**DRJ SPRING 2021**
March 29 - April 1
**A VIRTUAL EXPERIENCE**

# A NEW ERA OF
# RESILIENCY

The largest event dedicated
to managing risk and
resiliency in 2021

**84 Sessions and Workshops**
**85+ Expert Speakers**

# REGISTRATION
## GUIDE

DISASTER RECOVERY JOURNAL

**REGISTER NOW**
**WWW.DRJ.COM/SPRING2021**

# DRJ SPRING 2021
## March 29 - April 1
### A VIRTUAL EXPERIENCE

# A NEW ERA OF **RESILIENCY**

As the oldest business continuity resource in the U.S., DRJ has the **in-depth education and technology** to ensure you're equipped for today's disruptions and tomorrow's emerging threats.

The tools you gain at **DRJ Spring 2021: A Virtual Experience** can help you reduce downtime, increase workplace safety, secure your data, and reduce your overall risk. You'll **save time and money** by learning how to prevent disruptions or respond swiftly when they occur.

**DRJ**

DISASTER RECOVERY JOURNAL

# JUSTIFICATION LETTER

Dear [Decision Maker]:

I'd like your approval to attend **DRJ Spring 2021: A Virtual Experience** on March 29 - April 1.

DRJ conferences are the world's largest conferences dedicated to building resiliency, and attending is crucial for me to stay on top of the latest technologies, solutions and processes to manage risk and build resiliency for our company.

**A few key benefits that make this a worthwhile investment:**

**Peer networking to help solve BC challenges and review our current approaches:**
The conference is known for the collaborative nature of attendees and speakers in providing feedback and advice. The event builds in formal and informal networking times to facilitate this. It's invaluable to have discussions and gain knowledge from others who are facing the same challenges as us.

**Immersive Educational Opportunities with experts.**
There are over 84 sessions and workshops with 85+ speakers which will allow me to focus on the areas that are essential for our company - all in one place instead of trying to organize various separate training sessions.
I'll be able to:
  - learn from industry experts and seasoned practitioners.
  - gain valuable strategies to apply immediately to our company.
  - acquire first-hand information from professionals who share real-life scenarios.
  - learn the latest in business continuity, technology, trends, and business-related products.
  - share all of these great resources, information, strategies, and more with our employees

**An efficient way to demo and review the newest technologies and solutions.**
The event hosts a comprehensive exhibition floor which will allow me to meet and review the most current technologies and solution providers we need in one place. Arranging individual meetings would be cumbersome and inefficient.

This is an estimate of expenses for me to attend **DRJ Spring 2021: A Virtual Experience**:
  - Conference fee: $XXXX

It's essential for us to be on top of the latest tools, knowledge and education when it comes to managing risk and building resiliency, and I believe this conference will empower me to bring enormous benefits to our company.

Thank you,

Your Name

# SPONSOR SPOTLIGHTS

## Gold Sponsors

In the midst of disruption, fast and effective responses depend on clear information. BlackBerry® AtHoc® and BlackBerry® Alert® provide a centralized approach to crisis communications and critical event management with secure 2-way messaging to keep people safe and business operations running. Send critical messages to those affected after a cyber-attack, IT outage or weather event, and act decisively with the help of clear analytics and dashboards. Increase your operational resiliency, reduce costs and keep people safe with critical event management capabilities from BlackBerry.

We've brought together the most innovative minds in business continuity to shape the future of our industry. Combining experts from across Assurance, Avalution, ClearView, and BC Management, we help clients establish a clear vision and drive real results using our proven, proprietary methodology – the Business Continuity Operating System (BCOS). Our solutions—whether consulting, software, managed services, or staffing—are fully customized to be right for you, your team, and your organization as a whole. As a result, you gain the capability and confidence you and your executive team need to protect your employees, brand, and bottom-line.

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.

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.

## Silver Sponsors

Acronis unifies data protection and cybersecurity to deliver integrated, automated cyber protection that solves the safety, accessibility, privacy, authenticity, and security (SAPAS) challenges of the modern digital world. With flexible deployment models that fit the demands of service providers and IT professionals, Acronis provides superior cyber protection for data, applications, and systems with innovative next-generation antivirus, backup, disaster recovery, and endpoint protection management solutions. With award-winning AI-based antimalware and blockchain-based data authentication technologies, Acronis protects any environment – from cloud to hybrid to on-premises – at a low and predictable cost.

As the fastest-growing mass communication and emergency notification software provider in the world, AlertMedia helps organizations securely and effectively monitor threats, streamline notifications, and recover from incidents. The company's fully integrated, cloud-based platform delivers innovative communication tools that can be accessed from anywhere, at any time, using any device. For more information, please call (800) 826-0777 or visit our website at www.alertmedia.com.

Cutover, the leader in work orchestration and observability, is the only platform that provides full organizational visibility into dynamic flows of work, bringing them out of the dark matter of the enterprise to enable teams to move quickly with confidence. Cutover eliminates outdated approaches like static spreadsheets and weekend calls so teams can accomplish work quickly and effectively – without the usual headache.

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.

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.

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.

OneTrust GRC enables risk, compliance and audit professionals to identify, measure, and remediate risk across their business to comply with internal rules and external regulations. OneTrust GRC is a part of OneTrust, the #1 most widely used privacy, security, and governance platform trusted by more than 7,500 customers and powered by 130 awarded patents. OneTrust GRC is powered by the OneTrust Athena™ AI and robotic automation engine, and integrates seamlessly with the full OneTrust platform, including OneTrust Privacy, OneTrust Vendorpedia™, OneTrust PreferenceChoice™, OneTrust Ethics, OneTrust DataGuidance™, OneTrust DataDiscovery™, and OneTrust DataGovernance™. To learn more, visit OneTrustGRC.com or connect on LinkedIn.

Rave Mobile Safety, a trusted partner for safety software, provides innovative communication software for better emergency preparedness and faster response. Used by leading education institutes, corporations, and state and local public safety agencies, the award-winning portfolio of Rave Alert™, Rave 911 Suite™ including Smart911®, Rave Panic Button™, Rave Guardian™, Rave Eyewitness™, and Rave Prepare™ protects millions. Rave Mobile Safety is headquartered in Framingham, MA. For more information, please visit  https://www.ravemobilesafety.com.

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.

Workplace Recovery by Regus gives you preferential access to over 3000 workspace locations in more than 120 countries worldwide. With over 90,000 workplace recovery seats available across our network, we can help you get back to work faster if you can't use your own offices due to power outages, hurricanes, fires, floods, IT failures, social distancing requirements and more. We offer solutions for organizations of all sizes, including anytime access to fully serviced turnkey offices.

ServiceNow (NYSE: NOW) is the fastest-growing enterprise cloud software company in the world above $1 billion. Founded in 2004 with the goal of making work easier for people, ServiceNow is making the world of work, work better for people. Our cloud-based platform and solutions deliver digital workflows that create great experiences and unlock productivity to approximately 5,400 enterprise customers worldwide, including almost 75% of the Fortune 500. For more information, visit servicenow.com.

Sungard Availability Services (Sungard AS) is a leading provider of cloud connected infrastructure solutions serving enterprise customers from 75 hardened data centers and workplace recovery facilities in nine countries.  Sungard AS has a 40-year track record of delivering resilient and highly available hybrid IT solutions.  Backed by high performance networks, Sungard AS modernizes customers' end-to-end IT across connected infrastructure, cloud, recovery and workplace solutions.  Working with customers to understand their business objectives, Sungard AS identifies gaps in customers' current environments and tailors a solution to achieve their desired business outcomes. For more information visit Sungard AS at www.sungardas.com or call 1.888.537.6519.

# 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.

**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.

**BC Management** is the premier staffing agency for business continuity, disaster recovery, security, crisis and risk management professionals. Our database is composed of over 60,000 candidates in over 90 countries. We can assist with all your staffing needs from contract, contract-to-hire to direct-hire. With over 16 years of worldwide expertise, our experienced team also conducts extensive research including an annual business continuity compensation report and program management benchmarking (budgeting, staffing, maturity, organizational reporting, etc).

**Continuity Innovations** is a cutting-edge full service business continuity firm that specializes in business continuity software and award winning consulting services. ContinuityPRO is a leading business continuity software tool that is used to develop and maintain business continuity and disaster recovery plans. This web-based business continuity software allows organizations to have all of their recovery information located in one easy to use tool.  ContinuityPRO offers unlimited users and allows you to manage your business continuity program by performing risk assessments, business impact analysis, develop unlimited plans, and manage incidents all within one toolset. We offer professional business continuity consulting services, including Business Impact Analysis, Risk Assessment, Recovery Strategy Development, Incident and Crisis Management, Disaster Recovery, and Continuity of Operations (COOP). Our experience in planning ranges from financial services, manufacturing, education, healthcare, government, and more.

**The Converge Enterprise Cloud** teams across all Converge Technology Solutions companies work seamlessly together to develop, implement, host and manage data availability and disaster recovery solutions for all platforms. Based on our customer focused service delivery track record, vast engineering resources, and access to over 100 million dollars in mainstream system hardware, the Converge Enterprise Cloud delivers cost-effective resiliency solutions to customers all across North America. Additionally, the Enterprise Cloud practice provides the full breath of DRaaS, BUaaS, and Hardware Quick-Ship Solutions, together with our expert Business Continuity Consulting portfolio of services.

**ICOR** is the global leader in organizational resilience.  We educate. We credential. We lead.  Learn what it takes to be a leader in Organizational Resilience.  Become an ICOR certified Organizational Resilience Manager, Professional, or Executive.  Choose the certification path that's right for you - competency-based or discipline-based. ICOR provides education to individuals on how to build more resilient organizations and communities. ICOR credentials individuals with the competence to lead and manage risk throughout the organization. We are an international nonprofit 501c3 education and credentialing organization created to bring together the many silos, industries, and separate bodies of knowledge that individually support resilience into one profession entitled, "Organizational Resilience."  We participate globally in learning how individuals, organizations, and communities can become more resilient.

**Infinite Blue** provides a comprehensive low-code development platform and enterprise applications for the BC/DR industry. BC in the Cloud, Infinite Blue's flagship application, is part of a suite of applications that provides automated Software as a Service (SaaS) tools and professional services for building and maintaining an effective business continuity and disaster recovery program. With the ability to create new business continuity applications and easy to implement add-ons, Infinite Blue allows companies to streamline their risk management programs and stay resilient no matter what.

**Juvare** is a worldwide leader in crisis/emergency management and response technology. Over 600 emergency management agencies, 50 Federal agencies, 4000 hospitals and public health departments, as well as top-tier higher education institutions and Fortune 500 companies rely on Juvare solutions every day to manage all aspects of both planned and unplanned critical incidents including: natural disasters, man-made emergencies, acts of terror, pandemics like COVID-19, and more. Offering solutions from the industry standard WebEOC® to the revolutionary Juvare Exchange®, Juvare solutions empower corporations, healthcare facilities, academic institutions, government agencies, and volunteer organizations to leverage real-time data to collaborate and manage incidents faster and more efficiently, protecting people, property, and brands. For more information, visit www.juvare.com.

**KETCHConsulting** Moving from IT based disaster recovery to business continuity or COOP? KETCHConsulting helps with strategies and implementation. We understand the BCP/COOP people issues. We're teleworking experts. Executive education and buy-in are KETCHConsulting strengths (improving BCP ROI's). Our approach to BIA's, and risk analysis leads the industry. We're the most knowledgeable experts in Alternate/Hot Sites selection. We develop dozens of alternate recovery strategies for clients; and guarantee contract savings.
We execute tabletop exercises, gap analysis and plan audits. We assist in HIPAA, PSPREP, BS25999, and DHS compliance. We have many private sector references, but we're also leading state, local, and federal COOP consultants. We're recognized as workplace violence experts. KETCHConsultants are industry leading speakers, educators and authors. We've spoken/ exhibited at every DRJ conference, among others. We're all certified (CBCP/FBCI), senior, and experienced (averaging 25 years in IT/15 years in BCP). We can help with budget challenges!

**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.

**Mail-Gard** Critical printed and mailed documents are vital to the success of your organization. In the event of a business disruption, Mail-Gard has the solution to produce those documents, to ensure your message reaches your customers on time, every time. For more than 21 years, Mail-Gard has been providing Critical Communications Recovery Solutions to Fortune 1000, state and federal customers across the country. Mail-Gard maintains the security and quality standards that your business requires and with our experienced staff and a 100% recovery success rate, we can build a continuity and recovery solution that will meet your unique requirements. Please stop by our booth to learn how we can develop a plan that ensures your critical document production and protects your bottom line, your reputation…your company.

**Ripcord** 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.

**Satcom Direct** (SD) and its affiliated divisions offer a complete suite of products and services for your Business Continuity and Disaster Recovery needs. SD provides reliable enterprise data solutions based on VMware, Veeam, and Nimble Storage. Additionally, SD's Land and Mobile Division offers hand held satellite phones, large scale Cobham Explorer antennas, High-speed data over satellite, and PTT with worldwide coverage. SD has the connections needed to maintain voice and data communications during any kind of disaster, natural or manmade. Utilizing company owned Data Centers, teleports, and global offices, SD provides world-class data and voice global satellite connectivity for customers in the government, military and commercial sectors.

**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 or follow us on LinkedIn.

**Veoci** is an integrated platform for crisis response, disaster recovery, business continuity, and daily operations, offering tools to help your organization design, exercise, activate, and review plans and actions securely. Veoci is equipped with communication, task assignment, record keeping, and many more tools designed to adapt to any organization. Veoci does not just house your plans, BIAs and HVAs - it operationalizes them and launches them at the click of a button with task assignments, notifications, resource tracking and much more. Veoci allows you to easily maintain and keep all plans and HVAs for each site up to date with after-action reports you can easily tie back to your vulnerability assessments. Veoci is completely adaptable to your organization's structure with no software to install, no training or IT experience required, and no module costs. Veoci has been named to the 2019 Gartner Magic Quadrant as Leaders in Business Continuity Management Program solutions.

**Virtual Corporation** 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.

# VIRTUAL AGENDA

## DAY 1
### Monday, March 29, 2021

### 10:00a – 10:45a EST

## WORKSHOPS TRACK 1 - SESSION 1

### Are You Ready for a Massive Ransomware Attack at Your Organization? You Need a Cyber Exercise to Find Out!

*Regina Phelps*

*EMS Solutions Inc.*

Ransomware is likely one of the greatest cyber threats of our lifetime. Have you had a ransomware attack yet? If not, consider yourself lucky! Many major organizations have had systems locked up for weeks and months and have paid out large amounts of money. With many working at home, this threat is even more significant. Experts all agree on one thing…it is simply a matter of when and not if it will happen.

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

Attend this session and learn how to go about developing a realistic cyber exercise that will challenge the Executives, Crisis Management Team, the technology staff and the business units.

Topics Covered:
- What a cyber exercise is – and what it isn't
- Ransomware design principles
- What happens in a ransomware attack?
- Eight critical elements that make a cyber exercise work

*Regina Phelps is an internationally recognized thought leader in the field of emergency management, pandemic and contingency planning. Since 1982, she has provided consultation, training and speaking services to clients on five continents.*

## WORKSHOPS TRACK 1 - SESSION 2

### The Extraordinary Practitioner

*Phil Lambert*

*Ripcord Solutions*

Every organization requires practitioners to be property trained, and sufficiently motivated to execute the planning process and to promote the value to day-to-day operations.

Researching information on BC strategy is relatively easy. Yet, a plethora of BC books and recommendations has created a complex and contradictory array of choices for those who are desperate to do a great job. Conventional standards and legacy strategies worked well in the business world of yesterday, yet no one is telling you what it takes to be successful has changed. With the virus behind us, the world demands that we develop new skills, competencies and traits that will produce the results we want and are needed.

The DRJ Academy's BC Primer course is all about providing a modern-day framework for those planners who are just starting out and for those whose activities are not producing the best results. We'll show you how to make small shifts in activities that will make a seismic difference in your results.

The DRJ Academy BC Primer course is a turnkey Business Continuity basics course as it should be agile, smart, systematic, practical, and functional. The DRJ Academy BC Primer course represents a breakthrough in the design, approach, and delivery of a BC Program. The methodology of planning is like no other in the world. Simplicity at its fineness.

DRJ Academy has partnered with Ripcord Academy in the design, development and publishing of this course. Ripcord is the industry leader in providing eLearning training to the continuity industry.

*Phil Lambert is a visionary, game changer, and challenges outdated program strategies that no longer produce the outcomes we set out to achieve. Phil is an expert in the contingency planning field with over 25 years of experience. He has proven success in the design, development, and implementation of an enterprise wide continuity program based on an organization's risk appetite, aligned with their culture, and produces the outcomes senior leaders ask for.*

## WORKSHOPS TRACK 1 - SESSION 3

### Start to Implement BCOS Next Week

*Brian Zawada*

*Castellan Solutions*

Every business continuity program struggles at some point with lack of focus and a lack of engagement. These challenges exist for both robust, mature programs, as well as for programs in their first year of implementation. To help solve for focus and engagement issues, Castellan developed the Business Continuity Operating System (BCOS) – our proven process for driving business continuity and operational resilience success.

