

# A CLEAR VISION OF RISK & RESILIENCY

 **DRJ SPRING 2020**  
March 15-18, Orlando

DISASTER RECOVERY JOURNAL  
**DRJ**

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# A CLEAR VISION OF RISK & RESILIENCY



*Vanessa Mathews  
Master of Ceremonies*

## **WELCOME**

More training, more networking, and more business continuity and disaster recovery planning. We're elated that you decided to join us for our 62<sup>nd</sup> conference March 15-18, 2020, in Orlando, Fla. We're looking forward to connecting with you for three amazing days at DRJ Spring 2020! This exclusive opportunity allows you to sharpen your skills and learn from industry experts. You'll work with like-minded professionals, share strategies, and gain knowledge and confidence in your organization's risk and resilience programs. You'll receive ample opportunities to learn, network, and relax at the beautiful lakeside oasis of Disney's Coronado Springs Resort.

Our goal at DRJ Spring 2020 is to give you "A Clear Vision of Risk & Resiliency" to provide you with the best preparation and improvements for your response to today's disruptions and tomorrow's emerging threats.

## WHY SHOULD YOU ATTEND?

More than 85 speakers, 65 sessions, 80 exhibitors, and numerous networking opportunities. How can you afford not to attend DRJ Spring 2020? It's the best of the disaster recovery and business continuity world all wrapped into one amazing conference!

From increasing workplace safety to reducing downtime to securing data, you'll gain new skills, learn about the newest technology, participate in lively discussions, and interact with industry experts at DRJ Spring 2020.

The return on investment which you'll receive for yourself and your business after attending our three-day conference will be invaluable. You'll build connections, learn strategies, and gain confidence needed to strengthen your business. Our conference will help you be prepared for any situation!

DRJ Spring 2020...the knowledge and first-hand experience you'll gain at our conference is much more comprehensive than reading an article or watching a video.

Our conference will make all the difference in your business! You might realize it's life changing!

## NETWORKING

DRJ Spring 2020 is created to provide unlimited opportunities for you to meet and discuss essential topics with industry experts! This conference also gives you the opportunity to create connections with other thought leaders and colleagues who understand and experience the same industry-related challenges as you!

## EXHIBIT HALL

It's the hub of it all ... the exhibit hall has everything you need in one location. From meeting with representatives from top companies to acquiring information from industry consultants to seeing software demos and the latest in technology, this is the ideal place to be when you have some downtime. Don't forget complimentary snacks and more time for networking!

## RECEPTIONS

Be sure to make time to attend our networking meals and hospitality events. These are the perfect opportunities to relax and refuel to make the conference a complete experience. Don't miss out on the excitement at the lively Monday night hospitality event where we celebrate our 62<sup>nd</sup> conference!

## REGISTER AND SAVE BY THESE DATES

**ONLY \$1,295** Through January 15, 2020

**ONLY \$1,395** Through February 14, 2020

**ONLY \$1,495** Through March 15, 2020

## DRJ Orientation 1st time Attendees

Sunday, March 15, 2020, 12:00 – 12:30 p.m.



Paul Striedl  
Stifel Financial

Is this your first DRJ conference? What session should you attend first? Where's the exhibit hall? Where are the speaker's slides? Where is lunch? These and many other questions will be answered in this orientation session. Join this 30-minute session to meet the DRJ staff and the DRJ Editorial Advisory Board (EAB). They will share with you the keys to getting the most out of your conference experience. You'll learn more about the EAB and what they have to offer you at DRJ Spring 2020. Just bring your badge, your conference book, and your questions. We look forward to meeting you!

Paul L. Striedl, CBCP, MBCI, is the Business Continuity and Disaster Recovery Director for Stifel.





## HOTEL INFORMATION

Guest rooms include all the amenities you could want along with free high speed Internet access, two swimming pools as well as multiple restaurant options. Take advantage of our special discounted conference rate of **\$194 ++/night** by calling Group Reservations at **(407) 939-4686** (be sure to mention DRJ's special contracted rate) or at <https://book.passkey.com/go/DRJ2020>. A \$25 +tax fee will be charged for each additional occupant more than 18 years of age. Book your room early, the hotel fills up fast in March. There are a limited number of rooms available at our discounted rate in the new Gran Destino Tower. Contact Conference Director Patti Fitzgerald at [patti@drj.com](mailto:patti@drj.com) for a U.S. government room rate.

## TRANSPORTATION

If you'd like to rent a car our official car rental is Advantage Rent A Car. Call 800-777-5500 and mention **discount code CD040C7C88**. Visit <https://www.advantage.com/?rc=cd040c7c88>.



## THE DISNEY EXPERIENCE

Disney's Magical Express picks you up and takes you from Orlando International Airport to your Disney Resort hotel. Departing is also a breeze with our Resort Airline Check-in Service and return transportation to the Orlando International Airport. Reservations are required. We recommend you make your reservations at least 30 days in advance. Make your reservation today at [https://secure.reservations.disney.go.com/ibcww/en\\_US/dme/dmeform?groups=y](https://secure.reservations.disney.go.com/ibcww/en_US/dme/dmeform?groups=y).

## THEME PARK TICKETS

Whether it's spending unforgettable networking moments with colleagues or sharing a dazzling nighttime sky with friends and family, magical experiences reign supreme in Walt Disney World® Theme Parks. Take advantage of magical experiences with specially priced Meeting/Convention Theme Park tickets. Come for your meetings and events, then stay to experience the fun!

Take advantage of advance purchase to skip the lines at Theme Park ticket windows and pre-plan your free time with My Disney Experience to suit your individual agenda. FastPass+ is included with your Theme Park admission. Visit <https://www.mydisneygroup.com/drj2020/tickets--more#Theme-Park-Tickets>.



## Senior Advanced Track

**March 16, 2020, 1:30 p.m. – 5:15 p.m.**

Senior advanced practitioners are invited to attend our one-day track on Monday. If you are interested in attending, contact [senior-track@drj.com](mailto:senior-track@drj.com) to verify qualifications. This track features three breakout sessions in the afternoon. The afternoon breakouts will run separately from our general offerings to attendees. The day will conclude with an exclusive "Meet the Experts" reception in the evening. There is no additional cost for this specialized track.

### SAT-1: Creating Strategic Vision: The Intersection Between Culture and Risk

**Monday, March 16, 2020, 1:30 – 2:30 p.m.**



Jeff Dato  
Volunteer  
Corporate  
Credit Union

We often hear that a strong culture is the foundation element for a successful Governance, Risk, and Compliance (GRC) program. Logically, this makes sense, right? Okay, but ...

- What are the characteristics of a strong culture?
- What are the challenges to developing an effective risk culture?
- Are "organizational culture" and "risk culture" the same thing?
- What is the role of the Board and Management in creating a strong risk culture?

Most importantly, how did "Culture Club" get their name?

Bring an open mind and your "soft side" as this session will delve into the mysterious convergence of Culture and Risk and how they related to Business Continuity.

Attendees can expect both philosophical discussion and real-life examples to be shared during our time together

*Jeff Dato, GRC, MBCP is SVP, Chief Risk Officer at VolCorp.*

### SAT-2: Hindsight is 2020 – What the Past Can Tell Us About the Future!

**Monday, March 16, 2020, 2:45 – 3:45 p.m.**



Dan Bailey  
Gateway  
First Bank

We've all probably heard the old proverb: "Hindsight is 20/20." A proper definition of hindsight is – an understanding of a situation or event only after it has happened or developed. We deal with this in the realm of risk management on a daily basis. We are constantly after the holy grail of what can we or did we learn post-event. We look for the best ways to apply these lessons learned to our programs, plans, processes, and procedures.

Our job as risk professionals is to do our very best to foresee what bad things could happen in the future, how often they could happen, and what the impact would be if/when they do happen. But how can we be sure we're on top of our game with the entire risk landscape changing on such a regular basis? The past can be a benchmark of what the future may hold. During this session, we will interactively discuss several elements that directly impact or speak into what could be or will be taking place in the near future. Indicators (lagging versus leading); Influences (internal versus external); Intelligence (human versus artificial/machine); Instinct (reactive or responsive).

*Dan Bailey, SVP, Operational Risk Management at Gateway First Bank.*

### SAT-3: Meet the Experts Closing Panel and Discussion

**Monday, March 16, 2020, 4:15 – 5:15 p.m.**



Michele Turner

Amazon

Join Michele Turner as she facilitates this informative round-table style discussion. You will have the opportunity to learn from seasoned professionals. Hear their views on how the relationship in the disciplines between Risk Culture and Resiliency continues to rapidly evolve and where they anticipate it to be in the near future.

This is always a highly anticipated discussion with our Senior Advanced Track speakers. Bring your perspectives from today's sessions and be prepared to engage in a lively and thought provoking discussion.

*Michele Turner is Head of Global Business Resiliency at Amazon.*

### Meet The Experts Closing Discussion and Reception

Immediately following the last SAT session join our experts for light hors d'vours and a glass of wine.

# SUNDAY WORKSHOPS

These interactive workshops allow attendees to explore topics in-depth. Choose one workshop and register online at [www.drj.com/spring2020](http://www.drj.com/spring2020).

March 15, 2020 1:00 – 3:30 p.m.

## Sunday Workshop Session 1



### People not Paper: Resiliency Begins with Training

Phil Lambert  
Ripcord  
Solutions

Join us in this HANDS-ON workshop and be armed with a well-organized approach to the diversity of training types and delivery models for an effective and efficient training strategy. Learn what a training strategy looks like, how content will drive what type of training works best and learn to make training stick by delivering engaging content with just the right balance of information, instruction, and entertainment.

The crucial component of a well-prepared and resilient organization is that their people understand the “why,” “what,” and “how” they contribute to recovery.

A few of the topics that will be covered during the workshop:

- Regulations, Best Practices, and Standards; The New Rules of Resiliency;
- Training Program Strategy; Adult Learning Principles.

Phil Lambert is the Founder & Program Architect of Ripcord Solutions.

## Sunday Workshop Session 2



### Recharging Your Program: A Leader's Guide to Business Continuity and Disaster Recovery

Linda Pace  
Advanced  
Business  
Continuity

This interactive, hands-on session provides an In-Depth review of the components of a business continuity planning. Topics include: business impact analysis (BIA), effectively identifying business functions; data backup, recovery time objective (RTO), crisis communication and training. Participants will be able to plan a mock exercise and develop a basic test plan. Upon completion, attendees will be able to review their existing program or refresh the existing program based on industry standards and regulatory requirements. This is a hands-on workshop, not a lecture. Participants will receive a job aid and actionable take-aways. This workshop benefits those new to the industry or anyone wanting a fresh perspective on the current BC Approach.

Linda Pace is the Director for Policy, Standards and Training for a global financial services company.

## Sunday Workshop Session 3



### Birds of a Feather: Business Continuity Roundtable Discussions

Fast track your networking opportunities at the DRJ Conference. Join the Birds of a Feather session to participate in a conversation with other conference attendees about key topics and areas of interest. This forum will allow participants to explore solutions, address concerns, ask pressing questions, and converse about BC planning activities. This is a great opportunity to build relationships with other professionals in similar situations.

The Birds of a Feather workshop provides a structured approach with experienced and certified BC professionals facilitating each table. The format provides the flexibility to explore specific areas of interest or pressing topics such as recent events/impacts, lessons learned, challenges, leading practices, etc.

Come join us and set the stage for a successful conference experience

**Potential Topics:** recent events, planning and response, risk assessment and BIA, BCM exercises and testing, and other topics selected by participants.

