

Sessions are rated according to the level of experience for which they are appropriate. Novice for those in the industry less than two years; intermediate for those in the industry for two to five years; and advanced for those in the industry for more than five years. Choose one workshop to attend; mark your selection on page 17.

**Sunday Workshop Session 1**  
Novice/Intermediate/Advanced



Tim Bonno  
Ron Megert  
SBC Services, Inc.  
SBC Services, Inc.

**How To Implement a Successful Corporate Emergency Response Team (CERT) Program.**

Successful business recovery is dependant upon employee availability. Following a major disaster, first responders who provide law enforcement, fire, and emergency medical services may not be able to meet the demand for these services. People will have to rely on each other for help in order to meet their immediate life saving and life sustaining needs. CERT (Community Emergency Response Teams) is a positive and realistic approach to emergency and disaster situations where individuals will initially be on their own, at home or at work, and their actions can make a difference. Discover how you can adapt CERT to the corporate environment. This three-hour workshop will provide attendees with hands-on opportunities to learn about CERT and develop a program template that they can walk away with and begin using immediately. Attendees will learn how to successfully implement one of the best preparedness initiatives available today.

*In his current position at SBC Services Inc. Tim Bonno, technical director IT business continuity, manages a team responsible for all business continuity activities within SBC's Information Technologies organization.*

*Ron Megert is employed by SBC Services Inc. and leads the emergency preparedness initiatives within the company's data processing organization.*

**Sunday Workshop Session 2**  
Novice/Intermediate/Advanced



Barney Pelant, MBCP

**Developing the Recovery Strategy: The Next Step**

Barney F. Pelant & Assoc.

Once the business impact analysis (BIA) has been completed, the next logical step in the development of a business continuity program is the formation of the business recovery strategy. The results of this effort provide us the infrastructure for carrying out the successful recovery of the organization in case of a disastrous

event or business interruption. This infrastructure is also the foundation for the procedures that we develop next, a.k.a. our business recovery plan. This session is a former breakout session that has been expanded by popular request to a workshop. During the workshop we will examine a proven methodology for taking the findings of the BIA and developing successful strategies. Learn important and logical steps to take when structuring the business recovery strategy. You'll take home answers and solutions that you can implement immediately. Pelant will present an additional BIA workshop on Tuesday.

*Barney Pelant holds the certification of Master Business Continuity Professional, with more than 25 years experience in this profession. He is owner and managing director of Barney F. Pelant & Associates, a consulting practice dedicated to business continuity planning since 1991. Pelant serves on the Board of Directors of the Canadian Centre for Emergency Preparedness He is the past executive director, chair of the Certification Board and member of the Board of Directors of the Disaster Recovery Institute International. He helps organizations in all industries and professions to develop and carry out business continuity programs He is a frequent public speaker and provider of training seminars and workshops on business continuity planning and development.*

**Sunday Workshop Session 3**  
Intermediate/Advanced



Deidrich Towne, CBCP  
Peter Laz, CBCP  
National-Grid USA  
Forsythe Solutions Group

**Incident Management Plan Assessment**

In this highly interactive workshop you will learn to use the BCP Audit checklist and the Incident Management Plan Maturity Model developed by PPBI from recognized standards and industry best practices.

Returning to a workshop format for this venue PPBI has condensed the one and one-half day course to share the effectiveness this process can have on your plans. Exposure to the practical experience of the instructors in addition to recognized industry standards in measuring the maturity of your plans benefits both the public and private sectors. You will use the checklist to assess your capability to assemble, coordinate, collect and channel the resources required for critical incident management. The tools are free, the simulation authentic and the class is practical, useful immediately and fun!

*Deidrich Towne, CBCP, is a senior technical analyst in Information Technology for National Grid. He serves as Chairman of the Board for Private and Public Businesses, Inc.*

*Peter Laz, CBCP, is employed by Forsythe Solutions Group as a business continuity consultant with more than 21 years experience in Information Technology and more than 16 years experience in the field of contingency planning.*

**Sunday Workshop Session 4**  
Intermediate/Advanced

**Command Center Simulation Exercise**



Joseph Flach  
Bert Wolff  
Eagle Rock Alliance  
Chubb & Son

This session is designed to share some ideas and suggestions for preparing and testing the command center during a disaster. Suggestions for establishing the test goals and objectives; deciding on the appropriate target audience; selecting the right scenario(s); preparing the session material; room setup; facilitation techniques; after action reporting; and, more will be presented and discussed.

A few techniques that have been successful in different environments will be shared, including: using imbedded video in the presentation; preparing situation manuals; inviting civil authorities to attend the session; creating a facilitator's guide, and other creative presentation techniques.

The evolution of Chubb & Son's Command Center from its origins to the present day will be traced and discussed, along with the successes and lessons learned from their experiences in the years the program has been in effect.

*Joseph Flach is the practice manager of the business continuity planning (BCP) group for Eagle Rock Alliance, Ltd. He is responsible for all aspects of the performance of Eagle Rock's crisis management, business resilience, emergency response and business resumption practice areas.*

*Bert J. Wolff Jr. is vice president of corporate business continuity and security at Chubb and Son. He has been in his current position for three years. In this position he has created a standard process for the creation of emergency response and business continuity planning at Chubb.*

**Sunday Workshop Session 5**  
Novice



**BCP-101**

Session limited to 100 participants

Ed Devlin, CBCP

Norm Harris, CBCP

ES Devlin & Assc.

