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# Spring World 2007

The World's Largest Conference  
Dedicated to Business Continuity

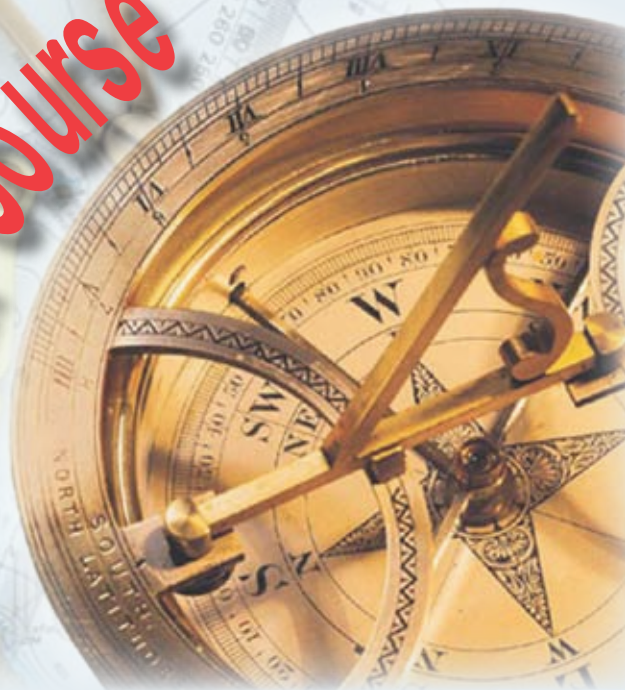


DRJ Presents Its  
36th Conference



Navigate Your  
Way To The  
Industry's  
Most Valued  
Continuity  
Conference!

Set Your Course



March 25 - 28, 2007

Disney's Coronado Springs Resort  
Orlando, Florida

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# Spring World 2007

March 25 - 28, 2007

Disney's Coronado Springs  
Resort • Orlando, Florida

**Welcome to the 36th conference offered by Disaster Recovery Journal!** I am proud of our history and am thrilled to be marking **DRJ's 20th anniversary** at Spring World 2007.

From humble beginnings, our annual shows have grown into the world's largest gatherings of contingency planners. It is inspiring and amazing to look out over our general sessions and see thousands of planners gathered in one room – for one purpose – to further our industry.



Richard Arnold,  
CBCP

DRJ President

Join us this Spring as we kick off another great conference in Orlando. We have an exciting lineup for you. Plus, we're making it even more fun by **giving away fantastic Anniversary prizes!** See page three for information.

We're bringing back some old favorites to celebrate the past - and some fresh new faces to help guide us into the future. Lou Heckler will kick off the conference. He was our first motivational speaker many years ago and has always done a great job of inspiring our audiences. We are also featuring many more experts in our general session lineup!

Don't miss out on this great conference. Register now to reserve your place at the industry's most experienced and most affordable conference. See page 17 for details!

## Spring World 2007 offers the ultimate seminar experience.

Enjoy all we offer for a low registration fee. We know budgets are tight, so we keep our fees low. But we never cut quality. In fact, we are continually improving our offerings! Attendees receive conference materials,

networking breakfasts, lunches and admission to hospitalities, receptions and the exhibition hall. Make plans to attend and see why DRJ's conferences are consistently ranked #1 in our industry!

Navigate Your  
Way to the  
Industry's Most  
Valued Continuity  
Conference



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It is often a case of "sink or swim" for business continuity planners who are battling unknown risks, tight budgets and limited time. Disaster Recovery Journal is throwing you a lifeline! Grab hold and **Set Your Course** for Spring World 2007. You will find top-notch information, education and entertainment to help you navigate your way out of the deep end.

Attendees can steer their way around obstacles and land on a path to success!

It's easy to **Set Your Course** at Spring World 2007. You choose the sessions, the workshops and courses that best match your interests. Whether you are an advanced planner or a beginner in the industry, you will find information to meet your needs.

# Set Your Course



for the World's  
Largest Conference  
Dedicated to  
Business Continuity

## Monday Evening Hospitality

You won't want to miss this popular event. Hosted by **Sungard Recovery Services**, the Monday Evening Hospitality allows plenty of networking opportunities in a relaxing atmosphere.

## Mock Disaster Exercise

The Mock Disaster Exercise is a hands-on learning opportunity held on Sunday. Participants work together to solve some of today's toughest challenges. It's limited to 200 attendees and fills up fast. Sponsors are **MHA Consulting** and **Pinnacle Training Solutions**.

## Cyber City

Attendees can surf the Internet and check email at the Cyber City. Brought to you by **Rentsys**, this Internet-access spot is convenient and helpful for attendees.

## Exhibition Hall

The exhibit hall provides attendees many chances to network and view products and services. This three-day event is open during many of the show hours!

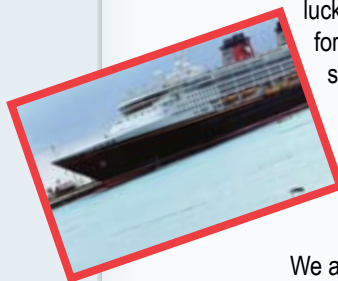
## Welcome Reception

Join attendees, exhibitors and speakers in this fun-filled kick-off reception! The perfect way to start the conference.

We are making  
a splash with our  
20th anniversary  
celebration! Dive into

the festivities. All attendees\* will have chances to win fabulous daily prizes, including a **three-day Caribbean cruise!** One

lucky participant will win a cruise for two on a Royal Caribbean ship! Additional spending money is included! You can't miss your chance to **Set Your Course** for fun – at the conference and afterward!



We are planning other fantastic

daily prize packages too! Don't miss your chance to win. Join us as we celebrate 20 years in the industry!

Register now to participate in the world's largest conference dedicated to business continuity - and dedicated to you!



\* Fully paid conference attendees are entered into the drawings. Prize does not include government fees, taxes and airfare. Contact our office for additional rules and regulations.



## Gold Sponsor



SunGard Availability Services offers a complete portfolio of solutions to help keep people and information connected - no matter what. By designing customized, enterprise-wide solutions that support people, processes and infrastructure, SunGard helps ensure that more than 10,000 customers achieve Information Availability uninterrupted access to mission-critical data and systems. [www.availability.sungard.com](http://www.availability.sungard.com)

## Silver Sponsors



Citrix Systems, Inc. is the global leader and most trusted name in on-demand access. More than 180,000 organizations around the world rely on Citrix to provide the best possible access experience to any application for any users, even when those employees are disbursed due to uncontrollable circumstances. [www.citrix.com](http://www.citrix.com)



Since 1971, Forsythe has served as a national provider of technology infrastructure solutions to organizations nationwide, including many Fortune 1000 companies. A trusted, independent advisor, Forsythe brings cross-platform expertise to its technology consulting, technology leasing, and value added reseller services. [www.forsythe.com](http://www.forsythe.com)



Hewlett-Packard Company provides leading-edge technology to support your BC and disaster tolerant needs. Through our three-pillar approach of people, process, and technology, a solution can be designed to meet your availability and continuity needs. Our experienced Solution Architects can work with you to design an infrastructure to support your needs. [www.hp.com](http://www.hp.com)



IBM Business Resilience and Continuity Services can cost effectively help you rapidly adapt and respond to internal or external dynamic changes - opportunities, demands, disruptions or threats - and continue operations with limited impact to the business. [www.ibm.com](http://www.ibm.com)

## Bronze Sponsors



eBRP Solutions Inc. provides web-based tools and utilities, as well as consulting services for business continuity management. ESN develops tools and utilities focused on core requirements: flexibility, scalability, objectivity and ease of use. ESN's core product is eBRP Toolkit. [www.eBRP.net](http://www.eBRP.net)



Emergency Services integrators (ESI) is a full service provider to both emergency management and public safety. Our emergency management product suite includes the design of EOCs, integration of emergency information management, and display systems. [www.esi911.com](http://www.esi911.com)



MessageOne helps enterprises prepare for and respond to disruptions in their normal business operations with the best and most cost-efficient solutions in the industry. The company's flagship product is EMS (Emergency Messaging System). [www.messageone.com](http://www.messageone.com)

## Non-Profit Sponsors



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. [www.drii.org](http://www.drii.org)



Private and Public Businesses, Inc. is committed to providing the industry with training and BC solutions in partnership with both private and public agencies that contribute to the effective collaboration required for regional disasters. [www.ppbi.org](http://www.ppbi.org)

## Co-Sponsors



Notify thousands in minutes with Amtelco's Red Alert Emergency and Event Notification system! In disaster and emergency situations, you need to quickly contact the necessary personnel. Find out how to save time, reduce errors, and speed your response time with Red Alert! [www.redalertsystem.com](http://www.redalertsystem.com)



Avalution Consulting specializes in business continuity strategy design, development, implementation and long-term solution maintenance. We excel at rapidly designing BC strategies and enabling in-house personnel to execute and maintain continuity plans. [www.avalutionconsulting.com](http://www.avalutionconsulting.com)



Canvas Systems is the leader in the used and refurbished IT industry. Our new state-of-the-art facility, coupled with our technical expertise and dedication to customer satisfaction, makes Canvas Systems the top choice for companies worldwide. With our inventory of over 85,000 square feet of used IT equipment, we offer the widest selection. [www.canvassystems.com](http://www.canvassystems.com)



myCOOP is COOP System's breakthrough continuity planning software. Recently selected by a number of substantial private and public sector institutions, the patented design was built from the ground up by world-class eCommerce developers. Visit our website to learn more about myCOOP, the future of continuity planning. [www.coop-systems.com](http://www.coop-systems.com)



Whether you're in the midst of a disaster or running test shipments, count on FedEx Custom Critical for all of your critical-shipment needs. We're North America's largest time-specific, critical-shipment carrier - providing 24/7 pickup and delivery throughout the U.S. and Canada. [www.fedexcustomcritical.com](http://www.fedexcustomcritical.com)



Fusion Risk Management provides IT risk management advisory and solution integration services. The organization represents a unique partnership of industry-leading professionals, including David Nolan and John Jackson. Fusion was founded with the vision that IT risk management solutions should be more effective, efficient, and economical. [www.FusionRiskMgmt.com](http://www.FusionRiskMgmt.com)

## Mock Disaster Sponsors



MHA Consulting, Inc. understands how critical continuous business operations are to your financial viability and success. There is no substitute for proven expertise, insight, and methodology when it comes to protecting your business. MHA is a recognized leader in business continuity planning consulting with successful engagements across many private and public sector industries. [www.mha-it.com](http://www.mha-it.com)



Pinnacle Training Solutions is recognized as an employee development leader across Australia, Europe, and North and South America. We offer: DR and BCP consulting & training; best practices of the BIA; manage projects in the BCP environment; risk assessment: assess, mitigate protect; keynote speeches; assessment instruments, PinnTelSeminars [www.pruspeak.com](http://www.pruspeak.com)

