

# ZEMA USER FORUM & EDM for ERM Conference

Requirements for Enterprise Data and Risk Management



Oct 3 -5, 2011

Hyatt Regency, Vancouver, BC

*Sponsors:*



## ZEMA USER FORUM

Get first-hand information on how ZEMA is taking shape and bringing more value to its users. The ZEMA User Forum allows you to take an active part in shaping and contributing to the future plans for product development.

Attendance to the User Forum is complimentary; however, please arrange your own travel and accommodations. If you are attending the Forum you are welcome to extend your stay to attend the EDM for ERM Conference - Requirements for Enterprise Data and Risk Management. ZEMA clients receive a substantially reduced rate to the conference of CAD 495, the regular conference fee is CAD 1295. See both agendas below for details.

Monday, October 3 (9am – 5pm)

### Day 1 – Maximizing Corporate Return on ZEMA

8:00 – 9:00	<i>Breakfast</i>
9:00 – 9:15	<b>Welcome and Introduction</b>
9:15 – 10:30 <i>Session 1</i>	<b>ZEMA Business Update</b> Business development since the 2010 User Forum <ul style="list-style-type: none"> <li>• New clients and their profiles</li> <li>• Support Services enhancement</li> <li>• Expanding ZEMA's global reach</li> <li>• Update on subscription services</li> <li>• Account Management</li> </ul>
10:30 – 11:00	<i>Refreshment Break</i>
11:00 – 12:15 <i>Session 2</i>	<b>ZEMA Technical Update</b> Product and process development <ul style="list-style-type: none"> <li>• Key new features and product enhancements</li> <li>• New products – ZEMA Express</li> <li>• Changes to the release process</li> <li>• Expansion of data coverage</li> <li>• Data integrity and validation</li> </ul>
12:15 – 1:45	<i>Lunch</i>
1:45 - 2:30 <i>Session 3</i>	<b>ZEMA as an Enterprise Data Management Platform</b> What can a full-blown ZEMA implementation look like? <ul style="list-style-type: none"> <li>• Business functions that ZEMA can perform</li> </ul>

	<ul style="list-style-type: none"> <li>• ZEMA components available</li> <li>• Business process automation with ZEMA</li> <li>• ZEMA business analysts as supplemental resources</li> </ul>
2:30 - 3:45 <i>Session 4</i>	<p><b>ZEMA User's Experience</b></p> <p>Examples of how ZEMA users extract value</p> <ul style="list-style-type: none"> <li>• ZEMA as IP</li> <li>• ZEMA as a data depository</li> <li>• ZEMA as an integration tool</li> <li>• ZEMA as business automation tool</li> </ul>
3:45 - 4:15	<i>Refreshment Break</i>
4:15 – 5:15 <i>Session 5</i>	<p><b>Business Process Automation</b></p> <ul style="list-style-type: none"> <li>• Where and how to create efficiencies using ZEMA?</li> <li>• Case Studies</li> </ul>
6:30 – 9:00	Dinner and Evening Social

## Tues, October 4 (9am – 12pm) Day 2 - Becoming an Advanced ZEMA User

8:00 – 9:00	<i>Breakfast</i>
9:00 – 10:00 <i>Session 1</i>	<p><b>Managing Interactions with ISOs and Pipelines</b></p> <p>Challenges posed by dealing with ISOs and client specific data</p> <ul style="list-style-type: none"> <li>• ISOs wide domain of data</li> <li>• Collecting certificate data</li> <li>• Settlement data management - Pushing bid/offer data to ISOs</li> </ul>
10:00 - 10:30	<i>Refreshment Break</i>
10:30 – 11:00 <i>Session 2</i>	<b>ZEMA Road Map</b>
10:30 – 12:00 <i>Session 3</i>	<p><b>User Feedback and Open Discussion</b></p> <ul style="list-style-type: none"> <li>• Where can ZEMA as a product improve?</li> <li>• How to tailor and enhance training?</li> <li>• Interaction with app support?</li> <li>• What new features do ZEMA users visualize?</li> </ul> <p style="text-align: right;">Closing Statements</p>
12:00 – 1:30	<i>Lunch</i>

## THE CONFERENCE

Welcome to the EDM for ERM Conference – Requirements for Enterprise Data and Risk Management. This event entails two days of detailed discussion on the identification, categorization, storage, access, utilization, analyses, reporting and business automation considerations in EDM to support trade and risk management in energy and commodities.

The conference targets system designers and implementers as well as users and key decision makers. The conference faculty includes data providers, software vendors, integrators as well as IT and business users from energy and commodity companies. You are invited to share two days of direct discussion, information sharing and networking in beautiful Vancouver BC.

## TOPICS HIGHLIGHTS

1. Elements of Enterprise Risk Management
2. Enterprise Data Management as a Foundation for Enterprise Risk Management
3. Risk and Opportunities in Data
4. Business Process Automation and Risk Management Systems
5. The Never-Ending Data Universe
6. Bringing Theory to Life - Overcoming the Challenges of ERM/EDM
7. The Compliance Challenge
8. Future Market Perspectives

## WHO SHOULD ATTEND?

- **Power, Oil, Gas, and commodities professionals** working for utility, trading and investment banking companies who have a direct need for market data
- **End use customers** with intensive energy portfolios
- **Front office traders and managers** who need rapid access to timely market data
- **Mid office analysts and risk managers** who need data and analytic systems
- **Back office employees** undertaking settlement or credit and accounts management
- **IT professionals and CTO's** looking to implement and support enterprise systems
- **Financial professionals and CIO's** responsible for their corporate health
- **Market analysts and data managers** who are responsible for developing the corporate IP
- **Hedge Fund Managers**