BCOS focuses on strengthening the seven core elements that differentiate a high-performing program from an under-performing one. Leveraging this framework enables business continuity leaders to answer "yes!" to the following statements:

1. I am empowered to make my organization operationally 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

*Michael Bratton*

*Castellan Solutions*

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 the Chief Operating Officer for Castellan Solutions, the largest, global provider of business continuity consulting, software, managed services, and staffing. Brian has more than 25 years of experience managing and building world-class, global business continuity programs that help organizations achieve and sustain the right level of resilience.*

*Michael Bratton is the Business Continuity Consulting Practice Leader for Castellan Solutions, the largest, global provider of business continuity consulting, software, managed services, and staffing.*

## WORKSHOPS TRACK 1 - SESSION 4

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

*Dr. Steven B. Goldman*

*MIT*

The DRJ attendee favorite and our longest running workshop! Successful business resilience 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 and conduct your successful drill/exercise. Students will master:

- Steve's Exercise Planning Checklist
- The company politics of drills and exercises
- Why drills/exercises are important
- Types of drills/exercises
- Elements of a successful exercise
- Scope, objectives, and extent of play
- 101 scenario ideas you can use
- Making it real
- Effectively conduct and critique PLUS keep your job!
- Leveraging an exercise for future gain
- SPECIAL! COVID-19 lessons learned for drills/exercises
- SPECIAL SPECIAL! Conduct a successful multi-layer exercise using Zoom!

*Sandra Galletti*

*Tidona Comunicazione (Italy) / MIT*

With their lively styles and real-life examples, Dr. Goldman and Ms. Galletti 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 Resiliency, Crisis Management, Risk/Crisis Communications, Pandemic Preparation/Response, and Crisis Leadership. He has over 35 years' experience in the various aspects of these disciplines, including program management, plan development, training at all levels, all types of drills and exercises, and response strategies. His background is comprehensive yet unique in that he has been a professional engineer, corporate spokesperson, manager of media relations, business continuity planner, crisis responder, consultant, and a Fortune 500 Company's Global Business Continuity Program Manager. Steve has published many articles and conducts several seminars annually on the various aspects of Business Continuity, Crisis Management, Pandemic Response, Crisis Leadership, and Crisis Communications.*

*Sandra Galletti is the Head of Operations at Tidona Comunicazione in Milan, Italy. She is responsible for Continuing Legal Education Programs for banks and financial institutions operating in Italy. Since 2009 she has been responsible for the "Banking Law Forum" held annually at the Italian Stock Exchange in Milan, attended by Italy's top banking executives and CEOs. She has coordinated several live virtual events in the banking and financial industry as well as in Crisis Management and Business Continuity. She is also Assistant Director of Crisis Management Courses, Professional Education Department, MIT.*

## 10:45a – 11:45a EST

## GENERAL SESSION 1

### The Courage To Go Together - Three Questions to Change How You Work, Live and Lead

*Shola Richards*

*Shola Richards, Inc.*

In Shola's flagship keynote, the Go Together™ strategy presented provides the audience with actionable strategies to transform their work culture, amplify team civility, and inspire themselves and others to consistently bring their best to their work.

This keynote is ideal for individual contributors, leaders, and teams who are:

• Dealing with the constant appearance of toxic work behaviors (e.g., gossip, incivility, and bullying) that are getting in the way of healthy workplace culture and optimal business results.
• Struggling to keep themselves engaged, energized, and positive when managing the nonstop challenges and complexities of the workplace.
• Feeling as if they do not have the influence, professional title, or education to make meaningful change in their organization.

The audience will leave with:

• The three key questions that they need to ask themselves to increase the likelihood of civil, engaged, and productive work culture.
• The answers to the most common objections to beginning the important (and challenging) work of positively transforming their work culture.
• The self-awareness to become mindful of how their words, actions, and behaviors affect others.

*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.*

*As a speaker, Shola has shared his transformative message with leading healthcare organizations, top universities, Silicon Valley, the motion picture industry, the TEDx stage, and in his greatest honor to date, as a keynote speaker for the Department of Homeland Security three days before the 15th Anniversary of 9/11, under the Obama Administration.*

## 11:45a – 12:00p EST

## 15 MINUTE DEMONSTRATION
### (GOLD SPONSOR)

**Fusion -** Zach Norman and Jonathan Hartmann

## 12:45p – 1:45p EST

## BREAKOUT TRACK 1 – SESSION 1

### How Adopting Microsoft Office 365 Online Will Force Organizations to Change Their DR Strategies

*Jerome Wendt*

*DCIG, LLC.*

The rising adoption of cloud technologies coupled with more individuals working remotely and from home has given rise to organizations adopting cloud-based, SaaS applications. Microsoft Office 365 represents one of the primary cloud-based SaaS applications that organizations of all sizes adopt.

As organizations move toward hosting their email, calendar, file sharing, and chat sessions with providers such as Microsoft, they still retain responsibility for protecting and recovering data they store in Office 365. In this presentation, Mr. Wendt will cover the following:

1. The shared responsibility model under which these providers operate.
2. The data availability and protection services included with Microsoft Office 365.
3. Where Microsoft's services end and your data protection and recovery responsibilities begin
4. The "Aha!" moment every organization must experience to choose the best data protection solution for Microsoft Office 365
5. The features that data protection solutions should offer to meet the new backup and recovery demands of Microsoft Office 365

Session attendees will leave with a solid grasp of how to best protect data stored in Microsoft Office 365 and which data protection features to prioritize when evaluating available solutions.

*Jerome Wendt currently serves as the President and Founder of DCIG, LLC, which he founded in 2007. Mr. Wendt is recognized as one of the foremost technology analysts in the enterprise data protection industry regularly publishing articles on DRJ.com.*

## BREAKOUT TRACK 1 – SESSION 2

### Developing a New Business Continuity Program - What My Program Looked Like One Year Later

*Ron Kamps*

*Mutual of Enumclaw*

Ron is currently the Business Resilience Manager at Mutual of Enumclaw Insurance. Due to mergers and acquisitions he has had the unique opportunity to work for six organizations within the following industries: Telecom, Airlines, Banking and Insurance. Each organization tasked him with either creating, expanding, or maturing their Business Continuity Program. Through these experiences Ron discovered that each organization, regardless of industry, all shared common elements to a successful Business Continuity program. Ron will share his roadmap, quarter by quarter, of key activities, deliverables, approach techniques, as well as lessons, tips and actual documents for a successful program.

*Ron Kamps received his CBCP in 2002 and has since developed, redesigned, implemented, managed and matured business continuity programs at six companies including three Fortune 500. Ron is currently the Business Resilience Manager at Mutual of Enumclaw.*

## BREAKOUT TRACK 1 – SESSION 3

### Is Our Profession at a Crossroads?

*James Green*

*DRJ EAB Member*

2020 proved to be an unforgettable year, not only in the world, but in our profession of business continuity. We have had the spotlight on us like never before. A global pandemic, civil unrest, ransomware and natural disasters tested organizations like never before. Our relevance and the importance of business continuity should be without question. Yet many companies have seen turnover and downsizing in their business continuity teams. How is that possible in an era of risk uncertainty? Has business continuity just become a "check the box" type function in many organizations? How can we better align with management and show true ROI for what we do? In this session we will use lessons learned from 2020 to help springboard our profession into its next required phase to remain an integral part of any organization.

We will discuss:
1. Should we have seen COVID-19 coming or was it a "Black Swan event?"
2. Why did so many organizations with strong business continuity frameworks and programs struggle with their response to COVID-19?
3. How do we as business continuity professionals prepare the next bump in the night?

*James Green has worked on risk events that have occurred all over the globe. In 2020 he was named the BCI's Consultant of the Americas, becoming the first person to be honored with this award twice.*

## BREAKOUT TRACK 1 – SESSION 4

### Designing an Effective BCP Testing Program

*Tracy Hall*

*Wolf & Company, P.C.*

In our work, we find that there is often confusion as to how to develop a multi-year BCP testing program. Financial institutions are overwhelmed with putting a program in place. Using your Business Impact Analysis can define what the testing program should be without adding unnecessary complexity and negatively impacting efficiency. Attendees of this presentation will learn:
• How to use your BIA to inform your multi-year BCP testing plan
• What components should be included and what could be left out
• Where to start to get the most effective and manageable program
• How to satisfy requirements for incorporating Risk Assessment results into your test plan

*Tracy Hall is a IT Assurance Senior Manager. As one of the leading BCP experts in the country, with over 20 years of experience. Her expertise includes: audit & assessment, business impact analysis, plan development & maintenance, training & awareness.*

## BREAKOUT TRACK 1 – SESSION 5

### Cultural Influences and Decision Making in a Crisis

*Anya Fleischer*

*Chime Financial*

Like values, a culture's social norms provide a foundation for understanding the underlying assumptions that guide people's behaviors, feelings, and interpretations of events. Crises and unforeseen incidents serve as perfect case studies that showcase how decisions are made. They also provide opportunity to practice decision making. Resiliency professionals can help with guiding the team to find the appropriate decision owner, mapping key stakeholders in the business and following a structured process to assist leaders in moving through the decision-making process. In this session, we will cover tangible ways to create pathways and empower teams to work together to define the decision, identify influencers and help avoid knee-jerk reactions that may lead to poor outcomes.

*Anya Fleischer is a Sr. Associate, ERM/BC/DR at Chime Financial. In partnership with key stakeholders, she strives to create resilient ecosystems and foster effective cross-functional solutions to address risks in matrixed corporate environments.*

## BREAKOUT TRACK 1 – SESSION 6

### Hindsight is 2020: Lessons Learned about Operational Resiliency in the face of Critical Events

Throughout 2020, the COVID-19 pandemic, civil unrest, record-breaking natural disasters, and extreme weather events challenged the resiliency of organizations around the globe.

2021 is not slowing down.

Join Jennifer Sand, VP of Product Management at Everbridge, as she takes us through insights that help us all prepare for the unthinkable – and how those insights are also directly applicable to mitigating risk when faced with critical events in our daily operations.

*Jennifer Sand*

*Everbridge*

*Jennifer Sand leads Everbridge's Critical Event Management product strategy. She has over 15 years of experience defining and delivering large scale SaaS products. In her last role, Jennifer was the VP of Product Management at CloudLock, which was acquired by Cisco in August 2016. Prior to that, Jennifer held a number of positions across both product management and engineering, with a focus on solving high impact problems for mid-market and enterprise customers through cloud-based solutions.*

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## 12:45p – 1:45p EST

## VIRTUAL TRADE SHOW

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## 1:45p – 2:00p EST

## 15 MINUTE DEMONSTRATION
**(SILVER SPONSOR - 2 sessions)**

**ServiceNow -** Aaron Callaway and Chris Hamrick

**Sungard Availability Services -** Michi Schniebel and Brian Fawcett

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## 2:00p – 3:00p EST

## PANEL DISCUSSIONS (join 1 of 4 sessions)

### 1 - Managing Third-Party Risk/Supply Chain

A supply chain can be defined as a complex ecosystem of people, processes, technologies, and resources that are involved in creating and delivering a product or service from a supplier to a customer.  In today's world, the frequent and seemingly endless occurrences of natural and man-made disasters have compelled organizations to adopt a more rigorous and proactive approach to risk management and Business Continuity planning in order to protect their supply chains. Participants in this panel discussion will learn how to identify, assess, and control the risks of their supply chains. In addition, panelists will share their insights and practical suggestions on how to drive the innovation that is needed to build a resilient supply chain that will achieve world-class results.

*John Liuzzi*

*Southern Glazer's Wine and Spirits*

*David Halford*

*Fusion Risk Management*

*John Liuzzi has over 25 years of Business Continuity experience. He is an experienced company President, C-Level executive, and three term Congressional appointee. He is currently the Director of Business Continuity for Southern Glazer's Wine and Spirits.*

*David Halford is Vice President, Business Continuity Management & IT Risk Solutions at Fusion Risk Management. David has over 25 years experience providing industry and practical solution leadership developing and supporting robust Operational Resilience programs.*

*Donna Nielsen*

*Gemstone Consulting*

*Margaret Millett*

*DRJ EAB Member*

*Donna Nielsen has over 25 years business operations consulting, continuity planning, disaster recovery and enterprise resilience experience, domestically and internationally.*

*She holds CBCI Certificate Business Continuity Institute. PMI PMP Project Management Professional , MA, Business Continuity, Northeastern Univ, and (ISC)2 CISSP Cert Information System Security.*

*Margaret Millett has been actively involved in the business continuity field since 1993 and worked for financial services companies in Boston, Massachusetts and Dublin, Ireland. She spent six years working for eBay in California. She worked for MetLife, Inc. in Cary, North Carolina for seven years managing the Global Resiliency Program in 45 countries. Margaret has held board levels positions with business continuity organizations, written publications and spoken at business continuity management conferences in North America, Europe, Asia and the Middle East..*

## 2 - Mentor/Mentee Goal Setting Boot Camp

*Tracey Rice*

*Fusion Risk Management*

*Sue Brown*

*Guggenheim Partners*

*Josh Mitchell*

*State Farm*

*Mitchell Born*

*Best Buy*

*John Jackson*

*Retired Risk and Crisis Management Executive*

You've finally done it. You went to the DRJ site and filled out the information to be a mentor or a mentee and you clicked the submit button. Wow, now what?? Or, you've not yet hit that button and you want to better understand what you need to do. Learn from two active and seasoned mentors and mentees, the key elements that will help you as a mentor or mentee to be successful in this or any mentor program. The mentoring teams believe one of the most important aspects to a successful mentor/mentee relationship, is thoughtful goal setting and creating a roadmap to achieve those goals.

This will be an interactive session with the use of Menti software, where you have the opportunity to interact with the panelists and to voice your thoughts and opinions as they lead us through such subjects as Creating Effective Goals, Goal Setting, Best Practices and building a Program Road Map to success.

*With more than twenty years of experience in business continuity, Tracey Rice is an accomplished industry leader and a passionate evangelist, who builds relationships with BCM leaders in enterprise organizations across the globe.*

*Sue Brown is the Vice President at Guggenheim Partners. Her approach to align the BCP program with the organizations mission have not only enhanced the BCP program, but brought value add for the development of other controls outside of the BCP program.*

*Josh Mitchell joined State Farm Insurance Companies in 2010 after serving as an Emergency Medical Technician for 10 years. Josh joined the Enterprise Business Continuity Team in 2015 as a business analyst after having various other roles within the company including Enterprise Incident Response and working with the Crisis Management Team.*

*Mitchell Born is a Business Continuity Analyst who's brief time in the industry has given him the opportunity to work within the areas of Business Continuity, Vendor Risk Management, Facility Risk Management, and Crisis Operations. Mitchell started in Business Resiliency in 2018 bringing with him over 20 years of Retail experience in the areas of Customer Relations, Commercial Sales, Supply Chain, and Merchandising. Prior to being a mentee in the DRJ Mentorship Program Mitchell had been involved in youth mentoring Middle School and High School students as a mentor.*

*John Jackson founded Chi/Cor's Disaster Recovery practice in 1980, launching the industry's first BC / DR software product, TRPS. In 1984, John joined Comdisco, leading their recovery center and consulting businesses during his 18 years. While at Comdisco, John lived in London and ran their European Disaster Recovery business and also spent several years creating Disaster Recovery Hot Sites in Japan, Singapore, Malaysia and Australia.*

## 3 - Cyber Resiliency: Ensuring Your Organization Isn't the Next Headline

*Matthew Butkovic*

*Carnegie Mellon University*

*John Beattie*

*Sungard AS*

*Robert Giffin*

*Castellan Solutions*

*Robert Capps*

*NuData Security*

*Eric Johnson*

*IBM*

Maintaining cyber resiliency is a difficult proposition without a world-wide pandemic. Learn how to avoid ransomware and protect your vital data with so many employees working from home. Managing third-party vendors and other cybersecurity risks has only become more difficult in the midst of a global health crisis.