## Cyber City Sponsor



Rentsys Recovery Services is the premier, nationwide continuity provider of recovery and contingency solutions. Our services focus on the recovery of clients' critical business processes through our alternate workspaces, replacement hardware, and restored communications. [www.rentsys.com/recovery](http://www.rentsys.com/recovery)

# Conference At A Glance

## Sunday

### Onsite Registration

11:00 am - 8:00 pm

### Cyber City

12:00 pm - 8:00 pm

### Workshops

1:30 pm - 4:30 pm

### DRII Meeting and Reception

4:30 pm - 5:30 pm

### Welcome Reception

5:30 pm - 8:00 pm

### Product Demos

5:30 pm - 8:00 pm

## Monday

### Cyber City

6:30 am - 6:30 pm

### Networking Breakfast

6:45 am - 8:00 am

### Onsite Registration

7:00 am - 5:00 pm

### General Session 1

8:15 am - 9:15 am

### General Session 2\*

9:30 am - 10:30 am

### General Session 3

10:45 am - 11:45 am

### Exhibit Hall Opens

11:00 am

### Lunch/Exhibits/ Product Demos

11:45 am - 1:30 pm

### Breakout Session 1

1:30 pm - 2:30 pm

### Break

2:30 pm - 2:45 pm

### Breakout Session 2

2:45 pm - 3:45 pm

### Refreshment Break in Exhibit Hall

3:45 pm - 4:15 pm

### Breakout Session 3

4:15 pm - 5:15 pm

### Exhibit Hall Closes

5:00 pm

### Product Demos

5:30 pm - 6:30 pm

### Hospitality

6:30 pm - 8:30 pm

sponsored by

**SUNGARD** Keeping People  
Availability Services and Information  
Connected.

## Tuesday

### Cyber City

6:30 am - 6:00 pm

### Networking Breakfast

6:45 am - 8:00 am

### Registration/ Info Desk Open

7:00 am - 5:30 pm

### General Session 4

8:15 am - 9:15 am

### General Session 5\*

9:30 am - 10:30 am

### General Session 6

10:45 am - 11:45 am

### Exhibit Hall Opens

11:00 am

### Lunch/Exhibits/ Product Demos

11:45 am - 1:30 pm

### Breakout Session 4

1:30 pm - 2:30 pm

### Refreshment Break in Exhibit Hall

2:30 pm - 3:00 pm

### Workshop Sessions

3:00 pm - 5:30 pm

### Exhibit Hall Closes

3:00 pm

## Wednesday

### Networking Breakfast

6:45 am - 8:00 am

### Information Desk Open

7:00 am - 12:00 pm

### General Session 7

8:15 am - 9:15 am

### General Session 8\*

9:30 am - 10:30 am

### General Session 9

10:45 am - 11:45 am

### Lunch

11:45 am - 1:00 pm

## Pre- And Post-Conference Events

### Saturday and Sunday

PRC-1: Ready, Set, Exercise

PRC-2: EOC: The Critical Tool

PRC-3: Outrageously Easy Rec. Planning

PRC-4: Customize/Improve BC Program

PRC-5: Fast Practice to Build Your BCP

PRC-6: NIMS ICS for Business/Industry

PRC-7: The Command Center

### Wednesday and Thursday

POC-1: Everything You Need to Know

POC-3: Total Integrated Mgmt.

POC-4: Implementing a BC Program

POC-5: Train the Trainer

POC-6: BC Planning for Avian Flu

POC-7: BC Planning Made Simple

### Wednesday, Thursday and Friday

POC-2: Best Practices & BIA

DRII Certification Courses

For complete details, including specific times, course descriptions and registration information, see pages 18 -19 for pre-courses; 20-21 for post-courses; and 22-23 for DRII information.

\* Daily prize drawings are held after the second General Session each day.

# Sunday Workshops

1:30 p.m. - 4:30 p.m.

## Sunday Workshop Session 1

Novice/Intermediate/Advanced



Tim  
Bonno,  
CBCP



Ron  
Megert

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

Back by popular demand, 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. 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.

Tim Bonno, is employed by AT&T as a technical director-IT service continuity, and manages a team responsible for all service (business) continuity activities within the companies Information Technologies organization.

Ron Megert is employed by AT&T and leads emergency preparedness initiatives within the company's Information Technologies organization.

## Sunday Workshop Session 2

Novice/Intermediate



Ed  
Devlin,  
CBCP



Norm  
Harris,  
CBCP

### BCP-101

Session limited to 100 participants

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 paced, 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, CBCP, is a consultant, author, instructor and speaker in the field of business continuity. Devlin is 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.

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.

## Sunday Workshop Session 3

Novice/Intermediate



Kathy  
Bork



Joni  
Gates,  
CBCP

### Training Your Command Team or Bust

Preparation in an organization can be key to a successful recovery and BC professionals work hard to achieve that high level of success. The business units are ready. The Command Team is in place. Then suddenly disaster strikes! Do you really know how your Command Team will respond to the onslaught of disaster? Does your Command Team have a knowledgeable understanding of the critical functions within the organization?

This workshop is designed to cover the importance of training your Command Team to respond to an emergency quickly and effectively. We will be covering team composition, different types of team leadership, roles and responsibilities, team activation, declaring a disaster and decision making tools, documentation critical to successful teams, business recovery teams verses disaster recovery teams, how to conduct a post mortem, lessons learned and much more.

All of this will be followed by role playing and tabletop scenarios to discover some of the critical keys and pitfalls to a successful Command Team.

Kathy Bork is a senior business continuity specialist for First Data Corporation. She is certified in networking and telecommunications and has spent the past 16 years in data centers and disaster recovery.

Joni Gates, CISSP, CBCP is director of business continuity planning at First Data Corporation. She has 23 years experience in the IT field with 15 years in InfoSec management and 12 years in disaster recovery and business continuity management.

Help us celebrate our  
20th anniversary  
6 in Orlando!



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 4

Intermediate/Advanced



##### Bird Flu: Is Your Business Continuity Plan Immune?

**Michelle Cross** This session covers the effectiveness of a business continuity plan in the face of a pandemic.

**Acordia** Participants will receive background information on pandemics, what makes them unique and dangerous; and factors that all plans must address to be effective.

**Charles Yorio** Participants will participate in a group activity - exercise - to reinforce these criteria and assist with evaluating the effectiveness of their plans.

*Michelle Cross is a senior vice president and senior risk consultant with Acordia, providing consulting services for both employee and asset-based protection. Cross has extensive experience working with higher education, K-12, real estate, chemical operations, healthcare, as well as financial and service entities. Her business continuity expertise includes developing, writing and testing crisis communications and crisis management plans, emergency preparedness procedures and functional/business recovery action plans.*

*Charles Yorio, CSP, ARM, is vice president, risk control for Acordia. He has more than 22 years experience in all facets of risk control. He brings experience from the retail, construction and health care industry along with seven years as an insurance company representative to his more than 13 years as an insurance broker risk control consultant. Yorio has worked with all management levels including, Fortune 500 companies on both human element property conservation and business continuity.*

#### Sunday Workshop Session 5

Novice/Intermediate



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

**Barney Pelant, MBCP**

**Barney F. Pelant & Assoc.** 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! This speaker will also present a detailed workshop on Tuesday.

*Barney Pelant is owner and director of Barney F. Pelant & Associates. His professional background includes more than 30 years focusing on business continuity planning, disaster prevention and recovery. He has held the certification of Master Business Continuity Professional (MBCP) from DRI International since 1997. 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.*

#### Sunday Workshop Session 6

Novice/Intermediate/Advanced

##### Mock Disaster Exercise

Sponsored by



Session limited to 200 participants.

Recent high profile disruptions have highlighted the need to improve corporate response at all levels of an organization. During this session, each attendee is an employee of a fictitious Fortune 100 company and a member of its crisis management team as the company responds to -- and attempts to recover from -- a major disruption. Attendees will be assigned to a response or recovery team responsible for executing critical tasks from the corporate crisis management plan including communication with other recovery teams, the media and emergency services, as well as making critical decisions to restore business operations and protect the safety of employees.

This exercise will challenge your thinking (regardless of your experience level), and the critique that follows will help you document ideas to apply to your business continuity planning program at home. This exercise is based on best practices for disaster simulation in use by some of the most mature BCP programs in the US.

*MHA Consulting, Inc. understands how critical continuous business operations are to your financial viability and success. MHA is a recognized leader in business continuity planning consulting with successful engagements across many private and public sector industries.*

*Pinnacle Training Solutions is recognized as an employee development leader across Australia, Europe, and North and South America. We offer: DR and BCP consulting & training; best practices of the BIA; manage projects in the BCP environment; risk assessment: assess, mitigate protect; keynote speeches; assessment instruments, PinnTelSeminars.*

# General Sessions

**Set Your Course  
for the General  
Sessions, held  
each morning for all  
attendees.**

**Whether you are an  
experienced planner  
or new to the  
industry, you will  
find tips and tools  
to help you navigate  
the obstacles in  
your path.**

**Our impressive  
array of speakers  
will throw you a  
lifeline and help  
steer you out of  
troubled waters!**

**Climb on board for  
fun, informative  
sessions each  
morning!**

## Monday

### General Session 1 8:15 a.m. - 9:15 a.m.



#### Get Ready! Get Set! Get Engaged!

*Lou Heckler*

In this session, Lou Heckler returns to our conference with a fresh look at ways top organizations and top people continue to produce at high levels. He will look at three key issues that will ensure that your people are performing like leaders and that your customers are delighted. His three areas are: Engage with Purpose...Engage with Performance...and Engage with People. Heckler will offer up-to-the-minute ideas, along with his whimsical sense of humor to bring you a message that will stay with you long after the conference ends.

*Lou Heckler is a peak performance specialist who has studied high achievers for more than 30 years. He is an Army veteran, a former corporate management training director, a television personality for 14 years, and a former adjunct faculty member at the University of Michigan's Executive Education Center for 19 years.*

### General Session 2 9:30 a.m. - 10:30 a.m.



#### Can It Be So?

*Ann Pickren, SunGard*

Today there are more products, solutions and resources than ever to help you achieve availability in your organization. And new advancements in the industry will continue to add to this broad array of options. Yet, in determining the right solutions, we should not forget the strength of our past experience and how to leverage that into the most cost effective solution in setting your course. But the question becomes: "Can it really be so?" Should we adopt this new technology, or does the right course involve a balance in traditional and emerging solutions? Follow the presenter as she takes a journey through her 15 years of experience with SAS and addresses some of the realities that remain constant in this changing world of availability.

