



## Lambert Business Rules Methodology Training and Mentoring

Lambert *Business Rules Development Practice (BRDP)* in partnership with Knowledge Partners, Inc (KPI) offers training and licensing of the KPI STEP™ Methodology. The KPI STEP™ license program offers options including training, labs and tools to facilitate implementing a business rules approach in your organization.

### Lambert's Training and Mentoring using the KPI STEP™ Methodology:

- **Half-day Project Stakeholder Seminar** – An introductory session for Senior Management
- **Two day on-site training** – Provides exposure to the KPI STEP™ Methodology
- **8 day Business Rule Lab** – On-site follow-on to the two day training, in depth practice and mentoring in the STEP™ methodology and planning for its use on a target project or program
- **Training and mentoring** delivered by KPI STEP™ certified instructors as part of a STEP™ licensing agreement

### Training and Mentoring Features:

- Provides training in KPI's STEP™ Business Rule Approach
- Focuses on the business problem as distinct from the implementation
- Discusses the business rules approach and how it differs from other approaches
- Covers the concepts, deliverables and guidelines of a business rule project
- Reviews methods to separate rules from business processes and promotes an understanding of why separating rules is important
- Practice in formulating, documenting and analyzing business rules
- Objective setting for business rules practices based on KPI's Rule Maturity Model™
- Adaptable to specific corporate needs or objectives

### The Lambert BRDP Focus

The Lambert *Business Rules Development Practice* focuses on sustainable business rules management and enterprise technology and architecture, and an agile approach to implementation of applications using a Business Rules Approach.

***Building Sustainable Business Rules***

## The KPI STEP™ Approach

Based on KPI founder Barbara von Halle's acclaimed "*Business Rules Applied*" (2002: Willey and Sons), the STEP™ approach has been updated and enhanced significantly based on client experience and technology advancements since publication. As a result, the approach has evolved into the STEP™ Methodology offering.

A business rules approach formalizes the way an organization manages and automates rules. STEP™ is a fully defined methodology for approaching business rules. STEP™ has four objectives are to:

- *Separate* rules from the rest of the system so you can reuse them
- *Trace* the rules to the reasons they exist as well as to where they are implemented
- *Externalize* rules so everyone can know what they are
- *Position* rules for change at any time

## The KPI Rule Maturity Model™

The KPI Rule Maturity Model (KPI RMM™), a tool used to chart potential ROI from implementing a business rules approach, may also be utilized as an aid in setting your organization's business rule goals and objectives.

## Licensing options

KPI STEP™ is licensed in three ways:

The **Provisional Project License (PPL)** – This limited use license provides the client in depth experience using the KPI STEP™ Business Rule Approach. The PPL is packaged with two days of training followed by an eight day Business Rules lab with mentoring. Additionally the client may choose to use the lab to begin planning target projects or programs. All phases of a Business Rules project are covered. The PPL course material and subsequent mentoring covers:

- Basic Business Rules concepts
- The KPI STEP™ Approach
- Identification of decisions in Use Case Steps/ Processes Models
- Formulating business rules in natural language, template form and decision tables
- Rule Analysis for completeness, inconsistencies, redundancy and overlap
- Linking terms in business rules to data deliverables or exiting data models
- Managing Business Rules as a Business Asset

The **Project License (PL)** – A full use license of KPI STEP™ its methods and software for use at the project level.

The **Organizational License (OL)** – A full use license of KPI STEP™ its methods and software for use at the enterprise level for use across multiple projects.

## *Building Sustainable Business Rules*