*Moderator: Robbie Atabaigi, MBCI, MBACP, CISA, CERT*  
• Lamar Poppell MBCI, CBCP, PMP, Six Sigma, CERT  
• Dave Ziev, MBCI, MBACP, ITIL  
• Terri Kirchner, Ph.D., MBACP, MBCI  
• Martin Myers, MS, AFBCI, MBACP, CERT  
• David Dunlap, CBCP, AMBCI, ITIL  
• Colleen Huber, MBACP, CRMP, CBRM, MBCI

## Sunday Workshop Session 4



Linda  
Hanwacker  
The LSH Group

### Interactive Workshop: Will You Be The Next Big Headline?

It is not uncommon to see companies make the big headlines about their data being breached. They're new stories daily. Our trusted internet models are targeted using unsecure network protocols, hidden malware, and updates to our software to name a few. In 2019, headlines read “Hospital System Halts Admissions Amid Malware Attacks”, “Third-Party Service Provider Security Incident”, “Ransomware Attack Cost City Millions”, “Hacker Steals Sensitive Details of Fragrance without leaving a Whiff of Smell” and more. This fun interactive game session will discuss credible types of threats that should be part of your organization's risk assessment to determine what risks you face on a daily basis. Participants in this interactive workshop will be part of a fictional organization to play this game that will challenge teams to prioritize key security initiatives for our everchanging threats and risks that will have

a negative impact. Types of initiatives in this game include “Two factor authentication”, “Build industry relationships”, “Endpoint protection”, “Identification and access management”, “Incident Response Program”, “Vendor Management”, “Physical Security”, “Patching”, “Penetration Testing”, etc., and of course there is always a chance of negative impacts based on the choices made. Can your team prevent your organization from becoming tomorrow's big headline? How will your team score, risk to resilience?

Linda Hanwacker is CEO/Founder of The LSH Group, LLC.

## Sunday Workshop Session 5



Brian Zawada  
Avalution  
Consulting



Michael Bratton  
Avalution  
Consulting

### Start to Implement BCOS Next Week

Every business continuity program struggles at some point with lack of focus and lack of engagement. These challenges exist even for both robust, mature programs, as well as for programs in their first year of implementation. To help solve for focus and engagement issues, Avalution developed the Business Continuity Operating System (BCOS). We believe the right framework enables continuity professionals to answer “yes!” to the following statements:

1. I am empowered to make my organization resilient
2. I have the resources needed to protect the organization aligned to management's expectations
3. I am challenged to grow personally and mature the program
4. I enjoy my work

Attend this workshop to learn about the BCOS, why it's essential to your personal and professional success, and the core tools used to achieve focus and engagement. During this workshop, we will work through three essential tools so you can start implementing the BCOS next week when you return to the office.

Brian Zawada is a co-founder and the Chief Visionary Officer for Avalution Consulting.

Michael Bratton is a Managing Consultant and the Business Continuity Practice Leader for Avalution.

## PRE-/POST-COURSES

Make your budget stretch further by attending pre-/post-courses. Separate registration is required. The courses are held onsite, providing a convenient way to gain even more training. See pages 18-20 for more information.

## EXHIBIT HALL

Top companies, consultants, and vendors all gathered in one location. This is the place you want to be. Schedule software demos, meet with solution providers, and enjoy some downtime between sessions.

## NETWORKING

DRJ Spring 2020 is the perfect venue for you to meet and connect with your peers and industry leaders.

Develop lasting professional contacts to collaborate on future challenges.

## GENERAL SESSIONS

The morning general sessions are tailored to a broad audience covering topics that appeal to all conference attendees. Start your day of learning and networking with sessions that focus on the best business continuity strategies, trends, and topics in the industry.



### General Session 1

8:15 a.m. – 9:15 a.m.



Shola Richards  
Shola Richards  
Inc.

#### The Spirit of Ubuntu—The Keys to Change How You Live, Work and Lead

This highly-engaging, memorable and actionable session will introduce you to the transformative African concept of Ubuntu (pronounced, oo-BOON-too), which is translated to mean, "I am, because we are." Additionally, Shola will share how Ubuntu, along with three powerful questions, will have the power to positively transform how we work, live and lead—starting today.

Lastly, Shola will present a strategy to help everyone to deal more effectively with the challenges that they will face in their journey, with an additional tool to ensure that you stay committed to positive change long after the keynote ends.

*Shola Richards is a dynamic keynote speaker, the best-selling author of Making Work Work, the author of the newly-released book—Go Together, he's an in-demand workplace civility expert, and he is a positivity writer with a passionate worldwide following.*

### General Session 2

9:30 a.m. – 10:30 a.m.



Regina Phelps  
EMS Solutions  
Inc.

#### Where do we go from here? Time for a reset? A Novel Coronavirus Update, Your Plans and Next Steps

The current Wuhan coronavirus outbreak (2019nCoV) has been spreading across the globe infecting thousands of people in dozens of countries. This has created anxiety around the globe, affected company supply chains and caused The World Health Organization to enact the Public Health Emergency of International Concern (PHEIC) designation for only the sixth time since 2005. The question is...where do we go from here?

This session looks at this global health crisis from two vantage points: Crisis Management & Infectious Disease & Pandemic Planning. How have you managed this so far? Are your processes and teams working well? Do you have sufficient situational awareness that you need to make decisions? How has your crisis management team responded and do you need to do a "reset" to improve performance?

It is not often that we get the occasion to use our plans and teams for a large global crisis. This is the time for a moment of self-reflection which provides us the opportunity to learn what has gone well and what needs improvement. This session will reflect on the global health crisis to date, how you can use this crisis as an opportunity to improve your overall crisis management and business continuity plans and teams.

*Regina Phelps, CEM, RN, BSN, MPA, is president/CEO of Emergency Management and Safety Solutions.*

### General Session 3

10:45 a.m. – 11:45 a.m.



Michele Turner  
Amazon

#### Coordinated Resiliency Efforts: The Treatment for Organizations' Potentially Risky Kaleidoscope Vision

If you've ever had an intense migraine, you are well aware of the kaleidoscope vision that can occur. In some cases, views are blurry, or distorted, and in others, can be extremely bright and shiny. Pain Relievers, rest, taking a step back...these are all remedies that if leveraged, can support clarity and the road to wellness. Sound familiar? Those bright, shiny, new initiatives that can occur in a blur. Those initiatives that, if not careful, can come on so quickly, and with such intensity, that teams may fail to acknowledge needed risks which left unaddressed, could lead to significant organizational headaches. Many times, being able to coordinate treatment- insights from all of the remedies such as Cyber and Organizational Risk Management, Business Continuity and Incident and Crisis Response, is what is needed. During this session, we will review each of the afore mentioned practices, and the crosswalks between them which can lead to organizational clarity to identify where the risks are, what strategies can be used to evaluate, what teams can be engaged to leverage mitigations, and how we can get the vision back to normal (or very close to). Coordinated Resiliency Efforts- a solid option for a cure to what may ail the organization.

*Michele Turner is the head of Global Business Resiliency at Amazon.*



## General Session 4

8:15 a.m. – 9:15 a.m.



Regina Phelps  
EMS Solutions  
Inc.

### How Do You Develop a Crisis Management Program for a Large Global Company? Easy ... One Step at a Time

LabCorp, an S&P 500 company, delivers world-class diagnostic solutions, brings innovative medicines to patients faster, and uses technology to improve the delivery of care. LabCorp processes over half a million patient orders a day and employs approximately 70,000 employees across more than 3,000 facilities. In 2018 LabCorp reported revenue of over \$11 billion.



Sean Robinson  
Laboratory  
Corporation  
of American  
Holdings

LabCorp's first decision was to select a time-tested methodology – the Incident Command System. This structure was the foundation for its entire program. A key part of their success was securing executive approval for the program, teams and plans early on. This helped to smooth the road for a global rollout. You can apply the same principals to your program regardless of your organization's size. Attend this fast-paced general session speech and learn the keys to LabCorp's success.

Regina Phelps, CEM, RN, BSN, MPA, is president/CEO of Emergency Management and Safety Solutions.

Sean Robinson is currently responsible for developing and implementing a comprehensive, enterprise-wide business continuity, disaster recovery, and crisis management program at LabCorp.

## General Session 5

9:30 a.m. – 10:30 a.m.



Eric McNulty  
Harvard  
University

### Meta-Leadership

Harvard University's National Preparedness Leadership Initiative (NPLI) prepares leaders in the public, private, and non-profit sectors to handle crisis and significant change events. NPLI's Meta-Leadership framework was developed after extensive research on and observation of leaders in high-stress, high-stakes situations. It is designed to provide individuals with tools that are conceptually and practically rigorous so that they are better equipped to act and direct others in emergency situations. Meta-leadership is currently being used by leaders in the fields of homeland security, emergency preparedness and response, and public health in the public, private, and non-profit sectors. Attend this session and find out how you apply this innovative approach to crisis leadership to your organization.

Eric McNulty, Associate Director of NPLI, is responsible for research relating to leadership in the high stakes, high pressure situations with preparedness and response.

Dr. Steven Goldman, Senior Lecturer in Crisis Management and Business Continuity at MIT.

## General Session 6

10:45 a.m. – 11:45 a.m.



Robert  
Chandler  
Lipscomb  
University

### Visionary Risk & Resiliency Leadership: Anticipatory Foresight for Risk and Resiliency

Risk and resiliency planning at its most fundamental level involves preparing your business or organization to continue with its operations despite otherwise unforeseen circumstances, disruptions, threats and crises. The absence of effective foresight can be a factor in business failures, losses and even complete extinction. Risk threats can range from sudden dramatic events to slower moving changes in the economic, cultural, political, landscapes or even macro changes in the earth's climate! One key for resiliency leadership is visionary foresight. This engaging and thought provoking - applied research-based session issues an important challenge to all leaders to expand their visionary risk and resiliency imagination that includes an approach that combines foresight, visionary insights, imagination, anticipation and innovation.

Robert Chandler, Ph.D. is Director Graduate & Professional Programs at Lipscomb University.

# Conference Schedule

## Sunday, March 15

Pre-Conference Courses .....	8:30 a.m. - 11:30 a.m.
Onsite Registration Opens .....	10:00 a.m. - 7:00 p.m.
DRJ Orientation .....	12:00 p.m. - 12:30 p.m.
Sunday Workshops .....	1:00 p.m. - 3:30 p.m.
Refreshment Break.....	3:30 p.m. - 4:00 p.m.
Solutions Track .....	4:00 p.m. - 5:00 p.m.
Exhibit Hall Opens.....	5:00 p.m. - 7:00 p.m.
Welcome Reception .....	5:00 p.m. - 7:00 p.m.

## Monday, March 16

Networking Breakfast .....	6:45 a.m. - 8:00 a.m.
Onsite Registration .....	7:00 a.m. - 5:15 p.m.
General Session 1 .....	8:15 a.m. - 9:15 a.m.
General Session 2 .....	9:30 a.m. - 10:30 a.m.
General Session 3 .....	10:45 a.m. - 11:45 a.m.
Exhibit Hall Opens.....	11:30 a.m.
Lunch.....	11:45 a.m. - 1:00 p.m.
Exhibits/Product Demos .....	11:45 a.m. - 1:30 p.m.
Breakout Track 1.....	1:30 p.m. - 2:30 p.m.
Breakout Track 2.....	2:45 p.m. - 3:45 p.m.
Refreshment Break in Exhibit Hall .....	3:45 p.m. - 4:15 p.m.
Breakout Track 3.....	4:15 p.m. - 5:15 p.m.
Exhibit Hall Closes .....	4:30 p.m.
Product Demos .....	5:30 p.m. - 6:30 p.m.
Hospitality.....	6:30 p.m. - 8:30 p.m.

## Tuesday, March 17

Networking Breakfast .....	6:45 a.m. - 8:00 a.m.
Registration/Info Desk Open .....	7:00 a.m. - 5:30 p.m.
Breakout Track 4.....	8:15 a.m. - 9:15 a.m.
Breakout Track 5.....	9:30 a.m. - 10:30 a.m.
Breakout Track 6.....	10:45 a.m. - 11:45 a.m.
Exhibit Hall Opens.....	11:30 a.m.
Lunch.....	11:45 a.m. - 1:00 p.m.
Exhibit/Product Demos .....	11:45 a.m. - 1:30 p.m.
Breakout Track 7.....	1:30 p.m. - 2:30 p.m.
Refreshment Break in Exhibit Hall .....	2:30 p.m. - 3:00 p.m.
Workshop Track .....	3:00 p.m. - 5:30 p.m.
Exhibit Hall Closes .....	3:00 p.m.