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

### General Session 3 10:45 a.m. - 11:45 a.m.



#### The Eye of the Storms – Crisis Management

*Lance J. Ewing, Harrah's Entertainment, Inc.*

Rita, Katrina, Wilma, and other storm-related disasters create crisis for most businesses and corporations. This session will focus on a Fortune 500 company that was struck by Katrina and Rita. Learn how the company handled claims totaling over \$1 billion and hear about the process prior to, during and after the hurricanes.

*Lance J. Ewing has extensive executive experience in the field of risk management and insurance including his current position as vice president, risk management for Harrah's Entertainment, Inc., which recently merged with Caesars Entertainment, Inc. Prior to this position, he served in senior risk management capacities for GES Exposition Services and for the City of Philadelphia School District.*



**The Tool for Global Recovery:  
The Incident Command System**

*Regina Phelps, EMS Solutions  
John Fowler, The Northern Trust*



Global companies are now embracing the system that has helped to transform the public sector – the Incident Command System. With the implementation of Homeland Security Presidential Directive #5 and the National Response Plan requiring ICS in all federal departments, many professionals see it only as a matter of time before ICS becomes a requirement in other arenas. Why use it? Simply put, it works! This general session will give an overview of ICS, show practical applications and detail how companies have effectively implemented it throughout their organization.

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

*John Fowler is the director of global business continuity and recovery services at Northern Trust Company.*

**General Session 5**  
9:30 a.m. - 10:30 a.m.



**Critical Aspects of Communication  
During Crises and Disasters**

*Dr. Robert Chandler, Pepperdine University*

All too often crises and disasters are not managed effectively despite having a well developed plan. Effective crisis communication is essential to successful management of crises, disasters, and emergencies. The conclusions of an extensive research study will be presented in this session. Hear major aspects important to sustaining effective communication during crises. You will also learn of the impact of emerging communication technologies on disaster and crisis management and an overview of some common and typical categories of communication breakdowns, failures, and misunderstandings.

*Robert C. Chandler, Ph.D. is professor and chair of the Communication Division in the Center for Communication and Business at Pepperdine University specializing in crisis communication.*

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



**Developing a Successful  
Business Continuity Program**

*Michael Emerson, Citrix Systems, Inc.*

Whether you are a large corporation or an SME (small to medium sized enterprise) the ability to effectively respond to a major incident continues to be on the forefront of executives and business owners minds. Today's demand for continuous customer service and the ever expanding global presence of companies, require businesses of today to have in place an effective and resilient business continuity plan. This session will focus on the following key areas of building a successful business continuity program (project initiation, risk assessment - BIA, building your recovery strategies, team structure, developing business/IT and facility recovery plans, testing/maintenance).

*Michael Emerson is the senior manager of security and business continuity services for Citrix Systems, Inc. He is responsible for all aspects of the Citrix Corporate Business Continuity and Disaster Recovery program.*



**NCS Priority Communications**

*John Graves, National Communications System*

The National Communications System (NCS), part of the Department of Homeland Security, is responsible for assuring the availability of National Security and Emergency Preparedness (NS/EP) telecommunications under all circumstances, including crisis or emergency, attack, recovery, and reconstitution. It provides priority telecommunications services, coordination, and information sharing operations, and other related programs support to NS/EP efforts across Federal, state, local and tribal government, critical infrastructure industry, and other authorized NS/EP organizations; these include the Government Emergency Telecommunications Service (GETS), Wireless Priority Service (WPS), and Telecommunications Service Priority (TSP) programs. This presentation provides an overview of the NCS and these three programs, and how they may apply to your organization.

*John Graves is the director of the Government Emergency Telecommunications Service and the Wireless Priority Service. He has served in this position since assignment to the NCS in April 1996.*

**General Session 8**  
9:30 a.m. - 10:30 a.m.



**It's a Risky Business:  
Satisfying Your Risk Appetite**

*Belinda Wilson, CBCP, Hewlett-Packard*

Assessing, mitigating and managing risk has become very complex. This presentation will discuss trends and drivers that can enable organizations to mitigate risks and produce an efficient business continuity program. New and unprecedented threats occur on a frequent and global basis, making business process resiliency very challenging. Threats of terrorism, political power and natural disasters including pandemics will significantly impact your organizations if the necessary precautions aren't taken care of. Risks can either be mitigated, managed or transferred but they cannot be ignored. This session will share the trends and drivers that these vulnerabilities demand of people and infrastructures; and how to best approach your risk appetite and its relevance to your business continuity program.

*Belinda Wilson, CBCP, is the executive director of business development, strategy and marketing for HP's Business Continuity Services organization.*

**General Session 9**  
10:45 a.m. - 11:45 a.m.



**Get with the Program!  
The S-O-L-I-D Communication Playbook**

*Barry Pruitt, PruSpeak*

Have your efforts been stymied by uncooperative senior management and competing business objectives? Have you ever been misunderstood by senior management? It's hard enough to get the right audience – and when you do, failure to organize communications will sink your efforts. Instead, make a C-H-O-I-C-E. Learn to utilize the essential ingredients for communicating with senior management (and key decision-makers) by knowing how – and when – to expand, illuminate, and illustrate information, reports, and recommendations. Gain proven steps that successful technical professionals employ to build a case, earn trust, and persuade. You can't get rid of internal competition for funding, so why not be a "player" in the game?

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

# Breakout Sessions 1

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

Sessions in each breakout track run concurrently.  
Choose one session from each track.

## Strategic Session 1

Intermediate/Advanced



### BC/DR Planning For the Customer Service Contact Center Environment

John Liuzzi

IRS

This presentation will provide a comprehensive discussion of how to develop an effective business continuity/disaster recovery strategy for the customer service contact center environment. Discussion will include the issues, risks and challenges a contact center operation must consider when building business continuity/disaster recovery plans to ensure continuity of operations as well as protection of vital business assets including technology, process and people.

John Liuzzi is currently director, Computer Security Incident Response Center and IT/DR for the IRS. He is a senior executive with more than 23 years experience in the design, engineering and management of state-of-the-art contact centers.

## Managerial Session 1

Novice/Intermediate/Advanced



### Preparing for Human Continuity Is More Than Just Psychological First Aid

Jeanette Sutton

Nat'l Hazards Ctr.

As preparedness experts for hazards and disasters look back on the 2005 hurricane season and consider the potential implications of a pandemic, we have a greater awareness of the human aspect of business continuity preparedness. Some experts have encouraged a focus on psychological first aid as a way to ensure business and human recovery from traumatic events. In this session, we will examine a series of disaster events, focusing on the social fall out as it affects human continuity in the workplace. We will reflect on the implications for various cultural groups within the global work environment, consider how future disasters may prompt social support activities for vulnerable populations in the workplace, and develop a set of recommendations for best practices.

Dr. Jeanette Sutton is a research associate at the Natural Hazards Center at the University of Colorado at Boulder. Her research focuses on preparedness for and response to disasters within businesses, communities, and households, sociobehavioral aspects of real-time warning systems, risk communication, and social vulnerability.

## Technical Session 1

Novice/Intermediate/Advanced



### Disaster Recovery Mainframe Testing at Aetna: A Case Study

Rick Farrick, CBCP

Aetna Ins. Co.

Learn how an automated simulation process was developed at Aetna to expand D/R mainframe testing to allow more mainframe batch applications to be tested in a DR exercise – without requiring additional staff to support this effort. This presentation takes a look at the process of 'Connecting the Dots', as well as, digging into the details of the how the process was structured. The results of this process can be kept for further analysis down to an individual application level (trending).

Rick Farrick is a senior disaster recovery coordinator with the Aetna Insurance Company in Hartford, Connecticut. Farrick has more than 25 years of experience in the data processing industry.

## Emergency Response Session 1

Novice/Intermediate/Advanced



### Insurance Aspects of Business Continuity Planning

James Olsen

Georgia State Univ.

Many people are acquainted with the basics of business continuity planning, but few have a good understanding of the insurance coverage that needs to be in place if a disaster should strike. For a lot of business owners, the very survival of the entity will depend on whether or not they were insured adequately. Join us for a briefing on the insurance requirements for an effective disaster recovery program. Learn about time element coverage's such as business income and interruption insurance; use and occupancy; extra expense coverage; calculating maximum loss scenarios; loss notification issues; duties of policy holders; valuable papers and records issues and a host of other insurance concepts that affect the claim recovery process. The session concludes with an executive summary of the Terrorism Risk Insurance Act (TRIA).

Jim Olsen has worked in the fields of safety, risk management and environmental affairs for more than 25 years. He is a Registered Environmental Manager (REM), holds several FEMA trainer certifications and recently completed the Department of Homeland Security's Master Exercise Practitioner Program (MEP).

## Advanced Session 1

Advanced



### The TCO of Business Resiliency: A Framework and Methodology

Zachary Jasnoff

PRICE Systems



David Cass

JP

Morgan Chase & Co.

Presently there is no uniform way of calculating TCO for business resiliency. This presentation proposes and demonstrates a TCO optimization model and methodology consistent with best practices put forward in COBIT, Basel II and most recently the VAL-IT framework. Models are needed that can rapidly generate optimal solutions based on defined performance parameters. Explore the frameworks of COBIT, Basel II and VAL-IT in relation to optimizing TCO. There will be a demonstration of modeling techniques via a case study.

Zachary Jasnoff is director of development projects, PRICE Systems, LLC., headquartered in Mt. Laurel, New Jersey.

David Cass is vice president, GTI Risk and Resiliency for JP Morgan Chase & Co.

## Information Session 1

Novice/Intermediate/Advanced



Kevin Haslag

FBI



Dan Hill

SRA Int'l. Inc.

### IT Continuity Of Operations: What Is It, What Does It Do, And How Does It Add Value To The Enterprise?

What are your recovery capabilities in relation to the functional requirements of the enterprise? What are the gaps between recovery capabilities and requirements? How do you sort out options, and develop a "go forward" recovery strategy? How do you move from an expensive and complex server recovery model, to an enterprise recovery services model? This session will "open the book" on IT COOP – what it is and how it works. It will also provide a roadmap for moving into enterprise recovery services.

Kevin Haslag is the IT COOP program manager in the FBI's Office of the CIO. He has had a long career in the FBI IT organization, and has been leading the IT COOP program since its beginning.

Dan Hill is a principal in SRA International's Information Assurance and Privacy practice. He is a member of the Board of Directors of the National Capital Area Chapter of ISACA.

# Breakout Sessions 2

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

Sessions in each breakout track run concurrently.  
Choose one session from each track.

## Strategic Session 2

Novice/Intermediate/Advanced



Andrew  
Cohen

EMC  
Corp.

### Electronic Discovery Preparedness

Managing electronic information in a compliant manner has become a central concern for many organizations. The new Federal Rules of Civil Procedure take effect December 1, 2006, which means organizations of all sizes and across various industries will be looking to make sure they can appropriately and efficiently produce electronic evidence, such as email or instant messages, in lawsuits. Considering today's regulatory landscape – and the next litigation request – organizations need to bridge the gap between legal and IT to better address the compliance challenge. This will enable companies to implement proactive policies and procedures.

