

Register and
Pay by January
20th, 2006 &
SAVE \$300

The 4th Annual IT Financial Management Week **April 3-6, 2006** Wyndham Miami Beach Resort, Miami Beach, FL

Enjoy unrestricted access to **4** conferences!

- 1** Measuring and Benchmarking IT Functions and Processes
- 2** Chargeback, Cost Allocation and Shared Services for IT
- 3** IT Governance and Portfolio Management
- 4** IT Asset Management

The premier event dedicated to the strategic and financial management of IT, developed for and delivered by industry practitioners with **16 Workshops, 40 Sessions and 10 Hours of Networking Opportunities.**

CIO Speakers Include:



Russ Finney
CIO
Tokyo
Electron



Don Martin
CIO
Armstrong
World
Industries



Ruth Harenchar
CIO
Hobart West
Group



Robert A.
Schwartz
CIO
Panasonic
USA



Joe Morgan
CTO
Standard
Register

NEW!

**ITFPE program
now available to all
attendees!**

The IT Financial Professional Education program is set up to enhance your learning and networking experience. Learn how you methodically implement strategies discussed at the conference. See page 7 for more details.

**Speaker Faculty
includes CIOs and
IT Directors from
organizations such as:**

- Air Products and Chemicals *Fortune 500* **NEW**
- America Online, Inc. **NEW**
- American Airlines *Fortune 500*
- Amerisure Mutual Insurance **NEW**
- Armstrong World Industries
- BNSF Railway *Fortune 500*
- Burlington Resources *Fortune 500* **NEW**
- Caterpillar Inc. *Fortune 100*
- CIGNA *Fortune 500* **NEW**
- ChevronTexaco *Fortune 100*
- Chicago Mercantile Exchange
- Henkel of America, Inc. **NEW**
- Hines **NEW**
- Hobart West Group **NEW**
- Johnson & Johnson *Fortune 100*
- Lehman Brothers *Fortune 100*
- LG & E Energy, LLC
- Merrill Lynch *Fortune 100*
- Mutual of Omaha *Fortune 500*
- Nothwestern Mutual *Fortune 500*
- Novartis Pharma AG **NEW**
- Panasonic USA **NEW**
- Partners HealthCare System, Inc **NEW**
- Pilkington North America **NEW**
- Royal Dutch Shell *Global Fortune 100*
- Smurfit-Stone *Fortune 500*
- Sprint *Fortune 100*
- Standard Register **NEW**
- Tokyo Electron
- Toyota Motor Sales, USA **NEW**
- Viking Range Corporation **NEW**
- Villanova University **NEW**

Co-Sponsors:



**CPE and PDU Credits
Available** See Page 7

CIO presentations include:



Don Martin
CIO, Armstrong
World Industries



Robert A. Schwartz
CIO, Panasonic USA



Bill McCreary
CIO, Pilkington North
America



Ruth Harenchar
CIO, Hobart West
Group



Joe Morgan
Vice President and
CTO, Standard
Register

Stephen Fugale
CIO, Villanova
University



Hear from the winners of the
**IT Financial
Management
Excellence Awards**

Revealing the winning strategies that helped make their IT organizations world class.



5 World Class Keynotes

- Don Martin, CIO, Armstrong World Industries
- Joe Morgan, VP & CTO, Standard Register
- Russ Finney, CIO, Tokyo Electron
- Robert A. Schwartz, CIO, Panasonic USA
- Charles E. Anderson, Director IT Planning, Air Products and Chemicals, Inc.



Strategic Thought Leadership

Must-know leadership priorities for 2006 discussed by CIOs setting the agenda for their world class IT organizations. You'll understand how other leaders prioritize strategic business goals and drive the adoption of IT best business practices.

Introduction to IT Financial Management Week



Networking

After receiving more structured lessons in how to advance your IT business ideas, share your thoughts with 400 fellow CIOs and IT finance practitioners during networking breaks and activities.

I find it to be very relevant, very poignant to what is going on in the industry and the evolution of IT. ... I think that the time spent at this conference is a very good investment.

Andres Carvallo, CIO
Austin Energy

**3rd Annual
IT Financial
Management
Awards Dinner
& Ceremony**

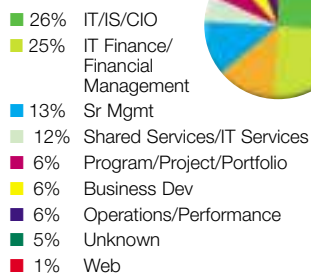
Tuesday, April 4, 2006
7.00pm - 10.00pm



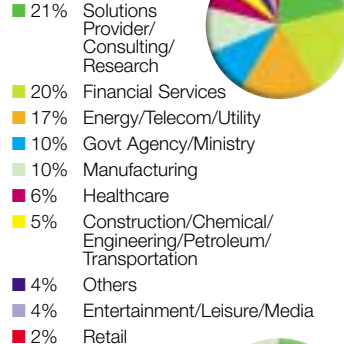
Enjoy the 5 piece live band, open bar, waitered wine service, 4 course, 5 star meal and champagne toast the winners of the 2006 Excellence Awards.

Here is a breakdown of **who attended** last year's IT Financial Management Week, and **who you can expect to meet** this year

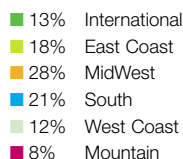
Job Function



Industry



Geographic Breakdown



Seniority



**1 week in sunny
Miami Beach!**

Sun, Sand, Salsa
Soak up the atmosphere that is uniquely Miami!



10 hours

of structured networking including:

- Networking breakfasts
- Morning & afternoon breaks
- Luncheons
- Cocktail Reception
- Awards Dinner and Ceremony
- Informal dine around

20+ Solution Providers In One Place at One Time

Your chance to meet the following vendors and gather their best practice advice and information about solutions that may be right for your organization.

CA, Open IT, Artemis, Pacific Edge, Business Engine, Corporate Renaissance Group, interProm USA, Intellilink, Equaterra, MKS...



"We're a proud sponsor and glad to be here. The show's been terrific and personally I've never seen as much interaction ... This show's been a great pulse in our buyer contact AND we've met a few folks that have given us a better sense of what kind of solutions are being demanded in the market"

Jeff Badshaw, Pacific Edge.

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Vendor Showcase

Vendor selection made easy. Benchmark best-in-breed technologies developed to support your evolving needs, and consultants who can provide guidance along the way.

To ensure you have a truly exceptional learning experience IQPC and IT Management IQ has created the perfect balance between the four critical areas that must be represented for every successful event.



Lessons in Implementation and Application

You know why, but do you know how? After hearing about strategic initiatives, you'll get first hand advice and lessons learned from fellow IT practitioners who have made these concepts work for them.

16 workshops

hands-on focusing on implementation and application of strategic ideas discussed at the 40 sessions of the main conference. The week is jammed packed with key takeaways that you adopt back in your organization



IT Finance Professional Education

Experts to Walk You Through Implementation, Every Step of the Way.

Once you've attended IT Finance Management your notebook will be filled with ideas and concepts you'll want to execute when you get back to the office. But once you get back, what comes next? And once you get these ideas off the ground, what if you run into a roadblock?

If only you had a way to get the answers and advice you need. Now you do!

IQPC and the IT Management IQ have created the IT Finance Professional Education program. An online forum that will enable conference attendees to walk step-by-step through the implementation of those ideas with expert advisory boards and your peers who share the same challenges.

For full program details see page 7 or visit the conference website www.itfmweek.com

CPE and PDU Credits Available.



Recognized by leading professional organizations, you can claim up to 40 hours of PDU certification points and/or CPE credits.



Transcription on CD-ROM now available!

Every session word for word! IT Management IQ and IQPC will be recording all conference sessions from the main two day conference (except panel sessions) and transcribing these for you to create the indispensable IT Management information reference tool that can be shared with your whole team. All attendees taking conference plus 3 workshops or more receive this for FREE. Available to all other attendees for \$499. (only available to conference attendees)

IT Financial Management Week 2006 • Conference at a Glance

Day 1 Monday, April 3, 2006 • Workshop Day

8:00 AM – 12:00 PM

choose **A** or **B**

A Best Practice Pricing, Costing and Chargeback Strategies and Tools for IT
Corporate Renaissance Group

B Maturing the Portfolio Management Capability in Your Organization
Project Corps

12:15 PM – 3:15 PM

choose **C** or **D**

C Managing your Business in Real-Time with Development Metrics and Dashboards
MKS Inc.

