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# IT Financial & Asset Management

SUMMIT WEST



October 24-27, 2005 • MGM Grand • Las Vegas NV

## 3 reasons to attend IT Financial & Asset Management Summit West

### 1 IT Financial Management goes WEST!

As a result of the great response to **IT Financial Management Week 2005** in Miami this spring, IT Management IQ has added the West Coast Fall event to your annual calendar! Giving your team a second annual opportunity to network and learn from your peers.

### 2 Brand new track added!

**IT Asset Management** is integral to managing and tracking your IT assets, especially as a requirement of Sarbanes-Oxley. Learn best practices on implementation and gaining buy-in.

### 3 Two track conference covering four key areas

Send a team and cover all 4!

- IT Chargeback, Cost Allocation and Shared Services
- IT Governance and Portfolio Management
- Measuring, Benchmarking and Improving your IT Functions and Processes
- IT Asset Management

## Keynote Speakers Include:



**Todd Brabender**  
Vice President  
Information Systems  
Hillenbrand Industries



**Marc West**  
Chief Information Officer  
H&R Block

## Keynote Sessions by:

H&R BLOCK *New Fortune 500*

HILLENBRAND INDUSTRIES *New*

## CIO Panel Companies Include:

NCR CORPORATION *New Fortune 500*  
*2005 IT Financial Management Excellence Award Winner*

NYISO *New*

TASTY KAKE *New*

TOKYO ELECTRON AMERICA *New*

## Speaker Faculty Includes:

ALLSTATE INSURANCE *New Fortune 100*

ARTEMIS INTERNATIONAL

CHICAGO MERCANTILE EXCHANGE  
*2005 IT Financial Management Excellence Award Winner*

CHUBB COMMERCIAL INSURANCE,  
HOME OFFICE SERVICES *New Fortune 500*

CICALA & ASSOCIATES, LLC

CORPORATE RENNAISSANCE GROUP

ECOSYS MANAGEMENT *New*

EPK GROUP *New*

ERACENT, INC *New*

EXELON *New Fortune 500*

HEALTH CARE SERVICES CORPORATION *New*

THE HARTFORD *New Fortune 500*

INDEPENDENT ELECTRIC SUPPLY *New*

LANIER, A RICOH COMPANY

MAIMONIDES MEDICAL CENTER *New*

METLIFE *New Fortune 100*

MGM MIRAGE INFORMATION SYSTEMS  
*New Fortune 500*

MKS GROUP *New*

NIELSEN MEDIA RESEARCH *New*

NOBLESTAR *New*

PHILADELPHIA STOCK EXCHANGE *New*

PLANVIEW, INC *New*

SCIENTIFIC ATLANTA *New*

SCOTT, MADDEN & ASSOCIATES

SMURFIT-STONE CONTAINER  
CORPORATION *Fortune 500*

SONY PICTURES ENTERTAINMENT *New*

SOUTHERN CALIFORNIA EDISON  
*New FORTUNE 500*

TANGOE *New*

TOKYO ELECTRON AMERICA *New*

TIMKEN COMPANY *New Fortune 500*

VERISIGN *New*

VERIZON COMMUNICATIONS  
*New Fortune 100*

WACHOVIA *New Fortune 100*

XEROX CORPORATION *New Fortune 500*

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# IT Financial & Asset Management Summit WEST

# Top 11 reasons to attend

*"I have been particularly impressed by the sharing of real life information discussions both within and between the sessions... the CIO roundtable was very, very impressive, real life people going through these same situations. Very glad I attended... very good."*

– **John Fillicetti, Director**  
IT Project Management  
T-Mobile

*"I have found this conference particularly worth while, one can feel alone in this journey to some extent and being able to spend time with other people who are working on the issues of balanced planning, use of scorecard, optimization and management of their application portfolio... has given me many new ideas and insights into other areas that I'm going to want to investigate so the interaction and talking to other people about some of the issues they've had to deal with and how they've solved those problems has been very worthwhile for me."*

– **Ruth Harenschaw**  
CIO  
Bowne & Co

## 1 Financial Management Goes West

As a result of the great response to IT Financial Management Week 2005 in Miami this spring, IT Management IQ has added the West coast Fall event to your annual calendar! Giving your team a second annual opportunity to network and learn from their peers.