*Matthew Butkovic if the Technical Director – Cyber Risk and Resilience Assurance in the CERT Division of the Software Engineering Institute (SEI) at Carnegie Mellon University (CMU).*

*As a Principal Consultant at Sungard AS, John Beattie works with companies to reduce organizational risk by establishing new BC and DR programs or transforming existing ones to improve effectiveness and address cyber-compromised data recovery.*

*Robert Giffin (CBCP, CISA) is the Chief Technology Officer at Castellan Solutions. Rob previously co-founded Avalution Consulting. Over his career, Rob has been involved in business continuity consulting at all levels. This includes consulting for hundreds of clients, building multiple continuity and information security tools, and participating in a wide range of industry groups and forums, such as the Disaster Recovery Journal Editorial Advisory Board.*

*Robert Capps is NuData Security's Vice President of Marketplace Innovation. He is an industry-recognized technologist, thought leader, and advisor with over twenty-five years of experience in retail, payments, financial services, and cybercrime investigation and prosecution. Robert brings his industry insight and vision to drive market-leading products and services for NuData Security, and is the public spokesperson for the organization. He is passionate about bringing safety to the digital world in the shape of cutting-edge technologies, so companies and end users don't have to worry about risks from cybercrime.*

*Eric Johnson has over forty years of IT industry experience with a focus on the following: Solving business challenges through solutions and services, Data center infrastructure operations management and support, Systems integration, Service delivery, Disaster recovery (SME), Business resiliency (SME), Business continuity (SME), Cyber incident recovery (SME), Six Sigma Black Belt, CBCP.*

### 4 - Resiliency in a Post-COVID World – The Next Evolution of our Profession

*Brian Zawada*

*Castellan Solutions*

*Jennifer Sand*

*Everbridge*

How can your company prepare for its reopening or employees' return to work? Each business is facing a truly unique situation and has distinct needs and preferences when it comes to resuming operations. Experienced healthcare professionals will share critical information on their involvement in pandemic planning. From practical and insightful information to lessons learned, these panelists will show attendees how to grow and adapt to new working hours, virtual meetings, working from home while effectively balancing leadership roles and family responsibilities, and more. You will leave this interactive session feeling emotional yet inspired from the first-hand stories filled with determination, empathy, compassion, fear, and joy.

*David Fortino*

*Pratt & Whitney*

*Shane Mathew*

*Virtual Corp*

*Brian Zawada is the Chief Operating Officer for Castellan Solutions, the largest, global provider of business continuity consulting, software, managed services, and staffing. Brian has more than 25 years of experience managing and building world-class, global business continuity programs that help organizations achieve and sustain the right level of resilience.*

*Jennifer Sand leads Everbridge's Critical Event Management product strategy. She has over 15 years of experience defining and delivering large scale SaaS products. In her last role, Jennifer was the VP of Product Management at CloudLock, which was acquired by Cisco in August 2016. Prior to that, Jennifer held a number of positions across both product management and engineering, with a focus on solving high impact problems for mid-market and enterprise customers through cloud-based solutions.*

*David Fortino serves as Head of Global Crisis Management for Pratt & Whitney, a Raytheon Technologies Company (NYSE:RTX). Pratt & Whitney is a $20-billion-dollar, world leading company in the design, manufacturing, and service of aircraft engines and auxiliary power units.*

*Shane serves as the leader of all professional services at Virtual Corporation. In this role, Shane oversees the consulting and software implementation services for the organization. Prior to joining the team, Shane served in various leadership roles within business continuity and emergency management in both healthcare and governmental organizations. Most recently, Shane was responsible for the creation of organizational resilience efforts within the retail pharmacy division of DaVita, a Fortune 200 renal services and healthcare company. Shane started his career in public health and led a team charged with developing bioterrorism response and mass prophylaxis plans for the CDC and local government.*

## 3:00p – 4:00p EST

## GENERAL SESSION 2

### Model Your Business – Not the Crisis!

*Mike Campbell*

*Fusion Risk Management*

Operational resilience, defined as the ability to prevent, respond to, recover and learn from operational disruptions, has become the top priority for firms across industries. Having experienced the struggles of pivoting mid-pandemic without complete, reliable data, executives worldwide share a renewed focus on their organization's resilience measures to improve their agility in decision-making.

While achieving operational resilience is a complex journey, it depends on business continuity as its cornerstone. As risk and resilience leaders, the COVID-19 pandemic offers us a chance to revolutionize how we manage business operations, inform executive decision-making, and enable teams to navigate the frontier of change. To do so, organizations require a robust operational resilience program, built of an integrated range of activities connected to governance, risk management, and compliance.

*Delroy Ross*

*Cigna*

This keynote led by Fusion Risk Management CEO, Mike Campbell and Delroy A. Ross, MBA, CBCP, CISA Global Business Continuity Officer at CIGNA, discusses the operational resilience journey that firms are facing and outlines what it takes to move from the current state of planning to the north star of coordinating a true resilience strategy.

*Michael Campbell brings more than 35 years of software development and technology experience to Fusion. His exceptional executive management background includes several executive leadership roles and board membership positions, as he spent the beginning of his professional career co-founding and developing several successful start-ups. With a unique global perspective and strategic insights, Michael's vision is to lead the company for growth and scale.*

*Delroy Ross is the Global Business Continuity Officer and Enterprise Crisis Lead for Cigna, with responsibility to ensure over 70,000 employees in 30+ countries can continue operations without disruptions. With 8+ years of experience in the space, Delroy and team try to cultivate ideas from other companies and research to continuously improve the program for Cigna. Recent initiatives include revamping the Governance around Business Continuity Management, integration of multiple methodologies via merger & acquisitions, and currently remodeling the corporate Business Impact Analysis to minimize the subjectivity. Delroy leads a diverse multifaceted team committed to continuous improvement.*

## 4:00p – 4:15p EST

## NETWORK BREAK
**Grab a cup of coffee and join one of our Discussion Forums**

## 4:15p – 5:00p EST

## BREAKOUT TRACK 2 – SESSION 1

### Risk and Decision-Making for the BC/DR Professional

*Cliff Thomas*

*Colorado State University*

Arguably, decision-making might be the single most important element of business continuity and disaster recovery programs. The decisions we make before, during, or after a disruption can mean the difference between limited impacts and grave consequences. In the world of BC and DR, decisions take many forms: which risks to mitigate, how to mitigate them, how and when to respond during uncertain situations, how to prioritize recovery activities, who is responsible for what…and the list goes on. As the era of "big data" emerges, we might be tempted to assume that more data will yield better decisions, but that assumption greatly over-simplifies things. The truth is that decision-making during times of risk and uncertainty tends to be a mishmash of many factors—some logical and some seemingly irrational. Using scientific evidence, real-world examples, and real-time demonstrations, this session will describe the nature of risk and decision-making, and some of its unexpected influences. Attendees will gain an understanding of how risky decisions are actually made, the importance of thinking about "how" to make a decision, and how to avoid common decision-making pitfalls.

*Cliff Thomas, Ph.D., MBCP, MBCI is an adjunct professor at Colorado State University and the University of Denver. Cliff's 20+ years of BC and crisis management experience includes corporate program management and international consulting.*

## BREAKOUT TRACK 2 – SESSION 2

### Incident Command System - Best Practices in Crisis Management

*Regina Phelps*

*EMS Solutions Inc.*

*Megan Murphy*

*OSFI*

How does your company manage a crisis? What process do you use to streamline communication between multiple locations, promote effective and efficient decision-making and respond quickly in a fast-moving emergency? Global organizations are increasingly embracing the system that has helped transform the public sector – the Incident Command System.

The Incident Command System (ICS) was developed in the mid-70's for emergency responders and has been used in the private sector for the past twenty years. It is a comprehensive methodology built on eight hallmarks that help to streamline span of control and decision-making. Why use it? Simply put, it works!

This general session will give an overview of ICS, and detail how companies have effectively implemented it throughout their organization. OSFI's experience in developing and using ICS across its offices helped protect critical functions of a financial regulator throughout uncertain times. In March 2020, during COVID-19, OSFI used ICS to move all of its employees to successfully work remotely, moving from 4 physical offices (Ottawa, Toronto, Montreal and Vancouver) to over 800 remote offices in one weekend.

Regina Phelps and Megan Murphy will demonstrate how ICS can solve the problem of departmental silos and program fragmentation that often occurs in any organization and streamline communication and decision making.

*Regina Phelps is an internationally recognized thought leader in the field of emergency management, pandemic and contingency planning. Since 1982, she has provided consultation, training and speaking services to clients on five continents.*

*Megan Murphy is currently Manager of Security of Operations at Office of the Superintendent of Financial Institutions. OSFI is an independent agency of the Government of Canada that regulates and supervises financial institutions.*

## BREAKOUT TRACK 2 – SESSION 3

### Is Your Organization Resilient Enough?

*Cary Jasgur*

*Mazars USA LLP*

There is not a BC/DR Professional working today that has not heard the terms Organizational and Operational Resilience and Resilient Organization. But what does it mean to be a Resilient Organization? There are many definitions, and most of them are correct, at least for the BC/DR Professionals reporting the information.

There is no one size fits all recipe for becoming a Resilient Organization. However, there are some key activities that can aid any organization in achieving a resilient status. By setting up your organization as resilient ensures you have looked at every aspect of your business operations, and have built in continuance, recovery, or migration strategies to protect your most critical business processes, applications, and services in the event of an unplanned disruption. However, that is not the path for every organization. Through this session, the five (5) focus areas leading to a Resilient Organization will be discussed, thus allowing the BC/DR Professional to determine what areas apply to their organizations and have the highest possible change of being implemented.

This interactive session will aid BC/DR Professionals in transforming not only their organization into a Resilient Organization, but themselves into Organizational Resilience (OR) Professionals.

*Cary Jasgur is a Manager and Lead Subject Matter Expert within the Mazars Organizational Resilience Practice. Cary has over 26 years' experience in Organizational Resilience, Business Continuity, Disaster Recovery, Crisis Management, Emergency Management, Incident Management, Continuity of Operations (COOP), Information Systems Security Officer (ISSO) duties, Federal Information Systems Management Act (FISMA) compliance, and Project and Program Management. Cary has developed and led many Organizational Resilience projects in financial services, healthcare, higher education, pharmaceuticals, and government markets.*

## BREAKOUT TRACK 2 – SESSION 4

### BCM After COVID: Changes, Challenges and Opportunities

*Selma
Coutinho*

*Ericsson*

2020 will be the year that none of us will forget, including the BC, CM and Security professionals. None of us expected a crisis like this for 7+ months and considering that our whole supply chain would be impacted at the same time. Black swan? Maybe. One thing is true: BCM is on spot and will evolve (for good). We will need to change old bias to be prepared to deal with new challenges that will come with the emerging technologies such as IoT, automations, cybersecurity, among others. All crisis bring opportunities and it is up to us to seize it. COVID accelerated the digital transformation of companies, what will require from BC and CM practitioners new strategies, ideas and innovations as what we have so far, will not be sufficient in this new normal.

*Selma Coutinho is Director of Security and BCM where she directs the security operations and Business Continuity operations at America (North and Latin America). She is passionate about drive and facilitates BCM and Crisis Management changes always focusing on the continuous improvement and enhancing the company's BC/DR posture that includes: leadership and employee's commitment, business understanding and real lessons learned from past experiences. Selma has MBCI, CBCP and CISSP designations.*

## BREAKOUT TRACK 2 – SESSION 5

### Julia's Adventures in Business Continuity and Emergency Management

*Julia Halsne*

*EBMUD*

Find out how one practitioner's journey began and evolved in a career through business continuity and emergency management. Julia will discuss how she took a program that was disjointed and fractured into an award winning program that serves as a model for the industry. Take a walk through what one agency experienced through COVID, Public Safety Power Shut offs, wildfires, and more. The presentation will include program tools and approaches to a variety of challenges including how to gain and maintain management support, building relationships and engaged network, and managing simultaneous events and operational priorities.

*Julia Halsne has over 34 years of combined experience in the environmental, water, and wastewater industry. She is responsible for the EBMUD Business Continuity Program and is responsible for the Emergency Operations Team exercises.*

## BREAKOUT TRACK 2 – SESSION 6

### How First National Bank Quickly Adapted Their BCMP during COVID-19

*Beth
Frasure*

*Veoci*

*Sary Wang*

*Veoci*

When the COVID-19 pandemic hit, to say it threw organizations and businesses for a loop would be an understatement. However, First National Bank was as prepared as they could have been for something so unprecedented. How? They had built a Business Continuity Management Program that was flexible and trained a team that was ready to adapt. First National Bank's existing BCMP was so comprehensive that the tools they needed were already there, they just had to get creative. FNB's customized BCP program had implemented actionable, printable plans and as plans changed, it was only a matter of adjusting – not scrambling or starting from scratch. FNB inserted team designations for returning to the office, working locations, employee tracking and much more. Viewers of a presentation by Jason Dobronz, SVP, Director of Resilience and Physical Security at F.N.B. Corporation would learn a great deal on the best practices for creating a solution that can change with changing times and how to include all aspects of our BC processes in one simple system.
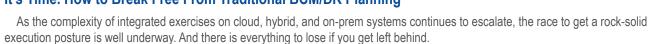
*Beth Frasure has two bachelor's degrees in Business and Psychology and is a Certified Business Continuity Professional with 10+ years of experience. Prior to Veoci, she worked as the BC Program Admin where she created, maintained, tested, and ran the business continuity program.*

*Sary Wang graduated with a degree in Computer Science but her passion for support navigated her into a client facing role. With over 18 years of support experience in the financial and risk industry, she is currently a Pre-Sales Engineer at Veoci where building custom Business Continuity Management Plan solutions is her newest passion.*
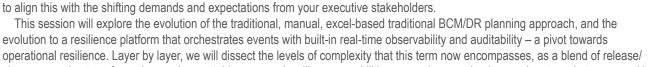
## BREAKOUT TRACK 2 – SESSION 7

### It's Time. How to Break Free From Traditional BCM/DR Planning

*Steve Piggott*

*Cutover*

*Darren Lea*

*Cutover*

*Mark Heywood*

*Cutover*

As the complexity of integrated exercises on cloud, hybrid, and on-prem systems continues to escalate, the race to get a rock-solid execution posture is well underway. And there is everything to lose if you get left behind.

That said, it's hard to get the time, buy-in, and budget to break with your existing BCM/DR planning tools, especially when you need to align this with the shifting demands and expectations from your executive stakeholders.

This session will explore the evolution of the traditional, manual, excel-based traditional BCM/DR planning approach, and the evolution to a resilience platform that orchestrates events with built-in real-time observability and auditability – a pivot towards operational resilience. Layer by layer, we will dissect the levels of complexity that this term now encompasses, as a blend of release/change, ongoing transformation, and executable recovery/ resilience capabilities are no longer a business advantage, but a competitive necessity.

*Steve Piggott works within all facets of Cutover to drive market awareness, revenue growth, and to align with our customers' requirements and expectations in receiving exceptional enterprise resiliency results. He brings a wealth of experience in driving successful customer outcomes across business transformation, operational resilience, disaster recovery, and business continuity program development.*

*Darren Lea has been a Senior Customer Success Manager at Cutover for the last 3 years, and now works within the Solution Delivery team ensuring customers get the most out of their investment in not only Cutover but their own tools also. Darren worked for almost 20 years in the financial services sector prior to joining Cutover, occupying a number of technology roles, including ownership of support functions and resilience testing for a number of key business services. Having lived through resilience incidents, and the work involved in regularly demonstrating to regulators resilience of technology based services, Darren is appreciative of the place that Cutover plays in improving the lot of similarly tasked technology professionals.*

*Formerly the Head of Operational Resilience for UBS, Mark Heywood has over 20 years of experience in senior risk and resilience roles and has worked across Financial Services, government departments, city and county councils and the charity sector.*

# VIRTUAL AGENDA

## DAY 2
### Tuesday, March 30, 2021

### 10:00a – 10:45a EST

## SOLUTIONS TRACK 1 - SESSION 1

### How to See Gray Rhinos

*Dr. Jo Robertson*

*"Executing Crisis: A C-Suite Crisis Leadership Survival Guide"*

The covid-19 pandemic was not a "black swan" (catastrophic event that came out of the blue that no one saw coming), it was a "gray rhino" that had long been predicted but leadership everywhere overlooked. As we move forward from the pandemic to new challenges, how do we better ensure we've got our eyes open so the next crisis doesn't hit us unaware?

Gray rhinos are high-likelihood-high-impact risks but we fool ourselves into believing that although they are high-impact risks, they are low-likelihood of happening this year and can be pushed into the moderate risk category for mitigation down the road.

Fine tuning the way we're looking at this will require a change of perspective and a new methodology — including reconfiguring the way we do our risk assessments to re-weight them differently.

Why as risk managers do we insist on the outdated strategy of rating the y-axis (likelihood) on equal footing with the x-axis (impact)? If we decrease the importance of the likelihood axis and increase the significance of the impact axis – our gray rhinos become red rhinos, clearly in need of mitigation.

This concept and methodology was first published in DRJ's Fall 2020 edition and is quickly gaining traction across the industry. Join this session to learn more about how to see your organization's gray rhinos.

*Dr. Jo Robertson has a doctoral degree in crisis management and more than 20 years of experience keeping companies out of crisis. She is the author of "Executing Crisis: A C-Suite Crisis Leadership Survival Guide" and DRJ's "How to See Gray Rhinos".*

## SOLUTIONS TRACK 1 - SESSION 2

### Be Prepared - Stay Connected

*Chris Faletra*

*COMSAT - A Division of Satcom Direct*

Events don't give you a choice where you might need to respond. Traditional terrestrial networks can be down, but you still need to coordinate operations, share information and access key data. From beginning to end, you need reliable communications for all emergencies, in all conditions. Satellites remain on the job in all circumstances.

You might be closer to using today's satellite-based wireless communications than you realize. Perhaps your agency already has some satellite equipment on command vehicles, sitting in a closet, or installed in your operations centers. Satellite-based wireless communications are more than just an option in  response and recovery planning. Collectively the equipment and services form a group of essential elements worthy of consideration by each and every first responder or business organization. Please take the time to reach out to us. We stand ready to assist in planning, then partnering with you in the implementation process when the time to respond arrives.