Andrew Cohen is associate general counsel and global solutions practice lead for compliance for EMC Corporation. His responsibilities include managing the Legal Department's Litigation and Employment Group and actively litigating commercial and employment law cases.

## Managerial Session 2

Novice/Intermediate



Brian  
Zawada,  
CBCP

### Successfully Building Business Continuity Awareness

Following the implementation of business continuity plans and strategies, a common challenge noted by most business continuity professionals is creating program awareness throughout the organization. In a recent survey sponsored by KPMG, only 35 percent of respondents indicated their employees get sufficient awareness training. In addition to outlining strategies to optimize awareness program, this presentation will explore trends in business continuity awareness program development and execution, identify optimal timing and methods to present awareness program content, and discuss how leading organizations are making their people aware of business continuity program roles and responsibilities.

Brian Zawada, CBCP, CISA, PMP, CHS-I, is the director of consulting services for Avalution Consulting. He actively managed internal business continuity programs and consulted with his business continuity clients for more than 12 years.

## Technical Session 2

Novice/Intermediate/Advanced



John  
Rabin

DHS

### Lessons Learned Information Sharing (LLIS.gov)

This session will provide an overview of Lessons Learned Information Sharing (LLIS.gov), the Department of Homeland Security's national online network of lessons learned and best practices for emergency response and homeland security officials. LLIS.gov helps emergency responders and homeland security officials prevent, prepare for, respond to, and recover from acts of terrorism and other disasters. The presentation will also discuss unique features of the system, including information sharing and collaboration tools, such as secure e-mail, message boards, feedback tools, the member directory, and LLIS.gov Channels.

John Rabin is the program director of Lessons Learned Information Sharing (LLIS.gov). Rabin served nine years as a naval officer.

## Emergency Response Session 2

Novice/Intermediate



Cliff  
Thomas,  
CBCP

Mercury  
Risk Svcs.

### Enterprise Disaster Preparedness: The Deadly Sins

As much as effective disaster preparedness is about "doing the right things", it is as much about "avoiding the wrong things". This session will identify and explore commonly employed approaches that will not only cripple your BC program—they may kill it. These lessons are designed to help participants avoid pitfalls that are all too often accepted as conventional wisdom. The session will include technology, leadership, business trends, information management, planning, and communications. Business continuity leaders and practitioners in any stage of program maturity will benefit.



Stephen  
Sadler

Univ.  
Corp. for  
Atmo-  
spheric  
Research

Cliff Thomas, CBCP, is the president of Mercury Risk Services in Fort Collins, Colorado. He has more than 21 years experience leading organizational preparedness.

Steve Sadler has served as health, environment and safety director for the University Corporation for Atmospheric Research and the National Center for Atmospheric Research for the past 18 years.

## Advanced Session 2

Advanced



Randall  
Till,  
CBCP

Master-  
Card

### Challenges Facing Business Continuity in Today's Ever-Changing Business Climate

This session examines current trends facing organizations today. What is the future of business continuity? How are changing threats and risks impacting our roles as business continuity planners? What steps do we need to take to stay ahead of these new challenges? This session looks at all of these questions and helps determine how these challenges are shaping the future of our business continuity industry. We will discuss the steps required to expand our business continuity program, and look at strong planning practices for all of the key areas within the program.

Randall Till, CBCP has more than 20 years experience in the field of business continuity management. He serves as a senior business leader and is responsible for developing and implementing business continuity plans on a global basis for MasterCard International.

## Information Session 2

Novice/Intermediate/Advanced



Steven  
Goldman

Goldman  
Mgmt.  
Cons.

### Working Successfully with BCP Consultants to Achieve Nirvana

The time may come (or has already arrived) when you need outside expertise for your BCP program. Although BCP consultants come in all sizes, shapes, and areas of expertise, there are some guiding principles you should know when choosing and working with them. In this valuable and informative session, you will learn how to find BCP/DRP consultants, define the scope, types of contracts, negotiations, and selecting the right one. Then you will find out how to best work with and manage your consultants, get the results you want, avoid mistakes, and deal with problems. Included are "Steve's Top Ten Questions to Ask before Hiring a Consultant" and "Practical Guidelines to Get the Most from your Consultant with Happiness for All."

Steve Goldman, Goldman Management Consultants, is a leading crisis management, business continuity, and crisis communications consultant. He was once the Global BCP manager for a Fortune 500 company and, prior to that, a business owner.

# Breakout Sessions 3

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

Sessions in each breakout track run concurrently.  
Choose one session from each track.

## Strategic Session 3

Novice/Intermediate/Advanced



### IT in a Business Context. Continuity in a Universal Language

Shiraz  
Alikhan

Forsythe  
Solutions  
Group

Increasing regulatory requirements, customer demands, competition and globalization intensify demands for business function availability, in turn increasing expectations for IT to maintain availability. Many times a disconnect exists between IT's actual continuity capabilities and business unit expectations of these capabilities, also known as the "Business Continuity Gap." This interactive session will utilize real-life lessons to outline six key steps for building a solid communications foundation, including establishing business units as customers, addressing technology issues in business function terminology and involving business units in critical-application decision making.

As principal consultant of business continuity and disaster recovery solutions for Forsythe Solutions Group, Shiraz Alikhan helps customers plan and implement initiatives for continuity of IT.

## Managerial Session 3

Intermediate/Advanced



### Anatomy of Successful Incident Management

Jim  
Mitchell

eBRP  
Solutions

The time, effort and expense to create, test and maintain business continuity or disaster recovery plans is ultimately spent to prepare for a real life disruptive incident. When the adrenaline is flowing, and everyone's out in the rain-soaked parking lot, will your plan be enough to manage the incident? Traditional Incident Management concepts have focused on just two processes – escalation and event logging. Those are holdovers from mainframe recovery days. Escalation and logging are insufficient for today's global, communication-saturated world. What should an Incident Management process include to be successful – and how can Incident Management requirements be interwoven into BCP and DR Plans?

A founding partner of eBRP Solutions, Jim Mitchell has been active in the business continuity field for 15 years, as both a corporate planner and as a consultant.

## Technical Session 3

Novice/Intermediate/Advanced



### In-Source, Out-Tasked or Hybrid Model: Understanding your Operational Recovery Options

Joe  
Starzyk

IBM BRS

Arguably, the most significant trend in the IT disaster recovery industry is the "in-sourcing" of a company's IT recovery strategy. Some industry analysts have stated that this approach is cost prohibitive. This session describes three approaches – in-source, out-tasked and hybrid models. This session will describe specific solutions, key technologies, and critical processes required for success regardless of the option chosen. Lastly, it will describe the advantages and disadvantages of each option.

Joseph Starzyk has provided consulting leadership for the design and implementation of overall business continuity and disaster recovery strategies for numerous clients across multiple industries, with a primary focus in the financial services sector. As a business development executive, Starzyk is accountable for establishing innovative strategies for IBM's Business Continuity and Recovery Services (BCRS).

## Emergency Response Session 3

Novice/Intermediate



### Corporate Command Centers: Policies and Procedures

Jim  
Cook,  
CEM

ESi

Emergency operation centers have long served as communications, command and control centers for first responders, hospitals, municipal, county, state and federal law enforcement and public works agencies to collaborate during incident response and recovery. Today, enterprise sectors with critical operations such as utilities, oil and gas, transportation, telecommunications and others are now embracing EOCs as they strive to ensure business continuity in a natural disaster, industrial accident, act of terrorism or other contingency. This session will focus on how to adopt EOC best practices to the enterprise environment.

Jim Cook is director of services for Emergency Services integrators (ESI), developer of WebEOC, the first and most widely used Web-based emergency management communications system, and former director of the Atlanta-Fulton County Emergency Management Agency.

## Advanced Session 3

Advanced



### Protecting Email: Essential Lessons from the Fortune 500

Paul  
D'Arcy

MessageOne

Email has become the most important business application and the foundation of corporate communication. In a crisis, email is your most important application for communication, collaboration, and management. Unfortunately, email is also your greatest challenge. This session will reveal real world email downtime statistics that illustrate the frequency of outages and the precise causes. It will show the most common vulnerabilities and lay out precise strategies to eliminate the risk of email downtime. You'll see the varied approaches that leading Fortune 500 companies have adopted to ensure that Microsoft Exchange and Lotus Notes remain operable through any crisis or disaster.

Paul D'Arcy is vice president of worldwide marketing for MessageOne and an expert on email and crisis communication infrastructure.

## Information Session 3

Novice/Intermediate



### Pandemic Communication Plan Testing and Validation

Marc  
Ladin

3N

Crisis communication plans often lack one critical element that can ensure your organization's blinding success or utter failure in the face of a disaster: testing and validation. We will explore best practices for making certain that your best-laid communication plans work as anticipated in the critical periods before, during, and following a pandemic flu outbreak. Specifically, we will examine the inner workings of pandemic communication needs. Attendees will learn about the communication-based science of message mapping, how to test message content for comprehension and persuasiveness to take action, and exercises for testing communication delivery in unusual circumstances that strain typical communication infrastructures.

With more than 12 years of software, hardware, and services marketing experience, Marc Ladin, vice president of marketing for 3n (National Notification Network), drives 3n's marketing strategy and serves as a key contributor in 3n's business continuity planning initiatives.

# Breakout Sessions 4

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

Sessions in each breakout track run concurrently.  
Choose one session from each track.

## Strategic Session 4 Intermediate/Advanced



### Keeping Transportation Moving When Disaster Strikes

Richard Levick

Levick Strategic Comm.



Gary Pudles

The AnswerNet Network

Transportation disasters obviously have major impact on industry providers as well as customers. Companies and agencies need to be ready for sudden call volumes and counter crashes, as well as the inevitable media, legal, and political questions and scrutiny. Learn a twofold strategy for the transportation industry. First is emergency planning, focusing on public response and employee training to communicate in real time. Second is a communications plan, implemented simultaneously, in which crisis teams assess the stakes, encourage public confidence, and minimize exposure.

Richard S. Levick, Esq. is the president of Levick Strategic Communications. He was named to the PRNews Hall of Fame for lifetime achievement.

Gary A. Pudles founded The AnswerNet Network in 1998. He won the Ernst and Young Entrepreneur of the Year award.

## Managerial Session 4 Novice/Intermediate/Advanced



### Pandemic Preparedness in your Community: Starting up a Grass Roots Organization

Harlan Dolgin, CBCP

Reuters

Learn how to organize a grass roots movement to educate the community and develop community plans for preparing for a pandemic. Public and private entities are busy making plans, but often they are planning in isolation, without knowing how their neighbor company or municipality is planning. In order to be most effective against a pandemic, it is critical that we share plans between organizations. Learn how a few motivated individuals can organize meetings, obtain speakers, get funding and create sub-committees who can deal effectively with the issues surrounding a pandemic.