## Wednesday, March 18

Networking Breakfast .....	6:45 a.m. - 8:00 a.m.
Information Desk Open.....	7:00 a.m. - 12:00 p.m.
General Session 4 .....	8:15 a.m. - 9:15 a.m.
General Session 5 .....	9:30 a.m. - 10:30 a.m.
General Session 6 .....	10:45 a.m. - 11:45 a.m.
Lunch.....	11:45 a.m. - 1:00 p.m.
Post-Conference Courses .....	1:30 p.m.

**REGISTER ONLINE TODAY!**

**[www.drj.com/spring2020](http://www.drj.com/spring2020)**

# BREAKOUT TRACK 1

Monday 1:30 – 2:30 p.m.

## Breakout Track 1 – Session 1



Heather  
Brouder

Fidelity  
Investments

### Increasing Resiliency Through Effective Communications

Whether your Business Continuity Plan is many years in the making or you are just developing initial thoughts, it is important to consider how you communicate with your employees. The next business interruption may be just around the corner and the time to start effective communications is now!

As business continuity professionals, we spend a lot of time with our business partners conducting the Business Impact Analysis and Threat Assessments to create effective Business Continuity Plans. The recovery strategies will not be effectively executed unless the managers and associates know what to do in advance of an actual event. Additionally, the business is exposed to the risk of failing to execute their plan and suffering an increased impact to operations due to associates and managers not knowing their role during an event.

An effective communications program includes associate and manager training, awareness messaging, and clear event management communications. The key to having a fully executable Business Continuity Plan is dependent upon the level of knowledge across the organization. This training will provide the methodology and tools to create an effective communications plan and increase resiliency across your organization.

*Heather Brouder is a Business Continuity Director for Fidelity Investments.*

*Timothy Booth is currently a Senior Risk Manager for Fidelity Investments.*



Timothy Booth

Fidelity  
Investments

## Breakout Track 1 – Session 2



Anya Fleischer

Autodesk Inc.

### Company Reputation: Valuable Asset or Potential Liability

How we manage perceptions and stakeholder expectations is vital to a company's success, & will determine whether brand value is created or destroyed. Recognizing reputation as a distinct risk will assist in strategic planning, creation of coordinated processes, and resiliency initiatives. In this session we will cover how to conduct a reputation risk assessment, which includes defining participants, roles, governance, response, monitoring, crisis management, and prevention tactics.

*Anya Fleischer manages Enterprise Risk and Business Continuity Programs at Autodesk Inc.*

## Breakout Track 1 – Session 3



Anne-Marie  
McLaughlin

New York  
University

### Plans Into Action: Speeding Response with Data, Locally and Globally

It's been said that "Plans are nothing but planning is everything." This presentation looks at the value of plans, specifically the data gathered as part of the planning process and how technology can be used to speed response using key metrics. The presentation will use real-world and simulated events to illustrate the value of making BCP data actionable in the moment, working beyond the spreadsheet. The presentation will also address data flow, communications, and the complexity of global response. NYU occupies over 200 buildings in Manhattan and Brooklyn and has a global footprint spanning six continents with 14 global locations in 13 countries. This presentation will also discuss program development across a complex global organization, collaborative planning, tabletop and functional exercises, as well as lessons learned.

*Anne-Marie McLaughlin is the Director of Emergency Management and Continuity at NYU.*

*Jack L. Briggs II is the Associate Vice President for Public Safety Operations at New York University (NYU).*



Jack Briggs

New York  
University

## Breakout Track 1 – Session 4



Amy  
Bennett

T. Rowe Price

### Invoking Your Business Continuity Plan: A Recent, Real-World Example From T. Rowe Price

Over concern of an explosion, on September 9, 2019, T. Rowe Price associates evacuated their global headquarters building in Baltimore, Maryland. Police, fire and other officials investigated a suspicious vehicle in their parking garage. Due to the pending presidential visit, federal agencies were also involved in the response. T. Rowe Price immediately invoked their business continuity plan. The plan included convening the incident command team at their designated emergency meeting space, as well as sending global trading and critical members of our trading support team to our recovery site. The business continuity team managed the overall corporate response, to include using our emergency notification system to alert associates and provide them instructional and informational communications throughout the incident. The business continuity team created a multi-functional working group that included security, facilities, logistics, communications, and other key stakeholders to pro-actively and re-actively support the business and our associates. T. Rowe Price conducted a thorough after action review and identified areas to sustain and areas to improve. This real-world business continuity plan invocation provides an opportunity for lessons to be shared and learned across our industry.

*Amy Bennett, CBCP, is an Assistant Vice President of Business Continuity at T. Rowe Price.*

## Breakout Track 1 – Session 5



Jamie Goodloe

ONSOLVE

### No BC Program is Complete Without an Effective Crisis Communications Plan

No Business Continuity Program is complete without a thorough and effective Crisis Communications Plan that ensures you can quickly communicate with employees, customers, and other stakeholders. Most companies utilize automated notification software tools to communicate with their people during a crisis event and to manage critical next steps, but an emergency communications tool is only as good as the program, people and data that supports it. Too many times systems do not work as planned (just as the state of Hawaii, who recently issued a full scale missile alert in place of a test).

This session will review strategies you may employ to ensure your systems and processes are successful, as well as cover a detailed use case where Jamie utilized these strategies to overhaul a Crisis Management program and successfully prove ROI to key stakeholders.

*Jamie Goodloe is a Solutions Engineer in the Professional Services division of OnSolve.*

# BREAKOUT TRACK 2

Monday 2:45 – 3:45 p.m.

## Breakout Track 2 – Session 1



Vicky McKim

Aureon

### A Clearer Vision of Process Risk using your BIA

Most of us conduct BIAs for our process and functions, but we seldom if ever use the data to do more than update our recovery plans. What if you could use the same data to clarify the vision of your Process Risk? What if that would in turn clarify the enterprise risk management view? This session will give you some tips on how to leverage the BIA data you already have to assess your exposure to process failure, giving your executives a better view of the true status your operational risks.

*Vicky McKim is Risk Management & Business Resilience Director at Aureon.*

Register by January 15, 2020, and SAVE \$200



## Breakout Track 2 – Session 2



Pat Corcoran  
IBM



Aaron Reed  
IBM

### Recovery Through the Lens of the Virus!

It seems like everyday in the news we're hearing about a government entity or company being impacted by a cyber-attack. Hackers may be attacking large companies or cities, but in reality ... they are attacking you! No one is immune, especially as we become more dependent on technology to live our lives. Is your team ready? Are you ready? How would you recover your environment from a cyber event? It's time to make this personal. Learn the key strategies on how you can protect, recover and ensure continuous operations of your organizations from increasing cyber threats.

Pat Corcoran held numerous operational and management positions associated with large scale application maintenance and development projects for IBM.

Aaron Reed, Manager, North America Cloud Resiliency Orchestration.

## Breakout Track 2 – Session 3



Maureen  
Roskoski  
Facility  
Engineering

### When the Smoke Clears: How ISO Certification Enabled Our Business to Continue During Recent Northern California Wildfires

As a small business, when we undertook the ISO Business Continuity Management Systems certification, we knew it would be a challenge and yet it would help us plan for business interruptions. However, until we experienced a real emergency and office closure, we did not appreciate how much it actually helped us prepare for what was, at the time, the most destructive fire in California history. FEA's Santa Rosa office was part of the evacuation area for the northern California wildfires that raged in October 2017. While our facility remained intact, buildings all around burned to the ground and the surrounding areas were inaccessible for weeks. Key elements from the business continuity management system developed through our ISO certification allowed us to maintain operations and provide services to our clients. Using the lessons learned through that experience, this presentation will share what worked and what could be improved during the event and the aftermath. We will share how the ISO 22301 Business Continuity Management Systems certification process is an effective tool to implement both incident response and business continuity plans. After joining our session, you will understand why we are committed to maintaining this certification.

Maureen Roskoski is FEA's Business Continuity Lead managing FEA's Business Continuity Management System.

## Breakout Track 2 – Session 4



Jerome Wendt  
DCIG

### Make the Right Choice between Disaster Recovery-as-a-Service (DRaaS) Solutions

Backup, cloud, replication, and managed service providers are rapidly converging to provide organizations of all size with new, robust DRaaS solutions. These solutions address many of the challenges that organizations normally face when implementing DR themselves. However, as these technologies converge, organizations must still make key decisions along the way. They must decide which type of DRaaS solution best aligns with their needs. They need to determine how much, if any, help they want when performing a recovery and where they want to recover. They need to answer how much, if any, change they want to make to their environment to implement the DRaaS solution.

This informative, vendor-neutral session will walk attendees available through the various approaches available that DRaaS providers take when delivering their solution. It will examine the pros and cons of each DRaaS approach, how each one aligns with the needs and requirements of specific organizations, and will provide key questions that organizations should ask to evaluate prospective DRaaS providers.

Jerome Wendt currently serves as the President and Founder of DCIG, LLC.

## Breakout Track 2 – Session 5



Roger  
Stearns  
Philips



Rob  
van den Eijnden  
Philips

### Supply Chain Integrated Resiliency and Crisis Management

The 2019 Horizon Scan report indicates that supply chain disruptions are a low frequency and low impact. I would argue that the dynamic nature of a global economy that these disruptions are more frequent and have a larger impact than we may see.

Using several incidents as examples we will show how theory and reality meet in the business continuity and crisis management planning and can be seen and planned for. Using an integrated Business Resilient platform while creating a corporate culture of business resiliency.

Roger Stearns is a Global Business Continuity Manager at Philips Center of Excellence.

Rob van den Eijnden is the Global Head Business Continuity & Resilience for Royal Philips.

# BREAKOUT TRACK 3

Monday 4:15 – 5:15 p.m.

## Breakout Track 3 – Session 1



Ramesh  
Warrior  
eBRP

### Orchestrating a Disaster Recovery Test

Planning a DR test is more than just picking a date and time to conduct an exercise. Meeting Management's objectives in the DR Test adds to the credibility and viability of the DR program. The objectives of the DR Test define what systems, services, and resources (staff) are in-scope for the test. Preparing for the test includes managing and coordinating the many stakeholders of the DR program. Monitoring and measuring during the DR test include: What needs to be monitored, real-time status of Infrastructure, Services, Staff Resources; How to measure real-time progress; Presenting the outcome for the Management, Auditors. In this session eBRP Solutions presents their experience helping their clients manage their DR tests.

Ramesh M. Warrior, director, is the chief visionary and conceptualist behind the eBRP brand.

## Breakout Track 3 – Session 2



Mike  
Jennings  
Assurance

### Cyber-crime: Is This a Business Continuity Event?

During this session we will discuss the impacts cyber-crime is now having on organizations. We will discuss the types of data being targeted, the rise of cyber-crime networks and the potential security risks. Additionally, we will review the implications of an event on your organization and your business continuity response.

Mike Jennings, CBCP, CBCS - VP Advisory Services for Assurance Software, Inc.

## Breakout Track 3 – Session 3



Paul Striedl  
Stifel

### Lessons Learned from the 6/10/19 NYC Helicopter Crash

This presentation will be a case study on how the Business Continuity Team at a multinational independent Investment bank and financial services company, managed their way through a crisis that caused a two-plus day outage at one of their most critical locations.

The topics addressed will include: Building Evacuation and Employee Accountability, Communications to Employees, Regulators and the Media, Crisis Management and Creating Templates on the Fly.

Paul L. Striedl, CBCP, MBCI, is the Business Continuity & Disaster Recovery Director for Stifel.