Along with vital connectivity and uninterrupted communications, in a crisis SD Data Center's purpose-built Tier III facilities ensure the security and accessibility of your critical systems and data with fully redundant infrastructure and connectivity.

SD Land & Mobile and COMSAT have access to a multitude of satellite networks to provide mobile and quick deploy connectivity for all your teams in the disaster area.

Get superior, reliable network performance via multiple Satellite Operators with our WTA Tier 4 Certified and independently owned Teleports providing Large Pipe Satellite Connectivity for voice, data, internet and video.

*Chris Faletra has been the director of Teleports COMSAT for last 4+ years, has 30+ years in satellite communication industry. GTE Telecom 1986 to 1994. Varian/CPI 1994 to 1996. Comtech EF Data 2004 to 2016. Holds BSEE from Northeastern University.*

## SOLUTIONS TRACK 1 - SESSION 3

### Understanding Situational Resilience Using Comparative Risk Analysis

*Richard Cocchiara*

*Cognitient Corp.*

Rich Cocchiara has been helping companies and governments to assess risks to their strategies, processes, organization, technology, applications, data and facilities for more than 30 years. His experience as a CIO, CTO and CISO give him unique insight to what is needed to ensure resilience against multiple demands, disruptions and threats being faced by companies and governments today and going into the future. Based on his observations of how companies responded to the COVID threat has led him to conclude that many companies view risk from one dimension and find themselves unable to deal with the dynamic risks they face today. Risk mitigation plans that do not take into account multiple scenarios are doomed to failure when something unexpected such as COVID arises and employees are challenged to respond quickly and concisely using their knowledge, experience and past performance (KEP). Developing situational resilience requires companies use comparative risk analysis to more accurately assess their risk mitigation abilities. Companies must go beyond normal risk planning by accurately determining how their staff will be able to respond to multiple scenarios and how that compares to best-in-class and industry competitors.

In this session attendees will learn how to use this type of analysis to allow them to get to the real truth of how their company handles multiple different scenarios thereby giving them the ability to develop risk mitigation plans that work in the real world as opposed to on paper.

*Richard Cocchiara is the Chief Innovation & Security Officer (CISO) for Cognitient Corp. As such, he is responsible for creating new and innovative approaches to assessing and managing risk. He is the former Chief Information Security Officer for the New York City Department of Education as well as the former CIO for Smarter Risk Corporation. A company focused on using analytics to uncover hidden risks to companies and government agencies. He spent over 30 years with IBM as a Distinguished Engineer and CTO for the Resiliency Services division and was a member of the prestigious IBM Academy of Technology. He has over 35 years of IT consulting, development & support experience with a specialty in IT risk such as cyber security and business continuity. He holds US patents for IT Risk and has performed multiple consulting engagements to many Fortune 500 companies around the world.*

## SOLUTIONS TRACK 1 - SESSION 4

### Combating the Evolving Threat Landscape with AI Monitoring and Cybersecurity Best Practices

*Tanner Boswell*

*OneTrust*

IT Security, Cybersecurity, Privacy and Data Management issues are ranked as top challenges facing the board of directors, corporates, oversight authorities and the IT Audit Function. The digital transformation has greatly impacted the way businesses track, measure and analyze risk across domains, with many financial institutions. Attendees will learn how data and technology have become both a challenge and opportunity for businesses. While organizations are more connected than ever processes extending risk management initiatives and accountability have struggled to bypass traditional second- and third-line professions. We'll review some key areas where financial institutions can leverage AI to inform decisions and implement automation to integrate into first line business applications to engage stakeholders and enhance compliance and board reporting.

*Tanner Boswell serves as a GRC Solutions Engineer for OneTrust GRC– a purpose-built software designed to operationalize integrated risk management. In his role, Boswell advises companies throughout their risk management implementations to establish processes to support operations and align with their enterprise objectives, including adopting industry best practices and adhering to requirements relating to relevant standards, frameworks, and laws (e.g. ISO, NIST, SIG and more). Boswell works with clients to realize the extent of their risk exposure, helping clients to map their digital infrastructure, assess risks, combat threats, monitor ongoing performance, and document evidence throughout the risk lifecycle.*

## 10:45a – 11:45a EST

## GENERAL SESSION 3

### How AI and Machine Learning Will Transform Critical Event Management
*Making the World Safer. Keeping Your Business Running. Providing Duty of Care.*

*Rich Thompson*
*BlackBerry*

*Ramon Pinero*
*BlackBerry*

Imagine a new type of critical event management solution that can detect an upcoming disruption to a business process and provide an early warning so that an organization can to start taking action to mitigate risks and minimize the impact on business. That's the power of Artificial Intelligence, Machine Learning and predictive analytics.

Intelligently surfacing and leveraging disparate information is a critical factor in an organization's ability to respond to an impacting event. Silos between business groups, business operations and emergency systems, coupled with a lack of visibility into a situation can cause delay and confusion, resulting in ineffective decision making and prolonged recovery. A critical event management solution with the predictive power of AI/ML can allow businesses to have greater visibility and warning of business impacting critical events before they happen, allowing businesses to be more proactive in preparing for future risks.

During this session, BlackBerry's Rich Thompson and Ramon Pinero will discuss how AI/ML will completely transform the  Critical Event Management landscape, what a next-gen critical event management system would look like, and provide a use case to illustrate the dramatic impact AI/ML can have on a cyberattack disaster response. Rich and Ramon will also provide a visionary roadmap of how BlackBerry sees these capabilities evolving over the next few years to manage modern-day threats from cyberattacks and IT system outages to operational and supply chain disruptions, physical security and man-made incidents, and natural disasters.

*In his role as the VP of Solution Strategy, Rich is responsible for all pre- sales technical efforts in the Americas. Rich is responsible for a team of Sales Engineers that conduct product demonstrations, technical evaluations, architecture reviews, solution consulting with our clients and partners. Rich and his teams support the Sales and product teams on Go- to market activities, product review, product strategy, and roadmap considerations. Rich has been with BlackBerry for 6 years, joining the organization in October for 2014. Rich is our subject matter expert on the retail industry and PCI compliance.*

*Prior to joining Cylance in 2014, Rich has 25+ years of experience in security. This includes 21 years leading security efforts at the regional and national level in the retail industry, and 5 years leading Sales Engineering and Professional Services efforts in the enterprise software industry. His expertise in forensics, incident response, electronic discovery, information risk management and governance leads Blackberry in the vision of protecting every endpoint under the sun.*

*Ramon Pinero is responsible for the implementation and deployment of AtHoc solutions across all sectors and customer support.  In this capacity, Ramon interfaces closely with AtHoc product groups, the CTO and engineering, yielding a field-ready product line, compatible with evolving customer environments and ensuring an outstanding customer deployment experience.  In prior positions, Ramon was a web application developer, manager of all presales, implementations, customer support and training for AtHoc. Ramon attended San Francisco State University.*

## 11:45a – 12:00p EST

## 15 MINUTE DEMONSTRATION
### (GOLD SPONSOR)

**BlackBerry -** Allan Bullock

**12:00p – 12:45p EST**

## BREAKOUT TRACK 3 – SESSION 1

### Emergency Communication in the Pandemic Era: Where Do We Go From Here?

*Peter Steinfeld*

*AlertMedia*

*Sara Pratley*

*AlertMedia*

Never before have organizations faced the onslaught of emergencies and business challenges they experienced during 2020. From the pandemic to a historically active hurricane season to record-setting wildfires, these major events have reshaped the world, our communities, and how we work and live.

In response, business leaders are reassessing all aspects of the workplace and business operations, from financial models to facility design to talent acquisition. With nearly two-thirds of employees now working remotely from their homes at least part of the time, organizations must also reconsider their ability to meet legal and ethical requirements related to employee safety and emergency preparedness.

The newly distributed workforce—now composed of hundreds of distinct locations and home offices—presents new challenges for operational leaders tasked with protecting their people. This decentralization of people and resources not only strains safety efforts—it also hinders organizations' ability to monitor, communicate, and resolve unplanned events as effectively as they otherwise could with everyone gathered into one office building or just a few locations.

In this session, AlertMedia's SVP of Strategic Sales Peter Steinfeld—a 20-year veteran of the emergency communication industry— and Sara Pratley, AlertMedia's VP of Global Intelligence, will highlight the most critical employee safety challenges facing business leaders as organizations transition to a "new normal." Additionally, Peter and Sara will provide real-world examples of how businesses are leveraging modern emergency communication solutions to protect employees and improve business resiliency in the wake of the global pandemic. Session attendees will learn practical tips and best practices for improving employee safety and emergency preparedness for a variety of business-critical events.

*Peter Steinfeld is passionate about helping organizations protect their most valuable assets: their people. He has been involved in the emergency communications industry for nearly 20 years—advising organizations on matters related to employee safety.*

*Sara Pratley is Vice President of Global Intelligence at AlertMedia, where she leads a team of experienced analysts to monitor emerging threats and incidents worldwide. Prior to joining AlertMedia, Sara was Vice President of National News for CNN's domestic newsgathering unit, where she led the network's coverage of major events.*

## BREAKOUT TRACK 3 – SESSION 2

### Setting and Managing your IT Disaster Recovery Program

*Ray Holloman*

*HCA Healthcare*

How do you start out with a brand new IT Disaster Recovery Program? Maybe you don't even have any BIA to even review. This session walks through some of the fundamentals that we use to run our IT Disaster Recovery Program. Instead of a BIA, we do an Application Impact Assessments that can also feed to other areas. How do we conduct DR testing in a way sustainable way for all of the data centers that we manage? What does our After Actions/Test Report look like that gets us a response from leadership? This session will walk you through some of the major tenets of our program that we have proven to be successful building blocks for a successful program.

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

## BREAKOUT TRACK 3 – SESSION 3

### Getting Back to Business! Latest Information About the COVID-19 Pandemic to Inform Business Planners

*Dr. Lisa Koonin*

*Health Preparedness Partners*

Now that the COVID-19 pandemic has raged on for more than a year, what should businesses be doing to continue to protect their workforce, customers, and communities? What is the status of COVID-19 vaccine and therapeutics? How should businesses prepare for office re-entry? This presentation will provide business continuity planners with an update of pandemic status and mitigation strategies, and include practical approaches for addressing when and how to re-enter the office, and other relevant COVID-19 response efforts. Businesses that implement pandemic response and recovery plans that are aligned with public health recommendations can significantly reduce harmful impacts to employees and customers, limit the negative impact of the pandemic to their business and community, and contribute to a successful recovery.

*Dr. Lisa Koonin founded Health Preparedness Partners, LLC after her 30+ years with the Centers for Disease Control and Prevention (CDC). Dr. Koonin is recognized as an international expert in emergency infectious disease preparedness and response.*

## BREAKOUT TRACK 3 – SESSION 4

### The Changing Face of Disaster Recovery: Are You Prepared to Recover Cyber-Compromised Data?

*Michael Shandrowski*

*Sungard AS*

*John Beattie*

*Sungard AS*

The face of disaster recovery (DR) is changing, and the culprit is a threat that's becoming increasingly common among businesses: cyberattacks/ransomware.

According to leading analysts, ransomware attacks have surged to become the second-leading cause of IT outages. And now that the U.S. Department of the Treasury's Office of Foreign Assets Control (OFAC) has issued an advisory highlighting sanctions risks for ransom payments to certain entities, investing in protecting your data is more important than ever before.

Even if you have preventive controls in place to safeguard your critical data from these attacks, you need to take precautions to recover your data in the event it's corrupted or encrypted.

Unfortunately, traditional DR plans likely aren't going to cut it.

Recovering compromised data following a successful cyberattack is a different recovery use case and, therefore, requires a unique recovery strategy, plan and enabling capabilities.

In this session, we'll show you how to put that strategy into place.

We'll examine the changing threat landscape, highlighting the key differences between DR and data recovery. We'll also break down best practices for compromised data risk management (CDRM), exploring everything from identifying your vital data assets (i.e., the data that absolutely must be recoverable) and the investments needed to protect them, to detecting and responding to attacks and recovering your compromised data.

By understanding the differences between DR and data recovery and implementing proper CDRM, you'll be ready to recover compromised data if you fall victim to a cyberattack.

*As a Principal Consultant at Sungard AS, Michael Shandrowski guides organizations in the evolution of their BC and DR programs within an ever-changing threat landscape. He holds experience in all phases of availability risk management.*

*As a Principal Consultant at Sungard AS, John Beattie works with companies to reduce organizational risk by establishing new BC and DR programs or transforming existing ones to improve effectiveness and address cyber-compromised data recovery.*

## BREAKOUT TRACK 3 – SESSION 5

### Hitchhikers Guide to Data Backups - *Past, Present, Future*

*Jeremy Brovage*

*Converge Enterprise Cloud*

Based on data being the lifeblood of your business today, join this session to learn the "The History of Data Backups with Disaster Recovery".

With so many data backup technologies and solutions available today, its more confusing than ever to select and implement the right backup solution for your specific business requirements.

Jeremy's session summarizes data backup systems and their changing role within the IT environment. The backup challenges we faced over the years have continued to evolve. From the 90's and tape-based restores, to today with many other recovery tools at our disposal, backups continue to be a cornerstone of a robust data protection strategy for modern business.

*Jeremy Brovage is based in Hartland, MI where he serves as a Senior Solutions Architect for Converge Enterprise Cloud, a division of Converge Technology Solutions.*

*He has spent over 27 years working in the Information Technology field with the last 10 years at SIS, a Converge Company. Jeremy has deep professional experience in designing and supporting solutions for various technology platforms that include Intel and IBM as well as hands-on experience with the related backup technologies that support these platforms.*

## BREAKOUT TRACK 3 – SESSION 6

### Positioning an End-to-end Resiliency Strategy is Essential in Developing a Successful Hybrid Cloud Design

*Joe Starzyk*

*IBM*

As many firms contemplate Hybrid Cloud enterprise architectures, the need to define an end-to-end resiliency strategy is often down played or quite often over looked given the perception that it is inherent in the overall cloud design. Contrasting the flexibility for scaling technology with the need to consistently achieve business metrics for Recovery Time and Recovery Point Objectives present a very unique situation in addressing the overall risk to reward proposition.

In this session we will explore several key factors that are critical in retaining an optimum resiliency strategy that compliment the emerging hybrid cloud infrastructure. Consideration will be given to not only the design of the specific architecture for resiliency, but more importantly the impacts to business readiness, operational resilience, and significant changes towards ensuring testing methods provide demonstrable results that are in line with external regulatory demands as well as internal audit requirements.

*Joe Starzyk has been providing Executive Consulting leadership in the design and implementation of resiliency strategies for over 40 years, working with Fortune 100 clients in the Financial Services, Insurance, Healthcare, and Retail and Distribution sectors, to name a few. Additionally, as a member of IBM's esteemed Academy of Technology, Joe has been instrumental in defining the role for IBM within the industry with respect to Hybrid Cloud design, Cyber Resiliency strategy, and overall Operational Readiness.*

## 12:45p – 1:45p EST

### SPONSOR SPEED NETWORKING

Connect with our sponsors with our Sponsor Speed Networking sessions. In each 5 minute session, you will join a sponsor and up to 5 people in a breakout room. Each attendee will have the opportunity to ask one question (5 questions total). After 5 minutes, you will switch rooms, joining a new sponsor for 5 minutes. At the end of the Sponsor Speed Networking sessions, you will have met with 12 different sponsors.

## 1:45p – 2:00p EST

### 15 MINUTE DEMONSTRATION
**(SILVER SPONSOR - 2 sessions)**

**Cutover -** Dhiren Mistry

**AlertMedia -** Peter Steinfeld

## 2:00p – 3:00p EST

### PANEL DISCUSSIONS (join 1 of 4 sessions)



*Mark Heywood*
*Cutover*

*Steve Piggott*
*Cutover*



*Darren Lea*
*Cutover*

*John Rosato*
*CS Technology*

### 1 - Why Operational Maturity Matters...

Now, more than ever, companies are doubling down on developing operational maturity strategies and execution postures. Your people matter more. Your investments in technology matter more. Your selection of eco-partners matters more. Your cloud journey matters more. Being compliant matters more. The list goes on, but the bottom line is this: providing exceptional customer experiences is essential to accelerating and sustaining revenue growth.

Simply put, the pace of change driven by the race to digital transformation is creating more risk and complexities across the IT estate than ever before. This raises big questions, including how to best compete, how your organization can thrive in the 'new' normal, and whether it's possible to develop a maturity curve that is sustainable?

Join CST and Cutover as they share experiences on securing stakeholder alignment on resilience, coupled with innovative operational modeling, and an explicit focus on providing business value, digging into how this translates into a lifecycle framework of exceptional outcomes. Finally, you'll learn about a new model of working that orchestrates humans and machine automation in seamless collaboration. If you and your organization aspire to develop and sustain a truly resilient operational maturity execution posture, the journey to developing the foundational building blocks will surely resonate with you, and you don't want to miss this session.