Harlan Dolgin is Americas BCP/DR manager for the global operations department at Reuters. He began working in the business continuity field in 1997 at Mercantile Bank.

## Technical Session 4 Novice/Intermediate/Advanced



Heidi Skatrud

Runzheimer Int'l.

### Virtual Office Work as a Business Continuity Strategy

Is your organization ready to sustain its operations in the case of an emergency? Many BC plans fail to prepare for and create a critical mass of employees who are able to remain productive even when faced with a business interruption. Explore how virtual office work or telework can become an integral part of the overall contingency planning. Learn how you can develop, test, and deploy virtual office programs that will help a critical mass of your employees function even if faced with weather events, road closures, highway construction, fires, earthquakes, tornadoes, hurricanes, floods, pandemics or terrorist incidents.

Heidi Skatrud is a vice president at Runzheimer International and has been with Runzheimer for the past 13 years. She has held a diversity of positions.

## Emergency Response Session 4 Novice/Intermediate/Advanced



Regina Phelps

EMS Solutions



Bonnie Ward

Liberty Mutual

### Operation Pink Mist – Conduct a Surprise Exercise in Your Company

Imagine coming to work one day and your company CIO greets you with... "SURPRISE! This is a Emergency Operations Center Exercise." That is exactly what happened last summer at the Portsmouth New Hampshire mission critical data center for Liberty Mutual. Only three people inside the company knew the exact date and time! This session explores exercise design, ways to challenge a well-developed team, the pitfalls to avoid and how to develop a stellar team! Learn exercise design and team development to help you build a great team.

Regina Phelps, CEM, RN, BSN, MPA has more than 25 years of experience. She has provided consultation and speaking services to clients in four continents.

Bonnie Ward has responsibility for Liberty Mutual's voice, data and video networks and equipment and for strategic direction of nationwide voice, data wire line and wireless networks.

## Advanced Session 4 Advanced



### Generally Accepted Practices: Networking Session

Session registration is limited to 200.  
Designed for experienced BC professionals.

Would you like to contribute to the formation 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



### 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.

# Tuesday Workshops

3:00 p.m. - 5:30 p.m.

## Workshop Session 1

Advanced



### Resiliency Workshop

Charles  
Wallen

FSTC

The term “resiliency” is an increasingly common component of BC, DR and risk management jargon. While we have moved to this new more expansive term, the actual practices used remain largely undefined, disjointed and inefficient.

Recognizing the need for better risk management methodologies and a clear specification for resiliency, FSTC has been working with Carnegie Mellon’s Software Engineering Institute to develop a resiliency model (RM).

This workshop will provide an overview of the RM and the emerging management discipline of “resiliency engineering”. The discussion will focus on the use of the model to determine where one’s organization is and where it needs to be in managing operational risk effectively.

There will be a hands-on exercise that will allow participants to not only experience the use of the Resiliency Model, but will provide a simulation of the process used to measure an organization’s resiliency capability. Participants will gain an appreciation of the power of taking a resiliency engineering approach to managing operational risk to drive down cost and consistently improve efficiency.

*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



Barbara  
Citarella

RBC  
Ltd.



Eugene  
Lucchese

NY State  
Dept. of  
Health

### Pandemic Influenza Tabletop Exercise

This workshop will be a pandemic influenza tabletop exercise with the purpose being to stimulate discussion, critical thinking and quick decision-making abilities.

Participants will have the opportunity to use slow paced problem solving methods to identify gaps in training and education.

They will also have the opportunity to increase their awareness concerning the large-scale impact of a pandemic.

Attendees will discuss the requirements for long-term business sustainability. Participants will be broken into work groups and given very specific challenges.

At the end each group will give a brief description of their solutions and decisions.

*Barbara B. Citarella is president of RBC Limited, an award winning healthcare and management consultant organization that specializes in disaster planning. Citarella was the co-chair of the National Association for Home and Hospice Care’s Hurricane Katrina Taskforce. She is currently assisting 13 state health departments with all hazards planning and pandemic flu education.*

*Eugene F. Lucchese is a drill coordinator for the New York State Department of Health, Health Systems Emergency Preparedness. He returned recently from a tour in Iraq where he was a Navy medic with the United States Marines. Lucchese in his role with the state is responsible for conducting tabletop exercises throughout the state as well as responding and coordinating disaster response through out the state.*

## Workshop Session 3

Novice/Intermediate/Advanced



Steven  
Goldman

Goldman  
Mgmt.  
Consultants

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

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/BCP/DRP exercise. Students will master the aspects of effective exercise preparation and execution, including:

- Types of drills and exercises
- Elements of a successful exercise
- Scope, objectives, and extent of play
- Scheduling and coordination
- The scenario team
- Scenario ideas
- Resources and props
- How to conduct, evaluate, and critique
- Imagination, creativity, and leadership
- Goldman’s highly acclaimed Exercise Planning Checklist.

You will learn how to avoid common pitfalls during the development process and how to anticipate and resolve potential problems. Exercise conduct, evaluation and critiquing strategies will be discussed.

*Steve Goldman has developed, conducted, and evaluated drills and exercises ranging from two-hour tabletops to massive three-day exercises involving hundreds of responders from dozens of companies and government agencies.*

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.

#### Workshop Session 4 Intermediate/Advanced



##### **There's A New Sheriff In Town: The Convergence of BC/DR and Corporate Security!**

*Tim Mathews* Since 9/11, the demarcation between corporate security and BC/DR has blurred. External and global events and considerations are driving a security-centered agenda. This presentation will cover the actual experience of putting it all together at a large, international organization. From the onset of an event, through triage and to the point of declaration, the functions of risk management, business continuity, disaster recovery, emergency management, corporate security and vital/records management and retention all have significant and complimentary roles to play.

This workshop will explore the benefits and challenges of integrating a "protect and prevent" mindset into a "plan and recover" culture. Also discussed will be the period of time from "business-as-usual" to "declaration of disaster" and the organizational and tactical implications of a measured response capability. The classification, definition, communication, teams, processes, ownership, procedures and technology enablement will be covered as well and the organizational challenges and synergies of alignment with corporate security, business continuity and disaster recovery activities.

*Tim Mathews, director of enterprise resiliency for Educational Testing Services, is responsible for corporate BC/DR, emergency management, records management/retention program, security, safety and environmental management. He has more than 24 years of leadership experience in the technology industry and 13 years consulting with Fortune 1000 clients.*

#### Workshop Session 5 Intermediate/Advanced



##### **Starting from Scratch or Auditing for Performance: Benchmarking Your EM Program**

*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, BC, DR, Crisis Communications and Event Management
- Training and Exercises

*Regina Phelps, CEM, RN, BSN, MPA 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 6 Intermediate/Advanced



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

*Barney  
Pelant,  
MBCP*

*Barney F.  
Pelant &  
Assc.*

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.

*Barney Pelant is owner and director of Barney F. Pelant & Associates. His professional background includes more than 30 years focusing on business continuity planning, disaster prevention and recovery. 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. His consulting experience includes roles as consultant and director of contingency services (consulting services) for SunGard Recovery Services, and senior manager - business continuity planning for Ernst & Young.*

## Conference Facilities

The official conference hotel is:

**Disney's Coronado Springs Resort**  
1000 W. Buena Vista Drive  
Lake Buena Vista, FL 32830  
**Reservations: 407-939-1020**

Guests rooms include coffee makers, irons, ironing boards, and wall safes. An expansive pool and several restaurants are also onsite for your convenience.

### Hotel Reservations

A block of rooms has been reserved at Disney's Coronado Springs Resort. Once the block is filled, reservations will be made on a space available basis, with the rate subject to change at the discretion of the hotel. The group rate is \$170 for a single room. A \$15 fee will be charged for each additional occupant over 18 years of age. **Attendees are responsible for making their own hotel reservations. Call 407-939-1020.** The hotel's fax number is 407-939-1012.

### Expansive Meeting Space

Disney's Coronado Springs Resort has more than 220,000 square feet of flexible meeting and convention center space. The Veracruz Exhibit Hall features 86,000 square feet. Wide hallways, huge meeting rooms and numerous other amenities make this hotel one of the best meeting spaces on the East Coast.

### Recreational Opportunities

Disney's Coronado Springs Resort has a state-of-the-art workout room, an arcade, a playground and three heated pools. In addition, you can visit the Dig Site, play volleyball or rent a watercraft or bike.

### Lunches, Breakfasts and More

We treat you right at our conferences! Enjoy networking breakfasts and lunches on Monday, Tuesday and Wednesday. The menu includes entrees, side dishes, drinks and desserts. In addition, attendees are treated to refreshment breaks! All is included in our low conference fee!

### Area Attractions

Theme Park excitement is just minutes away. Parks include Walt Disney World's Magic Kingdom, EPCOT Center, Animal Kingdom, and Disney-MGM Studios. For the sports enthusiast, there's tennis, boating, golf and more. Nighttime brings even more excitement. Visit Downtown Disney or Pleasure Island.

### Magical Express Transportation

Shuttle service to and from the airport can be arranged through *Disney's Magical Express*! **This exclusive complimentary shuttle and luggage delivery service conveniently takes you from the airport directly to your hotel.** Once you have a confirmed room reservation, call 407-827-6777 to book your *Disney's Magical Express* reservation. Make your *Disney's Magical Express* reservation at least 30 days in advance of your arrival date. Further details will be mailed to you after your conference reservation is made.

### Transportation on Disney Property

While onsite at Disney's Coronado Springs Resort, the Walt Disney World Resort Transportation network provides guests with complimentary transportation services to all Disney attractions.

### Conference Shuttle Service

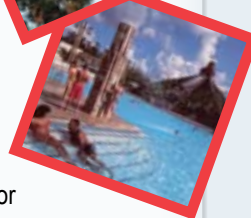
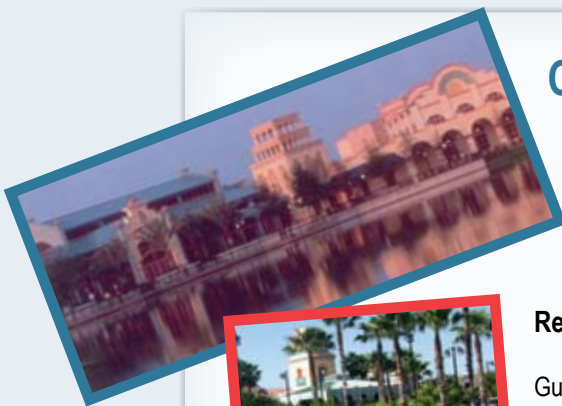
DRJ has arranged for shuttle service between Disney's Coronado Springs Resort's themed villages and the convention center. This convenient service will provide pick-up and drop-off services at all the villages during designated times.

