Event Driven Architecture and how they'll contribute to Business Agility in Insurance.

10:30-10:45

Morning Refreshments

10:45-11:30

Business Agility: The Result of Planned SOA. A Case Study

Ben Moreland, Director, Office of Technology, The Hartford

11:30-12:00

Modeling and Simulation for Business Applications

Dr. Sofia Passova, Founder and Scientific Advisor, Blueprint Software Systems

The presentation will cover advantages of using modeling and simulation for agile development of business applications. Special attention will be given to the development of executable business and IT models.

12:00-13:00

Lunch

13:00-13:45

"Enabling P&C Business Agility: Developing the next generation Underwriting Management System using a standards-based approach"

Ed Gray, Director of Customer Solutions, FirstBest Systems

13:45-15:45

An Approach to Business-Driven SOA

Dr. Vitaly B. Khusidman, Director Enterprise Modernization, Unisys Corporation
Elisa Kendall, CEO, Sandpiper Software, Inc.

The first speaker will demonstrate how an Insurance Subject Matter Expert (SME) can develop robust Insurance Business vocabularies and rules that promote common understanding among IT and business and support the automation of insurance business processes. At a more advanced level, the second speaker will explain how to validate Insurance Business vocabularies and further develop Insurance Ontologies.

14:30-19:15

Workshop Demonstration Area Open

BPM / SOA Tools Demos

Learn first-hand about the software built/in development using BPM/SOA standards

14:30-15:00

Afternoon Refreshments in the Demonstration Area

15:45-16:45

Panel Discussion. Business Agility: Fact or Fiction?

Moderator: Fred Waskiewicz, Director of Standards, OMG

Along with the audience, this panel of distinguished leaders will investigate whether or not the promises of technology will indeed lead to a more agile business enterprise.

Panelists: Ben Moreland, Director, Office of Technology, The Hartford
Frank Neugebauer, Senior Enterprise Architect, ACORD
James Bisker, Global Insurance Industry Leader for IBM Institute for Business Value
Karen Furtado, Insurance Practice Director, Collaborative Consulting
Pete Rivett, CTO, Adaptive

16:45-17:00

Day 2 Wrap-up and Adjourn

Wednesday, February 13, 2008

“Business Agility via Architecture Driven Modernization”

09:00-09:40 Keynote: Architecture-Driven Modernization: The Time is Now, The Reasons are Many & The Power is in Your Hands

William Ulrich, President, Tactical Strategy Group, Inc.

Aging software systems are built on inconceivable architectures and contain rampant redundancy and obsolete functionality, intermixed with mission critical code. Aging architectures can stymie even the best of plans. This discussion provides attendees with critical insights into why and how architecture-driven modernization can address essential information requirements in cost effective, practical ways.

09:40-10:15 Insurance Company Keynote Case Study

Title & Speaker: TBC

With insurance so dependent on automation, this session will feature a speaker from an insurance company with successful experience in modernization. The session will discuss the approaches used to deploy a successful modernization project.

10:15-10:30 Morning Refreshments

10:30-12:00 Case Study Panel: Understanding & Improving IT Architectures

Moderated by Djenana Campara, CEO, KDM Analytics

ADM experts have been assembled into a panel to share selected case studies on how to understand and improve critical information systems. This session discusses real world experiences in how organizations have decoupled and improved aging information systems using modernization tools and techniques.

Panelists: D.K. Bose, ADA Software
Hilde Smart, Blue Phoenix
Kim Abney, IBM
Chris Caputo, Hatha Systems
Vitaly Khusidman, Unisys Corporation

12:00-13:00 Lunch

13:00-13:30 Modernization & Software Assurance Session

Presented by Djenana Campara, CEO, KDM Analytics and Rama Moorthy, CEO Hatha Systems

Modernization aligns with many other disciplines, including software assurance. This session provides an overview of how ADM standards have been deployed in practice, the role of ADM in software assurance and demonstrations of tool interoperability in real world situations.

Topics include:

- ADM Standards in Practice
- Software Assurance Overview
- Interoperability Tool Demonstration

13:30-13:45 Afternoon Refreshments

13:45-14:15 ADM Standards Roadmap & Industry Impacts Update

Dr. Vitaly B. Khusidman, Director Enterprise Modernization, Unisys Corporation

The winner in the ADM standards race is the client or customer that benefits from deployment of these standards. The ADM Task Force provides an overview of ADM standards developed to date, relationships to other disciplines, work in progress and the strategic roadmap for modernization interoperability.

14:15-15:45 Case Study Panel: Transforming IT Architectures

Moderated by William Ulrich, President, Tactical Strategy Group, Inc.

This case study panel session will include key experts who will share their experiences in transformation aging information architectures into the architectures of tomorrow. Real world case studies are drawn from a variety of organizations that demonstrate the real value of ADM.

Panelists: Alain Picard, CIO, Benchmark Technologies
 John Carter, Product Architect, Computer Associates
 Michael Oara, CTO, Relativity Technologies
 Philip Newcomb, CEO, The Software Revolution, Inc.

15:45-16:00 Wrap-up Session: Closing Comments & Questions

Dr. Harsh Sharma, OMG Service Oriented Architecture SIG Co-Chair