*Formerly the Head of Operational Resilience for UBS, Mark Heywood has over 20 years of experience in senior risk and resilience roles and has worked across Financial Services, government departments, city and county councils and the charity sector.*

*Steve Piggott works within all facets of Cutover to drive market awareness, revenue growth, and to align with our customers' requirements and expectations in receiving exceptional enterprise resiliency results. He brings a wealth of experience in driving successful customer outcomes across business transformation, operational resilience, disaster recovery, and business continuity program development.*

*Darren Lea has been a Senior Customer Success Manager at Cutover for the last 3 years, and now works within the Solution Delivery team ensuring customers get the most out of their investment in not only Cutover but their own tools also. Darren worked for almost 20 years in the financial services sector prior to joining Cutover, occupying a number of technology roles, including ownership of support functions and resilience testing for a number of key business services. Having lived through resilience incidents, and the work involved in regularly demonstrating to regulators resilience of technology based services, Darren is appreciative of the place that Cutover plays in improving the lot of similarly tasked technology professionals.*

*John Rosato, CEO of CS Technology, is a trusted advisor of C Level Executives across a number of Fortune 2000 organisations. Since being appointed CEO, John has led CS Technology to nearly double its revenue with 500% profit improvement and developed market leading transformation strategies that help CST's clients drive agility and competitive advantage.*

*Tracey Rice*

*Fusion Risk Management*

*Melanie Lucht*

*Carnegie Mellon University*

*Rena Moakeh*

*Dematic*

## 2 - Building Everyday Heroes: Making Resilience Your Organization's Superpower

Building a resilient organization is not a hero's journey. You cannot do it alone. You need fit-for-purpose teams of superheroes to make it happen. Winning teams require you to know your organization, your network of talent, and the web of third parties that comprise it, inside and out. Your needs evolve over time. Great leaders are always looking for the right data to protect and achieve organizational objectives. Join us for an interactive session and learn from the experiences, insights and lessons learned of industry leaders mobilizing their organizations at new levels, focusing on what matters, leveraging their most prized asset (their people) to protect, evolve with, and deliver extraordinary outcomes for customers.

With more than twenty years of experience in business continuity, Tracey Rice is an accomplished industry leader and a passionate evangelist, who builds relationships with BCM leaders in enterprise organizations across the globe.

Melanie Lucht is the Associate Vice President and Chief Risk Officer for Carnegie Mellon University. In this role, Melanie oversees the following Organizations: Environmental Health and Safety, Disaster Recovery and Business Continuity, Emergency Preparedness, and Risk Operations.

Rena Moakeh is a qualified solicitor of England & Wales and holds a Bachelor of Law (LL.B Hons) from the University of Westminster (UK), has lived in six countries, and has 18 years of experience as a global legal & compliance team leader and strategic business partner. She is currently the global Compliance Officer of Dematic, a Supply Chain Optimization Digital Technology, Software, and Services company headquartered in Atlanta, Georgia, USA, serving 8K+ employees. Prior to this, Rena was at GE for 11 years in global regulatory and compliance leadership roles supporting Transportation and Energy Management/Digital Energy businesses.

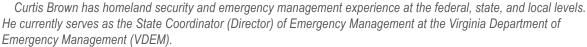*Vanessa Vaughn Mathews*

*Asfalis Advisors*

*Dru Levasseur*

*LGBT Bar Association*

*Curtis Brown*

*I-DIEM*

*Dr. Marie Gould Harper*

*American Public Univ. System*

## 3 - DEI in Resiliency

Why are diversity, equity and inclusion more important than ever? Panelists will provide answers to these questions – and more – to help organizations get through today's disruptions due to COVID-19. They'll field questions around key challenges encountered, share success stories, and offer insightful information and strategies to help foster a more inclusive and resilient organization.

Vanessa Vaughn Mathews is the founder and chief resilience officer of Asfalis Advisors.

M. Dru Levasseur is the Director of Diversity, Equity, and Inclusion for the National LGBT Bar Association, and leads Lavender Law 365 ® , an LGBTQ+ inclusion coaching and consulting initiative perfect for law firms, law schools, and workplaces. As a prominent figure in the LGBTQ+ equality movement for 25 years, 15 of which in the legal profession, Dru has extensive experience in law, advocacy, philanthropy, and community organizing.

Curtis Brown has homeland security and emergency management experience at the federal, state, and local levels. He currently serves as the State Coordinator (Director) of Emergency Management at the Virginia Department of Emergency Management (VDEM).

Dr. Marie Gould Harper is the Dean of the School of Business at American Public University. She is a progressive coach, facilitator, writer, strategist, and human resources/organizational development professional with more than 30 years of leadership, project management, and administrative experience. Dr. Gould Harper has worked in both corporate and academic environments.

*Martin Myers*

*Myers & Associates*

*Robbie Atabaigi*

*KPMG*

*Peter Laz*

*Fusion Risk Management*

*Bobby Williams*

*Advance Auto Parts*

## 4 - Rules and Regulations

Rarely do we receive advance notice of a disaster. That's why it's imperative to be prepared for any interruption within your organization by following regulations, standards, and leading practices – the backbones of business continuity planning. Highly-skilled experts will share current techniques and methodologies to comply with regulations and align with standards in the industry. You want to attend this session to ensure you're prepared for whatever happens next!

Martin Myers, MS, MBCP, AFBCI, CERT, is a BC/DR/CM Consultant. He has 30 years of experience in developing and evaluating disaster recovery and business continuity plans including emergency preparedness and response, and crisis management for prominent domestic and international companies. Some of the companies he has worked for include Bank of America, CapitalOne, KPMG, HP, and SAIC. His work has taken him throughout the U.S., and to Canada, Bermuda, Panama, Costa Rica, Ireland, the United Kingdom, and South Korea. Mr. Myers is a former President of the DRJ Editorial Advisory Board.

Robbie Atabaigi, MBCP, MBCI, CISA, ITIL Foundation, ISO 22301 Lead Implementer (application pending) is a Lead Specialist with KPNG's Cyber practice.

Peter Laz, MBCP, MBCI, is a Senior Manager with Fusion Risk Management and a member of DRJ's Executive Council. He has 30+ years of professional experience designing, implementing, and managing enterprise-wide risk and resiliency initiatives.

Bobby Williams currently works for Advance Auto Parts as the Senior Manager of Disaster Recovery. Bobby has BC and DR experience in programs for global financial companies, healthcare companies, and government power generation companies. He has consulted on DR programs for a global consulting company. He serves the business continuity profession as a Principal on the NFPA 1600 Technical committee and was the inaugural Chair of the DRI International Glossary for Resiliency.

## 3:00p – 4:00p EST

## GENERAL SESSION 4

### Operational Resilience and the Enhancement of Business Continuity

Increasingly, there is a focus on Operational Resilience as a means of building more adaptable organizations. Around the world the themes are very much the same, and the terminology and concepts are now finding traction across many industry sectors. However, all industry sectors in all geographies should understand its core tenets and how Operational Resilience thinking can add value through a perspective that truly resonates with executive leaders and boards of directors.

*Brian Zawada*

*Castellan*

In this keynote Brian Zawada, Chief Operating Officer at Castellan, will share his thoughts on why this shift in thinking is more than just a change in name, why some of its core components are important for your existing continuity program and how adopting the key principles of Operational Resilience can re-invigorate your work and bring focus to program outcomes.

*Brian Zawada is the Chief Operating Officer for Castellan Solutions, the largest, global provider of business continuity consulting, software, managed services, and staffing. Brian has more than 25 years of experience managing and building world-class, global business continuity programs that help organizations achieve and sustain the right level of resilience.*

## 4:00p – 4:15p EST

## NETWORK BREAK
**Grab a cup of coffee and join one of our Discussion Forums**

## 4:15p – 5:00p EST

## BREAKOUT TRACK 4 – SESSION 1

### An Operational Business Resilience Ecosystem

The next risk is just around the corner even while your still managing the current crisis.

*Roger Stearns*

*Philips*

One company's journey to develop and deploy a global business continuity program and how it has evolved into an operational business resilience ecosystem. Using an integrated and collaborative approach to break down silos to achieve real time insights for better informed decision making. This presentation will provide practical insights, examples and learnings of the companies journey.

*Roger Stearns is a certified FBCI, CBCP member. He's worked in a variety of BCM & Risk roles and industries for over 30+ year. Roger currently works for Philips as a Sr. Global Business Continuity Manager.*

*Rob van den Eijnden is certified with FBCI | CISA | CRISC | ISO22301LA and is the Global Business Continuity & Resilience Leader for Philips Royal.*

*Rob van den Eijnden*

*Philips*

## BREAKOUT TRACK 4 – SESSION 2

### A Collection of Lessons Learned Based on COVID-19

An organization's Business Continuity strategies and response capabilities may have forever changed due to the lessons we continue to learn through the COVID-19 pandemic. The success of an organization's Business Continuity Management program can be measured by the details managed throughout the Business Continuity lifecycle. COVID-19 has changed the way organizations will do business from this point forward and as such we need to consider how this affects our Plans and Programs. In this session we will examine the BCM lifecycle to determine what worked and possible updates that may need to be considered such as determining new or different risks, exercise scenarios, Plan assumptions and overall updates to your BCM framework.

*Monica Goldstein*

*Agility Recovery*

*Since 1995, Monica Goldstein's experience in business continuity planning and software has been comprehensive. Monica recently joined Agility Recovery with its acquisition of RecoveryPlanner, a global leader in BCM software and consulting. Monica was one of the founders of RecoveryPlanner and prior to joining its Executive team in 2008 was a part of the Senior Management team for CAPS Centers, an alternate site and BCM consulting company. Throughout her time with RecoveryPlanner and CAPS she consulted on a variety of BCM projects for a wide range of enterprise organizations and financial institutions, including implementing Business Impact Analysis (BIA), Business Continuity Plan development and Tabletop Exercises.*

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## BREAKOUT TRACK 4 – SESSION 3

### Cyber Response: Anticipating Your Business Response to a Crisis

*Mark Hoffman*

*Anesis Consulting Group, Inc.*

For years, companies have treated cybersecurity as a risk that IT could solve alone. Those days are gone. Beyond IT, organizations need to add crisis management and business continuity disciplines to their cyber response protocols.

This session will examine how organizations can benefit from anticipating critical components of their response protocol including – key decisions that will need to be made, communications requirements, navigating the privacy and legal landscape, cyber insurance requirements and risk assessments that utilize BCM data to support their response.

I will layout an approach to building an effective cyber response plan that guides their Crisis Management Team through the decision making process, prepares their customer facing employees for tough questions, enables them to communicate well during the crisis and builds a solid relationship with their cyber insurance provider.

We will discuss likely decisions that will need to be made and how to prepare the Crisis Management Team for making those decisions based on your organization's core principles and values, rather than on the emotions of the moment.

When it comes to a data breach, time is money – quick, well-organized responses often end up costing less. So, if you invest in a sound data breach response plan now, you may find that it pays for itself several times over in the years ahead.

*Mark Hoffman, senior business continuity & crisis management consultant with more than 20 years experience building mature BCM Programs with global impact. Specialize in new program development, program maturity, cyber response and crisis management planning and exercising.*

## BREAKOUT TRACK 4 – SESSION 4

### Using Continuity Planning to Enhance the Role of State/Local Government

*Avery Church*

*Fairfax County Government*

The focus of business continuity has traditionally been on the private sector where there is a primal need to protect profits. Government entities has a similar need, but it is mostly focused on ensuring the delivery of services to the residents. The confluence is more intense than one would assume and can provide benefits to all parties.

My goal with this presentation is to detail the role of continuity planning in the most relatable entity that we all interact with – state/local government.

*Avery L. Church serves as the Continuity Program Manager for Fairfax County Government with more than 10 years of business continuity and continuity of government experience. He leads a team of more than 100 representatives from across Fairfax County Government to design, develop, implement, and maintain the county's continuity capability.*

## BREAKOUT TRACK 4 – SESSION 5

### Navigating Critical Communication in the New Workplace Landscape

*Todd Miller*

*Rave Mobile Safety*

The workplace has been forever changed by the COVID-19 outbreak. Whether employees are operating remotely, transitioning back to the workplace or traveling to and from different locations, keeping everyone protected and informed is more crucial than ever. How can those in charge of employee safety evolve their critical communication strategy to account for these new factors?

This session will explore the roadblocks and unexpected communication challenges that may arise during emergencies like severe weather, an active assailant or a long-term crisis such as the coronavirus. Rave Mobile Safety's Kyle Grasso will share the strategies and solutions businesses need to proactively address common communication and safety gaps. Attendees will learn best practices to ensure every employee is safe and informed, regardless of their location.

*Todd Miller manages all strategic programs at Rave Mobile Safety. Prior to joining Rave, Todd managed the self-service consulting Practice at Oracle where he was responsible for the delivery of customized software solutions for clients in North America, supporting millions of users.*

## BREAKOUT TRACK 4 – SESSION 6

### Every Second Counts

*Allan Bullock*

*BlackBerry*

During a critical event, every second counts when trying to reach your audience quickly and securely.  In this session, we will share how to harness limited resources with intelligent technology and one platform to prepare for, respond from and recover from critical events to ensure safety, accountability and continuity of operations.

*Allan Bullock is a Critical Communication Specialist with 15 years' experience working in the communications industry, working with customers from both private and public sectors including Central Government, Blue Light, Security Services and financial organizations. He currently works across EMEA helping customers understand how Critical Event Management and Crisis Communications fits in to their business, and how it can work with Business Continuity Planning to improve communications using the latest technologies.*

## BREAKOUT TRACK 4 – SESSION 7

### Your Operational Resilience Program and the Impact of Impending Regulations

*Michael Rasmussen*

*SAI Global*

Attend SAI Global's Q&A featuring Michael Rasmussen from GRC 20/20, as we discuss:

- What are the fundamental requirements of these emerging regulations?
- Operationally how can I prepare my organization to implement them?
- Do the new guidelines make BCM and operational resilience a regulatory requirement?
- How can I work the new regulations into my GRC program and demonstrate compliance?
- What tangible steps can organizations put in place to ensure critical operations remain functional in a crisis?

*Michael Rasmussen (GRC 20/20) is an internationally recognized pundit on governance, risk management, and compliance (GRC) – with specific expertise on the topics of enterprise GRC, GRC technology, corporate compliance, business continuity, operational resilience, and policy management. With 27+ years of experience, Michael helps organizations improve GRC processes, design and implement GRC architecture, and select technologies that are effective, efficient, and agile. Michael is partnering with SAI Global for DRJ Virtual Spring 2021.*

# VIRTUAL AGENDA

## DAY 3
### Wednesday, March 31, 2021

### 10:00a – 10:45a EST

## WORKSHOPS TRACK 2 - SESSION 1

### Active Shooter – Lessons Learned From an Actual Event

*Ron LaPedis*

*Seacliff Partners International, LLC*

You just got a "shots fired" call from an organization within your jurisdiction. 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? What about private armed security? This session will be used to share the best practices of a business continuity professional with LEOs and will discuss what was learned from the May 2018 YouTube shooting.

This course will discuss how private industry approaches active shooter training, will present several ideas for how LE can work with private industry 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, FBCI, has more than 25 years of business continuity and information security experience as an implementer and trainer. Ron also has extensive training and experience in emergency response and active shooter training.*

## WORKSHOPS TRACK 2 - SESSION 2

### How to Conduct Dynamic Virtual Tabletop Exercises - Seizing the Opportunity of More Interactive and Feel-Real Simulation to Assess and Boost the True State of Readiness of Your Program

*Marie-Helene Primeau*

*Premier Continuum Inc.*

We believe that organizations that perform regular exercises have been proven to be the fittest to recover after a crisis. As practitioners, we might daydream that each participant invited to our tabletop exercise will be thrilled to test his or her skills during a simulation that will be a company-wide echoing success. The results are too often disappointing.

Strong from her field-oriented approach reflecting over 17 years of experience in supporting organizations, Marie has overseen lots of simulations and exercises, onsite and virtually, with numerous clients from various industries and with up to 50 participants. She is considered an expert. Having worked with hundreds of executives and senior managers, Marie is known for her presentation skills, interactive training approach and her proven methodologies.

Throughout this workshop and using field examples, Marie will share strategies and tips on how to make tabletop exercises dynamic and fun while meeting set objectives. In the context of COVID-19, performing exercises is as relevant as ever. Interactive and collaborative remotely-work tools and the greater availability of participants who have become more agile with such tools, sets the table for large-scaled table-top exercises if performed adequately. Yes, it is doubled and this presentation will show you how.

Learning Objectives
- Identify key success factors for tabletop exercises
- Address how exercises need to be planned and delivered in a different and most optimal way in a virtual world
- Experience tools making exercises more dynamic
- Exchange with fellows practitioners about best practices and lessons learned.