*“Overall great conference –  
worth the time and money.”*

— Jody Grizz

## Breakout Track 3 – Session 4



### Does Your Team Have What it Takes? Improving Your Plans and Training by Understanding the Psychological Impacts of Crisis Events

Shane Mathew  
Virtual Corp

This session takes an innovative look at one of the most important areas of a Crisis Management that are often overlooked – how the environment and your planning can be improved by accounting for the psychological impacts crisis events can have on your leadership team.

If you've experienced difficulty with your crisis management processes during crisis exercises or real-life events, it may not be as simple as updating your plans. Crisis events impact us in many ways, and the leadership team is not immune to struggles.

This session focuses on understanding some of the common issues crisis management teams face and how traditional plans & exercises don't account for them.

Attend this session to discover the common crisis management challenges that CM teams face in a disaster. Learn proven methods for improving your training and planning. Learn how to incorporate these techniques into learning/exercising events that get the attention of executives

Shane Mathew will share various techniques that psychologists recommend crisis managers and their teams understand and use when responding to crisis management events. Using case-history and real-life examples, participants will explore decision-making issues that occur in crisis events, understand response frameworks that can help simplify your response, and explore how modifications to your approach can ensure executive buy-in for preparedness.

Shane Mathew, VP of Professional Services for US BCM consulting and technology, at Virtual Corporation.

## Breakout Track 3 – Session 5



### The New Rules of Crisis Leadership

Jo Robertson  
Author of  
"Executing  
Crisis: a  
C-Suite Crisis  
Leadership  
Survival Guide"

This seminar sets out to make your organization more resilient to crisis by challenging what many consider best practice. Rather than implementing plans based on best practice templates or putting in place retainers with PR firms, business leaders would be better served by understanding key crisis concepts and tailoring them to their own situation.

The seminar includes new twists on "best practice" – to update the common understanding of what elevates good crisis management beyond wordsmithing. Instead of lists of the items that are "necessary" for a solid crisis plan or well-stocked war room, you'll find key things to consider as you tailor strategies for your own organization. In fact, this seminar shoots down best practices that are outdated yet continue to be repeated, and focuses instead on creating best practices that are tangible and useable for your organization.

Dr. Jo Robertson has a doctoral degree in crisis management and more than 20 years of experience keeping companies out of crisis.

## BREAKOUT TRACK 4

Tuesday 8:15 – 9:15 a.m.

## Breakout Track 4 – Session 1



### Business Continuity Leadership – The Next Generation

John Liuzzi  
Southern  
Glazer's Wine  
and Spirits

So, what is the future of Business Continuity and more importantly, who are the leaders that will drive the programs of tomorrow? The need for progressive leadership has never been more urgent as organizations realize that to survive in tomorrow's volatile, complex, and ambiguous business environment, they will need leadership skills different from those that helped them succeed in the past.

The next generation of Business Continuity leaders must realize that they too must evolve as leaders and be the masters of change and accept accountability to drive organizational resiliency. Business Continuity leadership both now and in the future, will be influenced by constant change, geopolitical volatility, technological disruptions, and both economic and environmental uncertainty.

The ability to master the dynamics of these inevitable forces will be the defining characteristics of success for the next generation of Business Continuity leaders.

So, what are the qualifications, skills, and characteristics that will distinguish the Business Continuity leaders of the future? This session will present easy to understand concepts, practices, and real-world examples of successful strategies that have been embraced by Today's industry leading professionals as they evolve to meet the dynamic challenges which will define the Business Continuity programs of tomorrow.

John Liuzzi is currently the National Director of Business Continuity for Southern Glazer's Wine and Spirits.

## Breakout Track 4 – Session 2



### Fighting Cyber Attacks Requires More than Security – It Requires Cyber Resiliency

Patrick Potter  
RSA Digital  
Risk Solutions

Cyberattacks are the number one risk on almost every organization's agenda – and these attacks are becoming more pervasive, sophisticated and creative. Combating them requires more than security measures. Responding to them requires more than incident response. Recovering from them requires more than business and IT recovery plans. Dealing proactively and effectively with today's cyberattacks demands an approach that combines security and resiliency, business and IT, incident and crisis response, risk and third party management and more. Attend this session to learn more about tomorrow's cyberattacks and what resilient organizations can do to effectively deal with them, and not only survive but thrive.

Patrick Potter is currently a GRC Strategist and subject matter expert for RSA, where he oversees the direction of the Archer Business Resiliency solution.

## Breakout Track 4 – Session 3



### A Clearer Vision of Risk: The New Domain of Human-Interaction Failure Disasters Technology

Bob Chandler  
Lipscomb  
University

"They completely discounted the human factor component, the startle effect, the tsunami of alerts in a system that we had no knowledge of that was powerful, relentless and terrifying in the end," said Dennis Tajer, the spokesman for the American Airlines pilots' union, said of the disastrous Boeing 737 MAX Pilot-MCAS technology interaction.

Recently, (ranging from such varied settings as diverse as the B737 MAX aircraft cockpit, to semi-autonomous self-driving automobiles) novel risks for human-technological systemic dependency have become an important area of concern. Disaster accident analysis and performance prediction for interdependent human-technology systems have traditionally been pursued as two separate failure processes but we are now recognizing a "new domain" of failure - the human-technology interactive factor failure. Thus, common approaches to visualizing performance failures predictions have focused on either human performance factors or technological failures or where one or the other category of "error mechanisms" are assumed to exist. However, it is becoming increasingly apparent that the interdependent interaction of human and technological systems can combine to create disastrous failures. Anticipating failures of joint human-machine systems requires a new visionary underlying model for risk and resiliency. This session calls our attention to this critical emerging area of disaster risk and suggests some paradigmatic shifts to better improve resiliency and save lives.

Robert C. Chandler, Ph.D. currently holds an academic appointment as a professor at Lipscomb University.

*"Great conference. Really enjoyed all of the networking opportunities before, during, and after sessions."*

— Jody Harris

Register by January 15, 2020, and SAVE \$200

## Breakout Track 4 – Session 4



Dave Halford  
Fusion Risk  
Management

### Evolve or Fade Away: The Future of Business Continuity Management

Business continuity management continues to evolve. As risk and resilience programs continue to converge, demand for measurable results and demonstrable success increases. By focusing on operational resilience, business continuity, disaster recovery, and enterprise risk programs can provide improved value, while also addressing ever-evolving standards from regulatory bodies.

This session outlines both an actionable methodology to stand up an enterprise resilience program, and how technology more easily enables data management and analytics to prove your program's effectiveness. You'll leave the session more confident and ready to offer an innovative solution to your enterprise.

David Halford is vice president, Business Continuity/Disaster Recovery Solutions at Fusion Risk Management Solutions.

## Breakout Track 4 – Session 5



Vanessa Mathews  
Asfalit Advisors

### But Why?

In some organizations, business continuity is the best kept secret. Unless your program is audited or your CEO sees the value, the common frustrations with BC are that it lacks executive support, it's too hard to get engagement, it's seen as a project, there's minimal career trajectory, the process takes too long to deliver value, the terminology is unclear, there's not enough money or budget to support it, etc. etc. etc.

What is changing in our world that we need to consider? What human factors should we include to "design with our stakeholders and not for our stakeholders?" How do we get the results we need to support our organizations and bring satisfaction to our roles?

In this session, we will discuss the competing interests with many organizations and how to manage behavioral changes.

By the end of this session, attendees will be able to:

- Express empathy and seek the "why" behind someone's behavior
- Recognize behavioral insights to "nudge" change
- Simulate ways to discover the "why"

Vanessa Mathews is the president and chief resilience officer of Asfalit Advisors.

## BREAKOUT TRACK 5

Tuesday 9:30 – 10:30 a.m.

## Breakout Track 5 – Session 1



Keith Frederick  
Frederick &  
Associates

### From Reactive to Proactive: Event Security & Beyond – Managing Physical Threats & Disruption

Today's multi-billion-dollar sports, entertainment, and special event industries are a financial juggernaut for ownership groups looking to safeguard people, brand, reputation, and organizational assets. In the event of a security breach, i.e., physical threat, bomb scare, workplace violence, active shooter/assailant, terrorist attack-domestic or international, or lone wolf, what protections and continuity strategies should organizations have in place to safeguard employees, attendees, and businesses?

In this session, attendees will learn:

- The importance of viewing physical security from a holistic, all hazards, proactive risk mitigation approach while being ever mindful of its relationship and significance to business continuity planning.
- Best practices for safeguarding confined spaces, stadiums, arenas, and other special event venues.
- Integrating physical security initiatives along with technology integration with the vertical, i.e. CCTV, responsible social media monitoring, license plate readers, biometrics, fast pass lanes, etc.
- How an organization's business continuity plan can be adversely affected in the event one of the aforementioned challenges.



Herbert Ubbens  
Paratus  
Consultants  
Group, LLC

- (5) takeaways to bring back to your respective corporate setting, stadium, venue or arena, high-school athletic dept, college/university, or wherever a special event takes place.

Keith Frederick, FBCI, CBCP, CHEP is an Organizational Resilience Solutions Consultant at Frederick & Associates.

Herb Ubbens, CPP, PSP, PPS is the President of Paratus Consultants Group, LLC.

## Breakout Track 5 – Session 2



Ray Holloman  
HCA Healthcare

### Creating and Running an IT Disaster Recovery Test

How do you create, plan and run a successful IT Disaster Recovery test? Let's step through the process that is used to create an objectives list, how do the DR team plan for the all of the application and how the test is ran that continues to produce consistent results for our application and business stakeholders. As more tools, come in to make testing easier, we can now shift our focus to other parts of the test to continue to make sure that it is as streamlined as it can be. This will take you through a step by step process to show how our DR team continues to run IT DR tests.

Ray Holloman, M.B.A., M.S. is a Business Continuity Administrator for HCA Healthcare.

## Breakout Track 5 – Session 3



James Green  
SAI Global

### Next Gen BCM: The Convergence of Risk and Continuity

IRM and BCM have common goals of identifying and mitigating threats to the business, but the separation of these similar functions is palatable in most organizations. Increasing digitization, more costly natural disasters and ever-changing man-made disruptions are changing the way businesses handle risk. Join us at this session to understand how you can build a more resilient organization and achieve gains by joining these functions.

James Green, Director, Risk Advisory Services at SAI Global.

## Breakout Track 5 – Session 4



Regina Phelps  
EMS Solutions  
Inc.

### The Golden Hour? How Will You Spend This Time? Be Careful Not To Waste It!

When an incident first begins to unfold, what makes it stay an incident instead of turning into a full-blown crisis? When faced with a fast moving and potentially catastrophic incident, what makes the difference in your ability to respond rapidly and effectively? Every organization is dealing with this issue as our current threats escalate in intensity and frequency. Ransomware, Malware, Denial of Service attacks and cyber intrusions of all kinds have placed a laser beam spotlight on how effective we are as an organization in the first few moments and hours of a potential crisis.

Regina Phelps, CEM, RN, BSN, MPA, is president/CEO of Emergency Management and Safety Solutions.

## Breakout Track 5 – Session 5



Joseph George  
Sungard  
Availability  
Services

### Post-Disaster Recovery: Things You Must Consider After Failing Over To Your Recovery Environment

You've failed over your business. Here's a question for you: Now what?

The truth is, for all the importance we place on having a disaster recovery (DR) plan, companies rarely think about what happens after recovery. This needs to change.

In this session, we're going to examine all the elements you should be thinking about ahead of time to ensure a successful post-disaster recovery. Questions like: Is your recovery environment a temporary solution or will you need it for long-term production? Are you able to connect to everything in your ecosystem? Can you run all of your production workloads in your post-recovery environment? How do you ultimately fail back?

In the end, circumstances are going to dictate your DR. By focusing on what you're going to do after you recover, you stand a better chance of stabilizing your business, getting up and running faster.

Joseph George is vice president of global recovery services at Sungard AS.



# BREAKOUT TRACK 6

Tuesday 10:45 – 11:45 a.m.