Norman L. Harris & Assc.

This must-attend workshop has been developed to provide practitioners with the basics of business continuity planning. It is

taught by two industry pioneers and is designed to set the stage for attendees to better understand the lessons they will learn during the DRJ conference. This session will explain the changes in the scope of the planning required by the many incidents that have occurred during the last 30 years. It will review what is expected of the disaster recovery/business continuity planner in today's fast pace, ever changing, business world we all live in. You will be exposed to questionnaires and plan development documentation requirements that every DR/BCP needs in order to do their job. The information you will receive during this session will save you time and help guide you through your own plan development cycle.

*Ed Devlin is a consultant, author, instructor and speaker in the field of business continuity. Devlin is a Certified Business Continuity Planner, a member of the Executive Council of the Disaster Recovery Journal and a member of the Advisory Board of the National Association of Contingency Planners. From 1973, when he co-founded Devlin Associates, to the present time, Devlin has assisted more than 400 companies throughout the world in the development or enhancement of their business continuity and business resumption programs.*

*Norm Harris, CBCP, Certified Recovery Planner, chairman, president and CEO of Norman L. Harris & Assc., is recognized as a leader in information technology management and disaster recovery. Harris co-founded CRISIS Magazine, one of the first disaster recovery publications and HSH, Inc., which became the largest disaster recovery consulting company in the US. For the last 25 years, Harris has consulted with thousands of business clients in every major industry.*

**Sunday Workshop Session 6**  
Novice/Intermediate/Advanced

**Tactical Exercise**

Sponsored by



Enrollment is limited to 200 participants.

With several high-profile disruptions fresh in everyone's minds, now is the perfect time to practice what we preach. Join us for a first-hand look at how a tactical exercise is put together, become part of the recovery team, and work with your peers to solve difficult BCP challenges.

Approximately 48 hours of recovery time will be simulated during this exercise. Every attendee will be assigned to a recovery team responsible for completing specific tasks from the plan. Each team will be responsible for communication with other teams and the emergency operations center, as well as making critical recovery decisions.

We are keeping the specifics of the scenario a secret so nobody can get a jump start, but we're sure your BCP knowledge and experience will be challenged. Whether you are new to the profession or a seasoned pro, this exercise is sure to provide some valuable lessons learned to bring back to your organization.

Sponsored by Strohl Systems, the exercise will be led by experienced, certified consultants who have tapped their knowledge reserves to make this session more realistic than any you've ever attended. Strohl Systems' motto, after all, is Plan. Practice. Prevail.

Space is limited, so register now!

*Strohl Systems has been providing tools necessary to build continuity plans, practice for disruptions and to prevail over disasters for almost 20 years.*

***"This has been a very beneficial conference! I found value in every session I attended."***

***Deborah Dillard  
XYO Energy Inc.***

# Sunday Workshops

**1:30 p.m.**

**These three-hour workshops allow intense study of a variety of subjects.**

# General Sessions

## Monday

The industry's top experts will relay vital solutions, strategies and priorities for today's challenging business continuity world.

General sessions **are for all attendees** each morning and target contingency planners of all experience levels. Attendees will find information that can be implemented in any environment.

Case studies, industry trends and emerging threats are just a few of the topics that will take center stage.

Find the solutions and strategies that meet your needs!

***"This was my first DRJ conference and I thought it was great! Well organized, great facility, excellent speakers. Very worthwhile!"***

**Cynthia Knaut**  
St. Paul Travelers

**General Session 1**  
8:15 a.m. – 9:15 a.m.



**Making the Most of Difficult Situations:  
Changing Markets, Changing Times**

*Garrison Wynn*

In the uncertain world of business continuity, it's important to have real solutions! In this insightful session we'll examine the challenges we face and learn how to laugh at our problems while using them as catalysts for success. This session covers a lot of ground and provides easily implemented, proven solutions that you can be implemented in all aspects of business continuity and related fields.

*As a speaker, advisor, and entertainer, Garrison Wynn has a background in manufacturing, entertainment, telecommunications, and financial services. An experienced actor in films and a stand-up comedian, he has hosted PBS specials and national radio programs.*

**General Session 2**  
9:30 a.m. – 10:30 a.m.



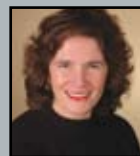
**Never Gamble With The Continuity of Your Business**

*Don DeMarco*  
IBM BRCS

Keeping your business operational can have high stakes. It's time to ante up and get in the game! Learn how to improve your odds for a successful business continuity program. Tips and tricks for implementing comprehensive business protection will be shared. Don't let your plans fold; walk away from this session with winning strategies!

*Don DeMarco is vice president of IBM's Business Resilience and Continuity Services, Americas, a business line of IBM Global Services. DeMarco joined IBM in the United States in 1980. Early in his career he held numerous operational and management positions associated with large scale information technology centers serving IBM in North America.*

**General Session 3**  
10:45 a.m. – 11:45 a.m.



**The Greatest Threat in Our Lifetime:  
What Are You Doing to Get Ready?**

*Regina Phelps*  
EMS Solutions

An influenza pandemic could be the greatest disaster in our lifetime...or could it? Health experts say it is a matter of if, not when the next pandemic will impact the globe. In the face of a pandemic, airports, airlines, businesses and the public face the risk of quarantine; the death toll could be in the millions. This general session will guide you through the maze of current medical information. This will include a discussion of the history of pandemics, current suggested practices, the current state of disease outbreaks in the world and what you should be doing to be ready.