## FACULTY

- **Alan Gunn**, Vice President Marketing, *Solarc*
- **Claus Murmann**, Director, *Deutsche Bank*
- **Dan Brummer**, Vice President Business Development, *Allegro Development*
- **Don Jefferis**, Partner, *Opportune*
- **Dr. Anguel Grigorov**, Director Risk Data Services, *Platts*
- **Dr. Zak El-Ramly**, President, *ZE PowerGroup*
- **Emine Unlu**, Global Market Data Manager, *BG Group (Invited)*
- **Gary M. Germeroth**, Chief Risk Officer, *Calpine*
- **Ken Piddington**, Chief Information Officer, *Global Partners*
- **Jim Allison**, Business Systems Analyst, *ConocoPhillips*
- **Larry Heitkemper**, President, Director of Weather Services, *MDA Earthsat*
- **Paul Copello**, President, *IIR Energy*
- **Wayne Sadin**, CIO, *MX Energy*

### FREE ZEMA Workshop 9:30 am – 12 pm

#### Describing an Enterprise Data Management System: Features and Functionality

- Sources of primary corporate data
- Identification, characterization and normalization of data
- Demystifying data validation
- Corporate processes and analyses
- Systems and applications that consume data
- Is one system of record possible
- Example of an integrated EDM
- Meeting audit and regulatory needs
- Cost and benefit of an EDM

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## Day 1 – Tuesday, October 4 (1:45pm – 5:45pm, evening Dinner)

12:15 – 1:45	<i>Lunch</i>
1:45 – 2:00	<b>Welcome and Introduction</b>
2:00 – 3:15 <i>Session 1</i>	<b>Elements of Enterprise Risk Management (ERM)</b> The true scope of Enterprise Risk <ul style="list-style-type: none"><li>• Business Management at the root of ERM</li><li>• The EDM for feeding trade and risk systems and supporting operational processes</li></ul>
3:10 – 3:45	<i>Break</i>
3:45 – 5:15 <i>Session 2</i>	<b>EDM as a Foundation for ERM</b> The impact in insufficient Data Management resources <ul style="list-style-type: none"><li>• The critically of data for effective decision making</li><li>• How to gain efficiency through Process Automation</li><li>• The power of advanced market analysis</li><li>• Before and After Case Study</li></ul>
5:15-5:45 <i>Session 3</i>	<b>Risk and Opportunities in Data</b> <b>Understanding the inherent value of data and the potential dangers</b> <ul style="list-style-type: none"><li>• Determining data quality</li><li>• What is data validation</li><li>• Meaningful versus distorting analysis</li><li>• Correlation, causation and assumption</li></ul>
7:15 – 11:00	Dinner and Casino Night

## Day 2 – Wednesday, October 5 (8:00am – 5:15pm)

8:00 – 9:00	<i>Breakfast</i>
9:00 -10:30 <i>Session 4</i>	<p><b>Business Process Automation and Risk Management Systems</b></p> <p>Empowerment through systems integration</p> <ul style="list-style-type: none"> <li>• Overlapping goals / requirements of ERM &amp; EDM</li> <li>• What true integration looks like</li> <li>• Business process automation</li> </ul>
10:30 – 11:00	<i>Refreshment Break</i>
11:00-12:15 <i>Session 5</i>	<p><b>The Never-Ending Data Universe</b></p> <ul style="list-style-type: none"> <li>• How to manage an evolving market space</li> <li>• Quantification and rationalization</li> <li>• The future of Data; new markets and sources</li> <li>• Requirements analysis; being efficient with data</li> <li>• Forward curves</li> </ul>
12:15 – 1:45	<i>Lunch Presentation by Keynote Speaker</i>
1:30 - 2:45 <i>Session 6</i>	<p><b>Bringing Theory to Life</b></p> <p><b>Overcoming the Challenges of ERM/EDM</b></p> <ul style="list-style-type: none"> <li>• Case studies presented by end users and internal champions</li> </ul>
2:45 – 3:15 <i>Session 7</i>	<p><b>The Compliance Challenge</b></p> <ul style="list-style-type: none"> <li>• A regulators perspective: regulating dynamic, semi-fungible and risk laden markets</li> <li>• Dodd Frank update</li> <li>• The challenge of good governance</li> <li>• Creating an audit trail</li> </ul>
3:15-3:30	<i>Refreshment Break</i>
3:30 – 4:30 <i>Session 8</i>	<p><b>Future Market Perspectives</b></p> <p><b>Forward market perspectives and expected infrastructure requirements</b></p> <ul style="list-style-type: none"> <li>• What's on the regulatory and business horizon</li> <li>• Facts and fiction</li> <li>• The EDM / ETRM checklist</li> </ul>
4:30-5:15 <i>Session 9</i>	<p><b>Panel Discussion</b></p> <p>Your opportunity to ask questions of our speakers or raise new issues</p>

# EDM for ERM Conference

Oct 4 -5, 2011  
Vancouver, BC

## Pricing

**Early bird (Aug 15<sup>th</sup>):** CAD 995

**Regular price:** CAD 1295

*User Forum is complementary to clients of ZEMA.*

## Venue



The Conference will be held at the Hyatt Regency in beautiful downtown Vancouver. This provides easy access to Vancouver's various entertainment districts and outdoor attractions such as Robson Street, Gas Town, Chinatown, English Bay, Stanley Park and Granville Island.

Vancouver has something to offer for everyone. Its lively downtown core, coastal atmosphere and surrounding mountains make for an ideal destination.

Visit [www.tourismvancouver.com](http://www.tourismvancouver.com) for details.

## Three ways to register

**Phone (toll-free):** 1-866-944-1469

**Email:** [contact@zeco.org](mailto:contact@zeco.org)

**Website:** <http://zeco.org/registration.htm>

## Contact person

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