## Breakout Track 6 – Session 1



### Agility and its Role in Increasing Your Organization's Resilience

Lynnda Nelson  
ICOR

Change is messy. Change is emotional. Change can't be forced. We know traditional change models don't work. We know that organizations that fail to innovate and change fail. And we know that change is happening faster than any of us can keep up.

Not managing change is a risk to organizations that might be more important than planning for natural disasters. Conversely, effectively managing change is a key aspect of increasing an organization's resilience.

Agility is an outcome of embracing change and making it part of how your organization behaves. People enjoy working in organizations where change is seen as a positive activity and one where they are part of the change rather than where it "happens" to them.

This presentation is going to challenge traditional change models and show you how everything you know about change is wrong. This presentation will show you how to design a change-friendly organization. It will show you how to make organizational change a community builder rather than something to fear. It will show you how to design an organization in a way to enable continuous adaptation to meet the challenges of an ever changing world.

Lynnda Nelson is the president of the board of directors of The International Consortium for Organizational Resilience.

## Breakout Track 6 – Session 2



### Working Through The Storm

Tim Jarrell  
COBB EMC

The sudden and unexpected arrival of a severe winter snow storm late one afternoon resulting in a major outage highlighted the cooperative's need to update its major outage procedures, response management, and implement an effective communication strategy for employees, members, and the community.



Cobb EMC (headquartered in Marietta, Georgia) needed immediate assistance enhancing its Business Continuity Program (BCP) to sustain business operations at its campus. Additionally, Cobb EMC also realized the need to upgrade the company's Emergency Response and Communications Plan to assure its integration with its Business Continuity Program. This lead to the creation of a supplemental Distribution System Restoration Plan.

Tim Jarrell is vice president of power supply and planning for Cobb EMC.

Ben brings his executive, planning, client relations and consulting experiences to Corus360, leading the Business Continuity Practice.

## Breakout Track 6 – Session 3



### The Value of Resilience-based Decision Making – Protecting More than Assets

Caitlin Durkovich  
Toffler Associates

How do organizations navigate a world where business boundaries extend well-beyond building walls and networks, norms are regularly challenged and radical transparency drives accountability? They recognize the dynamic environment and think about resilience as more than continuity of operations; it recognizes that resilience is as much about seizing the opportunities presented by disruptions as minimizing the impacts.



Dave Baber  
Toffler Associates

An organization's business continuity/resilience function is well-positioned to serve this role and can promote resilient decision-making by applying proven security and resilience techniques such as intelligence analysis, horizon scanning, contingency planning, crisis management. When resilience-based decision making is integrated into business functions, it creates an internal capacity focused on identifying blind spots, challenging biases and assumptions, and monitoring organizational health. The outcome is a more resilient organization, one that can identify, anticipate, respond to and bounce-forward from disruption – financial, regulatory, operational, reputational, social and political.

Take-a-ways:

- 1) Audience members will leave with a greater appreciation of the complex operating environment.
- 2) Audience members will be provided with specific cases studies of how integrating security/resilience concepts into business decision-making can yield greater returns – for the bottom-line and the brand.
- 3) Audience members will be provided with ideas about how to incorporate resilience into the decision process and demonstrate their broader value to the organization
- 4) Audience members will leave the session with recommendations on how to build a resilient organization, starting with widening the risk lens, strengthening governance and decision-making, and creating a culture of resilience.

Caitlin Durkovich leads the security and business resilience practice at Toffler Associates.

Dave Baber is the director of marketing for Toffler Associates.

## Breakout Track 6 – Session 4



Cary Jasgur  
Mazars USA

### Leveraging Enterprise Risk Management to Maximize Your Organizational Resiliency Program

Risks surround every organization's daily activities; successfully managing risks can go a long way in aiding with organizational resilience planning. What if there was a method to help organizations better prepare and plan for those unforeseen risks? Enterprise Risk Management (ERM) is that method.

ERM allows for the identification and classification of risks as a part of the day to day business. This interactive session evaluates how ERM supports Organizational Resiliency (OR) to ensure that an organization is prepared for the unplanned. ERM allows for the identification and classification of risks, the development of a proper response, policies, and procedures for addressing unplanned risks, and communication and monitoring activities. With the successful implementation of ERM at your organization, BC/DR Professionals develop better plans; devise more correct responses and safeguard their organizations against planned and unplanned events.

ERM and OR Programs align by using the best risk methodologies from both programs, from an overarching organizational lens, rather than just focusing on a particular vulnerability. Understanding the history and context of ERM helps to raise the bar for BC/DR Professionals. This session enables that discussion and challenges the attendees with creating a common ground.

Cary Jasgur is a Manager within the Mazars USA Organizational Resilience Practice with over 25 years of experience and presently holds a CBCP, MBCI, and PMP.

## Breakout Track 6 – Session 5



Robbie Atabaigi  
KPMG

### What to Expect When Expecting . . . Your Auditor!

The thought of an audit shouldn't make your heart skip a beat. Come join this session to learn what to anticipate when planning for the next audit of your Business Resiliency Program. Two perspectives will be given: 1) Program Owner; and 2) Auditor. Your Facilitators will engage participants on the topic of business resiliency beginning with the history of the concept and "how we got here" to trends, and general audit concerns in light of recent social and business events. You will walk away with timesaving tips for your next collaborative audit.



Ava Wallace  
Pioneer Natural Resources

Robbie Atabaigi is a Lead Specialist with KPMG LLP's Southeast Cyber practice in Atlanta.

Ava Wallace is a Records Operations Supervisor at Pioneer Natural Resources responsible for their Business Resiliency Program.



Register by January 15, 2020, and SAVE \$200

# BREAKOUT TRACK 7

Tuesday 1:30 – 2:30 p.m.

## Breakout Track 7 – Session 1



Susan Rogers  
FS-ISAC

### FS-ISAC TLP White – All-Hazards Framework, A Guide to Build Information Sharing Playbooks

As business continuity leaders, we participate in public/private partnerships to obtain situational awareness, collaborate with peers and connect with experts before, during and after a crisis event. Over the past decade, information sharing organizations have evolved the public/private partnership mission. This evolution helps members fill their gaps in specialized skills and collectively protect against systemic and critical infrastructure threats.

The Financial Services Information Sharing and Analysis Center (FS-ISAC) newly published TLP White FS-ISAC All-Hazards Framework is being used to build sector-level, cross-sector, country-level and event specific information sharing Playbooks. In addition to the Framework, this session will review many of the baseline concepts of cyber and physical event information sharing including: NIST Cybersecurity Framework, DHS National Infrastructure Protection Plan, National Critical Functions, National Council of ISACs, Traffic Light Protocol, 2015 Cybersecurity Information Sharing Act, National exercises and more. Practical steps will be presented for business continuity leaders who want to get more involved in sector information sharing efforts.

Susan Rogers is Vice President of Business Resilience of the Financial Services Information Sharing and Analysis Center (FS-ISAC).

## Breakout Track 7 – Session 2



Brian Strong  
CIT Group, Inc.

### Integrating Cybersecurity and Business Continuity for Increased Resilience

Cybersecurity incidents can have business continuity implications well beyond the IT space. Cascading effects on an organization can result from operational, financial, and reputational impacts arising from a security incident. So why should incident response, business continuity, disaster recovery and crisis management be thought of as distinct disciplines that are better off siloed? When viewed under the same strategic lens a convergence of these related functions can help reduce redundancies, confusion, and ad-hoc decision making, while also improving communications and collaboration when an incident does occur.

This presentation will provide practical steps to integrate business continuity and cyber security from preparedness to incident response and recovery.

Brian Strong is VP of Information Risk at CIT Group, a mid-sized financial institution.

## Breakout Track 7 – Session 3



Naveen Chhabra  
Forrester Research

### The State of Disaster Recovery

This session will cover the state of IT disaster recovery preparedness including: Organizational confidence in DR preparations, drivers fueling continued improvement in DR, organizational practices regarding DR program governance, planning, plan maintenance, and testing, provisioning and architecture of data center recovery sites, and current recovery objectives and technology adoption. We will also cover the most common causes of disaster declarations and downtime.

Naveen Chhabra serves infrastructure and operations (I&O) professionals, delivering strategic guidance to Forrester's vendor and end user clients.

## Breakout Track 7 – Session 4



Dan Perrin  
Regus

### Planning for People: The Human Element of Recovery

Planning for your staff in a crisis isn't the same as recovering data or managing your supply chain. People are an unknown quantity with differing requirements. Every person has unique expectations, commitments and, the hardest to plan for, emotions.

From dealing with the upheaval of a change of address from a burst pipe in the office to the aftermath of a citywide disaster - how will your staff react to your plan? Join us to review the most current research that addresses your employee's needs during a crisis.

Dan Perrin is the global solutions director at Regus.

## Breakout Track 7 – Session 5



Tracey Rice  
Fusion Risk Management

### The Benefits of Mentoring in Leadership Development and Career Progression

During the 2019 Fall conference, DRJ announced the official kick-off of the DRJ Mentoring program open to qualified participants at no-cost. Studies show that mentoring can lead to greater career success, including promotions, raises, and increased opportunities. Interested mentors and mentees are invited to complete a profile and apply for participation on-line. A key differentiator between the DRJ program and similar industry programs is the use of mentoring software that provides precision mentor/mentee matching, personalized guidance and mentee/mentor support and resources. We have selected a lively panel of mentors and mentees that will share their perspectives about the benefits of participating in the program, building trust/rapport naturally, flexible goal setting, use of traditional and virtual communication tools, actual success examples, etc.

This interactive session will be moderated but audience question and engagement is encouraged throughout the breakout session and we welcome ideas, recommendations and opposing views.

Tracey Rice is senior vice president of customer engagement at Fusion Risk Management.





# TUESDAY WORKSHOPS

March 17, 2020

These interactive workshops allow attendees to explore topics in-depth.

## Tuesday Workshop Session 1



### Best Practices from the YouTube Shooting

Ron LaPedis  
Seacliff  
Partners  
International,  
LLC

First responders are arriving at your location and you have no idea why. What you don't know is that you have an active shooter situation, and someone dialed 911. When the first responders arrive, will they be going in blind? Will they have to shoot their way through locked doors because no one knows where the keys are? Are there hazardous chemicals, processes, or areas that they need to stay away from? Do you have private armed security who could become targets when officers see their guns?

This course will discuss how law enforcement approaches active shooter training, will present several ideas for how you can work with LE before an event to ensure safety of both employees and officers, and will detail what went right and lessons learned from the May, 2018 YouTube shooter incident.

*Ron LaPedis is Managing Director at Seacliff Partners International, a business resilience and security consulting firm. Before that, he worked on HP NonStop servers for 25 years becoming a subject matter expert in high availability systems, business continuity, and security.*

## Tuesday Workshop Session 2



### Are You Ready for a Novel Coronavirus Pandemic? A Practical Hands-On Workshop to Improve Preparedness

Lisa Koonin  
Health  
Preparedness  
Partners

Private sector businesses, especially those that provide important community services, must plan and prepare for a pandemic outbreak. Pandemics can have a significant impact on businesses, producing high levels of worker absenteeism and disruption of business functions. Although as of February, 2020, the emerging outbreak of the novel corona virus has not yet been declared as a pandemic, cases are mounting and disruptive global impact on supply chains is increasing. This interactive workshop will address these vulnerabilities and provide practical life-saving approaches in four key areas. Businesses that develop and implement a pandemic response plan (as part of their business continuity plans), can significantly reduce harmful impacts, play a key role in protecting employees' and customers' health and safety, and limit the negative impact of a pandemic to their business, as well as their community.