*Marie-Helene Primeau is the Executive Vice-President of Premier Continuum. She is an expert-consultant, with over 17 years of experience in supporting public and private organizations in setting up, exercising, maintaining, and evaluating their business continuity program. Marie-Hélène is very hands-on with her clients, bringing value on all three levels – strategic, operational, and tactical. Over her career, she been involved at each step of the BCM cycle and with a broad spectrum of clients such as Alliance Bernstein, Vancity Bank, VIA Rail, Intact Insurance, Desjardins, iA Financial Group, the Government of Canada, British American Tobacco and many others..*

## WORKSHOPS TRACK 2 - SESSION 3

### Will You Be the Next Headline?

*Linda Hanwacker*

*The LSH Group*

It is not uncommon to see companies make the big headlines about their data being breached. They're new stories daily. Our trusted models are targeted using unsecure network protocols, hidden malware, and updates 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". This fun interactive 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 ever changing 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? Management Systems, this approach provides access and safety during a pandemic and to floods, fires and storms. It also makes these records searchable and shareable. When selecting a solution, it is important to consider access, cost, risks, retention & productivity. Take your paper records from risk to resilience.

*Linda Hanwacker is a subject matter expert, speaker, author and CEO/Founder of The LSH Group a professional consultancy specializing in BC/DR, COOP, Emergency & Crisis Mmgt. , Winner – BCI Business Continuity & Resiliency Consultant of the Americas.*

## WORKSHOPS TRACK 2 - SESSION 4

### Controlled Chaos-Training for Flexibility

*Andrew Ziegler*

*Tempest Risk Management*

No plan survives first contact with reality.

Business continuity plans rarely work exactly as they are supposed to. A solid plan will give you access to the tools and information you need to effectively navigate a business disruption. But if you do not use those tools or that information effectively, then they are a waste of time. Flexibility, creativity and adaptability are critical 'abilities' for business continuity response teams and leaders. In this session, we will discuss how to train for those abilities through workshops, exercises and table-top exercises to always expect the unexpected and think/act outside of the box in a controlled and thoughtful manner.

This session will require audience participation in engaging and fun group exercises designed to stimulate creativity and use seemingly unrelated resources to solve complex problems.

*Christy Ziegler*

*Tempest Risk Management*

*Andrew Ziegler has worked for large corporations specializing in risk management, business continuity and technology controls for 25 years. Andy is also a 17 year active first responder and serves on the board of directors of multiple community organizations.*

*Christy Ziegler is an Emmy Award winning director and corporate training specialist for Tempest Risk Management. Christy has 7 years of experience designing and facilitating training for one of the nations largest financial institutions.*

### 10:45a – 11:45a EST

## GENERAL SESSION 5

### Business Resiliency in 2021: Managing a Dispersed Workforce

2020 has been an unprecedented year, with businesses disrupted as employees migrated to remote work and a distributed workforce became standard. Without question, the pandemic exposed a gaping hole in today's business continuity strategy – a lack of timely and relevant risk intelligence. Enterprises have now recognized the need to accurately detect events that pose a threat to their business, and then have the capabilities in place to respond to those threats before they harm their greatest assets: people, places, and property.

*Matt Bradley*

*Onsolve*

Business continuity and duty of care are continuously evolving. 2021 will present even more complex challenges, like bringing a remote workforce back to the office, managing vaccine distribution and keeping ahead of additional unforeseen critical events amidst a new presidential administration. If 2020 has taught us anything, it is the need to prepare for the unexpected.

As enterprises prioritize securing, protecting and managing a dispersed workforce and operations, they should think about security through a risk intelligence lens, implementing solutions that continuously monitor and filter data to identify critical events in key areas in order to maintain business continuity in the wake of another disaster. Furthermore, they must establish best practices for reaching specific employees and create a plan for communicating smaller-scale critical events to the wider enterprise.

*A veteran security operations expert for more than two decades, Matt Bradley has deep, first-hand knowledge of security operations management, as well as an understanding of the critical challenges facing organizations in the future. Most recently, Bradley served as Regional Security Director for the Americas at International SOS, where he led the security services business and advised key executives on risk management solutions. Prior to International SOS, Bradley worked in Honduras as the Security Director for Tigo Honduras where he handled all matters relating to physical security; health, safety and environment; crisis management; and fraud investigation. He was also a General Manager for I Solution Security, where he advised on security matters for the Honduran President, Minister of Security, and Minister of National Emergency Commission. Previously, Bradley had a distinguished 14-year career with the Central Intelligence Agency (CIA).*

### 11:45a – 12:00p EST

## 15 MINUTE DEMONSTRATION
### (GOLD SPONSOR)

**Onsolve** - Chris Hurst

### 12:00p – 12:45p EST

## BREAKOUT TRACK 5 – SESSION 1

### Advanced Business Impact Analysis

Professor Steven Haynes will introduce participants to the traditional business impact analysis (BIA) tools. During this session, an examination of the strengths and weaknesses of these tools will be assessed. Afterwhich, Professor Haynes will introduce you to the resiliency-based BIA, and how the use of this assessment will help increase the overall effectiveness to planners, BC programs, and tabletop designs. Professor Haynes will use his experiences with BIAs and walk participants through real-world examples. This is a session aimed at individuals looking to improve their BIA tools and BC programs. All participants will walk away with a better understanding of planning versus response.

*Steven Haynes*

*University of Texas at Dallas*

Assistant Professor of Practice Steven Haynes has over 15-years of experience working in the risk management and insurance field. Haynes' past experiences include creating risk analytics programs, developing business continuity programs, improving loss reduction strategies, and managing complex disaster response and recovery operations. His research interest includes risk analysis, organizations under crisis, and mixed-methods research.

*Assistant Professor Steven Haynes has over 15-years of experience working in the risk management field. Haynes' past experiences include developing BC programs, improving loss reduction strategies, and managing complex disaster operations.*

## BREAKOUT TRACK 5 – SESSION 2

### Increasing Resiliency Through Effective Communications

*Heather Brouder*

*Fidelity Investments*

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 COVID-19 Pandemic has introduced new challenges that require effective communications. Additionally, severe weather and other potential impacts still exist. 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 what to do during an event.

*Timothy Booth*

*Fidelity Investments*

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 and hold Certified Business Continuity Professional and Associate Cyber Resilience Professional certifications through DRI International.*

*Timothy Booth is a Senior Risk Manager for Fidelity Investments and am part of a team providing business continuity administration and guidance for 40,000 employees across many lines of business. He holds a CBCP certification through DRI.*

## BREAKOUT TRACK 5 – SESSION 3

### Feels Like Time to Test the Partnership

*Mark Carroll*

*IR+M*

Interacting with your salesperson in times like these is something many people try their best to avoid. Pretty easy to engage the provider and place the order when everything is going well, but mix in real life perils and consternation and the dialogue advances to a whole new level. Discussions may involve less need or possibly elimination of a particular product and you worry that the sales rep will push harder to retain the revenue, independent of your perceived needs. While these situations can occur it is important to have these tough conversations as a means to become aware of other viewpoints and your true needs.

1. Don't fall into trap that all future disasters will play out just like Covid did.
2. Salesperson by position, possibly has a greater view on customer experiences where the customer themselves are limited to what "they" experienced only.

*Steven O'Neal*

3. Stories and experiences provide the basis for understanding, salesperson may provide a conduit to seek out these stories and learn from others.
4. The salesperson that works to identify a solution indicates a vendor partner as opposed to a peddler who has that one-track mind of preserving the revenue stream.

*Mark Carroll is a seasoned Risk and BC professional with leadership positions at multiple Fortune 500 corporations.*

*Steven O'Neal has 24 years experience recovering various organizations through disasters both large and small. Extensive experience delivering technology response solutions as operations manager for Rentsys Recovery followed by multiple years of working with passionate BC professionals getting buy-in from executive management as an Enterprise Account Executive.*

## BREAKOUT TRACK 5 – SESSION 4

### Measuring Your Organization's Alignment to ISO 22301:2019

*Lynnda Nelson*

*ICOR*

What are you waiting for? The international community published best practices and requirements for a business continuity management system back in 2012 and updated and improved these requirements in 2019. If your organization has not aligned its business continuity "program" to international requirements, it is time.

Looking for fop management support? You will no longer need to fight this battle with securing and continuing to engage top management once you have a business continuity management "system" in place. It is time to understand how a management system is different from a "program" and what you need to do to ensure you are providing the best information to top management about your business continuity capabilities.

Attend this presentation and first learn about management systems in general, about ISO 22301, and the changes to ISO 22301 in its 2019 version. As the speaker is one of the authors of ISO 22301 2012 and 2019, and represents the experts in the United States, this is an opportunity for you to learn from someone who has been "down in the trenches" and understands not just what is required, but why it is required, and what each requirement looks like.

*Founder and the President of ICOR, Lynnda Nelson manages ICOR's education and credentialing programs. She is an expert on international standards for business continuity management systems, crisis management and communications, and community resilience.*

## BREAKOUT TRACK 5 – SESSION 5

### Operational Risk Management: Champion for Business Continuity

*Patrice Beck*

*W.W. Grainger*

Since Business Continuity became a discipline in the early/mid- 1990s, it's been an orphan floating from place to place within organizations; Information Technology, Finance, EHS, or other.

As the myriad of threats to operations has grown, they have garnered the attention of executive leadership. Executives, now more than ever, support protections against potential threats. They understand and respond to risk.

It is time to move Business Continuity out from under other departments and into a top down driven, risk based structure. Business Continuity is a significant component of Operational Risk Management (ORM) and it is this discipline that can ensure executive support for Business Continuity.

This session explains how Operational Risk Management is the champion of Business Continuity and how to implement ORM practices into your Business Continuity Program.

*Patrice Beck has 20+ years experience in all aspects of Business Continuity Management Programs:BCMPs. She has developed programs in the continually changing resiliency environment. Her years of experience are testaments to the requisite adaption of BCMPs.*

## BREAKOUT TRACK 5 – SESSION 6

### Operational Resiliency 2.0 - Turning Data Into True Risk Intelligence With AI

*Dustin Radtke*

*Onsolve*

In 2020, more than 600 mass shootings took place in the U.S. and there were 22 weather and climate disasters that cost the nation a combined $95 billion. The COVID-19 pandemic, coupled with civil unrest, continues to be a source of constant news, data and social media chatter around the world.  From active shooters and riots, to extreme weather and wildfires, every one of these critical events created rivers of data flowing from sources like law enforcement, government agencies, news sources and social media. Many business continuity professionals tasked with monitoring this crisis struggled to make sense of it all.

Unfortunately, data volumes are not going to recede. The constant barrage of information, changing almost daily, can turn into waves of undefinable static if business resiliency teams don't have the right technology in place to create true risk intelligence they can act upon.

Be it an active shooter, rise in COVID-19 cases, managing a remote workforce or a hurricane, the next level of risk analysis lies in the ability to transform data surrounding a crisis into accurate, specific intelligence that will impact a company's people, places and property. In this session, Dustin Radtke, Chief Technology Officer at OnSolve, will outline how business continuity teams can turn data surrounding a critical event into true risk intelligence with AI and ML.  Dustin will also discuss how leading customers in complex industries are already using AI to accelerate operational resiliency and business continuity.

*Dustin Radtke is the Chief Technology Officer at OnSolve, a leading critical event management provider for enterprises, SMB organizations, and government entities. With over 20 years of experience, Dustin excels at building, leading and transforming global product and technology portfolios for global businesses. In his role as Chief Technology Officer, Dustin is responsible for setting product strategy and leading a rapidly growing global development and operations organization for OnSolve's market-leading cloud critical event management applications. Dustin has a proven track record of bringing successful product lines to market as well as reinvigorating existing product lines to achieve their ultimate potential.*

## BREAKOUT TRACK 5 – SESSION 7

### Key Lessons from Public Sector Preparedness and Response Agencies to Improve Organizational Resilience

*Josh Byrd*

*Juvare*

If COVID has taught us anything, it's that crisis doesn't happen in a vacuum. Whether it's a pandemic, a weather incident, civil unrest or any other emergency, everyone is affected. Learn key strategies and best practices from AWS's work with public sector organizations to improve your preparedness planning, response operations, and recovery to maximize operational resilience.

*Josh Byrd leads the marketing team at Juvare and is responsible for growing the brand through thought leadership and go-to-market strategy. He brings over 15 years of marketing leadership and storytelling in diverse fields including healthcare IT, SaaS startups, commercial electronics, real estate, and music business. Byrd is a graduate of Mississippi State University.*

*Darryl Wilson*

*Amazon Web Services*

*Darryl Wilson is a senior Amazonian with over 20 years of experience in helping organizations modernize the way they deliver services and solutions to their customers, as well as a Bachelor of Science in Emergency Administration and Planning from the University of North Texas.*

### 12:45p – 1:45p EST

## VIRTUAL TRADE SHOW

### 1:45p – 2:00p EST

## 15 MINUTE DEMONSTRATION
**(SILVER SPONSOR - 2 sessions)**

**Rave Mobile Safety -** Keith Weagle

**IBM -** Swapnil Chalke

### 2:00p – 3:00p EST

## PANEL DISCUSSION

*Doniella McKoy*
Health Partners Plan

*David Wiseman*
BlackBerry

### Effective Communications During a Crisis

During the heat of a high-pressure event, an effective crisis communications plan can ensure your organization responds with a balanced, stabilizing, risk avoidance strategy. Notifying your employees with quick and accurate information is often just the first step to putting your plan in action. Learn how to communicate with your employees, customers, stakeholders, and the public at-large to mitigate the situation and provide a conscious approach when your organization needs it most.

Doniella Mckoy currently serves as the Business Continuity Program Administrator for a health plan provider in Philadelphia, PA. She responsible for the business continuity software, the crisis communications system and disaster recovery initiatives.

David Wiseman is Vice President of Secure Communications at BlackBerry. He has over 25 years of experience in software, security, information management, mobility and communications at BlackBerry, IBM, SAP and the US Navy.

*Bill Homer*
Rave Mobile Safety

*Ann Pickren*
Onsolve

Bill Homer has been with Rave for 13 years and is currently our Sr. Director of Solutions Architecture. Bill's first 9 years at Rave were largely focused on Services and Support, where he managed and grew that team. He has personally been involved with hundreds of deployments of all solutions across all of the various verticals. Bill is now heavily engaged with the Sales team to provide technical and solutions expertise in the pre-sales process.

Ann Pickren currently serves as the Chief Customer Journey Officer of OnSolve.  As the Chief Customer Journey Officer, Ann will oversee the implementation of our OnSolve Communication Platform across over 27,000+ OnSolve customers. Ann will leverage her customer relationships as well as her deep domain expertise and years of experience in the notification industry to help OnSolve customers leverage the full power of the OnSolve platform to solve their communication needs.

### 3:00p – 4:00p EST

## GENERAL SESSION 6

*Vanessa Vaughn Mathews*
Asfalis Advisors

*Colleen Herrmann*
Amazon

### Beyond 2021: A New Era of Resiliency

We have been facing a radically different business environment with new challenges and norms for over a year. Our profession is now recognized as critical, having delivered solutions that have kept businesses operational and efficient during these challenging times. How do we sustain this new organization-wide focus on resiliency? What new challenges will we face beyond 2021? What is the best way for us to be prepared for what's next?

This session will be a lively, candid discussion with seasoned experts on the frontlines of managing risk and resiliency.

Vanessa Vaughn Mathews is the founder and chief resilience officer of Asfalis Advisors.

As Head of Corporate Business Continuity, Colleen is responsible for the strategic direction and tactical implementation of Amazon Corporate's Global Business Continuity Program.  She manages engagements in all of Amazon's regions in organizations as diverse as Global Real Estate and Facilities to Alexa Devices to Prime Video, to ensure we always deliver for our customers.  She is an expert risk manager and uses a risk focus to drive planning and response.

*Tom Clark*
USAA

*Dan Newton*
PNC

Tom Clark currently works for USAA in the Enterprise Operations Risk Management organization responsible for governance and oversight of USAA's enterprise-wide threat analysis and risk assessment management practices, specifically focused on Business Continuation.

Dan Newton has 20+ years of risk management and disaster recovery experience with 14 years in the Financial Industry.

*Dan Bailey*
Gateway First Bank

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

### 4:00p – 4:15p EST

## NETWORK BREAK
**Grab a cup of coffee and join one of our Discussion Forums**

### 4:15p – 5:00p EST

## BREAKOUT TRACK 6 – SESSION 1

### Third Party Management Program: Managing Risk & Operational Resilience

In this breakout session, I will share how I developed from the ground up a Third Party Management program, which is part of the overall resiliency program for Fusion Risk management.

*Bogdana Sardak*

*Fusion Risk Management*

Presentation outline:
- Overview of third-party management program & framework
- Third-party management policy creation and important sections
- Creation of initial setup and internal initiatives before engaging vendors
- Creation and rolling out due diligence requirements
- Third-party management risk assessment, tiering, and scorecard
- Third-party management ongoing management and monitoring
- Risk Identification & connection to overall company's resiliency program
- Automation of the third-party management process
- Embodying third-party risk management into Business Impact Analysis
- Collaboration with Key Stakeholders in the company (Legal, Security, Accounting, Finance, Business Functions)
- Importance of a mature third-party management program in business partnerships

*Bogdana Sardak is a passionate resilience professional working in the business continuity and risk management field, ultimately gaining experience in crisis management, disaster recovery, emergency response, mitigation planning at a variety of levels.*

## BREAKOUT TRACK 6 – SESSION 2

### The Best Offense is a Good Defense - How Resiliency Drives Innovation and ROI

The adage, "the best defense is a good offense," is attributed to many, including Machiavelli, Sun Tzu and George Washington. It has been applied as a reference in sports, board games and warfare. It means to take advantage of your opponent by being prepared, focusing on the basics, looking for opportunities and taking them. During this session, this concept will be applied to operational resiliency, which is the ability for an organization to bounce back after a disruption – to bend but not break.