*Regina Phelps, CEM, RN, BSN, MPA is an internationally recognized expert in the field of emergency management and contingency planning. She is founder of Emergency Management & Safety Solutions a consulting and training firm.*

# Tuesday

## General Session 4 8:15 a.m. – 9:15 a.m.



### Hurricane Katrina Response

Brandon Bond  
DHS/DMAT

This presentation will discuss the National Disaster Medical Systems response to Hurricane Katrina. You will be taken through the first 12 days of the disaster from the initial mobilization to the Superdome from the responder's perspective. Throughout the presentation lessons learned will be discussed that can be applied to your corporate and personal emergency response plans.

Brandon Bond is the disaster preparedness manager for Kaiser Permanente's National Security Services and a member of the U.S. Department of Homeland Security's Bay Area Disaster Medical Assistance Team (DMAT CA-6). Bond was deployed with CA-6 to the Superdome and the New Orleans Airport.

## General Session 5 9:30 a.m. – 10:30 a.m.



### The Value of a Corporate Ethical Disaster

Robert C. Chandler, Ph.D.  
Pepperdine University

The risks of ethical misconduct disasters have been neglected by continuity planners and senior corporate management. Ethical misconduct disasters are costly disruptions to business operations, loss of brand or reputation value, and in some instance the demise of many well-known companies. This session presents the call to expand continuity planning to include integrity as a mission critical factor. Recent revelations about ethical misconduct scandals make the prospects of the "unthinkable ethical disaster" a realistic concern for every business. No company is immune from these threats.

Robert C. Chandler, Ph.D. is the Blanche E. Seaver professor and chair of the communication division in the Center for Communication and Business at Pepperdine University specializing in crisis communication. He is the author of several books, including BCP Media's Crisis Communication Planning and The Value of a Corporate Ethical Disaster.

## General Session 6 10:45 a.m. - 11:45 a.m.



### Outsource or Insource? Finding The Right Solution To Meet Your Business Continuity Needs

Belinda Wilson, CBCP, Hewlett-Packard  
Clyde Berger, CBCP, Avaya



New and more stringent corporate governance, heightened alerts for terrorism, and the changing 7x24 business model, are all compelling business reasons for organizations to address business continuity. The traditional business continuity models propose either an insourced or outsourced solution. However, in today's world, a blended or multi-sourcing strategy may be best to address a full continuum of needs. This co-presentation by the business and the solution vendor will share with you the criteria, challenges and critical success factors for a winning combination.

Belinda Wilson is the executive director of HP's Business Continuity Services division that provides scalable and flexible BC/DT/HA solutions. She has more than 18 years BC/DR experience and is a globally recognized expert.

Clyde Berger is the global director of business continuity planning at Avaya since Sept 2002. He has more than 16 years experience as an active manager & planner.

# Wednesday

## General Session 7 8:15 a.m. – 9:15 a.m.



### Surf's Up: How About Your BCP?

Barry Pruitt  
PruSpeak, Inc.

Better, cheaper, faster! Nearer deadline, less budget, higher quality! Reorganize, reengineer, revisit! SOX, HIPPA, Homeland Security. The mantra may be different, but the danger is the same. Ignore what's necessary for what's currently popular or mandated. A constantly changing business environment creates an urgent need to reassess your approach to BC planning. You'll gain an overview of the martial art of business continuity planning – FASTpractice -- including the components, processes, and practices required for BCP success – from gaining commitment to communication to making the presentation.

Barry Pruitt is president of PruSpeak Incorporated, a global training and consulting organization, and teaches at the USC School of Business.

## General Session 8 9:30 a.m. – 10:30 a.m.



### Organizational Survival: The Integration of the Major BCP Plans

Martin Gonzalez  
BearingPoint

There is no "silver bullet" for organizational survival, only accepting the reality that many elements must come together to drive the company's emergency response, continuity of operations, and recovery from the event. In most organizations, significant work has gone into designing recovery solutions for the technology infrastructure. However, senior management is coming to the realization that other vital components must also be addressed. This session will discuss the need to have an integrated CORE (Crisis Organizational Response) plan, disaster recovery plan, and business resumption plan in order to deliver viable organizational survival capability across the enterprise.

Martin Gonzalez is a senior manager with BearingPoint. His responsibilities include the execution of business resumption processes after a major hurricane destroyed a company's world headquarter and damaged its data center.

## General Session 9 10:45 a.m. – 11:45 a.m.



### Disasters Shimasters! How To Find The Meaning in The Madness of Disaster Recovery

Vali Hawkins Mitchell  
Inner Directions, LLP

Recent disasters, including Hurricanes Katrina, Rita and Wilma, have taken their toll on us physically and mentally. Whether you are personally involved or just watch from afar, disasters of any type can have a big impact on continuity planners, responders and more. Learn how to design a personalized self-care manual so you can stay in the game for the long haul. Learn how to turn your daily grind into meaningful practice with the same self-care techniques that has been field tested and approved during Katrina and Rita. How do you find meaning in the madness of difficult work? Under stress some people become "looters" while others become "heroes." Disaster work changes us; learn how to pay attention with this simple to use, self-managed, well tested technique that will keep you alert rather than numb in any crisis.