*Dr. Lisa Koonin is recognized as an international expert in emergency preparedness and response, especially for pandemic influenza response. Dr. Koonin founded Health Preparedness Partners after her 30+ year career with the U.S. Centers for Disease Control and Prevention (CDC).*

## Tuesday Workshop Session 3



### Successful Drills and Exercises: Here's How!

Steven B.  
Goldman  
MIT

The DRJ attendee favorite and our longest running workshop! Successful business continuity and disaster recovery takes more than a plan: it requires realistic testing and validation. This workshop is where you learn how! Do your exercises provide as close- to-real situations as possible? Are your response teams challenged properly? What do others do? How can you improve? During this hands-on workshop, you will learn how to develop, set up, and conduct your successful BC/DR drill or exercise. Students will master:

- The company politics of drills and exercises
- Dr. Steve's Exercise Planning Checklist.
- Why drills/exercises are important
- Types of drills and exercises
- Elements of a successful exercise
- Scope, objectives, and extent of play
- The scenario development team
- 101 scenario ideas you can use
- Making it real
- How to effectively conduct, evaluate, and critique
- How to leverage this exercise for future gain

You will also learn to avoid common pitfalls and to anticipate and resolve problems. With his lively style and real-life examples, Dr. Goldman will lead the class through interactive discussions of successful exercise development and conduct. Don't miss it!

*Dr. Steven B. Goldman is an internationally recognized expert and consultant in Business Continuity, Crisis Management, Disaster Recovery, and Crisis Communications. He has over 35 years' experience in the various aspects of these disciplines, including program management, plan development, training, exercises, and response strategies.*



Register by January 15, 2020, and SAVE \$200



## Tuesday Workshop Session 4



Joe Layman

Cetera Financial Group



Susan Zielan

CoreLogic, Inc.

### Risk: How to Identify Critical Risk Within Your Organization

Risks vary across organizations and within lines of business. Leverage your available resources to identify the critical risk faced by your organization. In this collaborative session, Joe Layman, Director Business Continuity Management, and Susan Zielan, Senior Business Continuity Program Manager, will assist you with identifying critical risks that matter to your organization, and approaches to mitigate or accept those risks. Whether the risk is an asset, vulnerability or threat, learn to assess the criteria that identify and prioritize critical risk to your organization.

Joe Layman is the Director, Business Continuity Management for Cetera Financial Group and oversees the Business Continuity, Disaster Recovery and Crisis Management program.

Susan Zielan is the Business Continuity Program Manager, for CoreLogic, Inc.



## Tuesday Workshop Session 5



Regina Phelps

EMS Solutions Inc.

### Are you Ready for the Impact of a Cyber Breach? Do a Cyber Exercise to Find Out!

The cyber threat is likely the greatest threat of our lifetime. What is your organization doing to prepare for the impact of an attack or breach? Many organizations are buying software, enlisting vendors and adding staff to prevent it from occurring, but what happens when it does? Experts all agree on one thing ... it is simply a matter of when not if it will happen.

Few companies have serious plans for how they will respond to the impact of an actual cyber event - and even fewer stress test those plans. How can you prepare for the impact of a cyber-attack or breach? Conduct a cyber exercise! Such exercises force real-time situation analysis and decision-making and clearly demonstrates what you need in place in order to cope with the loss of technology.

This workshop shows Business Continuity Planners, Crisis Managers and their IT counterparts how to stage a cyber breach exercise that will test preparedness, reveal "hidden" circumstances and sharpen the responsiveness of everyone from top executives to front-line business managers and technologists.

Attend this session and learn how to go about developing a realistic cyber exercise that will challenge the Crisis Management Team, the technology staff and the business units. You will leave this workshop having thought out some key aspects of a cyber tabletop exercise, feeling better prepared to develop the exercise (and perhaps a bit more paranoid).

Regina Phelps, president of EMSS, is an internationally recognized thought leader in the field of emergency management, pandemic, and contingency planning, consultation, training, and speaking services to clients on four continents. Her niche includes incident management team development, pandemic planning, emergency operations center (EOC) design, and the development of emergency exercises for large global companies.



*"I walk away not just with business cards but with friends."*

— Marilyn Boatman



*"DRJ is the premier opportunity to share resiliency expertise, best practices, and the latest knowledge."*

— Jean Anderson



# SOLUTIONS TRACK

Discover solutions to today's issues. Seasoned industry veterans will present solutions using today's resources, products, and strategies.

Sunday, March 15, 2020  
4:00 – 5:00 p.m.



William Hord  
Quantivale

## Solutions Track 1: Successful Change Management Through ERM

Your organization is continuously experiencing change. Regardless of the change, whether it is related to operational processes, new technology, new products, compliance requirements or strategic initiatives, change is constant and necessary for growth and profitability. A well-defined change management process is critical to minimizing the impact that change

has on your organization. Leveraging the data that your ERM program already contains is an effective way to help create and manage the overall change management process within your organization. Your ERM program generally assesses and maintains detailed information related to strategy, operations and the remediation plans needed to mitigate impact on the organization. It is the tangents of this data that is vital to a successful change management process. When an organization utilizes this information aggregately and combines it into a well-defined change management process, your ability to proactively manage change increases your overall effectiveness. The end result is the ability to streamline your allocation of capital and resources. Join us as we discuss the various tangents of data and the change management process that will help you make better risk-based business decisions to save time and money for your organization.

*William "Bill" Hord has more than 28 years of experience in executive management within the financial services industry.*



Andrew Witts  
Infinite Blue

## Solutions Track 2: Connecting the Commonalities Throughout Your Continuity Program

In the continuity industry there are many different skill sets and areas of expertise: Business Continuity, Disaster Recovery, Emergency Response, Risk Management and Supply Chain Management to name a few. These areas are often handled by different groups/departments within organizations. Learn how to better understand each other's roles to provide a mutual benefit so that your organization is better prepared during an event.

*Andrew Witts works closely with program admins and users to ensure that they are using the BC in the Cloud platform to the full potential.*



Henk Grouls  
StormGeo, Inc.

## Solutions Track 3: Weather Insights: Why You Need More Than A Simple Weather Forecast

Since 1980, there have been over 240 weather-related disaster events in the U.S. that have exceeded \$1 billion in impacts with a total cost exceeding \$1.5 trillion dollars. Perhaps even more concerning, FEMA reports that weather is the #1 natural disaster affecting businesses in the U.S.; 40% of businesses fail to recover after a significant weather event; and these business failures are usually due to a lack of appropriate weather response planning.

*Henk Grouls is Managing Director of StormGeo, Inc., and Global Vice President of Cross Industry of StormGeo AS.*



Mark Carroll  
Income Research + Management



Steve O'Neal  
Agility Recovery Services

## Solutions Track 4: When the Music Stops Everyone Sits Down!

Management acknowledging the need for a risk management program is the first tough challenge in this industry, however identifying where it resides is often the bigger problem. As an industry WE can't even decide what we should call ourselves which then competes with overlap of various groups we need to work with. This session will dive into the overall problem and provide some suggestions on

how to resolve the issue, where your program should live in your organization, and why you should care? How does an organization operate resiliently when the naming conventions are varied and the functional alignments are inconsistent, self-serving, competitive, etc.? What makes for an effective risk-based organization? Where have you seen effective planning/execution? What are the barriers making this so challenging? Conversely, where have you seen flawed organizational titles/alignments that are not in the best interests of the firm, but are in place to address individual or departmental needs? What has been the result of this flaw? This session will be highly interactive, discussing a variety of approaches drawing from historical cases of organizational structure from the presenter's experience, but also drawing on attendees to bring forward their experience? What has worked (or not) and why? What are the guiding principles or critical success factors that need to be in place? What are the historical or industry-specific issues that prevent or foster this development? Do outside parties (e.g., regulators, consultants) have a role in assisting this resolution? The session promises to be highly engaging and thought-provoking.

*Mark Carroll is the Senior Vice President and Business Risk Officer for Income Research + Management (IR+M).*

*Steven O'Neal is an Enterprise Account Executive for Denver, CO-based Agility Recovery.*



James Green  
SAI Global

## Solutions Track 5: Five Tips for 2020 Resiliency

Have you considered the best ways for your organization to remain resilient as we head into 2020? The business climate is changing and with that, resiliency tips are changing too. We invite you to join Director, Risk Advisory Services, James Green in this important and lively session on his top five BC tips for your organization to remain resilient in 2020 and beyond.

James will not only share his tips, but the reasons why they are important and how they play a key role in your BCM program. This can't miss session covers crucial information for building the most robust BCM programs possible. Attendees will discover real-life knowledge they can immediately put to work in their own BCM program.

*James Green, Director, Risk Advisory Services at SAI Global.*



Sherri Flynn  
Recovery Planner



Melissa Ouari  
Marks Paneth LLP

## Solutions Track 6: Why Promoting Business Continuity Positivity is a Corporate Win!

An area often overlooked in end to end organizational resiliency is your workforce. Educating employees at all levels of the organization is a challenge for many. How Business Continuity professionals address education and communication around Business Continuity helps

both the organization and everyone in it to understand the positive value of Business Continuity. The need for Business Continuity success is more evident than ever but getting the word out continues to be a challenge. We will explore how organizations integrate Business Continuity Management pillar within their other risk initiatives such as security and privacy. We will also show you how best in class organizations are incorporating Formal Communication Plans around Business Continuity Management so that Business Continuity stays top of mind and is assimilated into day to day business practice. In this session we will discuss ideas to consider integrating into your Business Continuity exercising, training and awareness programs.

*Sherri Flynn is a Master Business Continuity Planner for RecoveryPlanner.*

*Melissa Ouari is a Senior Manager at Marks Paneth LLP New York City.*



Bruce Wingert  
Sykes Enterprises



Steve Rogers  
KingsBridge BCP

## Solutions Track 7: If The Past Repeats Itself, Why Not Learn From It

Understanding the experiences from others is as invaluable as your own. All too often, history repeats itself, so why not learn from it! This session is a solid mix of advice, tips, strategies, stories and media clips from more than two decades of experience in this ever-evolving field. The impact of the coronavirus will also be discussed with lessons learned. If

you are new to the industry, you'll learn what to do and NOT to do (to prevent mistakes). If you are an experienced planner, you'll have a chance to listen and learn about situations that you might have to deal with in the future.

*Bruce Wingert is currently the senior manager of business continuity for Sykes Enterprises.*

*Steve Rogers is a BCP solutions contractor working with KingsBridgeBCP.*



Jennifer Sand  
Everbridge

## Solutions Track 8: From Risk to Resilience: Moving from Situational Intelligence to Actionable Response

With the increased prevalence of workplace violence and active shooter situations, more organizations are investing in the development and delivery of a comprehensive, actionable security strategy. This presentation will examine the technology and strategies that organizations should deploy to change their critical event management strategy from passive to active. Attendees will learn how technology can help them assess, locate, act and analyze both physical and cyber threats. They'll also learn how data is enabling companies to rapidly pinpoint threats and automate response. Additionally, they'll receive advice on how to educate their leadership team on the benefits of furthering their critical event management strategy.

*Jennifer is VP of Product Management for Critical Event Management at Everbridge, Inc.*



Amber Peters  
SAP Digital Interconnect

## Solutions Track 9: Managing Crisis in an Interconnected World

Following the journey of an organization from manual, to automated, to intelligent requires bringing together the employee experience, management of emerging technologies and dispersed locations. Added complexity to solve today's problems includes inter-agency cooperation, blended workplaces with standard and contracted employees, and large scale, long term challenges that can be addressed using the basic principles of notification systems.

*Amber Peters is the Industry Expert for SAP Digital Interconnect.*

Register by January 15, 2020, and SAVE \$200



# SPONSOR SPOTLIGHTS

## Silver Sponsors



Assurance Software Inc. provides a complete business resiliency solution that is revolutionizing how companies eliminate vulnerabilities, minimize risk, and protect colleagues. Used globally by over 750 customers, Assurance is a recognized leader for customer-centric design, time-saving solutions, and expert services. Assurance has an industry-defining legacy that has shaped the evolution of business continuity for over 30 years. With our proven technology solutions, services, and dedication to customers, we are the partner of choice for helping you confidently master business resiliency and demonstrate the business value of your program. With Assurance, you can intelligently and strategically safeguard your organization to outpace risk.



eBRP Solutions Inc. provides web-based tools and utilities, as well as consulting services. ESN develops tools and utilities focused on core requirements. [www.eBRP.net](http://www.eBRP.net).