D IT Portfolio Risk Management: A Methodology for Calculating the Risk of your IT Portfolio
Intellilink Solutions, Inc.,

3:30 PM – 6:30 PM

choose **E** or **F**

E Designing and Developing Meaningful Metrics for your IT Function
OpenIT, Inc.

F A Step-by-Step Guide to Implementing and Maturing your IT Governance Framework
BYU's Office of Information Technology
Pacific Edge Software

6:45 PM - 8:45 PM

choose **G** or **H**

G Shared Services for IT: Building the Strategy and Plan to Run your IT Function and Processes as a Business
The Hobart West Group

H Demonstrating, Documenting & Capturing the Value of Information Technology
Artemis International Solutions Corporation.

Day 2 Tuesday, April 4, 2006 • Main Conference

7:00AM Registration and Networking Breakfast

8:00AM Chairpersons Opening Remarks

8:15 AM Keynote: Aligning Corporate Strategy with IT CIO, Armstrong World Industries

9:05 AM Running the Global IT Business: Overcoming Cultural and Organizational Barriers CIO, Tokyo Electron

10:00 AM Networking Break and Vendor Showcase

10:45 AM Fostering Innovation in Technology for Competitive Advantage CTO, Standard Register

11:30 AM Featured CIO Panel: Perspectives from IT Leadership

Panelists: CIO, Armstrong World Industries • CIO, Panasonic USA • CIO, Pilkington North America
CIO, Hobart West Group • CIO, Villanova University • CTO, Standard Register

12:30 PM Networking Lunch with break out sessions to follow

choose track
A, **B**, **C** or **D**

| | Track A | Track B | Track C | Track D |
|---------|---|---|---|--|
| | Measuring and Benchmarking your IT Function and Processes | Chargeback, Cost Allocation and Shared Services for IT | IT Governance and Portfolio Management | IT Asset Management |
| 2:00 PM | How to become a Strategy Driven World Class Organization through BSC and IT Governance BNSF Railway | The Production Pipeline – Transforming Data to Information and the Cost Allocation Model to Support it Boy Scouts of America | Maturing Your IT Governance Processes Pacific Edge Software And (Retail client to be announced) | Reducing IT Costs with Asset Management Johnson & Johnson |
| 2:50 PM | IT Dashboards: Mechanisms to Transform and Deploy Data Amerisure Mutual Insurance | Reviewing Alternatives to Cost Allocation Strategies Mutual of Omaha | Process, Alignment, Performance: A Best Practice Guide to Governance and Project Portfolio Balance Lehman Brothers and Business Engine | Vendor and Contract Management for Asset Management Sprint |
| 3:35 PM | Networking Break and Vendor Showcase | | | |
| 4:05 PM | Panel Discussion: Creating IT Transparency • BNSF Railway • Zebra Technologies • Merrill Lynch | Service Based Budgeting, Costing and Reporting for IT LG & Energy, LLC | Aligning IT with Corporate Strategy ChevronTexaco | Configuration Management for Asset Management Smurfit Stone |
| 4:55 PM | Assessing IT Risk Merrill Lynch | Implementing a Chargeback- Total Cost of Ownership Model America Online, Inc. | Panel Session: Specific Tools and Strategies for Making IT a True Partner to the Business Zebra Technologies, Novartis Pharma AG, Henkel of America, Inc. | Panel Discussion: Obtaining Executive Buy In for Asset Management Systems and Programs • Toyota Motor Sales, USA • Johnson & Johnson • Sprint |

5:45 PM **Cocktail Reception** Join your colleagues and fellow attendees in a relaxed and informal setting to discuss the days events.





7:00 PM – 10:00 PM

3rd Annual IT Financial Management Excellence Awards
















IT Financial Management Week 2006 • Conference at a Glance

Day 3 Wednesday, April 5, 2006 • Main Conference

- 7:00AM Registration and Networking Breakfast
- 8:00AM Chairpersons Opening Remarks
- 8:15 AM Keynote: Transforming from IT Service Delivery to Value-Driven Delivery CIO, Panasonic USA 
- 9:05 AM Funding High-Value Business Solutions by Continuously Improving IT Delivery Air Products and Chemicals, Inc. 
- 10:00 AM Networking Break and Vendor Showcase
- 10:45 AM The Road to IT Financial Management Excellence
Winners of the 2006 Awards discuss how they achieved IT Financial Management Excellence.  
- 11:30 AM Editorial Panel: Off and On the Record – IT Issues of the Day
Tom Hoffman, Editor-at-Large, Computerworld • Anne McCrory, Editor-in-Chief, CIO Decision
- 12:30 AM Networking Lunch

choose track
A, B, C or D

| | Track A Measuring and Benchmarking your IT Function and Processes | Track B Chargeback, Cost Allocation and Shared Services for IT | Track C IT Governance and Portfolio Management | Track D IT Asset Management |
|---------|---|--|---|--|
| 2:00 PM | Creating an IT Benchmarking Framework Royal Dutch Shell  | Using Service Level Agreements as a Performance Management Tool Hines  | Making the Case and Gaining Approval for IT Infrastructure Projects Partners Healthcare System, Inc.  | Improving Technology Investment Planning with IT Software Metering Burlington Resources  |
| 2:50 PM | Defining, Implementing, and Measuring IT Processes Based upon ITIL Best Practices Pershing LLC, a Division of The Bank of New York  | Running IT Like a Business through a Shared Services Model Caterpillar Inc.  | Establishing a Project Prioritization Methodology Seagate Technologies  | Establishing and Optimizing the Asset Portfolio American Airlines  |
| 3:35 PM | Networking Break, Expert Clinics and Vendor Showcase Clinics—outsourcing, benchmarking, implementation | | | |
| 4:05 PM | Utilizing an Integrated Measurement Approach to Achieve Quality, Agility and Cost Effectiveness Northwestern Mutual  | Panel Discussion: Strategies for Ensuring and Instilling User Accountability and Efficient Consumption of IT Resources Hines • Caterpillar | Delivering Greater Value Through Stronger and Sustainable IT Governance. Computer Associates  | Implementing an Asset Management Framework. Viking Range Corporation  |
| 4:55 PM | Panel Discussion: Creating a Metrics and Process-Driven Culture • Northwestern Mutual • Pershing LLC, a Division of The Bank of New York • CIGNA | Measuring IT Customer Satisfaction Royal Dutch Shell  | Best IT Project Portfolio Management Structure Chicago Mercantile Exchange and Artemis International Solutions Corporation  | Panel Discussion: The People Side of Asset Management: • American Airlines • Viking Range Corporation • Burlington Resources |
| 5:40 PM | Close of Conference | | | |
| 7:00 PM | | | | |



Organized Dine Around

Join your peers for a fun night out in Miami. Attendees will choose from a pre-determined list of Miami's great restaurants.

Day 4 Thursday, April 6, 2006 • Workshop Day

| | | |
|-------------------------------------|--|---|
| 8:00 AM – 11AM choose I or J | I Managing, Measuring and Benchmarking your Outsourced Providers EquaTerra  | J Designing Service Level Agreements for Efficient Business Unit Consumption ScottMadden, Inc.  |
| 11:15 AM – 2:15 PM choose K or L | K Performance Management and Process Improvement for IT BAE SYSTEMS Analytical Solutions Division  | L A-Step-by-Step Guide to Implementing a World Class IT Asset Management Structure Cicala & Associates, LLC  |
| 2:15 PM – 5:15 PM choose M or N | M Managing Enterprise-Level Decisions, Risks, and the Valuation Process Zero Delta Center  | N Achieving IT Cost Savings Utilizing ITIL Tools and Strategies InterProm USA Corporation   |
| 5:30 PM – 8:30 PM choose O or P | O Building a Balanced Scorecard for a Results-Driven Organization University of Miami's Information Technology Executive Institute  | P Aligning IT Strategy, Project Execution, and Performance Management into a CIO Management Framework Cutter Consortium.  |



Strategic Thought Leadership



Implementation and Application



Networking



Vendor Showcase



IT Financial Management Excellence Awards Dinner and Ceremony

Tuesday, April 4, 2006

The IT Financial Management Excellence Awards have been established to honor, recognize and promote individuals and organizations that demonstrate IT management true best practices. To identify and assess these leading organizations, IT Management IQ has assembled a prestigious list of IT management experts to accurately and objectively evaluate the true effectiveness of top companies, people and processes.