Vali J. Hawkins Mitchell, Ph.D., LMHC, is a certified traumatologist. She has two decades of working as a mental health counselor, researcher, national business consultant and coach, trauma and disaster specialist, author, workshop facilitator, speaker, and educator.

# Breakout Track 1

**Monday 1:30 - 2:30 p.m.**

Sessions in each breakout track run concurrently. Choose one session from each track. Mark your selection on the form on page 17.

## Strategic Session 1 Intermediate/Advanced



### Disaster Recovery Texas Style!

Learn the use and benefits of remote computing for ready access to files, programs and e-mail when workers are away from their office PCs. In addition, discussion will include the emergency response roles, BC for critical services, contract agreements, mobile software applications, security and remote computing and on line collaboration. See a demonstration of real life examples from disaster response efforts for Hurricanes Katrina and Rita as staged and implemented in Texas.

Shirley Scott, CISSP, is the director of operations, information technology for the Texas Department of Family and Protective Services. She has been involved with state emergency operations as a representative from the Texas Health and Human Services agency and contractor or employee with FEMA.

## Managerial Session 1 Novice/Intermediate/Advanced



### Connect-The-Dots: Will All Of Your Plans Really Work Together?

Business process recovery plans, crisis communication plans, technical recovery plans, executive response plans, emergency life/safety plans – so many plans, but will they all work together? How will your company's crisis and recovery plans, developed by different teams in your company, at different times, work together at time of disaster? How will the response teams integrate when it really counts? How do you "connect-the-dots"? See real-life examples of how continuity plan integration works and what you need to do to ensure that your company can truly "connect-the-dots" between all of your business continuity and disaster recovery teams. You will leave this session with a pragmatic approach to smoothly integrating all facets of disaster planning.

Evan Sicle, PMP is the operational risk officer for Commercebank, N.A providing professional, specialized skills relating to the development and coordination of the bank's business continuity planning and Sarbanes-Oxley internal control attestation using the COSO and COBIT framework.

## Technical Session 1 Intermediate/Advanced



### Building a BC Website

Lynda Geraci, CBCP  
In this informal, informational session planners are encouraged to participate as they learn the best tips and tricks for building a BC website. Discussion will include website contents, understanding your intended audience, security, and maintenance cycles.

Siemens Shared Services LLC  
Lynda Geraci, CBCP, business continuity manager at Siemens Shared Services in Orlando, Florida, is responsible for Siemens business continuity program and co-chairs the business continuity initiative for Siemens America. She has more than 25 years background in publishing, warehouse, retail, distribution, call and customer service centers, human resources, air transportation, power utility, government and diverse operating environments.

## Emergency Response Session 1 Novice/Intermediate/Advanced



### Selecting an Emergency Notification and Escalation System

Chris Gay, CBCP  
Blue Cross and Blue Shield of FL  
This session is intended to help in the decision making process of choosing an emergency notification and escalation system. Learn the benefits of implementing a notification system and the steps for vendor evaluation. Recommendations and possible options for securing funding for the tool will be discussed. Details about product features and capabilities including what they are and how you would use them will also be discussed. Attendees will leave with an understanding of the general functionality and capabilities of this emerging communication technology. Guidelines will be presented for the selection process as well as insights into the emerging technology of communication tools.

Chris Gay, CBCP, is manager – disaster recovery/systems continuity management, Blue Cross and Blue Shield of Florida. He has responsibility for the maintenance and preservation of the company's disaster recovery program to ensure mission critical business functions are available and protected in an adverse event.

## Advanced Session 1 Advanced



David Hill

Mesabi Group



Dan Tanner

Progress Smart

### Finding Data Protection Choices That Meet Your Disaster Recovery Priorities

Yes, you must concern yourself with people, processes, and technology in your planning. But don't forget your data. Data protection is changing dramatically, and you are going to have to plan to match up your requirements to protect and recover your data. And to reconcile your vital data recovery needs with the money that you have available. In this presentation, we will show you how you can proceed. We will give you some simple rules as to how to make sense out of all the confusion and how to build an effective data protection architecture as part of your overall business continuity and disaster recovery planning.

David Hill is principal with the Mesabi Group. He has an advanced degree from MIT's Sloan School.

Dan Tanner is founder of ProgressSmart. He is a computer industry veteran and is extensively and widely cited, honored, and published.

## Information Session 1 Novice/Intermediate/Advanced



Gerry Printz, CBCP

AMSA-DOR, Ltd.

### One Storm, Six Recoveries and 10 Lessons Learned

On August 29, 2005, Katrina struck land. This is the story of the planning and recovery of five companies located in different parts of Mississippi. You will learn what went right and what went wrong. More importantly, you will hear of the 10 most important lessons learned as a result of Katrina. A sixth recovery, the presenter's business and family recovery will also be discussed. This intimate look into these organizations, in different industries and of different sizes will be of benefit to everyone, not just those in hurricane country.