Everbridge, Inc., the world's leading provider of Critical Event Management software solutions, ensures business, government and healthcare organizations are prepared to rapidly respond to – and even avoid – sudden, unexpected disruptions. The Everbridge Critical Event Management Platform delivers organizational resilience on an unprecedented scale – combining real-time monitoring, situational awareness, and integrated response and collaboration solutions across from a single, enterprise-wide view. Keeping people safeguarded, assets and reputations protected, and continuity maintained and restored quickly is the Everbridge measure of success in an uncertain world.



Fusion Risk Management is a leading industry provider of cloud-based software solutions for business continuity, integrated risk management, IT disaster recovery, and crisis and incident management. Its products and services take organizations beyond legacy solutions and empowers them to make data-driven decisions with a comprehensive and flexible approach through one system. Fusion and its team of experts are dedicated to helping companies achieve greater organizational resilience and mitigate risks within their businesses. For more information, visit [www.fusionrm.com](http://www.fusionrm.com).



IBM Resiliency Services can help clients develop an enterprise-wide resiliency strategy to address the risks and opportunities of today's business environment which requires near-continuous operations. Our portfolio encompasses innovative Resiliency as a Service offerings including resiliency orchestration, data backup, virtualization and disaster recovery cloud services to full-scale compute, data and applications resiliency, high availability and recovery solutions, and the most resilient and efficient facilities and Data Centers. IBM has proven expertise, knowledge and technology to provide the best consulting, build, manage and run services that will ensure the continuous availability of your business in the face of any opportunity or threat. Learn more at [www.ibm.com/services/resiliency](http://www.ibm.com/services/resiliency).



With over 60 years of combined experience in the mass notification industry, OnSolve is the leading global provider of SaaS-based critical communication solutions for enterprise, SMB, and government organizations. The formation of OnSolve in 2017 brought together three of the industry's most relied upon products, CodeRED, Send Word Now and MIR3. The company's cloud-based solutions provide users with fast, reliable methods of sending critical information and alerts to employees, residents and other stakeholders across multiple devices. Mass notification and collaboration is an essential element of emergency response and business continuity planning, keeping teams on track and coordinating during critical events. OnSolve solutions are designed and proven to save lives, protect revenue, reduce costs, and preserve business continuity. More information can be found at [www.onsolve.com](http://www.onsolve.com).



Regus is the global workplace provider. Its network of more than 3,000 business centers in 120 countries provides convenient, high-quality, fully serviced spaces for people to work and recover, whether for a few minutes or a few years. The key to flexible working is convenience and so Regus is opening wherever its 1.5 million members want support – city centers, suburban districts, shopping centers and more. [www.regusworkplacerecovery.com](http://www.regusworkplacerecovery.com).



RES-Q™ provides the full range of Managed Recovery, Disaster Recovery, Quick-SHIP and DR/BC Consulting Services. Corus360 has multiple facilities with its flagship Recovery Center located in Atlanta, GA. RES-Q™ delivers recovery options for all major technology platforms, including IBM Mainframe, IBM Power, and all Open-Systems, plus provides Workgroup Recovery Positions for business recovery. Learn more at [www.resqdr.com](http://www.resqdr.com).



SAI Global helps risk and compliance professionals proactively manage risk to create trust and achieve business excellence, growth and sustainability for their organizations. SAI360, our world-leading Risk platform, is the most complete integrated approach to risk management on the market including compliance management, enterprise & operational risk management, EHS & operational excellence, ethics & compliance learning and digital risk & business continuity use cases. Combining market-leading software capabilities, learning content and controls, SAI360 provides a line of sight to navigate risk and compliance management by addressing it from every perspective. SAI Global is headquartered in Chicago, U.S., and operates across Europe, the Middle East, Africa, the Americas, Asia and the Pacific. Discover more at [www.saiglobal.com/risk](http://www.saiglobal.com/risk) or follow us on LinkedIn.



Sungard® Availability Services™ (Sungard AS) has more than 30 years of experience providing flexible availability services that help ensure organizations keep applications always on, always available. The company leverages its proven expertise to provide managed IT services, information availability consulting services, business continuity management software and disaster recovery services to clients in North America, Europe and India. Sungard AS helps customers improve the resiliency of their mission.

## Bronze Sponsors



Agility Recovery is a leading provider of business continuity and recovery solutions, helping to recover our customers' businesses following any interruption. We provide simple to implement solutions that ensure access to temporary power, fully furnished mobile offices and local brick and mortar office space, communications equipment and computer systems, as well as planning and testing resources. Since 1989, Agility has rescued thousands of organizations with an unparalleled success rate, through business interruptions large and small.



Ascent Business Technology is a niche software product company focused on addressing business operational challenges through automation & optimization of processes, and enabling organizations to be more cost efficient & resilient. AutoBCM by Ascent is an end-to-end enterprise resiliency solution that helps organizations prepare a robust risk and continuity management program to tackle any business disruption. With three major modules – BCM, Crisis Management and IT Disaster Recovery, AutoBCM is any organization's one stop solution to address all business resiliency needs.



Avalution specializes in business continuity and IT disaster recovery consulting, outsourcing, and software solutions for organizations of all sizes. Catalyst combines our consulting methodology with a simple user interface, on-screen help guides, and customizable templates to make the business continuity and IT disaster recovery planning lifecycle easy and repeatable. [www.avalution.com](http://www.avalution.com) or [www.bccatalyst.com](http://www.bccatalyst.com).



Our team has worked with every vertical from banking/finance, healthcare, manufacturing, education, energy/utilities, government and more, helping to build, improve and automate business continuity programs. Our focus is providing the best platform that is easy to use with more features at a lower cost. Learn more at [www.bcinthecloud.com](http://www.bcinthecloud.com).



Kingsbridge develops software, provides consulting and supports your business to create disaster recovery and business continuity plans. Customers include insurance, communication, transportation and banking institutions across N. America and the Caribbean. [www.kingsbridgebcp.com](http://www.kingsbridgebcp.com).



Developed by Premier Continuum, ParaSolution is a world-class award-winning web-based software that addresses the entire BCM lifecycle and can be tailored to your needs. It integrates BIA, risk assessment, plan development and activation, exercises, and crisis and incident management. ParaSolution is supported by experienced and certified consultants and trainers, thereby ensuring the continued maturity of your resilience program. With ParaSolution, your organization can rest assured it is undertaking an approach in line with current best practice.



Quantivate is an industry-leading provider of web-based governance, risk, and compliance software solutions. Our BC module enables an organization to easily develop implementable plans, keep plans up-to-date, perform exercises, manage incidents, and increases the availability of critical operations across the enterprise. [www.quantivate.com](http://www.quantivate.com) or 800-969-4107.



Positioned as a Leader in Gartner's BCMP Software Magic Quadrant, RecoveryPlanner has been providing its all-in-one, web-based software and expert consultancy services to organizations of all sizes and industries. Our proven methodology is based on and meets all pertinent frameworks and regulations. Learn more at [www.recoveryplanner.com](http://www.recoveryplanner.com).



Remver Consulting is a veteran, woman, and minority owned Business Continuity, Information Technology, and Cyber Security consulting firm. We help design, implement, maintain, and enhance comprehensive Business Continuity and IT Disaster Recovery Programs. Our innovative and strategic solutions include: IT and Cyber Risk Assessments, Business Impact Analysis (BIA), Business Continuity, and IT Disaster Recovery Plan development.



Founded in 2005, Ripcord is a consulting firm specializing in Crisis Management, Disaster Recovery, Business Continuity, and IT Security. We believe that recovery needs to be a heads-up activity and not a heads-down activity. So when a crisis, cyber-breach or business disruption occurs, your organization has the plans in place and, more importantly, your people have the muscle memory to execute those plans.



RSA helps leading organizations transform the efficiency of their continuity and recovery teams, address the most critical areas of the business quickly, and partner across the business to achieve their resiliency goals. RSA Archer® Business Resiliency provides an automated approach to enable your organization to respond swiftly in crisis situations and protect ongoing operations. For more information about RSA's products and services, visit [www.rsa.com](http://www.rsa.com).



SAP Digital Interconnect links organizations, people, and things simply and without layers of complexity to enable developers, enterprises, and mobile network operators of all kinds and sizes to easily drive digital transformation with intelligent, interconnected mobile engagements. The SAP Digital Interconnect group, provides cloud-based engagement services that use configurable APIs, programmable digital interfaces, and proven messaging channels to connect the "last mile" between enterprises and their SAP solutions and other applications, customers, employees, and things. We continuously monitor events around the world to enable real-time, intelligent responsiveness that helps organizations maintain continuity, resiliency, and personal well-being. Join the SAP Digital Interconnect Community at <https://community.sapdigitalinterconnect.com/>. Follow us on Twitter at @SAPInterconnect.



Unitrends introduces backup appliances and cloud data protection that leverage cutting edge technology to automate manual tasks, eliminate management complexity, and deliver tested hardware and software resilience.



Resilience and Business Continuity planning and consulting services tailored to fit your industry; utilizing proven, scalable and sustainable solutions. We are always available as partners and guides when you have a question or need some additional support. Our goal is to minimize the stress of continuity planning and optimize resilience. Learn more at [www.virtual-corp.net](http://www.virtual-corp.net).

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The International Consortium for Organizational Resilience provides access to the many offerings of education and credentialing expertise. [www.theicor.org](http://www.theicor.org).



## PRE-CONFERENCE COURSES:

Earn up to 16 additional CEAPs by attending a Pre-Conference Course. To register visit [www.drj.com/spring2020](http://www.drj.com/spring2020).

### THESE COURSES REQUIRE AN ADDITIONAL FEE.

*Note: A class will be canceled if minimum number of registrants is not met.*

#### PRC-1: Basics of Workplace Violence Behaviors of Concern Threat Assessment



Saturday, March 14, 8:30 a.m. – 5:00 p.m.

\$1,095 per person

Presenter: Bob Chandler, Ph.D.

Some 2 million American workers are victims of workplace violence each year. Workplace violence can strike anywhere, and no one is immune. Nothing can guarantee that people will not become a victim of workplace violence. There are, however, steps which can help reduce the odds, starting with learning how to recognize potentially violent situations by observing and considering behaviors of concern exhibited by others in the workplace, including current and former subordinates, co-workers, supervisors, customers, visitors, vendors, or even students. Many organizations have put proactive threat assessment protocols and teams in place to help scan for these behaviors of concern and have reactive plans to help prevent violent acts before they occur.

Clinical psychological evaluations of risk are a highly confidential component of a comprehensive behavioral threat assessment and management process and should only be done by qualified and credentialed professionals. However, living and working in a “see something – say something” era, it has become incumbent on a wide range of managers, supervisors, co-workers and subordinates to become much more aware of mal-behavioral warning signs. In the contemporary climate of workplace violence risks we are all to some degree on the “front lines” of the early warning system.

Do you know the warning signs of potential workplace violence when you see them? Could you describe them appropriately in reporting your observations to the designated channels in your organization or to other officials? In this course you can get an orientation grounding in the basics of recognizing and describing behaviors of concern in your workplace, school, at the ballpark or stadium, social or religious congregation or in a retail location. Do you know what signs for which you should be on the lookout?

While this course is not intended to provide qualifications for a clinical diagnostic proficiency, it can serve as a general introduction to the nature and process of behavioral threat risk assessment which may be of benefit to both the individual and their organization. This research based short course has been crafted at the “college undergraduate level” but has been designed to enable students without previous academic studies in the area through those with advanced degrees in social science and psychology to learn and apply insights from the rapidly growing field of behavioral threat assessment in their own workplaces.