Applications will be taken in each of the following categories:

1. Best IT Chargeback & Pricing Structure
2. Best IT Metrics & Performance Measurement Structure
3. Best IT Governance Structure
4. Best IT Project Portfolio Management Structure
5. Best IT Asset Management Structure
6. IT Financial Management Leader of the Year

Submission Deadline: January 31, 2006

Go to: <http://www.itfmweek.com/itfmawardsna>

Awards Dinner & Ceremony

7.00pm

Guests will be invited to take their seats

7.05pm

Five Piece Live Band plays as Guests take their seats

- Open Bar and waitered wine service
- Four Course, 5 Star dinner with choice of wine

8.30pm

Ceremony begins

Master of Ceremonies announces the 2006 winners and details some of their achievements.

9.30pm

Champagne Toast for all the 2006 Winners

- Open Bar
- Coffee Served
- Winners Photo session

10:00pm

Conclusion of the Awards Dinner and Ceremony

"I want to thank IQPC for the award. This conference is for all of us to continue to learn that IT Financial Management is a long term journey as we further advance our skills in this area. It is a relatively new financial profession so these types of conferences are great to help learn and share ideas."

Michael Bender, IT Controller, Cisco Systems

Winners of 2005 IT Financial Management Week:



Best IT Metrics & Performance Measurement Structure

Winner:
BNSF Railway Co.



Best IT Chargeback & Pricing Structure

Winner:
Nationwide Services Company



Best IT Governance Structure

Winner:
Florida Dept of Health Information Technology



IT Financial Management Leader of the Year

Winner:
Sam Coursen, NCR Corporation Information Technology Services



Best IT Project Portfolio Management Structure

Winner:
Chicago Mercantile Exchange, Technology Division

Judges Panel Includes:

Anne McCrory
Executive Editor
CIO Decision

Jeffrey McIntyre
AVP, Technology Services
BNSF Railway

Bob Tarne
PMI IT & Telecom Special Interest Group

For full list of Judges visit www.itfmweek.com

Experts to walk you through implementation, every step of the way.



Once you've attended IT Financial Management Week, your notebook will be filled with ideas and concepts you'll want to execute when you get back to the office. But once you get back, what comes next? And once you get these ideas off the ground, what if you run into a roadblock?

If only you had a way to get answers and advice without ever having to leave the office. Now you do.

IQPC and IT Management IQ have created the IT Financial Professional Education program. It's an online forum that will enable conference attendees to walk step-by-step through the implementation of those ideas with expert advisory boards.

This online forum will run for four months with the express aim that each discussion group – broken down by subject matter and challenge – will, by the end of the four months, have created a 'Best Practice' Handbook that they and their organizations can refer to time and time again.

Eligibility

To become a professional education participant register for the conference and 3 workshops or more. This ensures that you've drilled down into your specific challenge areas. You can join as many of the following professional education groups as you wish.

Note: All those wishing to participate must reference the 'Professional Education' upon registration.

Dates The professional education discussion groups start the day that you get back from the conference and run until **Friday, August 11, 2006**. Group members will also have an opportunity to meet each other at the general luncheon on **Wednesday April 5, 2006**. Tables will be set up according to discussion group.

Time Commitment The groups are set up to allow all members to ask for assistance when required – there is no mandatory time requirement for involvement! It is important to stress however, that the greater the level of involvement from all members, the more valuable will be the final 'Best Practice' Handbook.

Setup Once the conference has concluded, participants will be asked to provide a one-page summary of their main challenges in addition to the main successes that have been brought about within their organization or through previous roles. The advisory board will provide initial feedback on these summary sheets which will then form the basis of subsequent discussion streams.

Format The discussion streams will continue as you submit your questions and share your experiences with the advisory boards. You'll know when professional education group and advisory board members have made a new contribution via automatic email notifications.

Advisory Boards Advisory Board members have been chosen for their recognized expertise in the specific subject area. They will be serving as an additional resource for you in your efforts to implement and execute IT Financial Management best practices. IQPC will be working closely with the Boards to summarize the discussions in a monthly digest that will help form the basis of the final 'Best Practice Handbook'.

For further information please email guy.clayton@iqpc.com

CPE and PDU Credits Available



PDU Certification
Upon request,

IQPC will provide PMPs with a certificate confirming attendance and number of hours that may be redeemed with PMI for PDUs. Any CCR Activity Reporting Form is to be completed by the PMP.



CPE Credits

IQPC is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on

the acceptance of individual courses for CPE credit. Web site: www.nasba.org There are no prerequisites or advanced preparation needed to attend this group offering conference. For more information regarding CPE credits, administrative policies or complaints, please contact Customer Service on 1-800-882-8684.

Groups & Advisory Boards

① IT Chargeback, Cost Allocation and Shared Services

- Ron Bradley is Executive Director and Principal Consultant with Corporate Renaissance Group
- Roger McCall, Principal, ScottMadden, Inc.
- Nate Langston, Director of Information Systems, Boy Scouts of America
- Richard Gude, I/S Manager, Planning & Budgeting, Mutual of Omaha

② IT Governance and Portfolio Management

- Roger McCall, Principal, ScottMadden, Inc.
- Mary Finlay, Deputy CIO, Partners Healthcare System
- Betsy Wood, Manager, Operating Model Integration, ISTG Ops & Quality, Intel
- Kazim Isfahani, Vice President, Business Engine
- Ed Cullari, Director, Amerisure Project Management Office, Amerisure Mutual Insurance
- Mark Benyofsky, Managing Director, Zero Delta Institute for Enterprise Excellence
- Mitch Stein, Director, CIGNA Technology Institute, CIGNA

③ IT Asset, Vendor and Contract Management

- Pat Cicala, CEO, Cicala & Associates
- Joan Knudsen, Director of Asset Management, American Airlines
- David Farrow, Director, IT Business Operations, Smurfit-Stone
- Mark Moroses, Senior Director, Technical Services & Security Officer, Maimonides Medical Center

④ Measuring and Demonstrating IT Value

- Andrew Muras, Vice President, BAE Systems
- Sharon Getz, Director, Information Systems, Zebra Technologies Corporation
- Jeffrey McIntyre, Assistant Vice President, Technology Services, BNSF Railway
- Mitch Stein, Director, CIGNA Technology Institute, CIGNA

**Day 1****Monday, April 3, 2006 • Workshop Day****Workshop****A 8:00 AM – 12:00 PM****Best Practice Pricing, Costing and Chargeback Strategies and Tools for IT**

Delivered to you through case study examples, peer interaction and hands-on exercises to develop a service cost model design that you can begin to implement when you get back to the office.

- This workshop will cover these best practices of running IT as a business:
- A customer-facing service management framework
 - A market-based "Service Catalog" that your customers can relate to and using service level agreements to establish prices and other performance expectations
 - Managing effect service unit costs through delivery process performance
 - Charging back and billing your customers for the volume of service they consume at the appropriate price (Q x P), or the ability to work with your customers to modify their consumption patterns and unit cost without a formal bill
- Learn how to design, develop and implement a "best-practice" solution for:
- Moving your financial management focus closer to the customer

- Calculating the unit cost of services delivered to customers,
- Designing pricing models to recover 100% of actual cost
- Integrating the results of service costing into you service level agreements, and Producing a monthly consumption-based invoice.

About your workshop leader: Ron Bradley is Executive Director and Principal Consultant with Corporate Renaissance Group. Ron spent 25+ years in various shared service management positions within the utility industry and served as Director of Activity-based Costing and Performance Management for a large utility company prior to launching his consulting career. He has been designing "cost-to-serve" models in the service industry for more than 10 years.

**Workshop**
choose **A** or **B****B 8:00 AM – 12:00 PM****Maturing the Portfolio Management Capability in Your Organization**

This workshop is a deep dive into the three global challenges faced in implementing Enterprise Portfolio Management (EPM).

This workshop provides practical insights into the strategic, developmental and tactical steps that lay the foundation for and are the predictors of successful EPM. Hear how three companies from three different industries and three different cultures each developed portfolio management to enhance their strategic management, new initiative delivery, customer satisfaction, and tactical operations.

About your workshop leader: Shelley Gaddie brings her experience working in global organizations as a research scientist, engineer, and business executive to continually seek out balanced, practical solutions to today's business delivery challenges. As a

Senior Executive responsible for recovering and revitalizing failing projects, programs, regions and companies, her emerging focus on the need for companies to bridge the common experience between strategy, goals, objectives and plans and the delivery of results led her to launch **Project Corps**, an organization that provides support to companies worldwide with every aspect of project management; enterprise, portfolio, program and project level. Shelley directly supports the vision of PMI through regular chapter and Congress speaking engagements, through regional, national, and international advisory roles, and has been selected to stand for a 2006-2008 PMI Board of Directors position.