## 2 Brand new track added

**IT Asset Management** is integral to managing and tracking your IT assets, especially as a requirement of Sarbanes-Oxley. Learn best practices on implementation.

## 3 Who will you meet?



### Job Function

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



### Seniority

- CIO/CFO/Controller/VP/Director 32%
- Senior Manager 28%
- Head/Leader/Specialist 24%
- Analyst 14%
- Consultant 2%



### Industry

- Solutions Provider/Consulting/Research 21%
- Financial Services 20%
- Energy/Telecom/Utility 17%
- Govt Agency/Ministry 10%
- Manufacturing 10%
- Healthcare 6%
- Construction/Chemical/Engineering/Petroleum/Transportation 5%
- Others 4%
- Entertainment/Leisure/Media 4%
- Retail 2%



### Geographic Breakdown

- International 13%
- East Coast 18%
- MidWest 28%
- South 21%
- West Coast 12%
- Mountain 8%

## 4 2005 IT Financial Management Excellence Awards Winners

2005 IT Financial Management Excellence Awards Winners will detail their winning applications in their presentations. Hear from NCR Corporation and Chicago Mercantile Exchange

## 5 No other event brings together this many leaders in IT Finance:

Past companies who have attended IT Financial Management Week include:

AMERICAN ELECTRIC POWER  
MANITOBA HYDRO  
CARLSON COMPANIES  
EN CANA CORPORATION  
UNITED SPACE ALLIANCE  
HCSC HEALTHCARE SERVICE  
ALTICOR  
TSX GROUP  
BAXTER HEALTHCARE  
UNOCAL  
TRAMMELL CROW CO  
CIBC  
METLIFE INSURANCE CO.  
THE COCA COLA CO  
CHECK FREE INC.  
INGRAM MICRO  
AMERICAN AIRLINES  
BNSF RAILWAY COMPANY  
MANDALAY RESORT GROUP  
TRANSCANADA PIPELINES  
ENGELHARD CORP.  
CITIGROUP  
BELLSOUTH  
TRW AUTOMOTIVE  
LG&E  
ROBERT BOSCH CORP  
GHI GROUP HEALTH, INC.  
MDU RESOURCES GROUP, INC.  
IMPERIAL IRRIGATION DISTRICT  
ECONOMICAL INSURANCE GRP  
TYCO SAFETY PRODUCTS  
WACHOVIA BANK  
JP MORGAN CHASE & CO.  
MARRIOTT  
MICHELIN N.A.  
NCR CORPORATION  
NIKE  
ALLIANZ LIFE  
THE E. W. SCRIPPS COMPANY

# IT Financial & Asset Management Summit WEST

**6** Bring your team and take advantage of this two track program, with sessions covering 4 key areas

**A** IT Chargeback, Cost Allocation and Shared Services

**B** IT Governance and Portfolio Management

**C** Measuring, Benchmarking and Improving your IT Functions and Processes

**D** IT Asset Management

**7** Five interactive panel sessions addressing successful responses to key challenges. Including.....

- **Exclusive CIO Panel**

**Sam Coursen**

CIO

NCR CORPORATION

*2005 IT Financial Management  
Excellence Award Winner*

**Ken Fell**

CIO

NYISO

**Autumn Bayles**

CIO

TASTY KAKE

**Russ Finney**

VP & CIO

TOKYO ELECTRON AMERICA

- **Chargeback vs. Cost Allocation**

- **Exclusive Vendor Panel**

- **Best Practices in Building an IT Scorecard**

- **Controlling IT Costs through Effective IT Asset Management**

**8** **21 Brand NEW Case Studies**

including: H&R Block, Philadelphia Stock Exchange, Sony Pictures Entertainment and more...

**9** IT Financial & Asset Management Summit West will provide answers for CIO's and senior IT Finance executives seeking to:

1. *Make a robust cross-functional business case for IT projects and initiatives*
2. *Demonstrate the value of IT to the business on an ongoing basis to win greater mindshare*
3. *Take advantage of the current business environment and align IT spend to help achieve your companies growth goals*

**10** 13 Extensive workshops designed to cover all your key IT challenges and provide real strategic and practical solutions you can take back to your organization.