#### Some Course Objectives:

In this course, participants will be given the opportunity to;

- Learn the distinctive components of behaviors of concern.
- Learn the basics to recognize early warning signs related to behaviors of concern
- Learn the fundamental steps of responding to early warning signs related to behaviors of concern
- Gain a clearer understanding of the process and outcomes specific to scanning behavioral assessment

For more course information email [robert.chandler.phd@outlook.com](mailto:robert.chandler.phd@outlook.com).

*Robert C. Chandler, Ph.D. (University of Kansas) is an internationally recognized expert on multiple aspects of communication and human interaction in specialized contexts. He currently holds an academic appointment as a professor at Lipscomb University.*

#### PRC-2: Cyber Security – A Primer for Non-technical Management Professionals



Saturday, March 14, 8:30 a.m. – 11:30 a.m.

\$600 per person

Presenter: Lee Eisen

This three hour course will provide the participants with:

- The confluence of Business Continuity and Cyber Security
- Overview of threat landscape and techniques & tools to address threats.
- Helping your organization adopt and adapt to digital transformation
- Cyber breach response and governance-risk-compliance (GRC)

For more course information email [ted.brown@ketchconsulting.com](mailto:ted.brown@ketchconsulting.com) or call 484-919-2966.

*Lee Eisen, MBCP and MBCI, has a significant background in business continuity management and compliance programs.*

#### PRC-3: Cyber Security – How to Execute a Cyber Security Exercise



Saturday, March 14, 1:30 p.m. – 4:30 p.m.

\$600 per person

Presenter: Lee Eisen

This three hour course will provide the participants with:

- Elements of a Cyber Security Exercise and its benefits
- Basic types, components and benefits of a Cyber Security exercise
- Helping senior leadership interpret the results of an exercise
- Make your organization's staff aware of cyber security threats & best practices

For more course information email [ted.brown@ketchconsulting.com](mailto:ted.brown@ketchconsulting.com) or call 484-919-2966.

*Lee Eisen, MBCP and MBCI, has a significant background in business continuity management and compliance programs.*

#### PRC-4: Business Impact Analysis (BIA)



Saturday, March, 14 - 8:30 a.m. - 4:30 p.m.

\$1,200 per person

Presenter: Kathryn Scourby

This course is an in-depth look at how to conduct a Business Impact Analysis (BIA). The class is for both BIA novices and experienced professionals. It provides you with the opportunity to gain a deeper knowledge and understanding of the BIA.

The course will explore the concept of the BIA. You will be taught two different approaches to a BIA – interviews and workshops and the value of each. You will also be provided with an actual BIA survey and the results of clients BIA's.

The objectives of this class are:

- Understand the BIA process;
- Understand how to structure a BIA;
- Apply the standard methods to conduct a BIA;
- How to determine the results of the BIA & identify the critical functions for recovery strategies.

For more course information email [ted.brown@ketchconsulting.com](mailto:ted.brown@ketchconsulting.com) or call 484-919-2966.

*Kathryn Scourby, CBCP – Ketch Consulting, works with professional service firms to achieve their goals in the areas of business continuity, disaster preparedness, risk management and compliance exercises. Kathy's experience includes thirty-three years with the international law firm Hunton & Williams, LLP, including over five years as the firm's only Business Continuity Manager.*

**Register by January 15, 2020, and SAVE \$200**

## POST-CONFERENCE COURSES:

Earn up to 16 additional CEAPs by attending a Post-Conference Course. To register visit [www.drj.com/spring2020](http://www.drj.com/spring2020).

### POC-1: Certified Business Resilience Manager (CBRM)



Wednesday, March 18, 1:30 p.m. – 5:00 p.m.

Thursday, March 19, 8:30 a.m. – 5:00 p.m.

Friday, March 20, 8:30 a.m. – noon

\$1,895 per person

Presenter: Rick Wellman

A 3-day Business continuity and resiliency training plus an optional certification testing. The CBRM designation has been earned by more than 3000 certified professionals globally.

The training begins with a basic introduction to business continuity and then leads participants through a BC planning road-map with detailed steps for developing and implementing a business continuity plan and program for their organizations.

The road-map consists of assessing and gathering business continuity requirements for managing a disaster; developing recovery solutions and strategies; developing business continuity plans based on requirements and solutions; testing and implementing BC solutions; maintaining BC plans; executing BC plans in the event of a disaster, and managing normalization of business. The training includes group exercises using real business cases for risk management, business impact assessment (BIA) and recovery strategy development.

Students will receive a presentation workbook and take-home business continuity plan templates. Students may also take the optional multiple-choice CBRM (Certified Business Resilience Manager) certification exam. The class fee includes optional certification testing and processing. Additionally, participants who successfully obtain the CBRM certification also qualify for CBRITP (Certified Business Resilience IT Professional) certification through BRCCI.

Learn more about this course and certification at [www.brcci.org](http://www.brcci.org) or call 1-888-962-7224. For more information on this course please contact [info@brcci.org](mailto:info@brcci.org).

*Rick Wellman, senior business continuity and resilience trainer and consultant for BRCCI, is a highly skilled subject matter expert with more than 25 years of training and consulting experience.*

### POC-2: Operational Risk Management



Wednesday, March 18, 1:30 p.m. – 5:00 p.m.

Thursday, March 19 3, 8:00 a.m. – 5:00 p.m.

Friday, March 20, 8:00 a.m. – noon

\$1,100 per person

Presenter: Vicky McKim

Students should bring their laptops with USB port for the class templates and to use during the practice. The group work time will allow participants to gain experience in assessment interviews, analysis, risk rating, calculating the cost benefit of mitigation and creating the reports and presentations for key stakeholders.

#### Students will leave with the following Course Materials

Electronic templates for Assessment & Report Samples.

Workbook that includes: Hardcopy of the Power Point, Outline of key concepts  
Paper copy of templates and report samples

A certificate of completion for participants who attend the entire course.

The course will be taught in the following 5 Modules:

- **Module 1** – Overview of core concepts
- **Module 2** – Assessment
- **Module 3** – Analysis and reporting
- **Module 4** – Mitigation and risk tolerance
- **Module 5** – Creating a program

Upon completion of this course participants will:

- Be familiar with the risk management program structure and life cycle
- Understand the types of risk
- Have a good understanding of operational risk and its categories

- Improve how they:
  - o Conduct operational risk assessments
  - o Be able to identify various vulnerabilities, threats and controls
  - o Be able to rate and chart risk from one of several manual methods and be aware of automation capabilities available
  - o Identify mitigation options
  - o Facilitate cost benefit analysis
  - o Create risk reports
  - o Understand and manage risk acceptance for their risk management programs
  - o Embed risk awareness into their culture

For more course information email [vicky.mckim@aureon.com](mailto:vicky.mckim@aureon.com) or call 515-830-0233.

*Vicky McKim is Risk Management & Business Resilience Director at Aureon.*

### POC-3: ICOR's Certified Organizational Resilience Course - What do you need to know to increase the resilience of your organization?



Wednesday, March 18, 1:30 p.m. – 5:00 p.m.

Thursday, March 19, 8:30 a.m. – 4:30 p.m.

Friday, March 20, 8:30 a.m. – 11:30 a.m.

\$1,295 per person

Presenter: Lynnda Nelson

Attend ICOR's Certified Organizational Resilience 2-day Course and learn how to increase the resilience of your organization. With a focus on Organizational Behavior and Infrastructure, you will gain valuable insight into the importance of the following competency areas:

- COR.1 Leadership Qualities for Resilient Organizations
- COR.2 Culture & Its Impact on an Organization's Resilience
- COR.3 Knowledge Management
- COR.4 Agile Change Management
- COR.5 Agile Project Management
- COR.6 Structure & Design
- COR.7 The Agile Workplace
- COR.8 Facility Management
- COR.9 The Resilient Workforce
- COR.10 Agile Finance

This course is intended for those responsible for increasing the resilience of the organization and for managing risk throughout the organization. This course includes 2 of the 5 clusters (10 of the 25 competencies) offered as part of ICOR's Certified Organizational Resilience Certification series that provide you with the knowledge of how to build more resilient organizations.

ICOR's organizational resilience competency-based certification program identifies and evaluates what it takes to be a leader in organizational resilience—across the globe; and across all career levels, job roles, and job functions. To earn certification as a Certified Organizational Resilience Manager, Professional, or Executive requires completion of additional competency courses. See the ICOR website to learn more: <https://www.build-resilience.org/cred-path-2.php>

Includes course book, instruction, and 10 competency (COR 1-10) exams  
Each competency area has one 30-minute online exam to be completed outside the course schedule.

For more course information email [education@theicor.org](mailto:education@theicor.org) or call 1-866-765-8321.

*Lynnda Nelson is the president of the board of directors of The International Consortium for Organizational Resilience, a non-profit 501c3 education and credentialing organization in the disciplines that support resilience.*

## THESE COURSES REQUIRE AN ADDITIONAL FEE.

*Note: A class will be canceled if minimum number of registrants is not met.*

### POC-4: CE 1000: Essential Knowledge for Critical Environments (CETa)



Wednesday, March 18, 1:30 p.m. – 4:30 p.m.

Thursday, March 19, 8:30 a.m. – 4:30 p.m.

Friday, March 20, 8:30 a.m. – 11:30 a.m.

\$1,295 per person

Presenter: Jim Nelson

CE 1000 is designed for those newer to working in the critical environment/data center or those in information technology management seeking to understand the critical environment facility. The focus of CE 1000 is on creating a base set of knowledge for those working in critical environments such as data centers, call centers, research and development, hospitals, clean rooms, banking/trading floors, broadcasting sites, and manufacturing facilities. Includes practical activities that focus on problem solving to bridge theory with learning that can be applied immediately on the job.

#### Course Outline

1000.1 Introduction to the CE

1000.2 Starting Logic of the Built Environment

1000.3 Understanding Tiering

1000.4 Capacity Planning

1000.5 Understanding Procedures

1000.6 Maintenance

1000.7 Equipment in the CE

1000.8 Cleaning, Access Control, Lightning & More

For more information regarding this course contact ICOR at: [education@theicor.org](mailto:education@theicor.org) or at 866-765-8321 or 630-705-0910.

Jim Nelson, president of Business Continuity Services, Inc., and is the founder and currently serves as the chairman of the board of directors for The International Consortium for Organizational Resilience (ICOR).

### POC-5: Create a Table-Top Exercise – An Exercise in BC/COOP Preparedness!

Sponsored by KETCHConsulting



Wednesday, March 18, 1:30 p.m. – 4:30 p.m.

\$600 per person

Presenter: Ted Brown

In this class you will be given four different table-top scenarios, including the injects, and you will learn how to create a situation, scenario, and injects for your audience, your business, your location, and your BCP maturity.

You'll identify operations, decisions, and policies that impact the ability of a business unit to execute plans. The exercise will end with conclusions and discussions that will change, emphasize, and otherwise affect your business continuity/COOP plan. You will conclude with an "after action" report that will lead to effective modifications and improvements to the plans being exercised.

For more course information email [ted.brown@ketchconsulting.com](mailto:ted.brown@ketchconsulting.com) or call 484-919-2966.

Ted Brown, MBCI, CBCP, CBCV, president, and CEO of KETCHConsulting, is a recognized crisis management and business continuity industry leader.



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— Ron LaPedis

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## Benefits to Mentees

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- Address challenges in real time,
- Gain exposure to different companies, functional areas and/or best practices
- Develop the skills needed for your success
- Discover new strengths, talents and interests.

## Benefits to Mentors

- Grow your coaching and counseling skills
- Expand your access to information
- Build larger networks
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- Improve over-all communication skills
- Increase coaching and management skills

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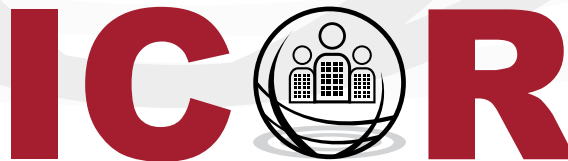
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