Gerry Printz, CBCP, CISA, CISSP has more than 25 years of experience in information systems. He has designed and prepared information systems assessments, business continuity plans and security programs for a wide variety of firms.

# Breakout Track 2

**Monday 2:45 - 3:45 p.m.**

Sessions in each breakout track run concurrently. Choose one session from each track. Mark your selection on the form on page 17.

## Strategic Session 2

Novice/Intermediate/Advanced



Regina Phelps

EMS Solutions



Liz Granger

Visa Int'l.

### How to Implement Pandemic Planning in YOUR Company

This fast paced session will discuss the components of an effective pandemic plan. Practical information will be shared on how to write a pandemic plan and implement it in your company. Components of the plan include: surveillance at your company, assessment, preparedness, vaccination programs, emergency response, communications, incident or crisis management involvement, and training and exercises Attend this informative session to find out what you and your company should be doing to be ready for the next global disease outbreak!

Regina Phelps, CEM, RN, BSN, MPA is founder of Emergency Management & Safety Solutions, a consulting and training firm.

Liz Granger leads the enterprise resiliency program for all US-based Visa facilities. She is responsible for development and implementation of work area recovery program, crisis management teams and related emergency operations centers at all Visa facilities.

## Managerial Session 2

Novice/Intermediate/Advanced



Barry Cardoza, CBCP

Union Bank of Calif.

### Business Impact Analysis: The Analysis Phase

First you collect your BIA data and then you decide how you want to analyze it. Or, is it really the other way around? This presentation demonstrates why you would want to plan your analysis process first. It also includes a methodology for analyzing the data that you collect. The process is scalable to any size of business, and applicable to most any type of business. Attendees will leave with a model they can apply at their own companies.

Barry Cardoza, CBCP, is vice president/manager of contingency planning and disaster recovery for Union Bank of California, N.A. He has more than 30 years experience working in a systems development/project management capacity within a variety of industries, including 16 years of experience in banking.

## Technical Session 2

Intermediate/Advanced



Terry Siegrist

OpenTech

### Automate Business Continuity for Mainframe Data to Improve Recovery Integrity

This educational presentation discusses the alternatives for managing the business continuity processes and identification requirements for mainframe data. In addition, current methods and some of the exposures of current manual process will be discussed as well as the pros and cons of currently available solutions. Also discussed are the needs and methods to automate the business continuity processes at various levels of the mainframe data environment including point in time application recovery across the data center, system infrastructure, and historical tape data as well as the impact on disaster recovery and vaulting needs and methods to address statutory requirements.

Terry Siegrist has been with OpenTech Systems for five years and holds the position of vice president. He has been in the IT business for more than 30 years, with the past 20 years of his career focused on working with vendors to provide OS/390 software solutions.

## Emergency Response Session 2

Novice/Intermediate



Sara Williams, CBCP

Jack Henry & Assc.

### Recovery Steps: Are They Only for Information Systems?

Various types and levels of disasters can happen at the most unpredictable and inopportune times causing us to question the importance and completeness of our plans' "recovery steps". Are you confident the design and execution of your company's existing recovery plan is sufficient? Join me in discussing "Recovery Steps" that could improve your recovery startup window and improve the rebound of your organization's fiscal future not only for Information Systems but for all revenue producing and business support functions.

Sara Williams is a business recovery consultant with Jack Henry & Associates' Centurion Disaster Recovery Division. She has more than 20 years diverse business background with her most recent experiences being in all aspects of business continuity.

## Advanced Session 2

Intermediate/Advanced



Paul LaPorte

Continuity Research

### Delivering ROI and Strategic Advantage Through BC

Learn how strategic advantage and ROI gained from business continuity are real and measurable. We will examine research gathered from multiple sources including a multi-year study of large public companies. This research will help quantify the value of a sustained business continuity program as well as benchmark your company against industry leaders and best practices. The presentation will equip continuity professionals and management with necessary information to overcome executive or Board level objections associated with continuity initiatives, how to build trust and support for the continuity team and its efforts and help answer the question, "Why should we invest in this?"

Paul LaPorte is CEO of Continuity Research, a leading research company for business continuity and technology convergence. He has held senior roles in marketing, business development and product development at leading technology firms.

## Information Session 2

Novice/Intermediate/Advanced



John Marini

Adjusters Int'l

### Katrina & Rita Lessons Learned: Business Continuity from an Insurance Perspective

Your task as a BCP professional is to protect operations and to ensure a full recovery. Insurance and the claim adjustment process can be the difference between survival and demise, yet too often the insurance claim process is not built into the BC plan. Hear examples that help you analyze how your insurance policy will actually respond to a disaster and how you can maximize its effectiveness in your recovery plans. To emphasize the impact of the insurance claim process and the importance of its detailed inclusion in any contingency plan, we'll discuss several areas of potential conflict, along with examples of financial disasters that can be avoided if the crisis management team is fully informed.

John Marini, vice president of Adjusters International (AI), was involved in the management of AI's Hurricane Andrew storm operations and responses to the Midwest Floods and the California earthquakes.

# Breakout Track 3

**Monday 4:15 - 5:15 p.m.**

Sessions in each breakout track run concurrently. Choose one session from each track. Mark your selection on the form on page 17.