### Airline Information

**Airlines:** American Airlines is DRJ's official airlines for Spring World 2007. For reservations, call 800-433-1970 or visit [www.aa.com](http://www.aa.com). Use file #A9737AB for the discounted rate.

### Car Rental Information

**Car Rental:** Avis is DRJ's official rental car service. Call 800-331-1600 or reserve your car via [www.drj.com](http://www.drj.com) after you've registered for the conference. Use file #D005078 for the discounted rate.





# Spring 2007 Registration Form Sign up by Dec. 15, 2006 for a \$50 discount! Register By Jan. 25, 2007 for \$895!

Date \_\_\_\_\_ List Your CBCP, FBCI, CRP# \_\_\_\_\_  
 Mr/Mrs/Ms \_\_\_\_\_ First Name \_\_\_\_\_ Last Name \_\_\_\_\_  
 Company \_\_\_\_\_  
 Title \_\_\_\_\_ Mail Stop \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ E-Mail \_\_\_\_\_  
 State \_\_\_\_\_ Country \_\_\_\_\_ Zip \_\_\_\_\_  
 Telephone \_\_\_\_\_ Fax \_\_\_\_\_  
 Print Name As It Should Appear On Badge \_\_\_\_\_  
 List Any Designations For Badge \_\_\_\_\_  
 Emergency Contact Name/Phone Number \_\_\_\_\_  
 Check here if you require special needs \_\_\_\_\_ Please specify \_\_\_\_\_  
*Notify conference personnel during Onsite Registration of your arrival and special needs.*

**Indicate Your Industry:** \_\_\_\_\_ Banking/Financial \_\_\_\_\_ Public Utilities \_\_\_\_\_ Transportation \_\_\_\_\_ Insurance  
 \_\_\_\_\_ Communications \_\_\_\_\_ Manufacturing \_\_\_\_\_ Government \_\_\_\_\_ Education \_\_\_\_\_ Computer Services  
 \_\_\_\_\_ Wholesale \_\_\_\_\_ Health Care \_\_\_\_\_ Petroleum \_\_\_\_\_ Mgmt. Consultant Other: \_\_\_\_\_

Rank Your Experience Level \_\_\_\_\_ Novice (less than 2 yrs) \_\_\_\_\_ Intermediate (2-5 yrs.) \_\_\_\_\_ Advanced (5+ yrs.)  
 Is This Your First Conference at DRJ? \_\_\_\_\_ Yes \_\_\_\_\_ No

## Payment Information

\_\_\_\_\_ Check enclosed for \$ \_\_\_\_\_ Which Discounts Apply (if any) ? \_\_\_\_\_  
 \_\_\_\_\_ Bill my company, Attn: \_\_\_\_\_  
 \_\_\_\_\_ Purchase order attached, P.O. # \_\_\_\_\_  
 \_\_\_\_\_ Bill my  \_\_\_\_\_ Bill my  \_\_\_\_\_ Bill my AMEX \_\_\_\_\_ Bill my DISCOVER  
 Security Code \_\_\_\_\_ (three-digit number found on back of card)  
 Account # \_\_\_\_\_ Exp. Date \_\_\_\_\_  
 Signature \_\_\_\_\_

**Cancellation Policy (Must be in writing):** Conference enrollment may be cancelled through Feb. 26, 2007 without penalty. No refunds or credits will be given for cancellations received after Feb. 26. All no shows will be charged the full amount. All cancellations must be received in writing.

I have read and understand the cancellation policy. \_\_\_\_\_

**Promotional Policy:** DRJ retains the right to use attendee images and comments for promotional purposes.

## Session Information

Name: \_\_\_\_\_ Company: \_\_\_\_\_

Please complete this section to make your **breakout** and **workshop** selections. Circle only one session per time slot. **General sessions** are held each morning and are open to all conference attendees.

### Sunday, March 25

Workshop Sessions SWS-1 SWS-2 SWS-3 SWS-4 SWS-5 SWS-6

### Monday, March 26

Breakout Session 1 SS-1 MS-1 TS-1 ES-1 AS-1 IS-1  
 Breakout Session 2 SS-2 MS-2 TS-2 ES-2 AS-2 IS-2  
 Breakout Session 3 SS-3 MS-3 TS-3 ES-3 AS-3 IS-3

### Tuesday, March 27

Breakout Session 4 SS-4 MS-4 TS-4 ES-4 AS-4 IS-4  
 Workshop Sessions WS-1 WS-2 WS-3 WS-4 WS-5 WS-6

## Registration Rates

Registration rates for the conference are as follows:

- only \$895.00 through Jan. 25, 2007
- only \$995.00 through Feb. 26, 2007
- only \$1095.00 through Mar. 25, 2007

Make conference checks payable to Disaster Recovery Journal. All fees must be paid in US currency only and payment must be drawn on a U.S. bank.

## Three Easy Ways To Register

Fax: 314-894-7474  
 24-hours a day

Mail: DRJ Registrar  
 P.O. Box 510110  
 St. Louis, MO 63151

Web: [www.drj.com](http://www.drj.com)

## For registration information

(314) 894-0276  
 9 am - 5 pm CST  
 -or email-  
[mercedes@drj.com](mailto:mercedes@drj.com)

## Early Registration Bonus

Register by Dec. 15, 2006 and receive an additional \$50 discount. This bonus applies regardless of any other discounts that have been taken as long as the form reaches our office by Dec. 15, 2006.

## Registration Discounts

Three or more employees from the same company who register at the same time are eligible for a 10% discount. All certified individuals (**must be certified at the time of registration**) are eligible for a 10% discount. All contingency group members are eligible for a 10% discount with proof of membership. These discounts must be requested at the time of registration. No refunds of the discount will be issued, and only one discount per registrant will apply (except Early Registration Bonus).

# Pre-Conference Courses

## PRC-1: Ready, Set, Exercise: The Full Monty!

Sat., March 24, 9:00 a.m. - 5:00 p.m.  
Sun., March 25, 8:00 a.m. - 11:30 a.m.  
\$695 per person  
Presenter: Steven B. Goldman

This course is the comprehensive version of Steve Goldman's "Ready, Set, Exercise!" workshop. During this hands-on class, you will learn the details of how to set up and conduct a successful crisis plan exercise.

- Where to begin
- Types of Exercises
- Getting Management support
- The Exercise Planning Checklist
- The Exercise Design Dream Team
- Scope, objectives, and extent of play
- Developing your Exercise Manual
- Resources, data, and props
- Controllers, evaluators, observers and players
- How to conduct and critique the Exercise
- Leveraging for your next exercise
- Includes CD of all forms and templates presented in class.

We will also develop a basic exercise scenario. Then we will practice what you learned as we participate in a table top drill and a simulated exercise. Two participants will receive BCP Media's "Crisis Management Plan" (advanced DVD and manual).

Steven Goldman, Goldman Mgmt. Consultants, LLC, is a leading crisis management, business continuity, and crisis communications consultant. He has developed, conducted, and evaluated more than 100 drills and exercises.



## PRC-2: Emergency Operations Centers: The Critical Tool for Event Management

Sat., March 24, 9:00 a.m. - 5:00 p.m.  
Sun., March 25, 8:00 a.m. - 11:30 a.m.  
\$725 per person  
Presenter: Regina Phelps

An Emergency Operations Center (EOC) is critical for effective management of an event. It allows for command, control and communication and also helps to prevent the formation of "silos" that so commonly develop in an emergency environment. This workshop covers everything you need to know to design both the center and the management concept. Five participants will receive BCP Media's, "Terrorism: How Can We Cope?" (DVD and manual).

- Physical design factors
- Incident Command System
- Equipment and tools
- Who should be involved?
- Sustained operations
- Communication concerns and solutions

- Role of senior management
- Forms and Processes
- Virtual EOC's

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



## PRC-3: Outrageously Easy Recovery Planning

Sat., March 24, 9:00 a.m. - 5:00 p.m.  
Sun., March 25, 8:00 a.m. - 11:30 a.m.  
\$795 per person  
Presenter: Jeffrey Williams

This workshop is a special presentation of the very popular seminar that normally costs \$2,091 and has been given around the world. Topics include the reasons for planning; the parameters of recovery planning; security; how to do a TRA, a BIA and a risk analysis; how to determine critical processes; what alternate methods are available; how to select recovery strategies; the importance of records management; offsite storage; and much more.

Included is a fully-registered copy of the Phoenix Disaster Recovery Planning System. At this workshop, you will develop the first draft of a recovery plan for your own company.

You will learn how to prepare an in-depth emergency response plan and by the end of the seminar, you will have a draft of your first plan to take back to your office.

Ten participants will receive BCP Media's, "Disasters: Wrath of Disasters," (five disaster movies on one DVD).

Jeffrey Williams is president and chief strategist for Binomial International Inc. and DisasterRecovery.com Inc.



## PRC-4: Customize and Improve Your BC Program

Sat., March 24, 9:00 a.m. - 5:00 p.m.  
Sun., March 25, 8:00 a.m. - 11:30 a.m.  
\$695 per person  
Presenter: Randall Till, CBCP

This course will encourage attendee dialogue and problem-solving to find the best solutions, while helping you to implement proven techniques and customize the business continuity plan that best fits your organization. The latest and most successful business continuity practices, refined and implemented throughout Till's 20 years in the business continuity field, will be combined with your real-work experiences in this interactive class.

Along with providing a review of the key components and processes necessary to enhance the BC process, you will build relationships with other professionals in the industry while learning from their experiences. Till will outline proven techniques that will enable you to navigate roadblocks to successful BCP in your

organization while facilitating useful dialogue among participants. Additional topics include:

- Gaining management commitment and participation as a key success factor
- Assessing risks and defining business impacts associated with disruptions
- Defining processes and practices for effective emergency response and crisis management
- Reviewing strong practices and techniques associated with successful business continuity and disaster recovery plans
- Exercising, testing and training the keys to being recovery ready

Ten participants will receive BCP Media's, "Mock Disaster," DVD.

Randall Till, CBCP has more than 20 years experience in the field of BC management. He serves as a senior business leader and is responsible for developing and implementing business continuity plans on a global basis.