**A** *Best Practice Pricing, Costing & Chargeback Strategies & Tools for IT*

**B** *IT Performance Management and Process Improvement: Performance Driven Process Development (PDPD)*

**C** *Development Metrics and Dashboards - Managing Your Business in Real Time*

**D** *Demonstrating, Documenting & Capturing the Value of Information Technology*

**E** *Building an Enterprise Project Portfolio Management Capability in Your Organization*

**F** *Developing an IT Governance Framework for Program Management*

**G** *Shared Services for IT: Building the Strategy & Plan to Run Your IT Function & Processes as a Business*

**H** *A Step-by-Step Guide to Developing a Solid IT Asset Management Program*

**I** *Developing Measurements and Metrics Across the Application Development Life Cycle*

**J** *IT Investment Planning: Budgeting, Forecasting & Business Planning*

**K** *Maintaining & Ensuring Compliance with an Asset Management Program*

**L** *Creating & Capturing IT Value with Balanced Scorecards*

**M** *Best Practice Pricing, Costing & Chargeback Strategies & Tools for IT*

**11** It's a week in Las Vegas!



# Conference-at-a-Glance

**Day 1** Monday, October 24, 2005


**Pre-Conference Workshops**

**A 8.00 – 11.00 Choose A or B**  
**Best Practice Pricing, Costing & Chargeback Strategies & Tools for IT**  
 CORPORATE RENNAISSANCE GROUP

**B 8.00 – 11.00 Choose A or B**  
**IT Performance Management and Process Improvement: Performance Driven Process Development (PDPD)**  
 PLANVIEW, INC 

11.00 **Workshop Registration** – Lunch will be served

**C 11.15 – 2.15 Choose C or D**  
**Development Metrics and Dashboards - Managing Your Business in Real Time**  
 MKS GROUP 

**D 11.15 – 2.15 Choose C or D**  
**Demonstrating, Documenting & Capturing the Value of Information Technology**  
 ARTEMIS INTERNATIONAL 

2.15 **Workshop Registration**

**E 2.30 – 5.30 Choose E or F**  
**Building an Enterprise Project Portfolio Management Capability in Your Organization**  
 EPK GROUP 

**F 2.30 – 5.30 Choose E or F**  
**Developing an IT Governance Framework for Program Management**  
 NOBLE STAR

5.30 **Workshop Registration** – Dinner will be served

**G 5.45 – 8.45 Choose G or H**  
**Shared Services for IT: Building the Strategy & Plan to Run Your IT Function & Processes as a Business**  
 SCOTT, MADDEN & ASSOCIATES


**H 5.45 – 8.45 Choose G or H**  
**A Step-by-Step Guide to Developing a Solid IT Asset Management Program**  
 CICALA & ASSOCIATES, LLC

**Day 2** Tuesday, October 25, 2005

**Main Conference Sessions**

- 7.00 – 8.00 **Registration and Breakfast**
- 8.00 – 8.15 **Welcome & Introduction to the Conference by the Premier Chairperson**
- 8.15 – 9.15 **Keynote Presentation: Running IT as a Business: Transforming IT from a Cost Center to a Profit Center**  
 H&R BLOCK *Fortune 500*
- 9.15 – 10.15 **Exclusive CIO Panel**  
 NCR CORPORATION *IT Financial Management Excellence Award Winner*  
 NYISO, TASTY KAKE, TOKYO ELECTRON AMERICA
- 10.15 – 11.00 **Morning Break and Exhibit Viewing**

Choose a Track or Bring a Team and Attend Them All!