## Strategic Session 3 Intermediate/Advanced



### Recovery Site Evaluation: Finding Viable Solutions

As organizations grow more dependent on their information systems, the need for hot sites becomes increasingly crucial. Organizations can be crippled by poor evaluation of recovery site investments. Should an organization hire an external provider or establish recovery facilities in-house? Which providers offer the best facilities and services at the best price? What data needs to be recovered? Answering these questions and more requires an evaluation of multiple business factors. Viable solutions do exist; the challenge lies in making the best choices for the business.

Michael Croy, Forsythe's director of business continuity solutions, has more than 20 years of experience in building, developing and implementing disaster recovery and business continuity programs.

As principal consultant for Forsythe's business continuity and disaster recovery solutions practice, Shiraz Alikhan helps customers plan and implement initiatives.

## Managerial Session 3 Novice/Intermediate/Advanced



### What Happens When Best Practices Aren't Practiced?

If print to mail disaster recovery and continuity aren't planned for or carefully executed, the results can mean no billing, no income...no business. Learn what happened to three companies that were impacted by Katrina. What were the best practices encouraged before the Hurricane? What actually happened? How did recommended & actual practices compare? What went right? What went wrong? What lessons were learned? What are the new Best Practices?

Gerald A. Montella serves as general manager of Warminster, Pa.-based Mail-Gard. He is responsible for developing and managing the company's sales and marketing activities, including advertising, trade shows, direct sales and independent sales representatives.

## Technical Session 3 Intermediate/Advanced



### Designing Multi-Site Disaster Tolerant Architectures

This session focuses on several case studies for multi-site clustering, data replication and failover. It covers the considerations and guidelines for designing a disaster tolerant architecture, along with examples for multi-site extended clusters and continental clusters. For each case study, we will discuss how customer requirements get translated into solution architectures and the infrastructure and services needed to build these architectures.

Steve Haldeman has 10 years experience designing business continuity and disaster tolerant infrastructure solutions. He manages the Americas pre-sales team which provides BC and availability solutions.

Jeffrey Kight is a senior solution architect with the business continuity and availability design team at Hewlett-Packard. He designs BC infrastructure solutions for enterprise and corporate customers.

## Emergency Response Session 3 Novice/Intermediate/Advanced



### WiFi Security

Today, security needs to be the cornerstone of a company's computer network. With the advent of wireless communications technologies, that security and privacy is threatened. This presentation will look at security techniques that both users and companies need to be mindful of in this new age. Learn the methods and forms of hacker attacks and industry standards, "Best Practices," that can improve your overall wireless security posture. This presentation will include discussion of wireless LAN security factors, the 802.11 security standard, encryption, and security issues.

Doug Conorich is the global solutions manager for IBM Global Services' Managed Security Services. In this capacity, he has responsibility for developing new security offerings and all training of new members of the MSS team worldwide in how to do "ethical hacking" and service delivery.

## Advanced Session 3 Advanced



### Lessons Learned from Hurricanes Katrina and Rita

SunGard Availability Services will discuss the lessons learned and challenges when facing disasters such as Hurricanes Katrina and Rita. We will share feedback from clients on how their businesses were impacted and how they reacted. A member of SunGard's Crisis Management team will share challenges faced by clients, statistics and lessons learned.

Ann Pickren, senior vice president, SunGard Availability Services, is responsible for all availability software products that are designed, developed and supported by SunGard.

Bob DiLossi, manager of crisis management at SunGard is responsible for our crisis management center, which manages the alerts and disasters across the country. DiLossi is a leading expert in crisis management and has managed SunGard clients for more than seven years. He is a frequent speaker at industry and SunGard events.

## Information Session 3 Novice



### Professionalism in BCP

This session features an overview of the certification and education programs available from DRI International. DRII has been providing instruction in business continuity planning (BCP) methodology since 1988. Staff and leaders will be on hand to describe course objectives, the process for attaining certification in BCP and other services.

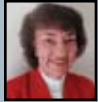
DRII is a recognized leader in providing education, standards, and professional certification. DRII's goals are to create a base of common BCP knowledge through education, assistance, and the development of a resource base; to certify qualified individuals; and to promote the credibility and professionalism of certified professionals.

# Breakout Track 4

**Tuesday 1:30 - 2:30 p.m.**

Sessions in each breakout track run concurrently. Choose one session from each track. Mark your selection on the form on page 17.

## Strategic Session 4 Intermediate/Advanced



### Discover Financial Case Study Using the Business Continuity Maturity Model

Alice Staten Discover Financial Services conducted benchmarking research to ensure the company is well prepared for emergency scenarios through the development and adoption of best practices in BC planning. The firm decided to utilize the Business Continuity Maturity Model because it best suited the specific situation. This presentation will address why Discover Financial decided to have an assessment performed by an external consultant, the lessons learned for various levels of management, and how the findings were used to decide the priority and scope of changes within our organization.

Alice M. Staten is the vice president of business continuity for Discover Financial Services (DFS). She is responsible for overseeing the continuity planning, which includes training and awareness, conducting rehearsals, and handling of business interruptions.

## Managerial Session 4 Intermediate/Advanced



### BCP Without Executive Passion: That Dog Won't Hunt

Karlene Bowen Lori Broache Executive passion and support of business continuity is essential for a successful program. This high intensity interactive session will focus on clear steps to gain and maintain executive support of an enterprise-wide BC program. The session will cover the five key points a CEO needs to know about crisis management. You will also learn how to make your BCP program a corporate asset instead of just a "cost center".