## PRC-5: FASTpractice to Build Your BCP

Sat., March 24, 9:00 a.m. - 5:00 p.m.  
Sun., March 25, 8:00 a.m. - 11:30 a.m.  
\$645 per person  
Presenters: Barry Pruitt  
Michael Herrera, CBCP

Don't be caught in a disaster waiting for perfect when you can attend this session and start with progress! BCP is vital to keeping your organization operating after an unplanned disruption. Yet many organizations have untested/out of date or no plans. Gain best practices for BCP at today's fast pace. If you're an expert, learn how to speed up the process; if you're new to the profession, get your program in place quicker through FASTpractice! You'll:

- Discover how to be a FASTpractice planner
- Quickly define key roles/responsibilities
- Map the fastest route to implement a "best practice" BCP program
- Raise your program's maturity level at a faster pace
- Gain the fastest approach to completing the Business Impact Analysis (BIA) and Risk Assessment
- Outline how to quickly design/develop/ implement recovery strategies and plans based on requirements
- Get the FASTpractice approach to maintenance/testing and continuous improvement
- Reduce exposures and ensure continued operation of your organization in the event of an unplanned disruption

Learn strategies and procedures to maintain/resume/ recover critical business functions and processes, and how to include procedures to execute critical

priorities vs. non-critical functions/services/processes. Workshop includes: workbook, disk of presentation materials, forms, and bonus CDs. Two participants will also receive BCP Media's, "Fast Practice to Build Your BCP."

Barry Pruitt has 22 years experience managing major projects, teaches at USC School of Business, and has experienced a major business interruption.



Michael Herrera, CBCP, is the president/CEO of MHA Consulting Inc., has more than 16 years BCP consulting and training experience, and has first hand experience dealing with four major disasters.



### PRC-6: NIMS ICS for Business and Industry

Sat., March 24, 9:00 a.m. - 5:00 p.m.

Sun., March 25, 8:00 a.m. - 11:30 a.m.

\$595 per person

Presenters: Dr. Tom Phelan

Deidrich Towne, Jr. CBCP

Peter Laz, CBCP

PPBI has combined the NFPA 1600 Standard with NIMS Incident Command principles to create an easy to adapt ICS model for business and industry. Compliance with the Department of Homeland Security's National Incident Management System (NIMS), and the categories of the National Fire Protection Association 1600 Standard as revised in 2004 serve as the basis for this simplified critical incident management course. PPBI's instructors

have experience in both public and private sector disaster recovery. The course is highly interactive and easily adaptable to your organization's needs. Learn to use ICS to improve incident management. Two participants will receive BCP Media's, "Fundamentals of DR Planning and Emergency Management."

Dr. Thomas D. Phelan, president, Strategic Teaching Associates, Inc., is a founding member of the U.S. Department of Homeland Security.



Deidrich E. Towne, Jr. CBCP is senior technical consultant for Forsythe. He has more than 35 years experience in Information Technology.



Peter Laz, CBCP, is a business continuity consultant with Forsythe. He has 23 years experience in IT and 18 years in disaster recovery, business resumption and incident management. He is also a member of the DRJ Editorial Advisory Board, board of director of PPBI, and membership director of NY Capital Region Chapter of ACP.



### PRC-7 The Command Center

Sat., March 24, 9:00 a.m. - 5:00 p.m.

Sun., March 25, 8:00 a.m. - 11:30 a.m.

\$595 per person

Presenters: Norm Harris, CBCP

Tracy Cowan, CBCP

If a disaster occurred and your organization/company was forced to implement their DR/BC Plan could you do

it, number one and would it be effective, number two? It is critical to keep control of the situation during this pressure-packed time. If you are to maintain control you need to assure that all teams involved are receiving accurate information about the situation and are given proper instructions to follow. They must communicate with each other. This is where having a well-organized and effective Command Center, your Nerve Center, comes in. Without it you are just "flying by the seat of your pants", passing out information and giving instructions in haphazard ways.

This detail training class/workshop is a hands-on consultative approach that leads the participants through the command center process. You'll gain valuable knowledge and receive cutting edge material focused on their recovery efforts.

Building an effective command center can be challenging enough but doing it efficiently and economically is even a bigger challenge. You can't afford to miss this "All New Class" sign up early as setting is limited.

Two participants will receive BCP Media's "DR/BC: The Command Center" (3 DVDs/1 CD).



Norm Harris, CBCP, Certified Recovery Planner, chairman, president and CEO of Norman L. Harris & Assoc., is recognized as a leader in information technology management and disaster recovery.



Tracy Lee Cowan, CBCP, CRP is business continuity/disaster recovery consultant for ICSI Consulting Services, Inc.

## Pre-Conference Course Registration Form

Complete this form and mail to: Systems Support Inc., PO Box 510110, St. Louis, MO 63151 or fax to (314) 894-7474. Make check payable to Systems Support Inc. or provide credit card information.

\_\_\_\_ PRC-1: Ready, Set, Exercise: The Full Monty (\$695)

\_\_\_\_ PRC-2: EOC: The Critical Tool (\$725)

\_\_\_\_ PRC-3: Outrageously Easy Recovery Planning (\$795)

\_\_\_\_ PRC-4: Customize/Improve Your BC Program (\$695)

\_\_\_\_ PRC-5: Fast Practice to Build Your BCP (\$645)

\_\_\_\_ PRC-6: NIMS ICS for Business & Industry (\$595)

\_\_\_\_ PRC-7: The Command Center (\$595)

Check enclosed for \$ \_\_\_\_\_ Check # \_\_\_\_\_

\_\_\_\_ Bill my Visa \_\_\_\_\_ Bill my American Express

\_\_\_\_ Bill my MasterCard \_\_\_\_\_ Bill my Discover

Security Code \_\_\_\_\_ (three-digit number found on back of card, four digits on front for AMEX)

Account # \_\_\_\_\_

Exp. Date \_\_\_\_\_

Signature \_\_\_\_\_

First Name \_\_\_\_\_ Last Name \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_ Mail Stop \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

**Cancellation Policy (Must be in writing):** Course enrollment may be cancelled through Feb. 26, 2007 without penalty. No refunds or credits will be given for cancellations received after Feb. 26, 2007. All no shows will be charged the full amount. All cancellations must be received in writing.

**Registration in a class is non-transferable to a different course. Students must remain in the course in which they are enrolled.**

# Post-Conference Courses

## POC-1: Everything You Need To Know to Design The Successful Exercise

Wed., March 28, 1:30 p.m. - 5:00 p.m.  
Thurs., March 29, 8:00 a.m. - 5:00 p.m.  
\$725 per person  
Presenter: Regina Phelps

Learn from the exercise master – Regina Phelps conducts 50+ exercises a year! Do you have a plan but have not yet tested it? You might discover that your document is less than sufficient. There are really only two ways to find that out. One is to have an actual disaster; the other is to do an exercise. The latter is usually a better learning experience and certainly a lot less stressful! The workshop details everything you need to do to design a successful exercise from the ground up. You will walk out of this workshop with your next exercise planned and under your arm!

- Five types of exercises
- Exercise Design Team
- The development of the Exercise Plan
- Selecting & Training a Sim Team
- Rules of exercise facilitation
- Participate in two advanced tabletop exercises
- Develop the outline for your own tabletop exercise

Five participants will receive BCP Media's "Crisis Communication," planning book and DVD.

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



## POC-2: Best Practices and the BIA

Wed., March 28, 1:30 p.m. - 5:00 p.m.  
Thurs., March 29, 8:00 a.m. - 5:00 p.m.  
Friday, March 30, 8:00 a.m. - 12:00 p.m. (consultations)  
\$695 per person  
Presenters: Barry Pruitt  
Michael Herrera, CBCP

This technical workshop is a hands-on consultative approach of leading participants through the BIA process. You'll gain cutting edge material including best practices from around the world. Learn:

- Through BIA interview, data collection, & executive summary exercises
- How to complete a BIA – start to finish!
- Tips, traps, and pitfalls in a BIA
- Suggested BIA tools and approaches
- How to identify risks and leverage results
- Advice on how to best "sell" the BIA
- How to identify your audience
- Where the BIA "fits" in the BCP process

Take home participant workbook, BIA sample questionnaire, sample executive summary, and all presentation materials on disk. Participants also get consultation on their personal BIA – and each

The workshop concludes Thursday at 5:00 p.m. Bring your personal BIA and/or questions to schedule a FREE private consultation on Friday morning. You'll receive personal and specific feedback and advice on your BIA. Two participants will receive BCP Media's, "Best Practices and the BIA," DVD and CD.

Barry Pruitt has 22 years experience managing major projects, teaches at USC school of business, and has experienced a major business interruption.



Michael Herrera, CBCP, is the president/CEO of MHA Consulting Inc., has more than 16 years BCP consulting and training experience, and has first hand experience dealing with four major disasters.



## POC-3: Total Integrated Maintenance

Wed., March 28, 1:30 p.m. - 5:00 p.m.  
Thurs., March 29, 8:00 a.m. - 5:00 p.m.  
\$695 per person  
Presenter: Jeffrey Williams

There are three aspects to the evergreen process that business continuity planners must know and practice. These are:

TRAINING: Tasks for response and recovery can only be carried out by people who are trained on how to do this. To cover this aspect of your plan protection, you must design, develop and conduct training to ensure that your team members know what to do. This session will cover the rationale for training, and how to develop, manage and deliver training. The highlighting of deficiencies that will be discovered through training will also be discussed.

EXERCISING: Business continuity plans are only as good as the results of the last exercise. This session will develop and conduct structured walk-throughs, and explain real-time tests. Feedback from testing will be introduced.

MAINTENANCE: This is an ongoing process in which the team tasks, personnel assignments, systems, applications, functions and databases are continually monitored and updated.

Note: In this seminar, one-half day will be spent on each of these topics.

Ten participants will receive BCP Media's "Disasters: Wrath of Disaster" on DVD.

Jeffrey Williams is president and chief strategist for Binomial International Inc. and DisasterRecovery.com Inc.



## POC-4: Implementing a Comprehensive Business Continuity Program

Wed., March 28, 1:30 p.m. - 5:00 p.m.  
Thurs., March 29, 8:00 a.m. - 5:00 p.m.  
\$695 per person  
Presenter: Randall Till, CBCP

Numerous examples, practical experiences and real-life solutions required to implement various components

of a Business Continuity Program are outlined in this course. Students will be provided with concepts and techniques associated with assessing risks and how to determine impacts associated with business disruptions. Time will be spent discussing the approach and best practices for emergency response and management plans. Special emphasis will be placed on the exercising of recovery plans, evaluating recovery readiness and reporting results to executive management. Mr. Till will share techniques on how to engage the management and staff within your organization. Experienced or new business continuity planners will be sure to leave this class armed with techniques and concepts that will help their organizations. Ten participants will receive BCP Media's "Business Continuity Program," DVD and CD.

### Key Tracks:

- Gaining management commitment and participation as a key success factor
- Assessing risks and defining business impacts associated with disruptions
- Defining processes and practices for effective emergency response and management
- Reviewing strong practices and techniques associated with successful business continuity and disaster recovery plans
- Exercising recovery plans and capabilities
- Evaluating recovery readiness and effectively reporting results to management.

Randall Till, CBCP has more than 20 years experience in the field of BC management.