*Patrick Potter*

*Archer*

Most look at resiliency as a good defense, and that played out in 2020 as many organizations were disrupted which prompted them to begin building resiliency. However, what if we viewed building resiliency as a business strategy – to help drive innovation, to increase speed time to market, or to become stronger financially? Did you know building resiliency often results in a positive ROI over the short- and long-term?

Attend this session to learn about five ways to build resiliency that will enable your organization to not only come out of disruption, but emerge more quickly, in better financial shape, more agile and ready to capitalize on opportunities that present themselves during and after a crisis.

*Patrick Potter has over 30 years' experience leading risk management, operational resiliency, compliance, internal audit, third-party management, strategic planning and process improvement in both practitioner and consulting roles. He has developed a unique perspective working with analysts, partners and customers spanning many industries including financial services, healthcare, government, energy, education, and travel and hospitality.*

*Patrick is a subject matter expert for Archer where he provides strategic input into the development of the Archer Suite and works with customers on best practices.*

## BREAKOUT TRACK 6 – SESSION 3

### It's 2020 : The COVID-19 Era! NEW Disaster Recovery Challenges

*Estella Maldonado*

*Delta Dental Insurance*

February 2020, Delta Dental is deep in the planning of its annual data center failover exercise for the enterprise, the WHO announces there is a novel virus pandemic. The alarm is real and timely given that this virus is highly infectious and mortality rate is on the upstream. The California Governor mandates everyone in the state stay home and quarantine. The world, as we know it, has come to a screeching halt!

The question we faced at Delta Dental was, do we cancel this Disaster Recovery Exercise (DRE)? And the answer although not completely with highest confidence was "No, we go forward". In the back of our minds was the probability that this stay home to quarantine situation could realistically progress to a worse situation compromising our ability to conduct business as usual and the Crisis Management team would formally make a disaster declaration at Delta Dental for real. More than ever we needed to ensure our recovery plan worked!

*David Carter*

*Delta Dental Insurance*

** Promptly, we moved to readjust our DRE planning, including assessing new risks introduced into the picture. Communication, connectivity, coordination became the pillars of this effort.

In the end, there was consensus that we executed our DRE 2020 better than most years. The communication was clear, issue resolution was faster, and overall there was tighter control through the four-day exercise. We are here to share our Lessons Learned with you.

*Estella Maldonado, DR, custom designs and socializes programs to best meet organization's needs for recovery and resiliency. Managed this year's enterprise DRE at Delta Dental engaging 200+ participants. Trajectory includes Deutsche Bank, IBM, Dow Chemical, Astellas.*

*David Carter, 15 years in Cyber Risk & Compliance. Believes sustainable value creation for internal/external customers is the primary measure of success. He manages teams in Risk Controls Monitoring, Red Teaming, Audit Process Support, and Technology Continuity.*

## BREAKOUT TRACK 6 – SESSION 4

### The Pennsylvania State University's Hershey Medical Center - How We Executed During The Corona Pandemic And Lessons Learned

*Ted Brown*

*KETCH Consulting*

The Pennsylvania State University's Hershey Medical Center – How We Executed During The Corona Pandemic And Lessons Learned presented by Ted Brown, Alumni Elected Member of The Penn State Board of Trustees – Founder and Chair of The Risk Sub-Committee with Over-sight of Hershey

At DRJ Fall World Ted Brown presented how Penn State University went from Classroom education to distance learning with 63,000 students attending 300 Zoom classes the first day after Spring Break. That session got a 9.2 on a scale of 1-10. This session will discuss how Penn State's Hershey Medical delt with the Pandemic as a health care provider and a teaching institute. For example, 144 nursing students were quarantined when 3 tested positive with COVID-19. This session will cover almost a year of planning and execution and will convey lessons learned for not only health care providers, institutions of learning, but all organizations. The session will be presented by a Penn State Trustee with oversight of Hershey but will also include interviews with Hershey Leadership.

OVER A DOZEN LESSONS LEARNED THAT YOU CAN APPLY TO YOUR ORGAIZATION. Ample time for Q & A after the session.

*Ted Brown, CBCP, CBCV, MBCI President & CEO of KETCHConsulting, has been an Alumni elected member of the Penn State Board of Tustees since 2013 (re-elected in 2016 and 2019). He is founder and Chair of the Risk sub-committee with oversight of Penn State's Hershey Medical Center.*

*As one of IBM's first business continuity and recovery services' (BCRS) executives, Brown led its growth from zero revenue in 1989 to half a billion dollars in 1998. With 52 years in technology, Brown has contributed 32 years of experience to the business continuity industry. He also offered a great deal of time and personal assistance during the long effort to reconstruct the U.S. Virgin Islands, including the only clinic, and he led the year-long recovery of the University of the Virgin Islands after Hurricane Marilyn.*

## BREAKOUT TRACK 6 – SESSION 5

### You Survived COVID-19. But Are You Ready for What Comes Next?

*Kevin Barnard*

*ServiceNow*

In 1906, San Francisco was shattered by a magnitude 7.9 earthquake, but contrary to popular belief, it wasn't the earthquake that destroyed the city. Instead, it was a devastating fire sparked by residents eager to use their stovetops again. The takeaway? Often, it's not the initial disaster that harms us but rather a poor response in its aftermath.

Today, many organizations occupy a similar position. Though most survived the initial shock of COVID-19, their subsequent processes and systems are still neither secure, resilient, nor compliant, and businesses lack a cross-functional lens to facilitate enterprise-wide crisis management. As a result, organizations are vulnerable but unaware of it.

Here, Kevin will highlight those vulnerabilities and offer a path forward in which business continuity and resiliency shifts from reactive recovery to proactive, business-aligned scenario planning. He'll draw from his time leading IT Disaster Recovery, Business Continuity, and Crisis Management at GE Capital to offer actionable tips to:

• ensure resiliency is a C-level priority
• understand and prioritize critical assets, processes, and capabilities across the organization
• shift risk and resiliency from IT to line of business-driven

The big idea? In a volatile world, disasters can occur at any time. Our disaster response strategies must reflect that via improved visibility and agility.

Kevin is a Senior Director in ServiceNow's Chief Innovation Office, where he helps organizations build the workflow-driven Connected Enterprise of agility, resiliency, and visibility. Before that, he held a variety of senior IT positions at GE Capital, a federally-regulated 'too big to fail' bank.

*Kevin Barnard is a Senior Director in the Chief Innovation Office at ServiceNow where he helps customers strategize and build the workflow-driven Connected Enterprise. In this role, he crafts enablement materials and provides C-level guidance to organizations seeking to improve agility, visibility, and resiliency.*

## BREAKOUT TRACK 6 – SESSION 6

### Crisis Management in a Virtual Environment

*Carlo Kelejian*

*Continuity Innovations*

Remote working has brought upon many challenges to the workforce. One of these challenges for BC/DR teams is adjusting from physical to virtual command centers. This session will focus on how to manage events in a virtual environment and utilizing technology to create and manage workflows to ensure proper management of a crisis or incident.

*Carlo Kelejian is an award winning consultant and has over 20 years experience in the BC/DR industry. Carlo holds a Master's Degree in Business Continuity Management from Norwich University, a CBCP certification from DRII, and MBCI from the BCI. His experience includes working with many industries such as Financial, Manufacturing, Government, Education, Insurance, Health Care and more.*

## BREAKOUT TRACK 6 – SESSION 7

### Charting a Low-Risk Path to Modern Disaster Recovery

*James Slaby*
*Acronis*

*Biren Jajal*
*Acronis*

*Len Tamasi*
*Acronis*

*Raymond Sue*
*Acronis*

*Keith Lukes*
*Ubistor*

Several new forces have converged to highlight the urgent need for DR and to transform the business case for it. The sudden shift to remote work, the growing reliance on SaaS applications, and a surging cyberthreat environment have created daunting new challenges to preserving 24/365 business uptime. Further, the high cost and relative inflexibility of traditional DR solutions calls for new thinking, architectures and implementations – including a path forward that minimizes risks to the business.

By interviewing a business leader who recently oversaw a successful modern DR deployment, Acronis DR and cybersecurity experts will explore the whys of the company's decision-making process: the factors that combined to make a compelling, low-risk business case for the move. The discussion will then move to the hows: the methods the company used to overcome obstacles and sell the project internally, to craft requirements and evaluate potential vendors, and ultimately to deploy its chosen solution.

The session will include a brief look at some compelling features of the company's implementation, an examination of the trend toward the convergence of data protection with DR, and a look at how testing and auditing have evolved past their former status as cumbersome and painful obligations.

*James Slaby is the Director of Cyber Protection at Acronis. He has also worked as an industry analyst covering cybersecurity, cloud services and networking at research firms like Forrester and the Yankee Group. With over 300 published tech research reports, he has been quoted in The Economist, the Wall Street Journal and hundreds of tech publications.*

*Biren Jajal has over 25 years of experience in the backup, disaster recovery, virtualization, and enterprise storage space. He has served as a Disaster Recovery Specialist with Acronis for over 8 years and regularly engages in helping partners build a cloud disaster recovery practice as part of their managed services.*

*Len Tamasi focuses on empowering partners and clients to grow and protect their business with Acronis Disaster Recovery solutions. Len has over 20 years of experience in the Disaster Recovery and Information Technology markets with companies such as GiantLoop, Verizon Enterprise and Terremark.*

*Raymond Sue has over 20 years of experience in backup, disaster recovery and datacenter management. He has served as a Senior Solutions Engineer with Acronis specializing in cloud and DR for almost 8 years and previously worked as a datacenter manager for a mid-sized company supporting four global data centers.*

*Keith Lukes brings decades of expertise in DR consulting to advise companies on the business and technical drivers of modern DR deployments. Besides extensive experience with complex managed services and enterprise data storage, Keith has deep knowledge of the current generation of leading DR vendor solutions.*

# VIRTUAL AGENDA

## DAY 4
### Thursday, April 1, 2021

**10:00a – 10:45a EST**

## SOLUTIONS TRACK 2 - SESSION 1

### Three Common Mistakes in Ransomware Security Planning

*Frank Trovato*

*Info-Tech Research Group*

When large organizations are crippled for days or weeks due to a ransomware attack (e.g., Garmin, City of Baltimore, Travelex, etc.), it begs the question how are these attacks penetrating what should be a mature security profile? And why are they not able to contain the incident more quickly, and then simply restore infected systems from backup?

This session will cover three common mistakes are made by these and other organizations that leave them unprepared to prevent or reduce ransomware risk.
1. Failure to position risk in business terms to get appropriate funding and security policy buy-in.
2. Not going deep enough in testing ransomware readiness.
3. DR planning, including backup strategy, does not account for a ransomware threat that could infect your backups and DR site.

*Frank Trovato is a Research Director at Info-Tech Research Group, and a certified business continuity professional with extensive experience in organizational resilience planning.*

## SOLUTIONS TRACK 2 - SESSION 2

### Business Continuity Perspectives on Preventing Workplace Violence and Insider Threat

*Dave Hunt*

*Homeland Security Consulting, LLC*

Business Continuity Programs should address the risks of insider threat and extreme violence which have the potential to seriously impact any organization. Identifying persons who may harm others or the organization can prevent incidents and provide appropriate intervention measures. Organizations should develop a program to manage these risks, tailored to the needs of their organization, addressing the steps in prevention, mitigation, response and recovery. Implementing training for workplace violence prevention also benefits the organization to identify persons who may wish to harm the organization through theft of intellectual property, IT system compromise, reputational damage or pilferage.

Dave Hunt, FBCI, CPP is a national subject matter expert, with 35 years of law enforcement and emergency response experience. He has developed many of the nation's emergency preparedness guidance documents, including the current DHS active shooter preparedness program, the national workplace violence standard, the national exercise guidance and national planning guidance.

*Dave Hunt, FBCI, CPP, has 35 years experience in law enforcement and emergency response, supporting organizations in managing risk and protecting employees and assets. Mr. Hunt recently led a team to revise the DHS Active Shooter Preparedness Program, and served on the technical committee to revise the National Standard for Workplace Violence Prevention and Intervention. He has worked with corporations of all sizes, universities, non-profits and houses of worship to develop capabilities to prevent and respond to crisis incidents. He frequently lectures on risk management and the need to incorporate extreme violence prevention and insider threat management into business continuity programs.*

## SOLUTIONS TRACK 2 - SESSION 3

### Cybersecurity - What's Keeping Management Awake Tonight!!

*Dr. Al Marcella*

*BAC, LLC*

Sustainable business resiliency begins with proactive cyber security!

Cybersecurity refers to the people, products, and processes that protect electronic data from those with malicious intent. This presentation will provide participants with an insight into the technologies that may wreak havoc throughout an organization's operating environment. Our discussion will focus on cyber security exposures and associated attacks that are commonly perpetrated against organizations and individuals.

Dr. Marcella will discuss cyber security exposures…identifying various threat actors that seek to wreak havoc and disrupt business operations. Session participants will be provided with proactive internal control recommendations, designed to mitigate the associated risks and security exposures brought by these threat actors.

Dr. Marcella, is president of BAC, LLC an internationally recognized public speaker, author, researcher, consultant, and workshop facilitator..

*Dr. Al Marcella recipient of the ISSA's Security Professional of the Year award in 2016 is an internationally recognized public speaker, author, researcher, consultant, seminar leader with 40+ years of experience in IT audit, security & risk management.*

## SOLUTIONS TRACK 2 - SESSION 4

### How to Recover Your Reputation After a Crisis

*Andrew Gilman*

*CommCore Consulting*

When Johnson & Johnson navigated through its tampering crisis 30 years ago, they called CommCore founder and CEO Andrew Gilman. He is still known in U.S. PR circles as "The Tylenol Man" because of that successful collaboration and outcome. When the Canadian government was faced with a health, economic and tourism crisis due to the SARS epidemic, they called only one U.S.-based PR company: CommCore.

When The New York Times wanted to write about the most effective and innovative crisis communications simulation program, they called CommCore and published a profile of our PressureTest™ simulation. NPR also singled out CommCore for our cutting-edge approach to crisis planning. The New York Observer named CommCore one of the Power 50 PR Firms.

When it happens (not if) to your company, industry or community, what can you do to prepare, withstand and recover? Andrew Gilman, President and CEO of CommCore Consulting will provide experience and examples and hands-on exercises to participants.

*Andrew Gilman is a crisis communications expert, Andrew has provided advised hundreds of corporations, institutions and government officials. Andrew created CommCore's industry leading PressureTest™ that focuses on social media and traditional table top crisis simulations.*

## 10:45a – 11:45a EST

## GENERAL SESSION 7

### How Will the COVID-19 Pandemic Affect Our Industry & How Can You Prepare?

*Regina Phelps*

*EMS Solutions Inc.*

The COVID-19 pandemic was everything we had feared and prepared for many years. Those of us who wrote and developed pandemic plans were brought into the light during the heightened avian flu scare in the 2000's culminating in the 2009 H1N1 pandemic. Fortunately for the world, the 2009 pandemic was mild by all accounts. We had planned for something that could be just as bad as 1918, but fortunately, that didn't happen. The world then fell back into a slumber and pandemic planning became a box to check on a compliance form but not a fully developed or robust plan. "After all, 2009 wasn't that bad." Fast forward to 2020 and the great coronavirus pandemic. It was all we dreaded and more.

Does the pandemic secure the positions of business continuity (BC) and crisis management (CM) or could we find ourselves in a compromised position? I hope for the later but I fear the former. Going forward all BC/CM professionals will need to know how to discuss and demonstrate the value we continue to bring to the organization. You know the old saying – out of sight, out of mind.

Topics covered:
- As a profession, what has worked and what needs improvement with COVID-19?
- As the pandemic winds down, how critical is BC/CM?
- How do you define the value of BC/CM to your organization?
- What are the top values that BC/CM brings to your organization?
- Understand how to demonstrate BC/CM value to management

*Regina Phelps is an internationally recognized thought leader in the field of emergency management, pandemic and contingency planning. Since 1982, she has provided consultation, training and speaking services to clients on five continents.*

## 11:45a – 12:00p EST

## 15 MINUTE DEMONSTRATION
### (GOLD SPONSOR)

### Castellan Solutions - Brian Zawada

## 12:00p – 12:45p EST

## BREAKOUT TRACK 7 – SESSION 1

### Paradigm Shift: Redefining Plans with Agility and Depth

*Chris Duffy*

*Infinite Blue*

For years we have built office-centric plans. The shift from those plans to a distributed workforce brings additional challenges and opportunities.