Karlene Bowen is the director regulatory relations for Fair, Isaac, Inc. the leading provider of credit risk scoring and risk management tools to lenders and consumers.

Lori Broache is a principal with Continuity Management Solutions, a firm that develops and implements customized worldwide BCP programs and processes for international and regional companies.

## Technical Session 4 Novice/Intermediate/Advanced



### Avoiding Digital Disaster With Proactive Forensics and Forensic Incident Response

Carole Longendyke Safeguarding digital assets is critical to DR and BC, but failure to consider and prepare for the preservation and recovery of data as a result of internal disputes or litigation can have catastrophic results. Hear frequently asked questions concerning data recovery and analysis, including why 'delete' does not mean 'delete' in the digital world. Case studies in which data forensics has been used in court will be presented. Learn specific 'must know' strategies to prepare for, react to, and avoid a digital disaster.

Carole Longendyke is a partner and director of forensics with PG Lewis & Associates. As a certified forensic examiner, she has been retained as consultant and expert witness on a number of high profile cases.

## Emergency Response Session 4 Novice/Intermediate/Advanced



### Hurricanes and BC: Defining the Potential Threat

Chris Hebert The devastation wrought from a number of storms during the 2004 and 2005 season gives rise to the need for a serious review not only of current forecasting methods but also the way in which the strength, duration and impact of each land-falling storm is communicated to the public, the media and to government agencies. To do their job, DR/BC organizations need to better understand if the next storm is a moderate category two or a devastating category two. Elements to consider include how wide the storm is, how fast it's moving, the water temperature and variable depth along its projected path. These and other considerations can make two hurricanes of the same category into two considerably divergent types of storms. Having a better understanding of each storm's characteristics is the best possible tool when planning for how to better prepare and respond.

Chris Hebert is lead hurricane forecaster with ImpactWeather. He began his meteorology career near the southern tip of South America working offshore on a jack-up rig owned by Shell.

## Advanced Session 4 Advanced



### Generally Accepted Practices: Networking Session

Session registration is limited to 200. Designed for BC professionals with seven years minimum experience.

Would you like to contribute to the creation of the DRJ/DRII Generally Accepted Business Continuity Practices document? The mission of the DRJ/DRII effort is "to be recognized as a leading source of 'sound' Generally Accepted Practices by providing a depository of knowledge and recommendations offered by skilled business continuity practitioners. This session will allow you to provide feedback on the Generally Accepted Business Continuity Practices document. This document is being written by practitioners from the public and private sectors as well as partner organizations. Join in this ground breaking initiative and gain the insights that will be shared during this session. Be prepared to communicate your questions and/or answers in an interactive roundtable environment. Your expertise will be invaluable to this effort.

Members of the DRJ's Editorial Advisory Board will facilitate this session.

## Information Session 4 Novice/Intermediate/Advanced



### More Lessons Learned: A Case Study of Hurricanes Katrina and Rita

Tom Serio The presentation covers the preparation, recovery and lessons learned from Hurricanes Katrina and Rita during the 2005 hurricane season. Hurricane Katrina's magnitude, level of impact, and catastrophic results had everyone recovering "out of the box". At Office Depot, new and creative ways to support associates were implemented across the board. Many steps were taken to minimize the impact from these storms and to expedite the recovery. Many lessons were learned from the events, and will be shared with the attendees. Focus will also be on employee issues and include steps on disaster awareness.

As director of global business continuity for Office Depot, Inc., Tom Serio is responsible for domestic and international BCP development and heads the company's crisis management team.

Sessions are rated according to the level of experience for which they are appropriate. Novice for those in the industry less than two years; intermediate for those in the industry for two to five years; and advanced for those in the industry for more than five years. Choose one session to attend; mark your selection on page 17.

### Workshop Session 1

Novice/Intermediate/Advanced



#### Resiliency – A Yardstick and a Roadmap

Charles Wallen

FSTC

The term “resiliency” has increasingly become part of the business continuity dialogue as organizations have endeavored to strengthen their ability to effectively respond to business disruptions. This session will review a project being coordinated by the FSTC Business Continuity Standing Committee to develop a Resiliency Maturity Model (RMM). The vision of the RMM is to provide organizations with a tool to measure the maturity of an organization’s BCP program against a common benchmark targeted on resiliency. The initiative focuses on defining the key processes and capabilities generally considered crucial to resiliency in areas such as technology, work-space, people, security and crisis management. The RMM tool will provide a clear roadmap for any organization interested in measuring and enhancing the resiliency of their business continuity program.

Charles Wallen is the managing executive of the Financial Services Technology Consortium’s Business Continuity Standing Committee, which is actively working to address shared business continuity and technology recovery opportunities.

### Workshop Session 2

Novice/Intermediate/Advanced



#### BIA Workshop: Business Impact Analysis Beginning to End

Barney Pelant, MBCP

Barney F. Pelant & Assc.

The Business Impact Analysis (BIA) project is the logical first step in the development of a business continuity program.

The project provides the business rationale for disaster recovery and business continuity planning.

A BIA can help an organization to learn their current capability to recover from a disastrous event. Also, the BIA can help validate that the plan in place is really meeting the organization’s business needs.