**Workshop**
choose **C** or **D****C 12:15 PM – 3:15 PM****Managing your Business in Real-Time with Development Metrics and Dashboards**

Are you getting bogged down in the measurement process - developing too many measures (or too few), overly complex implementations, failing to use metrics for improvement initiatives, or failing to link metrics with top-level strategies or actual work processes of the employees?

The key to any measurement program is the ability to view progress in real-time. Thought leaders in the industry are turning to management dashboards as a way to gain clear visibility of project status, processes and metrics across the enterprise. Specific topic areas covered in this workshop will include:

- Collecting data that is linked to the business objectives of your organization
- Engaging all levels of your application development and IT functions to participate
- Setting up a management dashboard and relevant reports
- Using data and metrics proactively for continuous improvement

About your workshop leader: Doug Akers is the **Tactical and Solutions Product Manager at MKS Inc.** and is responsible for the company's Requirements and ITIL offerings among other solutions. Working with MKS for over 10 years, Mr. Akers began his career as a Customer Support Representative and later a Market Research Manager. He transitioned to the role of Product Manager in 1999 where he first was responsible for the company's Unix to Windows interoperability products including the award-winning MKS Toolkit product line.

**Workshop**
choose **C** or **D****D 12:15 PM – 3:15 PM****IT Portfolio Risk Management: A Methodology for Calculating the Risk of your IT Portfolio**

The solution lies in breaking out the risk factors inherent in each project and aggregating these assessments into a risk index for the entire project portfolio.

Leading organizations have made much progress in measuring the return on their IT investments, but risk assessment has remained elusive. This workshop will outline a simple and easy to implement methodology for calculating and analyzing the risk of your IT portfolio. Through an in depth presentation and discussions you'll learn:

- How to calculate portfolio risk
- What factors contribute to portfolio risk
- Why project cost isn't a risk factor
- How to set up a process to capture required data

About your workshop leaders:

As **Chief Executive Officer of IntelliLink Solutions, Inc.**, **Patrick Boylan** guides the strategic direction and general management. Patrick has more than 15 years of hands-on experience in strategy development, business restructuring, and change management, spanning numerous vertical industries and global markets. **Fumiko Kondo, Managing Director at IntelliLink**, directs the overall management and performance of all IntelliLink client engagements. She has more than 10 years of experience managing large scale systems implementation and process redesign projects.





Day 1 Monday, April 3, 2006 • Workshop Day

Workshop

choose **E** or **F****E** 3:30 PM – 6:30 PM

Designing and Developing Meaningful Metrics for your IT Function



Meaningful IT Metrics drive key IT management initiatives. You'll examine case studies and examples describing how companies have benefited by introducing more measurements to their IT functions – for the users of the IT services, the business units, and to the IT groups that are responsible for IT services. You'll learn how to develop metrics that will improve:

- How IT resources are used
- Capacity and performance planning
- Proactive budget planning, more prepared (re)negotiation with vendors
- Pay-per-use agreements with vendors
- Monitoring technology uptake in your organization
- Skill and workflow analysis

- Internal chargeback of IT hardware and software costs to each business unit
- Measures for IT services availability
- Measure ROI of IT investments
- Objective reports that facilitate communications between units

About your workshop leader: Signe Marie Stenseth is Vice President of OpenIT, Inc. She has an MBA from College of Europe, Belgium and The Norwegian School of Economics and Business Administration. She has worked as an advisor for the Norwegian Government and the EU Commission before joining Open IT in 1999.



If you can't measure IT you can't optimize IT! This workshop will discuss and show how to create meaningful IT metrics and how you can get a jump start in implementing it in your organization.

Workshop

choose **E** or **F****F** 3:30 PM – 6:30 PM

A Step-by-Step Guide to Implementing and Maturing your IT Governance Framework



Before embarking on the path to effective IT Governance, you'll find the answer to some basic questions first:

- What are we currently working on?
- Who's working on what?
- What is our mix of projects versus "keep the-lights-on" activity?
- What are the products and services we are currently supporting?

This interactive workshop will help you to:

- Assess the maturity of your IT organization
- Best practices for maturing your IT governance process
- How to design and implement a simple road map with clear benefits realization at each step

Come to this workshop ready to discuss the barriers and overcome the challenges you see in maturing your own IT governance process.

About your workshop leaders:

Ernest J. Nielsen is currently **managing director** of **Enterprise Project Management** for **BYU's Office of Information Technology**. Before that, he developed the Stanford Advanced Project Management Program, which was awarded the Stanford Deans' Award for Innovative Industry Education in 2002. Since 1991, Ernie has worked with international Fortune 100 companies to establish effective processes that support resilient IT governance.

Eric Burke is the **Director of Product Marketing** for **Pacific Edge Software**. His experience in IT governance and portfolio management spans more than fifteen years working directly or as a consultant to Fortune 500 companies. Eric holds an MBA from the University of Washington and Bachelor of Science in Engineering from Harvey Mudd College.



Traditional annual planning and budgeting processes simply cannot keep pace with the rate of change in IT, driving the need for a more agile IT governance process that delivers better informed, more efficient decision making.

Workshop

choose **G** or **H****G** 6:45 PM - 8:45 PM

Shared Services for IT: Building the Strategy and Plan to Run your IT Function and Processes as a Business



Is your company a good candidate for this radical but achievable approach? What does it take to transform from a cost center to a profit center? How do you effectively deliver services to both your internal customers and your external paying clients?

At this workshop, you'll receive tools to evaluate whether your situation is a likely candidate for such a transformation, and key implementation strategies for making such a transformation happen. You'll also receive:

- Examples of IT organizations that have become profit centers
- A review of success and failure factors in the examples
- Criteria to determine which IT organizations and companies are good candidates for becoming a shared services for-profit business

- List of major steps in transforming from a cost center to a profit center
- Framework for determining how to handle internal vs. external customer demands
- Framework for establishing service level management for both internal and external customers

About your workshop leader: Ruth Harenchar serves as the **CIO** at **The Hobart West Group**, a private equity backed document management suite of companies supporting the legal industry. She brings a wealth of expertise as an information technology executive having held IT management and consulting positions at Electronic Data Systems, Ernst & Young, and as CIO at Bowne & Co., Inc.

What if your IT organization really was a business that generated revenue and profit for your company?

Workshop

choose **G** or **H****H** 6:45 PM - 8:45 PM

Demonstrating, Documenting & Capturing the Value of Information Technology



This workshop will enable you to:

- Increase the business value of IT by objectively selecting, prioritizing, sequencing and auditing your IT investments for maximum business value and competitive advantage
- Reduce the time-to-value for IT investments by automating and streamlining cross-functional IT development and operational processes
- Improve efficiency by allowing your organization to rapidly allocate key IT resources across competing development and operational initiatives
- Increase agility by providing scenario-based simulations for rapidly evaluating alternative IT project pipeline options

This workshop will help you understand how to combine the metrics from your IT management processes and support functions with deeper benchmarking and alignment of your IT investments with business plans.

About your workshop leader: Michael Lester is an **IT Solutions specialist** for **Artemis International Solutions Corporation**. Mr. Lester brings over 15 years of experience in the software industry to Artemis. Most recently, he served as senior product manager for Pacific Edge Software, where he was responsible for the company's project portfolio management software. Prior to this, Mr. Lester worked in a variety of technical and support positions at Buildnet, Inc. and Franklin-Covey.



While you know that IT has strategic value, chances are your CEO doesn't, and it's up to you to show him.