In this session you will learn proven techniques and strategies to help you analyze your current building plans and update them to fit with the changing priorities brought on by the new normal of working from home. You'll understand how to expand the value past Business Continuity and organizational resiliency while minimizing the work effort overall.

*Chris Duffy creates high value customer experiences in Organizational Resiliency and serves as a trusted adviser and strategist to BC in the Cloud clients. He's also a recognized, award-winning speaker and evangelist for the elevation of BC/DR.*

*Andy Witts*

*Infinite Blue*

*With over 15 years' experience in the industry, Andy Witts manages the Customer Success, Professional Services and Customer Support department for all applications at Infinite Blue.*

## BREAKOUT TRACK 7 – SESSION 2

### Business Continuity Leadership - Do You Have "The Right Stuff?"

*John Liuzzi*

*Southern Glazer's Wine and Spirits*

Do you have the "Right Stuff" to be a Business Continuity leader in the future?

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 historic events of 2020 challenged Business Continuity professionals like never before. With a worldwide pandemic, an historic year of hurricanes, tornados, and wildfires, along with national civil unrest, 2020 represented the most volatile, dynamic, and eventful year in our lifetime.

The most important lesson learned from these events is that they have forever raised the bar for what will be expected from the Business Continuity professional in the future. There is now a new definition of who the future Business Continuity leader must be and, what role they must play. Business Continuity professionals must now realize that in order 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.

So, do you have the "Right Stuff" to be a Business Continuity leader in the future? Come join us at this informative session as we discuss real-world examples and 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 has over 25 years of Business Continuity experience. He is an experienced company President, C-Level executive, and three term Congressional appointee. He is currently the Director of Business Continuity for Southern Glazer's Wine and Spirits.*

## BREAKOUT TRACK 7 – SESSION 3

### Case Study and Lessons Learned - Afghanistan SOC

*Michael Quam*

*Micron Technology*

Michael Quam brings with him more than 14 years on the industry of resilience. In addition to currently working for Micron Technology, Michael Quam is also serving in the US Army Reserves in this field. At Micron, Michael leads a global team of BCM professionals. His team is responsible for BCP, CM, DR, and Incident Response globally across 17 countries and 37 sites.

In the military, Michael has just returned from Afghanistan, where he stood up a SOC and ran the Crisis Management program over all Afghanistan. Prior to that, he served in a risk advisor on several tours to Afghanistan, a cultural expertise advisor in the Pentagon and National Defense University, and Business Continuity Instructor at the Military Intelligence schoolhouse.

Protecting Soldiers while ensuring mission success and Army values has many similarities across many of the business sectors (People, Operations, and Reputation). Today's session will detail the standing up of the SOC in Afghanistan and the role CM plays in a SOC and in Incident Management. In addition to this, Michael will cover lessons learned from one of the most crisis prone countries in the world and the importance of some of the key components of CM: Identification, Escalation, and Communication. This will also cover the relationship between BCP and CM and the differences in training each. He will then end the session with some key transitions from this military experience back to his role within Micron Technology.

*Michael Quam is working BCM at both Micron Technology and the US Army Reserves. Leading BCM, CM, and DR for more than 14 years. In Afghanistan, leading CM for the Afghanistan Security Operations Cell, with over 100 crisis incidents in a 1 year period.*

## BREAKOUT TRACK 7 – SESSION 4

### The Importance of Managing Data Related to your BCM Program

The session will focus on the management of data related to your BCM Program.

What data do you need? Why it is important to define a single source of truth for different types of program data. How to capture the data. How to keep the data current. Using an example of Supplier related data – providing and example of how powerful the data can be in your management of business continuity risk.

*Kelley Okolita is recognized as an industry expert with more than 25 years experience and sought after as a speaker. Presented at conferences from US to Australia and Singapore. Published a book in 2010 on building an enterprise wide business continuity program.*

*Kelley Okolita*

*Cambia Health Solutions*

## BREAKOUT TRACK 7 – SESSION 5

### COVID-19 and Next Normal for Business Continuity

In this presentation, I will share an overview of Liberty Mutual's approach to responding to COVID-19, then talk about the global impact of the pandemic, the new normal and share my thoughts about the future of business continuity.

*Ashley Goosman is a Business Continuity and Crisis Management manager who works for Liberty Mutual Insurance, helping employees Enterprise-wide respond to and prepare for business interruptions.*

*Ashley Goosman*

*Liberty Mutual Insurance*

## BREAKOUT TRACK 7 – SESSION 6

### Become a "Top Talent" Using These Five Traits

Degrees and certifications, although beneficial and marketable, will not necessarily predict your professional trajectory. Data shows that if you want to get hired, stay hired and grow your career you need to embrace five very important traits, build a powerful personal brand and be adaptable to change. Becoming a top talent requires more than using your expertise to meet the needs of your organization. It necessitates using your talents, creativity and expertise to think outside of the box and advance the success of your team, program and company.

*Cheyene Marling, Hon. MBCI is a global leader with over 22 years dedicated expertise specializing in the business continuity profession. She founded BC Management, Inc. in 2000, and in July 2019, BC Management became a part of Avalution Consulting LLC, which is now a Castellan Solutions company. Cheyene is responsible for overseeing staffing strategies and data research analytics for our clients globally in addition to providing career assessment and coaching expertise.*

*Cheyene Marling*

*BC Management - A Castellan Solutions Company*

## 12:45p – 1:45p EST

## SPONSOR SPEED NETWORKING

Connect with our sponsors with our Sponsor Speed Networking sessions. In each 5 minute session, you will join a sponsor and up to 5 people in a breakout room. Each attendee will have the opportunity to ask one question (5 questions total). After 5 minutes, you will switch rooms, joining a new sponsor for 5 minutes. At the end of the Sponsor Speed Networking sessions, you will have met with 12 different sponsors.

## 1:45p – 2:00p EST

## 15 MINUTE DEMONSTRATION
**(SILVER SPONSOR - 2 sessions)**

**Everbridge -** Greg Mummah

**Acronis -** Raymond Sue and Stephen Nichols

## 2:00p – 3:00p EST

## PANEL DISCUSSIONS (join 1 of 4 sessions)

### 1 - New Business Models/Planning Tools

*James Green*
*DRJ EAB Member*

*Thomas Boehling*
*Amazon*

*Aaron Callaway*
*ServiceNow*

*Alice Kaltenmark*
*BCI USA Chapter*

Join us for an interactive session exploring new business models and planning tools from a panel of experts. Whether you plan on following specific guidelines, rules, or regulations, staying on top of the latest trends is a must. Learn new insights from these experienced industry leaders.

James Green has worked on risk events that have occurred all over the globe. In 2020 he was named the BCI's Consultant of the Americas, becoming the first person to be honored with this award twice.

Thomas Boehling, Senior Business Resilience Manager, has spent the last 20+ years driving innovation in the business continuity and technology disaster recovery disciplines. A passionate advocate for "resilience by design," his experience spans the military, finance, insurance, healthcare, manufacturing, publishing and technology services. Thomas is currently at Amazon, managing the resiliency program for global human resource operations.

Aaron Callaway, Director Global Risk Transformation, is a 20+ year industry expert focused on business continuity and IT disaster recovery. Prior to ServiceNow Aaron was the founder of FairchildRS. FairchildRS was acquired by ServiceNow in 2019 and the Fairchild product was the blue print for the ServiceNow BCM product.

Alice Kaltenmark joined the BCI USA Chapter board as a voluntary board member in 2015 and is currently the chapter president. Alice's professional experience spans over 20 years in business continuity and disaster recovery in the information solutions industry and over 40 years in IT.

### 2 - Get the Word Out Effectively

*Dan Perrin*
*Workplace Recovery*

*Peter Steinfeld*
*AlertMedia*

*Pat Scheckel*
*Singlewire Software*

*Courtney Eiceman*
*Infinite Blue*

When disaster strikes, the last thing you want to worry about is trying to track down all of your employees to make sure they're safe and know what's going on. Learn how to notify co-workers, reassure the public, and put your crisis communications plan in action. Customers and other stakeholders will appreciate a stable, balanced response when your organization faces the challenge of an unexpected crisis.

Dan Perrin runs the Workplace Recovery Group within Regus. Dan has been with Regus since 2005 and has worked in the Workplace Recovery division since 2012. Dan and his team manage and assist several thousand clients globally by using the Regus platform of over 3000 locations to design, implement, test and run their people recovery.

Peter Steinfeld is passionate about helping organizations protect their most valuable assets: their people. He has been involved in the emergency communications industry for nearly 20 years—advising organizations on matters related to employee safety.

Pat Scheckel is the Executive Vice President of Product Management and Marketing at Singlewire Software. Pat has been with Singlewire since 2010 and is responsible for the product roadmap and marketing of the InformaCast emergency mass notification system.

With over 15 years of experience in marketing and communications, Courtney Eiceman's main focus is bringing the Infinite Blue brand to life. Her main responsibilities include strategizing and executing marketing campaigns, and leading customer-focused events and initiatives.

### 3 - When Civil Unrest Comes Knocking

*Joan Landry*
*Abbott Laboratories*

*Garry MacArthur*
*N7 Security Group*

Many businesses face increased risk when protests near facilities turn into a large-scale, public disturbance. Civil unrest can threaten employees, disrupt operations, and damage property. Prioritize the safety of your employees and the resilience of your organization by exercising your crisis management plan, emergency notification services, and emergency response plan. Proactively work with co-workers, building security, and even local law enforcement to ensure your plans, resources, and relationships are ready for an unpredictable, unnerving event. A bit of preparation can make all the difference.

*Joan Landry, AFBCI, MBCP, is the Business Continuity Principle Consultant for Abbott, a global healthcare company. Joan has spent more than a decade working to ensure resiliency in the face of disruption across Abbott's diverse businesses.*

*Garry P. MacArthur CPP, PSP is the Principal of N7 Security Group, LLC a firm specializing in physical security consultations and executive protection.*

*Anne-Marie McLaughlin*
*New York University*

*Jason McCall*
*Colorado State Trooper*

*Anne-Marie McLaughlin CBCP is Director of Emergency Management and Continuity at New York University. Prior to this role, she led emergency management and continuity for the University of Massachusetts Boston.*

*Serving Colorado since 2008, Task Force Officer, Trooper Jason McCall P.S.P, A.B.C.P leads the State Infrastructure Protection Team. As the State's physical security expert, he supports communities by working with private and public partners to protect people, structures, assets, and processes.*

### 4 - Exercising/Testing Your Plans

*Dr. Steve B. Goldman*
*MIT*

*Sherri Flynn*
*Agility Recovery*

Successful business continuity and disaster recovery requires realistic exercising to validate your plans. Creating real-world drills should challenge and develop your staff, highlight areas of need, and provide tangible data you can share to gain executive support.

*Dr. Steven B. Goldman is an internationally recognized expert and consultant in Business Continuity, Crisis Management, Disaster Recovery, and Crisis Communications. He has 30+ years experience across many aspects of business continuity.*

*Consultant of the Year 2020, Sherri Flynn has 25+ yrs training & collaborating with all levels of employees. Sherri provides consulting services on all aspects of Business Continuity Planning and is a certified Master Business Continuity Planner (MBCP), Information Security Manager (CISM) & ISO 22301 Lead Implementer.*

*Charlie Maclean-Bristol*
*PlanB Consulting*

*Tom Muehleisen*
*NUARI*

*Charlie Maclean-Bristol is a multi award winning business continuity and crisis management author and consultant. He is the owner and founder of two UK based business Continuity companies, PlanB Consulting a business continuity consultancy and Business Continuity Training and training provider.*

*Tom Muehleisen, CISSP, MIPM and Retired Army Lieutenant Colonel, is a proven leader in cybersecurity. He is currently the Director of Cyber Operations for NUARI, where he designs and facilitates cyber exercises on the DECIDE® platform. He has a rich emergency management background as a National Guardsman, ranging from fighting fires to writing Washington State's cyber response plan.*

*James Slaby*
*Acronis*

*James Slaby is the Director of Cyber Protection at Acronis. He has also worked as an industry analyst covering cybersecurity, cloud services and networking at research firms like Forrester and the Yankee Group. With over 300 published tech research reports, he has been quoted in The Economist, the Wall Street Journal and hundreds of tech publications. Slaby has also held product and solutions marketing roles at tech vendors including Sonus, Acme Packet, Bay Networks and Motorola.*

## 3:00p – 4:00p EST

## GENERAL SESSION 8

### Leading for Resilience: New Challenges and Opportunities

*Eric McNulty*
*Harvard University*

In these unprecedented times, business continuity teams are being tested as never before. Leaders face multiple simultaneous threat scenarios, requiring that they keep themselves and their teams stronger, longer. Their effectiveness is dependent upon the ability to create a culture of resilience as much as on any specific skill set. In this interactive session, the presenters will draw from decades of experience and share pragmatic approaches to building organizational capacity and capability to successfully navigate turbulence: accurate anticipation, nimble pivots, and trust-based relationships.

Participants with a better understanding of how to lead and manage multi-dimensional incidents, leverage time and pacing to optimize preparedness and response, and engage disparate stakeholders in unified action.

*Eric McNulty writes and speaks on leading through crisis and change. He speaks to audiences globally about leading in fast moving, unpredictable circumstances. Eric is co-author of the book, You're It: Crisis, Change, and How to Lead When it Matters Most.*

*Dr. Steve B. Goldman*
*MIT*

*Dr. Steven B. Goldman is an internationally recognized expert and consultant in Business Continuity, Crisis Management, Disaster Recovery, and Crisis Communications. He has 30+ years experience across many aspects of business continuity.*

## 4:00p – 4:15p EST

## NETWORK BREAK
**Grab a cup of coffee and join one of our Discussion Forums**

## 4:15p – 5:00p EST

## TOWN HALL / CLOSING SESSION



*Vanessa Vaughn Mathews*

*Asfalis Advisors*



*Tracey Rice*

*Fusion Risk Management*



*Ramon Pinero*

*BlackBerry*



*Ann Pickren*

*OnSolve*



*Cheyene Marling*

*BC Management - A Castellan Solutions Company*

### Maintaining Focus in Such Trying Times

Several media outlets chose "resilience" as the word of the year in 2020. Join an enlightening Town Hall session with some of the resilience industry's leading experts openly discussing how organizations, businesses, and individuals can maintain focus in such trying times. Our panelists discuss the future recovery and the challenges many business continuity professionals will face down the road.

*Vanessa Vaughn Mathews is the founder and chief resilience officer of Asfalis Advisors.*

*With more than twenty years of experience in business continuity, Tracey Rice is an accomplished industry leader and a passionate evangelist, who builds relationships with BCM leaders in enterprise organizations across the globe.*

*Ann Pickren currently serves as the Chief Customer Journey Officer of OnSolve. As the Chief Customer Journey Officer, Ann will oversee the implementation of our OnSolve Communication Platform across over 27,000+ OnSolve customers. Ann will leverage her customer relationships as well as her deep domain expertise and years of experience in the notification industry to help OnSolve customers leverage the full power of the OnSolve platform to solve their communication needs.*

*Ramon Pinero is responsible for the implementation and deployment of AtHoc solutions across all sectors and customer support. In this capacity, Ramon interfaces closely with AtHoc product groups, the CTO and engineering, yielding a field-ready product line, compatible with evolving customer environments and ensuring an outstanding customer deployment experience. In prior positions, Ramon was a web application developer, manager of all presales, implementations, customer support and training for AtHoc. Ramon attended San Francisco State University.*

*Cheyene Marling, Hon. MBCI is a global leader with over 22 years dedicated expertise specializing in the business continuity profession. She founded BC Management, Inc. in 2000, and in July 2019, BC Management became a part of Avalution Consulting LLC, which is now a Castellan Solutions company. Cheyene is responsible for overseeing staffing strategies and data research analytics for our clients globally in addition to providing career assessment and coaching expertise.*

# VIRTUAL AGENDA

## ADDITIONAL COURSE OPTIONS

**THESE COURSES REQUIRE AN ADDITIONAL FEE.**

## COURSE 1

### Business Impact Analysis (BIA)

*Saturday, March 27, 1:00 p.m. – 5:30 p.m. EST*
*$1,200 per person*
*Presenter: Ted Brown*
*When: Instructor will contact you to set timing*

Covid-19 has proven that we can consult, train, and educate remotely. We are proud of our partnership with DRJ and the successful virtual execution of this class last Fall. On March 27, 2021, students will attend the initial instruction via ZOOM, followed by one-on-one training including survey review, on subsequent days. 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 or call 484-919-2966.**
**To register for this course, please email DRJ at conf.reg@drj.com.**

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

## COURSE 2

### Learn To Create a Tabletop Exercise

*Friday, April 2, 9:00 a.m. – 12:00 p.m. EST*
*$600 per person*
*Presenter: Ted Brown*
*When: Instructor will contact you to set timing*

Covid-19 has proven that we can consult, train, and educate remotely. We are proud of our partnership with DRJ and the successful virtual execution of this class last Fall. On April 2, 2021, students will attend  instruction via ZOOM. 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 or call 484-919-2966.**
**To register for this course, please email DRJ at conf.reg@drj.com.**

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