During this workshop we will examine the successful methods for achieving timely

desired results.

We will cover asking the right questions to learn: What is most important? Why?

This workshop will be interactive, so bring your questions and come share your experiences!

Barney Pelant, MBCP, is owner and managing director of Barney F. Pelant & Associates, a consulting practice dedicated to business continuity planning since 1991. He holds the certification of Master Business Continuity Professional from DRI International. Pelant’s technical experience ranges from the design and development of domestic and international business centers, to the development of contingency plans to ensure their ongoing viability. In 1991, he launched his own practice dedicated to business continuity planning and development.

### Workshop Session 3

Novice/Intermediate/Advanced



#### Emergency Management: The Basics!

Regina Phelps

EMS Solutions

Often a company’s reaction to a disaster or major event is plagued by fragmentation due to numerous “silos” or departments who have a “piece” of the event management process. All of these different silos may not be aware of each other’s activities or responsibilities. There may not be a centralized process for coordinating the efforts. This can lead to a disjointed response, hampered communication, ineffective delivery and a slow recovery. The effective management of an event requires a well-thought out coordinated and integrated response. This workshop focuses on the necessary planning that must be done for a smooth transition from preparedness to response and finally recovery.

- Hazard analysis – match the planning to the risk
- Bringing together the silos – Emergency Response, Business Continuity, Disaster Response, Crisis Communications and Event Management
- Training and Exercises

Regina Phelps, CEM, RN, BSN, MPA is an internationally recognized expert in the field of emergency management and contingency planning.

With more than 24 years of experience, she has provided consultation and speaking services to clients in four continents. She is founder of Emergency Management & Safety Solutions a consulting and training firm. Phelps’ niche includes crisis management team development, emergency operations center design and the development of emergency exercises for large global companies.

### Workshop Session 4

Novice/Intermediate/Advanced



#### Program Governance: Do You Have a Game Plan?

Robert Vogt  
MBCP

KPMG  
LLP

A Program Governance Office (PGO) establishes management’s commitment to implement a strategic framework protecting the integrity of your organization. Whether you are looking to improve your existing PGO or need to establish a new PGO, this workshop will provide you with insights regarding such essential elements as:

- Key Players
- Roles and Responsibilities
- Support and Funding
- Strategic direction
- Establishing Policies
- Standardization
- Integration within the organization
- Compliance
- Reviews / Approvals
- Communications to employees, stakeholders, and business partners
- Removing obstacles
- Maintenance / Training

This is an excellent opportunity to network and learn of some leading practices shared throughout the industry.

Robert Vogt, MBCP, CPP, is a Manager with KPMG LLP and is a Council Member for the American Management Association (Department of Homeland Security). He has more than 20 plus years of experience in leading successful cross-functional teams in a wide variety of disciplines including business continuity management, crisis management, corporate security management, as well as public / private sector cooperative initiatives.

## Workshop Session 5

Novice/Intermediate/Advanced



### Ready, Set, Exercise! How to Develop and Conduct a Successful Crisis Plan Exercise

Steve Goldman

Goldman Mgmt. Consultants

Successful crisis management and disaster recovery takes more than a plan: it requires realistic testing and validation. How do you do that properly? Are your exercises smoke and mirrors or do they provide as-close-to-real situations as possible?

How does your program compare? How can you improve? During this hands-on workshop, you will learn how to set up and conduct a successful crisis plan exercise. Students will master the aspects of effective exercise preparation and execution, including:

- The scenario team
- Scope and Objectives
- Extent of play
- Scheduling and coordination
- Resources and props
- Scenario ideas
- Critiques
- Imagination, creativity, and leadership
- Goldman's acclaimed Exercise Planning Checklist

You will learn how to avoid common pitfalls during the development process and how to anticipate and resolve potential problems that could occur. Exercise evaluation and critiquing methods will also be discussed. With his lively style and real-life examples, Goldman will lead the class through interactive discussions of successful exercise development techniques.

Steve Goldman is a leading crisis management, business continuity, and crisis communications consultant. He has more than 25 years experience in all aspects of crisis management, including BCP program management, plan development, crisis communications, training, exercises, and audits.

## Workshop Session 6

Advanced



### Advanced Networking Workshop

Session limited to 150 participants.

Designed for planners with 7+ years of experience.

This interactive session will focus on issues relevant to continuity professionals with seven or more years of experience. Issues that affect experienced planners will be discussed.

Topics to be covered will include - but are not limited to:

- Pandemics
- Terrorism
- Program Management
- Crisis Management
- Program Governance and Regulatory Compliance
- BC/DR/CRM Plan Integration
- High Availability / Advanced Technology Solutions
- Global Recovery Techniques
- Event Management
- Enterprise Risk Management
- Call Centers
- Off Shore Risks

Join this lively interactive session. Be prepared for an in-depth study of the critical topics affecting advanced BC professionals today. Don't miss your opportunity to network with your peers.

Members of DRJ's Editorial Advisory Board will facilitate this session.

***"This conference has provided lots of useful information as well as renewed my enthusiasm for enhancing our business continuity program!"***

***Diane Bland  
NIBCO Inc.***

# Tuesday Workshops

**3:00 p.m.**

**These workshops continue until 5:30, providing plenty of time for hands-on study.**