## POC-5: Train the Trainer: Fundamentals of BCP and Emergency Mgmt. Practices

Wed., March 28, 1:30 - 5:00 p.m.  
Thurs., March 29, 8:00 a.m. - 5:00 p.m.  
\$595 per person  
Presenters: Dr. Tom Phelan  
John Jackson  
Deidrich Towne, Jr., CBCP

This is the ultimate "take home" course for new or experienced BCP professionals. With the tools and expert instruction PPBI will provide, you will be able to train other members of your organization. PPBI will provide take home Power Point slides, handouts, and reference material for you to conduct a BCP/EM orientation course back home.

The course will include basic plan design, vulnerability and capability assessment, exercise design, training principles, and an easy to follow workshop outline. This is the ultimate "keeper" for adding value to your DRJ conference investment.

Two participants will receive BCP Media's, "Fundamentals of DR Planning & Emergency Management."

Dr. Thomas D. Phelan, president, Strategic Teaching Associates, Inc., is a founding member of the U.S. Department of Homeland Security. He has recently consulted for USDA, FDIC, I.B.M., the



American Institutes for Research, and several counties.

John Jackson has more than 30 years of IT risk management experience and is widely regarded as one of early and current visionaries and leaders in the disaster recovery and business continuity industry. Jackson is currently executive vice president of Fusion Risk Management, based in Chicago. Active in the industry, Jackson is a member of the Disaster Recovery Journal Executive Council, board of director for Private and Public Businesses Inc., and is the Chicago chapter vice president for InfraGard. Jackson holds a bachelor's degree in business management from DePaul University.



Deidrich E. Towne, Jr. CBCP is senior technical consultant for Forsythe. He has more than 35 years experience in Information Technology committed to infrastructure management, business continuity planning, disaster recovery and incident management.



### **POC-6: BC Planning for the Avian Influenza:**

Wed., March 28, 1:30 p.m. – 5:00 p.m.

Thurs., March 29, 8:00 a.m. – 5:00 p.m.

\$595 per person

Presenters: Ted Brown, CBCP

Morris Davis, CBCP

Avian Influenza – “The Y2k of 2007.” American business faces unprecedented challenges in preparing for the potential of an Avian Influenza pandemic. Every BCP conference and publication has at least one dialogue on Avian Influenza. Most focus on the health of citizens. Important...but so are the implications to your BCP.

This interactive session is aimed at you, the Business

Continuity professional. You will learn everything pertinent about Avian Influenza and its potential effect on your people, your customers, your suppliers, and your supply chain. You will learn the risks and the solutions. The session will cover the four C's of Avian Influenza BC Planning: Commitment, Contingency, Coordination, and Communications. Following this extensive education, you will participate in an Avian Influenza Table Top Exercise.

Your take-aways from this session include articles and publications from WHO, the CDC, news media, and other sources. You will also receive checklists, and an outline of your Avian Influenza Component to your BCP.

Ten participants will receive BCP Media's, “Ground Zero,” DVD and “World Trade Center” CD.

Edward (Ted) Brown, CBCP, president and CEO of KETCHConsulting, is a nationally-recognized BCP leader, speaker, and educator.



Morris Davis, CBCP, national practice leader of KETCHConsulting, has years of experience in BCP, including conducting many table exercises for business and government.



### **POC-7: BC Planning Made Simple**

Wed., March 28, 1:30 p.m. - 5:00 p.m.

Thurs., March 29, 8:00 a.m. - 5:00 p.m.

\$595 per person

Presenter: Norman Harris, CBCP

Since 9/11 what are we most worried about? Network

Security? Physical Security? Terrorist Threats? Loss of Critical Staff? Power Outages? Natural Disasters? This interactive class will teach the student everything he/she needs to know to get started on their DR/BCP. Bring your laptop to this class and we will provide you with a CD full of resources, forms and questionnaires to utilize.

Harris will cover the following:

- Risk Assessments Questionnaires
- Network Security Questionnaires
- Development of Business Processes
- Recovery Time Objectives
- Time Lines for Recovery
- Development of DR/BCP Teams
- Impact on Operations

This unique class is taught by Norm Harris and during the class he will personally assist you with your DR/BC Plan and insure that you have all the tools you need.

Two participants will receive a complete four-DVD set of “BCP Planning Made Simple” at the conclusion of the class. Come to this class for one on one training, but register early. Space is limited.

Norm Harris, CBCP, Certified Recovery Planner, chairman, president and CEO of Norman L. Harris & Assoc., is recognized as a leader in information technology management and disaster recovery.



## **Post-Conference Course Registration Form**

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- ☐ POC-1: Everything You Need to Know (\$725)
- ☐ POC-2: Best Practices & The BIA (\$695)
- ☐ POC-3: Total Integrated Maintenance (\$695)
- ☐ POC-4: Implementing a BC Program (\$695)
- ☐ POC-5: Train the Trainers (\$595)
- ☐ POC-6: BC Planning for Avian Influenza (\$595)
- ☐ POC-7: BC Planning Made Simple (\$595)

Check enclosed for \$ \_\_\_\_\_ Check # \_\_\_\_\_

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☐ Bill my MasterCard ☐ Bill my Discover

Security Code \_\_\_\_\_ (three-digit number found on back of card, four digits on front for AMEX)

Account # \_\_\_\_\_

Exp. Date \_\_\_\_\_

Signature \_\_\_\_\_

First Name \_\_\_\_\_ Last Name \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_ Mail Stop \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

**Cancellation Policy (Must be in writing):** Course enrollment may be cancelled through Feb. 26, 2007 without penalty. No refunds or credits will be given for cancellations received after Feb. 26, 2007. All no shows will be charged the full amount. All cancellations must be received in writing.

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# EXTEND YOUR STAY AT DRJ SPRING WORLD 2007 AND BUILD PROFESSIONAL CREDENTIALS WITH DRI INTERNATIONAL

- Keep up to date with ongoing training.
- Broaden your scope of professional practice.
- Document your expertise to further your career.
- Build your career track around recognized standards and skills.
- Get practical tips from recognized experts in the field.



Choose from DRI International courses before and after the DRJ Conference. Plus, take a step towards obtaining your DRI International Certification.

## DRI International — The Best Instruction in the Field

With DRI International, you'll get the best instruction in the field.

You'll learn from:

- Certified professionals who average 20 years' experience in the field
- Master instructors who bring the course to life with real-world experience
- Proven course content that is constantly updated to keep you abreast of best practices in the profession
- Comprehensive course materials that will provide a ready-reference throughout your career
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## Pre-Conference Courses March 22–24

### BCP-50I: Business Continuity Planning Review\* (March 22–24)

**EXPERIENCED PROFESSIONALS** BCP-50I is a two-day review course designed for individuals experienced in business continuity or disaster recovery planning. Major topic areas focus on the “Professional Practices for Business Continuity Professionals” that form the basis of the certification examination, and identify most parts of contingency & recovery plans. Upon completion of the course, participants will have reviewed:

- the functional components of a plan
- components of risk analysis and risk assessment, and how to identify critical business functions
- development of recovery alternatives for business functions and communications facilities
- development of recovery methods and procedures and techniques for monitoring and controlling recovery plan tests

### (NEW) BCLE-PFI: Pandemic Influenza: Building a Continuity Plan (March 23–24)

This new course provides an in-depth review and analysis of a specialized methodology that serves the need to prepare businesses for a potential outbreak of pandemic influenza. Topics range from starting to think through the differences in a pandemic-specific plan to exercising and maintaining such a plan.

## Post-Conference Courses March 28–April 1

### BCLE-330: Business Impact Analysis (March 28–30)

This course builds upon the previous Business Impact Analysis methodologies offering a higher level of expertise in processes and the importance of this the BIA in the functional requirements phase of corporate contingency planning. Participants learn how to develop and successfully conduct a BIA project.

### BCP-50I: Business Continuity Planning Review\* (March 28–March 30)

**EXPERIENCED PROFESSIONALS** See description under pre-conference workshops.

### BCP-60I: Master-Level Case Study Preparatory Course\*\* (March 28–March 30)

**EXPERIENCED PROFESSIONALS** This course addresses all 10 areas of professional practice for business continuity planners and prepares the candidate for the most coveted of certifications, the Master Business Continuity Professional (MBCP).

### ACCELERATED INTRODUCTORY COURSE

### BCLE 2000: Business Continuity Course for Advanced Professionals\* (March 28–April 1)

This course is designed for BCM professionals who have to develop, manage, or execute crisis communication activities within their business continuity program. This workshop will look specifically at the concept of reputation—its evolution and risk factors. It teaches how to plan to preserve the organization’s reputation before a disaster strikes and also how to rebuild it after a disaster strikes. Key messages are developed, crisis plans are evaluated, and participants investigate the basics of public relations as well as dealing with the news media in good times and bad.

\*Includes Qualifying Exam

\*\*Includes Master Case Study Exam

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## DRJ Spring World 2007 Class Schedule

| Courses: |           | 330 | 501        | 601       | PF1 | 2000       |
|----------|-----------|-----|------------|-----------|-----|------------|
| March 22 | morning   |     | ■          |           |     |            |
|          | afternoon |     | ■          |           |     |            |
| March 23 | morning   |     | ■          |           | ■   |            |
|          | afternoon |     | ■          |           | ■   |            |
| March 24 | morning   |     | Qual. Exam |           | ■   |            |
|          | afternoon |     |            |           | ■   |            |
| March 28 | morning   |     |            |           |     |            |
|          | afternoon | ■   | ■          | ■         |     | ■          |
| March 29 | morning   | ■   | ■          | ■         |     | ■          |
|          | afternoon | ■   | ■          | ■         |     | ■          |
| March 30 | morning   | ■   | ■          | ■         |     | ■          |
|          | afternoon |     | Qual. Exam | MBCP Exam |     | ■          |
| March 31 | morning   |     |            |           |     | ■          |
|          | afternoon |     |            |           |     | ■          |
| April 1  | morning   |     |            |           |     | ■          |
|          | afternoon |     |            |           |     | Qual. Exam |

## Can't attend DRJ Spring World 2007?

Visit the DRI International Web site to see all courses offered at [www.drii.org](http://www.drii.org)

## Examination Schedule

|                         |                     |                        |
|-------------------------|---------------------|------------------------|
| Qualifying Exam:        | Saturday, March 24  | 8:30 a.m. – 12:00 p.m. |
| Qualifying Exam:        | Wednesday, March 28 | 1:30 p.m. – 5:00 p.m.  |
| Qualifying Exam:        | Friday, March 30    | 1:30 p.m. – 5:00 p.m.  |
| Master Case Study Exam: | Friday, March 30    | 1:30 p.m. – 5:00 p.m.  |
| Qualifying Exam:        | Sunday, April 1     | 1:00 p.m. – 4:30 p.m.  |



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