**Day 2****Tuesday, April 4, 2006 • Main Conference**7:00AM **Registration and Networking Breakfast**8:00AM **Chairpersons Opening Remarks**8:15 AM **Keynote: Aligning Corporate Strategy with IT**
Don Martin, CIO, Armstrong World Industries9:05 AM **Running the Global IT Business: Overcoming Organizational and Cultural Barriers**
Russ Finney, CIO, Tokyo Electronics10:00 AM **Networking Break and Vendor Showcase**10:45 AM **Fostering Innovation in Technology for Competitive Advantage**
Joe Morgan, Vice President and CTO, Standard Register11:30 AM **Featured CIO Panel****Perspectives from IT Leadership**

- Facing the challenges of running IT as a business
- How to communicate IT's value across the enterprise
- Gaining buy in for large scale high price infrastructure projects
- Putting together a world class IT team
- Defining the evolving role of the CIO

Panelists:

| | | | | | |
|--|--|---|--|---|--|
| Don Martin CIO Armstrong World Industries | Robert A. Schwartz CIO Panasonic USA | Bill McCreary CIO Pilkington North America | Ruth Harenchar CIO Hobart West Group | Stephen Fugale CIO Villanova University | Joe Morgan Vice President and CTO Standard Register |
|--|--|---|--|---|--|

12:30 PM **Networking Lunch with break out sessions to follow**2:00 PM – 2:45 PM choose track **A**, **B**, **C** or **D**

Track A

Measuring and Benchmarking your IT Function and Processes

How to Become a Strategy-Driven World Class Organization through Balanced Scorecard and IT Governance

Hear how the 2005 IT Financial Management Excellence Award Winner for Best Metrics and Performance Measurement Structure created their best-in-class IT organization

Key learning points include:

- Creating a Balanced Scorecard
- Developing the "right" metrics that align with IT and corporate strategy and incent the right behavior
- Setting achievable targets, attainable by an IT organization
- Setting appropriate tolerances for each of those metrics

Dennis Auge, Director of Technology Services
Cherie' Coles, Manager of Technology Services
Financial Management and Planning
BNSF Railway

2005
Award
Winner

Track B:

Chargeback, Cost Allocation and Shared Services for IT

The Production Pipeline: Transforming Data to Information and the Cost Allocation Model to Support it

Learn how to "keep the lights on" while charging appropriately for value added technology improvements, and:

- Mining and refining data into a valuable information resource
- The concept of the information production pipeline
- The importance of keeping the pipeline running efficiently
- How the pipeline encourages businesses to look for cost savings and value added improvements
- The business process used at the Boy Scouts of America to ensure costs are allocated appropriately

Nathan (Nate) Langston,
Director, Information Systems
Division
Boy Scouts of America

Track C:

IT Governance and Portfolio Management

Maturing Your IT Governance Processes

During this one hour case study several lessons learned will be shared in implementing and maturing an IT governance solution.

Technology has transformed the way the specialty retail industry operates today. Once known for their conservative IT strategy, growth and hyper-competition has driven retail organizations to reverse their thinking about the role of technology. Hear how this leading retail company has reinvented its IT governance process in the last several years.

Eric Burke, Director of Product Marketing
Pacific Edge Software



Retail client to be announced.
See www.itfmweek.com for updates

Track D:


IT Asset Management

Reducing IT Costs with Asset Management

Learn about a real example of savings of \$1.5MM in savings driven by improved IT asset accuracy, utilizing:



- Asset management lifecycle cost saving opportunities
- Maintenance contracts cost saving opportunities
- Other asset management cost savings opportunities in these areas:
 - Telecom
 - Licensed Software
 - Remote Access
 - Policies

Michael Stevens, Service Delivery Manager
Johnson & Johnson

| Track A | Track B | Track C | Track D |
|--|--|--|--|
| <p>IT Dashboards: Mechanisms to Transform and Deploy Data</p> <p>Amerisure's dashboards provide the ability to drill-down into the displayed data, depending on the users role, revealing the critical detail required for informed decision-making.</p> <p>Using dashboards at Amerisure have realized the following benefits:</p> <ul style="list-style-type: none"> Provides a powerful information view for its management team Provides relevant, easy to understand data for the user Captures and display information about IT business performance Identifies mechanisms to extract, load and transform data <p>Ed Cullari, Director, Amerisure Project Management Office Amerisure Mutual Insurance</p> | <p>Reviewing Alternatives to Cost Allocation Strategies</p> <p>Mutual of Omaha is evaluating IT Simplified Cost Allocation, Cost-Sharing and Service Pricing to decide what process best aligns with corporate goals and accurate accounting methodologies that minimizes impact on the business units and provides better control over their costs through its usage. Hear how the organization is:</p> <ul style="list-style-type: none"> Reviewing the detail of the current Mutual of Omaha Cost Allocation Process Reviewing the factors to consider when developing the Company approach Reviewing alternate approaches to cost allocation strategies Considering models ranging from operating as a cost center to operating as a profit center Evaluating the benefits and drawbacks of each approach based on the needs of your organization <p>Richard E. Gude, Manager, I/S Planning and Budgeting Mutual of Omaha</p> | <p>Process, Alignment, Performance: A Best Practice Guide to Governance and Project Portfolio Balance</p> <p>This session will offer unique insight into the IT governance approach perfected by a \$12 billion global finance leader in Lehman Brothers.</p> <p>The presentation will provide depth of detail around how Lehman created a globally consistent framework for initiating, managing, and delivering effective communication across IT and with the business. In addition, insight into the comprehensive, common set of tools used to improve project and portfolio management, track time and manage financials, will also be discussed.</p> <p>Brian Greenberg, Vice President, IT Lehman Brothers and Kazim Isfahani, VP Marketing Business Engine</p>  | <p>Vendor and Contract Management for Asset Management</p> <p>Sprint has saved millions of dollars in unnecessary software purchases as a result of redeploying unused software licenses accounted for by accurate software asset management processes and systems, in addition to millions of dollars saved through better, more accurate contracts.</p> <p>This presentation will answer the following questions:</p> <ul style="list-style-type: none"> How to partner with vendors to facilitate asset management? How do you develop and maintain an accurate data repository for successful asset management? How does software asset management facilitate contract negotiations? <p>Kathy Pourmehr, Director, Operations Management Office, IT Enterprise Services Sprint</p> |

3:35 PM **Networking Break, Expert Clinics and Vendor Showcase**

4:05 PM – 4:50 PM choose track **A**, **B**, **C** or **D**

| Track A | Track B | Track C | Track D |
|---|---|--|---|
| <p>Panel Discussion: Creating IT Transparency</p> <p>Helpful tips on developing metrics and processes that create transparency from these varied organizations</p> <ul style="list-style-type: none"> Jeffrey R. McIntyre, Assistant Vice President Technology Services, BNSF Railway Sharon Getz, IS Director Zebra Technologies James Mann, Vice President, Corporate Audit, Merrill Lynch | <p>Service Based Budgeting, Costing and Reporting for IT</p> <p>You'll hear how this 2005 IT Financial Management Excellence Award Honoree created and implemented a products and services model, a web-based IT service catalog and prepared the IT organization for activity-based cost management.</p> <ul style="list-style-type: none"> Learn how the Products and Services Model can improve discussions with your clients Understand how to generate an internal customer bill for IT services Understand how product/service and activity-based cost management compliment implementation of the Information Technology Infrastructure Library <p>Laura Mattingly, Manager, IT Financial & Service Level Management LG & Energy, LLC</p>  | <p>Aligning IT with Corporate Strategy</p> <p>Building on the award-winning IT Infrastructure Governance structure, Chevron has developed effective IT strategy and governance processes for business specific applications and services.</p> <p>Hear about:</p> <ul style="list-style-type: none"> Identifying the new challenges and raising business expectations of IT Developing an IT strategy directly from business strategies Documenting and maintaining alignment of IT projects to business strategy Standardizing project evaluation criteria to include strategic fit Informing local IT decision processes to include enterprise impact Planning for impacts to IT organization <p>Bob Miller General Manager, Strategy Planning and Organizational Capability CHEVRONTEXACO</p>  | <p>Configuration Management for Asset Management</p> <p>When fully utilized to record all changes to the production environment an organization can have a running history of configuration modifications along with a dynamic hardware inventory of assets.</p> <p>In this presentation, hear how to:</p> <ul style="list-style-type: none"> Control introduction of changes to the production environment Increase success rates Comply with Sarbanes-Oxley with an inventory of assets Metrics that track success rates of installs, an audit trail of changes, and records demonstrating appropriate authorization Centralized database of all changes <p>Dave Farrow Smurfit Stone</p> |