Track <b>A</b> <i>IT Chargeback, Cost Allocation &amp; Shared Services</i>	Track <b>B</b> <i>IT Governance &amp; Portfolio Management</i>
11.00 – 11.05 <b>Chair's Address</b>	11.00 – 11.05 <b>Chair's Address</b>
11.05 – 11.50 <b>Panel Discussion: Chargeback vs. Cost Allocation</b> TIMKEN COMPANY <i>Fortune 500</i> LANIER, A RICOH COMPANY METLIFE <i>Fortune 500</i> EXELON <i>Fortune 500</i>	11.05 – 11.50 <b>Building an Effective Framework for IT Governance and Portfolio Management</b> VERISIGN
11.55 – 12.40 <b>Implementing and Managing an IT Chargeback System</b> LANIER, A RICOH COMPANY	11.55 – 12.40 <b>Managing, Measuring and Evaluating Risk Across IT Projects</b> WACHOVIA <i>Fortune 100</i>
12.45 – 2.00 <b>Birds of a Feather Luncheon</b>	12.45 – 2.00 <b>Birds of a Feather Luncheon</b>
2.05 – 2.50 <b>Planning and Managing Change Within the Chargeback System: Pitfalls and Lessons Learned</b> SOUTHERN CALIFORNIA EDISON <i>FORTUNE 500</i>	2.05 – 2.50 <b>Best IT Project Portfolio Management Structure</b> ARTEMIS INTERNATIONAL, CHICAGO MERCANTILE EXCHANGE <i>2005 IT Financial Management Excellence Award Winner</i> 
2.55 – 3.40 <b>Activity Based Management and 'Process Based Costing &amp; Budgeting' for IT</b> VERIZON COMMUNICATIONS <i>Fortune 100</i>	2.55 – 3.40 <b>Establishing an IT PMO to Achieve Process Excellence</b> MGM MIRAGE INFORMATION SYSTEMS <i>Fortune 500</i>
3.45 – 4.15 <b>Afternoon Break and Exhibit Viewing</b>	3.45 – 4.15 <b>Afternoon Break and Exhibit Viewing</b>
4.20 – 5.05 <b>Using IT Chargeback to Drive Significant IT Value Add</b> SCIENTIFIC ATLANTA	4.20 – 5.05 <b>Best Practices in IT Governance Methodologies, Tools &amp; Processes</b> TOKYO ELECTRON AMERICA
5.10 – 5.55 <b>Shared Services for IT: Running IT as a Business</b> METLIFE <i>Fortune 100</i>	5.10 – 5.55 <b>Best Practices in Aligning IT Staff &amp; Resources with Projects</b> HEALTH CARE SERVICES CORPORATION
5.55 – 6.10 <b>Chairs' &amp; Speakers Summary &amp; Conclusions</b>	

**6:15pm-7:15pm Cocktail Reception**

# Conference-at-a-Glance

**Day 3** Wednesday, October 26, 2005

**Main Conference Sessions**

7.30 – 8.00	<b>Breakfast in Exhibit Hall</b>
8.00 – 8.15	<b>Recap and Setting of Objectives &amp; Direction for the Day by the Premier Chairperson</b>
8.15 – 9.15	<b>Keynote Presentation</b> <b>Creating Transparency: Implementing a Governance Model that Enables Cost Visibility and Demand Management</b> HILLENBRAND INDUSTRIES
9.15 – 10.15	<b>Exclusive Vendor Panel</b> Panelists Include:    Visit website for updated panelists

10.15 – 11.00 **Morning Break & Exhibit Viewing**  
Choose a Track or Bring a Team and Attend Them All!

Track **C** **Measuring, Benchmarking & Improving Your IT IT Function & Processes**