| Track A | Track B | Track C | Track D |
|--|--|--|--|
| <p>Assessing IT Risk</p> <p>At Merrill Lynch, the establishment of a common Control Self Assessment program for risk management allowed for the effective management of the operating risk function for more than 1,200 offices globally.</p> <p>You'll receive answers to these questions:</p> <ul style="list-style-type: none"> • How do you get started with a self assessment program? • What are benefits of using a common risk framework? • What are examples of hierarchies and assessments? • What is the relationship between businesses and IT risk assessments? • How do you drive risk mitigation investment decisions based on specific metrics? <p>James Mann Vice President, Corporate Audit, Enterprise Initiatives Merrill Lynch</p> | <p>Implementing a Chargeback- Total Cost of Ownership Model</p> <p>You'll hear how AOL built this model, providing for flexibility to accommodate change in cost components and rates. Hear how the system is using:</p> <ul style="list-style-type: none"> • Activity Based Costing • Identifying cost components • Tracking cost components • Allocating costs of shared components • Granular and aggregate reporting • Flexibility to add new cost components • Frequency of reports <p>Bala Kini, Lead Financial and Planning Analyst, Architecture and Planning Team America Online, Inc.</p> | <p>Panel Discussion: Specific Tools and Strategies for Making IT a True Partner to the Business</p> <p>Hear how these organizations have changed commonly held perceptions about the IT function with specific tools and strategies.</p> <ul style="list-style-type: none"> • Sharon Getz, Director, IS, Zebra Technologies • Dr. Karl-Friedrich Franz, Head of Resource Management, Global IT Infrastructure and Service Management, Novartis Pharma AG • David Saunders, Director, NA Regional IT Governance, Henkel of America, Inc. | <p>Panel Discussion: Obtaining Executive Buy In for Asset Management Systems and Programs</p> <p>Resistance to creating asset management systems is the first barrier to implementation. Here how these organizations communicated potential value and got the ball rolling.</p> <ul style="list-style-type: none"> • Samuel Barton, Senior Contract Manager, Information Systems, Toyota Motor Sales, USA • Mike Stevens, Johnson & Johnson • Kathy Pourmehr, Director, Operations Management Office, IT Enterprise Services, Sprint |

5.45pm - 7:00pm **Cocktail Reception**
Join your colleagues and fellow attendees in a relaxed and informal setting to discuss the day's events.

7.00pm - 10.00pm
3rd Annual IT Financial Management Excellence Awards



IT FINANCIAL MANAGEMENT
Excellence Awards

Day 3 Wednesday, April 5, 2006 • Main Conference

7:00AM **Registration and Networking Breakfast**

8:00AM **Chairpersons Opening Remarks**

8:15 AM
Keynote: Transforming from IT Service Delivery to Value-Driven Delivery
Robert A. Schwartz, CIO
Panasonic USA






9:05 AM
Funding High-Value Business Solutions by Continuously Improving IT Delivery
Charles E. Anderson, Director, IT Planning
Air Products and Chemicals, Inc.




10:00 AM
Networking Break and Vendor Showcase




10:45 AM
Award Winners' Panel Discussion
The Road to IT Financial Management Excellence
Winners of the 2006 Awards discuss how they achieved IT Financial Management Excellence.





11:30 AM
Editorial Panel
Off and On the Record—IT Issues of the Day
Tom Hoffman, Editor-at-Large, Computerworld
Anne McCrory, Editor-in-Chief, CIO Decision






12:30 PM
Networking Luncheon. Includes ITFPE Group Introductions



| Track A | Track B | Track C | Track D |
|--|--|---|---|
| <h3>Creating an IT Benchmarking Framework</h3> | <h3>Using Service Level Agreements as a Performance Management Tool</h3> | <h3>Making the Case and Gaining Approval for IT Infrastructure Projects</h3> | <h3>Improving Technology Investment Planning with IT Software Metering</h3> |
| <p>Understand how to exploit past opportunities for improvement and use the benchmark process and outcomes to your advantage.</p> | <p>Sell your staff on the value of internal SLA's. Explain how the baselines established in the SLA will let them know exactly where they stand in terms of their performance.</p> | <p>Keeping this infrastructure – 55,000 nodes on the network, 900+servers, 800 applications – healthy and in good working order requires ongoing investment. Hear how major investments, such as purchasing a new data center and installing an in-house wireless solution for two large hospitals got the go ahead.</p> | <p>After two years of measuring software usage and pro-actively managing software assets, annual IT savings at Burlington Resources is \$5MM.</p> |
| <p>Hear how to:</p> <ul style="list-style-type: none"> • Understand key steps to a successful benchmark • Ensure communications are effectively planned and executed • Ensure stakeholders are along for the ride • Ensure that the benchmark outcome will meet expectations <p>Eric Mealus, IT for Shell Benchmarking Manager Royal Dutch Shell</p> | <p>Hear how to:</p> <ul style="list-style-type: none"> • Consider the cost of providing various levels of service • Factor vendor commitments in your SLA • Pilot the SLA for feedback from users <p>Marc Meeks, Lead Support Analyst, Hines</p> | <ul style="list-style-type: none"> • Laying the groundwork for the big "ask" well before it is time for the investment • The role of benchmarking and stakeholders • How to pitch investments in business terms rather than techno-speak <p>Mary C. Finlay, Deputy Chief Information Officer Partners HealthCare System, Inc</p> | <p>Learn how to:</p> <ul style="list-style-type: none"> • Identify opportunities to optimize the distribution of software between the divisions and discontinue duplicative or extraneous software • Decide the right level of tolerance for software denials • Manage "specialty" software, and how to evolve as new software opportunities become available <p>Dan Shearer, Manager, Technology Enhancement Burlington Resources and Debbie Garcia, Petro - IST Supervisor, Burlington Resources</p>  |

| Track A | Track B | Track C | Track D |
|---|---|--|---|
| <h3>Defining, Implementing, and Measuring IT Processes Based upon ITIL Best Practices</h3> | <h3>Running IT Like a Business through a Shared Services Model</h3> | <h3>Establishing a Project Prioritization Methodology</h3> | <h3>Establishing and Optimizing the Asset Portfolio</h3> |
| <p>Hear about consistent and repeatable incident and problem management process, clear roles and responsibilities, reduced time to resolve incidents/restore services, and improved ability to measure processes.</p> | <p>Over the time period that will be discussed, Caterpillar Inc. sales have doubled while IT costs in absolute dollars have reduced by more than 20 percent.</p> | <p>Learn how to easily implement a project prioritization process that will align resources with mission critical projects and eliminate projects that have lower value to the company.</p> | <p>American Airlines achieved more than \$25MM in annual cost savings by validating and reducing baseline inventory in a worldwide, multi-platform environment for more than 90,000 assets.</p> |
| <p>You'll gain insights and hear these tips:</p> <ul style="list-style-type: none"> • Don't let the tool limit your abilities to implement process best practices • Identify and train advocates early in the process implementation • Ensure that you don't overcommit improvements without accurate baseline metrics • Select those processes that can benefit the most from a formal process framework and improve them first. <p>Joseph Gallagher, Vice President and IT Service Manager Pershing LLC, a Division of The Bank of New York</p> | <p>This presentation will show you:</p> <ul style="list-style-type: none"> • How to provide shared IT services to a company divided into 28 highly autonomous business units • How to address the creative tension between autonomous Business Units and a centralized Shared Service Organization • How the process of negotiating the cost of Shared Services works • Specific examples of using the Shared Services model to drive dramatic cost reduction • How the Shared Services Model has evolved and improved over time • Next steps for further improving the cost of providing Shared Services by changing the model <p>Paul A. Joseph, Director of Global IT Solutions Caterpillar Inc.</p> | <ul style="list-style-type: none"> • Learn how to align IT projects to the company's strategy or customer requests • Ensure IT resources are working on the right projects • Produce a list of the top IT projects • Eliminate lower or non-value add IT projects • Work with customers on prioritizing IT projects <p>Beth Raiola, Senior IT Director Seagate Technology</p> | <p>You'll hear about:</p> <ul style="list-style-type: none"> • Asset definition and prioritization of project scope • Outsourcing asset management services • Collecting data for all asset types • How a refreshed desktop environment aids software asset management and compliance • Reports and analyses used to optimize the asset portfolio <p>Joan Knudsen, Director, IT Asset Management American Airlines</p> |

| Track A | Track B: | Track C: | Track D: |
|--|--|---|--|
| <p>Utilizing an Integrated Measurement Approach to Achieve Quality, Agility and Cost Effectiveness</p> <p>Northwestern Mutual is driving process efficiencies to deliver solutions and services that are faster, better and cheaper.</p> <p>This presentation will cover:</p> <ul style="list-style-type: none"> • Best practices that will help in avoiding the trap of diving too deep with one methodology or model • Key measures to demonstrate IT quality and value realization • Adoption of popular Six Sigma tools for causal analysis, prioritization of requirements and defect prevention <p>Prem Ranganath, IT Project Manager Northwestern Mutual</p> | <p>IT Service Catalog as the key component of the IT Demand and Financial Management at BP</p> <p>BP recently consolidated the service delivery functions of its IT organization into a \$500M+ Global Operations organization.</p> <p>In this presentation hear about:</p> <ul style="list-style-type: none"> • The transformation of its IT service delivery model from asset/project-centric to service-centric • Its IT cost accounting and recovery methodology from allocation-based to consumption-based • Implementation of an IT Service Catalog to supporting tools for service based demand management, budgeting, costing, and reporting <p>Mary Q. Eng Manager, Commercial & Planning Digital and Communications Technology BP</p> | <p>Delivering Greater Value Through Stronger and Sustainable IT Governance</p> <p>The process sounds straightforward on paper, but CIOs are struggling with how to create and sustain a practical IT Governance framework.</p> <p>You'll hear the following:</p> <ul style="list-style-type: none"> • What type of IT Governance framework will be easily and quickly adopted by all stakeholders throughout the enterprise? • Is there a 'right' methodology, and which standards are appropriate? • How can IT focus on delivering optimized services to the business rather than technology components? • What are the best practices around tracking, monitoring, and reporting IT performance? <p>Carl Landers Sr. Director, Product Marketing Computer Associates</p>  | <p>Implementing an Asset Management Framework</p> <p>Tracking both software and hardware and keeping an accurate account increased by at least 200% for Viking Range Corporation.</p> <p>Learn how to:</p> <ul style="list-style-type: none"> • Improve the lease return process under control thus saving substantial amount of money on a semi-annual basis • Provide pertinent information to managers and supervisors that helped them budget appropriately for the next year, easing the burden in their budgeting process • Evaluate asset management vendors • Strategize for successful implementation • Review reporting capabilities <p>Shyam Ramachandran, IT Manager Viking Range Corporation</p> |

| Track A | Track B: | Track C: | Track D: |
|---|---|--|---|
| <p>Panel Discussion: Creating a Metrics and Process-Driven Culture</p> <p>Methodologies to vastly improve business processes have transformed companies – but only to the extent they are fully embraced. Hear tips and recommendations on getting these quality and measurement methods in place.</p> <ul style="list-style-type: none"> • Prem Ranganath, IT Project Manager, Northwestern Mutual • Joseph Gallagher, Vice President and IT Service Manager, Pershing LLC, a Division of The Bank of New York • Mitch Stein, Director of CIGNA Technology Institute, CIGNA | <p>Measuring IT Customer Satisfaction</p> <p>Who Do You Ask, How Do You Ask Them, and What Does It Mean?</p> <p>Gain insight into Shell's strategy and tactics on IT Customer Satisfaction for</p> <ul style="list-style-type: none"> • Deciding what to measure • Implementing and interpreting those measures • Creating change plans basis the measures <p>This strategy includes five layers of measurements:</p> <ul style="list-style-type: none"> • Economic buyers – they hold the ultimate purse strings • Leaders – mid and upper level managers in our IT structure • Users of specific IT services or functions • Callers to the Help Desk • End Users of IT services <p>Eric Mealus, IT for Shell Benchmarking Manager Royal Dutch Shell</p> | <p>Best IT Project Portfolio Management Structure</p> <p>Chicago Mercantile Exchange, Inc. was awarded the 2005 IT Financial Management Excellence Award for Best IT Project Portfolio Management.</p> <p>Driven by the need to reflect frequently shifting priorities in the mix of technology projects, CME quickly realized the need for a robust portfolio management solution that allowed decision makers to propose "what-if" questions and ad-hoc reporting capabilities. The Artemis 7 portfolio management tool was selected as the ideal solution and has been successfully deployed for more than two years at CME.</p> <p>Mark Bennett, Associate Director, Project & Financial Controls Chicago Mercantile Exchange and Michael Lester, IT Solutions Specialist Artemis International Solutions Corporation</p>   | <p>Panel Discussion: The People Side of Asset Management:</p> <p>While tracking, reporting and creating systems to support asset management pose its own significant challenges, managing the organization's attitude and preparing them for change should also be factored into your implementation plans. Here tips and advice from:</p> <ul style="list-style-type: none"> • Joan Knudsen, Director, IT Asset Management, American Airlines • Shyam Ramachandran, IT Manager, Viking Range Corporation • Dan Shearer, Manager, Technology Enhancement, Burlington Resources |



Organized Dine Around 7.00PM

Join your peers for a fun night out in Miami. Attendees will choose from a pre-determined list of Miami's great restaurants.

Day **4****Thursday April 6, 2006 • Workshops Day****Workshop**choose **I** or **J****I** 8:00 AM – 11:00 AM**Managing, Measuring and Benchmarking your Outsourced Providers**

This session will provide you with the essential tools and takeaways needed to better leverage your service provider relationships and ensure greater value for your organization.

- The components of a successful benchmarking process and practice
- The most relevant and viable cost and process performance metrics organizations should capture before and during an outsourcing effort
- The current best in class cost & performance levels for outsourced finance and accounting processes
- The role of software tools & applications in relation to supporting measurement, benchmarking and outsourcing management efforts
- How outsourcing management & benchmarking efforts relate to and

support efforts to address regulatory compliance efforts like Sarbanes Oxley

About your workshop leaders:

Mark Robinson is Senior Vice President at EquaTerra. He has held IT executive positions with Citibank, Chase Manhattan, and Prudential, where he gained significant buy-side experience in outsourcing. **Stan Lepeak, Managing Director, EquaTerra Research** is leader of EquaTerra's benchmarking, research and executive network practice area focused on global Information Technology and Business Process Outsourcing.



Key to a successful outsourcing initiative is the demonstrated achievement of critical benchmarks as originally defined in the outsourcing business case.

Workshopchoose **I** or **J****J** 8:00 AM – 11:00 AM**Designing Service Level Agreements for Efficient Business Unit Consumption**

Service level agreements (SLAs) are a potent tool for the IT shared service. They can be used to:

- Improve communication between IT and the business
- Identify business plans that may drive IT resource requirements
- Understand customer expectations for IT performance
- Set customer expectations of IT performance
- Quantify and communicate the value IT is bringing to the business

However, there are as many approaches to designing and implementing SLA as there are models for IT organizations. We will discuss successful approaches as well as pitfalls that others have encountered. We will answer the questions:

- What should be included in the SLA?
- How often should an SLA be renewed?
- Who should negotiate the SLA?
- How should you implement the first SLA?

- What is the difference between a service level indicator and a key performance indicator?
- How will the SLA be used as a governance tool?
- How does the SLA fit into the shared services model?
- What is the definition of a successful SLA?

About Your Workshop Facilitator:

For over 20 years, **Roger McCall** has been a **Management Consultant** with **ScottMadden, Inc.**, a general management consulting firm specializing in shared services. He is a principal in the firm and has worked with industry and government to develop, implement and improve shared services processes and tools. His primary interest is in improving IT's effectiveness through the deployment of the shared services management model. Mr. McCall has published articles on improving IT / business alignment by implementing the shared services approach and is a frequent speaker on the topic.

Bring your company's questions and concerns about the service level agreement process and we will help to answer and address them in this workshop.

Workshopchoose **K** or **L****K** 11:15 AM – 2:15 PM**Performance Management and Process Improvement for IT**

So, what is IT really providing? How should we measure and improve performance? How do we control costs? Should we outsource?

Effective performance management, coupled with process improvement, helps address these issues – for management of the IT environment is, first and foremost, a process – with different tasks, relationships and resource requirements.

This interactive workshop will use case study examples to show you where to begin, including FastTrack approaches for implementing the two most effective tools for performance management and process improvement in IT. Specific topic areas will include:

- Elements and key steps of effective performance management
- Using the basic tools in performance management: Balanced Scorecard and Activity Based Management

- Tips for successfully implementing a top-down/bottoms-up approach
- Linking measurement systems, cost drivers and process improvement
- Developing Service Level Agreements and Chargebacks
- Benchmarking internally and with external service providers

About your workshop leader:

Andrew Muras is Vice President of **BAE SYSTEMS Analytical Solutions Division** and is responsible for developing and implementing performance management and business solutions for both industry and government organizations. He teaches various courses and workshops in performance measurement and process analysis techniques across North America. His professional experience covers all Shared Services functions, including information technology, finance and accounting, purchasing, HR and payroll, mailrooms, administration and facilities.

Each participant will not only have a unique opportunity to discuss lessons learned with other session participants, but will also be given a free software package to help analyze and measure your IT processes and products.

Workshopchoose **K** or **L****L** 11:15 AM – 2:15 PM**A-Step-by-Step Guide to Implementing a World Class IT Asset Management Structure**

The workshop is the culmination of more than 20 years of experience in managing IT for organizations from 100-300,000 people.

- "Set the stage" for your IT asset management program
- Gain buy in from the appropriate people in the organization for IT asset management
- Evaluate opportunities in individual IT asset management processes
- Utilize IT asset management tools environment and selection strategies
- Effectively use IT asset management data and reporting best practices
- Individualize activities and timeline development for the IT asset management program

About your workshop leader:

Patricia M. Cicala has served as **CEO and President of Cicala & Associates, LLC** for five years. Cicala & Associates is a premier IT research and services firm that has served over 50 Fortune 1000 clients during its tenure. Ms. Cicala has over 20 years of experience in the management of technology, with expertise in the areas of asset management, procurement, contracts, and strategic technology workplaces.

The topics covered will address the people, processes, tools and strategies necessary for successful IT asset management and actionable advice that can be used immediately and into the foreseeable future.

Day 4 Thursday April 6, 2006 • Workshops Day



Workshop
choose M or N

M 12:15 PM – 3:15 PM

Managing Enterprise-Level Decisions, Risks, and the Valuation Process

You'll gain an understanding into how statistical-based methods can be leveraged in an IT setting to increase the success of enterprise initiatives and programs.

The workshop will explore how rigor can be applied against decision making and valuation processes that affect enterprise-level initiatives and efforts that inherently contain risk and uncertainty. You'll hear about available methods, while at the same time, understand how they are applied and how their value to the enterprise can be realized. Upon completion of the workshop, attendees will:

- Understand the concept of Enterprise Decision Management as it applies to IT
- Understand the methods that can be applied against the enterprise decision making process in order to arrive at better, more informed decisions
- Understand how uncertainty and personal bias influence the decision making process and the inherent risks associated with these 'unknown factors'
- Learn how to address the non-financial issues and risks

- associated with enterprise portfolio valuation and management
- Understand how different valuation methods can be applied against enterprise portfolios, including initiative and program portfolios
- See how software tools can be used to aid in the decision making, risk, and valuation processes.

About your workshop leader: Mark A. Benyovszky, is the **Managing Director** of the **Zero Delta Center for Enterprise Alignment**, an innovative research and development organization. Mr. Benyovszky has more than 16 years of industry and consulting experience. He has held senior leadership positions with several leading companies including a 900-person management and technology consulting company and a Fortune 500 public distribution company. Mr. Benyovszky is a guest lecturer at the University of Chicago Graduate School of Business, where he lectures on Zero Delta methods.



Workshop
choose M or N

N 2:15 PM – 5:15 PM

Achieving IT Cost Savings Utilizing ITIL Tools and Strategies

An ROI model will be presented to illustrate a recommended approach to ITSM/ITIL's value determination.

This workshop will focus on IT Service Management and ITIL's business value potential and an implementation approach that enhances the quality of IT's services and improving IT's processes based on ITIL's best practices. An ROI model will be presented to illustrate a recommended approach to ITSM/ITIL's value determination. Through interactive discussions and case study examinations, you'll hear about:

- The proven four-prong ITSM / ITIL implementation approach
- ITSM / ITIL implementation successes and lessons learned
- Identifying business value areas with examples provided for each benefit area
- The order-of-magnitude of benefits will be described and realized examples provided
- The role of business value will be described as it relates to

- measuring and monitoring business success
- Critical success factors as they relate to business value will be provided

About your workshop leaders:

Mart Rovers is the **President of InterProm USA Corporation**, an IT consulting firm specializing in implementing enterprise service management improvement solutions, including ITIL-based processes consulting, assessments and certification training courses, the implementation of organizational changes, and the implementation and integration of supporting technology. He has 20+ years of IT experience.

Bruce Guthridge is a **founding member of I.T. Executive Partners** and is a managing partner in the firm. He has been a management and technology consultant for the last 15 years.



Workshop
choose O or P

O 5:30 PM – 8:30 PM

Building a Balanced Scorecard for a Results-Driven Organization

This workshop will help the organization's leadership clarify, articulate, and communicate the organization's vision and strategy through an integrated system of objectives, measures, targets, and initiatives.

This workshop will lead to the elimination of non-strategic initiatives and investments, and alignment of activities to the priorities of the strategy, and ultimately a performance-driven and eventually an incentive-driven culture, aligned through clear roles, responsibilities, and accountabilities.

Attending this workshop you will learn how to:

- Drive strategic alignment and rapid, effective execution of the strategy across the organization
- Provide the strategic context within which to rationalize and prioritize activities (initiatives and programs) across the organization, and establish clear accountability for execution of the strategy across the organization
- Create a strategic management system
- Achieve its strategic goals and targets

- Provide critical components for your business to start becoming a strategy-focused organization

About your workshop leaders:

William E. "Bill" Davis is a faculty member at the **University of Miami's Information Technology Executive Institute**. With 30 years of IT and business experience, including multiple tenures as Chief Information Officer and other executive positions, Bill is well versed in corporate balanced scorecard, applications development, IT methods and standards plus global telecommunications. **Robert L. Perrin** is a **faculty member** at the **University of Miami's Information Technology Executive Institute**. He has more than 30 years of information technology and business experience, including multiple tenures as Chief Information Officer.



Workshop
choose O or P

P 5:30 PM – 8:30 PM

Aligning IT Strategy, Project Execution, and Performance Management into a CIO Management Framework

Through case studies, you'll examine a practical and proven CIO management framework that both focuses on controlling project and lights-on costs and also substantially increases IT and business alignment and IT's business impact.

This workshop presents practical, proven methods that apply innovative budgeting and costing techniques, business and IT strategy alignment, project portfolio management, and performance management frameworks, and gives the CIO a continuous and effective method for managing the entire IT investment.

- Examine how IT financial management and budgeting is used to achieve business alignment
- Understand, in practical terms, how business and IT strategy is aligned
- Understand how project investments are managed to achieve business strategy and bottom-line impact
- Apply performance management in a set of simple management dashboards
- Learn how to apply the CIO management framework

- Understand how the CIO management framework is applied in IT governance
- Explore how business management is involved in alignment, project management, and performance management

About your workshop leader: Robert Benson is **Principal** with the **Beta Group** and **Senior Associate** with the **Cutter Consortium**. The Beta Group is an industry leading consulting firm specializing in strategic and financial management of IT for Fortune 500 companies and government agencies world wide. Cutter Consortium is an IT advisory firm comprising a group of more than 100 internationally recognized experts who have come together to offer content, consulting and training to its clients.

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"..there have been some incredible speakers that are clearly very knowledgeable about IT Governance, about chargeback models. It's been a great experience, I have a lot of takeaways, also the networking aspect of the conf has been incredible I have met a lot of people in a similar industry as mine... and have had an opportunity to speak to a number of consultants and vendors about their portfolio management products so I think its been a very valuable experience"

Karen Painter
Turner Broadcasting



Exhibitors:



Job Function

- 26% IT/IS/CIO
- 25% IT Finance/ Financial Management
- 13% Sr Mgmt
- 12% Shared Services/IT Services
- 6% Program/Project/ Portfolio
- 6% Business Dev
- 6% Operations/ Performance
- 5% Unknown
- 1% Web

Sponsorship and Exhibition Opportunities

Vendor Categories:

- **Portfolio Management (Project Portfolio Management or Application Port. Management)**
- **IT Chargeback Tools/Systems**
- **IT Cost Allocation Tools/Systems**
- **Dashboards (Digital and Others)**
- **IT Performance Management Tools and Systems**
- **Shared Services Consultancies**
- **Project Portfolio Management Consultancies**
- **IT Governance & Technology Optimization Consultancies**
- **Business Technology Optimization Vendors or Consultants**
- **IT Budgeting & Investment Planning Tools**
- **IT Asset Management Tools**

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Since its inception three years ago, CIO Insight's editorial coverage and design elements have become recognized throughout the industry. CIO Insight was voted one of the Top 10 Best Magazines by the American Society of Business Publication Editors and has won several Ozzie Awards for best design features.



About Baseline www.baselinemag.com

Baseline is the only magazine that provides the practical information Business Technology Leaders need to have in order to undertake complex business technology initiatives that produce bottom line results. Each month, Baseline magazine delivers in-depth case dissections of major IT deployments at leading companies. Extensive editorial coverage reveals the business goals, strategies, and performance metrics used; the technologies and vendors selected including customer references and the products deployed; and the overall planning tools that Business Technology Leaders can utilize for their own project management.

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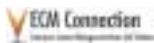
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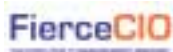


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