Track **D** **IT Asset Management**


11.00 – 11.05	<b>Chair's Address</b>	11.00 – 11.05	<b>Chair's Address</b>
11.05 – 11.50	<b>Developing a Structured IT Measurement &amp; Benchmarking Program</b> CHUBB COMMERCIAL INSURANCE, HOME OFFICE SERVICES <i>Fortune 500</i>	11.05 – 11.50	<b>Panel Session: Controlling IT Costs Through Effective Asset Management</b> SMURFIT-STONE CONTAINER CORPORATION <i>Fortune 500</i> MAIMONIDES MEDICAL CENTER XEROX CORPORATION <i>Fortune 500</i> PHILADELPHIA STOCK EXCHANGE
11.55 – 12.40	<b>Designing &amp; Developing IT Metrics to Drive an Estimation Program</b> ALLSTATE INSURANCE <i>Fortune 100</i>	11.55 – 12.40	<b>Building a Business Case for IT Asset Management</b> SMURFIT-STONE CONTAINER CORPORATION <i>Fortune 500</i>
12.45 – 1.45	<b>Functional Peer Luncheon</b>	12.45 – 1.45	<b>Functional Peer Luncheon</b>
1.50 – 2.35	<b>Panel Session: Best Practices in Building an IT Scorecard</b> INDEPENDENT ELECTRIC SUPPLY THE HARTFORD <i>Fortune 500</i> NIELSEN MEDIA RESEARCH ALLSTATE INSURANCE <i>Fortune 100</i>	1.50 – 2.35	<b>Implementing an IT Asset Management Program</b> MAIMONIDES MEDICAL CENTER
2.40 – 3.25	<b>Developing &amp; Utilizing Metrics for IT Investment Planning &amp; Budgeting</b> NIELSEN MEDIA RESEARCH	2.40 – 3.25	<b>Demonstrating the Value of Your IT Asset Management Program</b> XEROX CORPORATION <i>Fortune 500</i>
3.30 – 3.50	<b>Afternoon Break and Exhibit Viewing</b>	3.30 – 3.50	<b>Afternoon Break and Exhibit Viewing</b>
3.50 – 4.35	<b>Utilizing IT Metrics &amp; Benchmarking to Improve Performance Across the Organization</b> SONY PICTURES ENTERTAINMENT	3.50 – 4.35	<b>Integrating IT Asset Management with Change and Configuration Management</b> PHILADELPHIA STOCK EXCHANGE

**Day 3** Wednesday, October 26, 2005

**Dinner Workshops**

4.45 **Workshop Registration** – Dinner will be served

**I** **5.00 – 8.00** Choose I or J  
**Developing Measurements and Metrics Across the Application Development Life Cycle**  
ALLSTATE INSURANCE *Fortune 100*

**J** **5.00 – 8.00** Choose I or J  
**IT Investment Planning: Budgeting, Forecasting & Business Planning**  
ECOSYS MANAGEMENT 

**Day 4** Thursday, October 27, 2005

**Post-Conference Workshops**

7.30 **Workshop Registration** – Breakfast will be served

**K** **8.00 – 11.00** Choose K or L  
**Maintaining & Ensuring Compliance with an Asset Management Program**  
ERACENT, INC

**L** **8.00 – 11.00** Choose K or L  
**Creating & Capturing IT Value with Balanced Scorecards**  
THE HARTFORD *Fortune 500*

11.00 **Workshop Registration** – Lunch will be served

**M** **11.15 – 2.15** **Best Practice Pricing, Costing & Chargeback Strategies & Tools for IT**  
CORPORATE RENAISSANCE GROUP

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MANAGEMENT

## Sponsorship and Exhibition Opportunities



**IT Financial & Asset Management Summit West** brings together senior executives with the fiduciary responsibility for seeking cutting edge solutions to improve, contain and control all aspects of enterprise IT ownership impacting the financial effect of those systems. We will host executives highly involved in selecting solutions impacting cost control and governance for IT systems. The titles of executives attending the IT Financial & Asset Management Summit West are CIO's, VP's and Directors of IT Finance, Cost Accounting/Financial Systems, IT Governance, IT Portfolio Management, IT Budgeting, Project Portfolio Management, Strategic IT Planning and IS/IT Architecture.

Senior executives will be represented from a cross section of industries. Organizations will be Fortune 1,000 in size. We are working with corporations like Ricoh, Carlson, Mercedes Benz, ABN AMRO, Chevron Texaco, and T mobile just to name a select few. These senior executives are traveling from around the U.S. to garner best practices and concrete solutions to assist them in improving their corporate IT financial management initiatives.

The decision makers in attendance at the **IT Financial & Asset Management Summit West** will be senior executives and analysts for their corporations. Clearly being a Sponsor at the conference will enable you to have crucial access to those buyers through a multitude of vehicles while they are forming key strategies. The next step after strategy will be implementing those ideas internally. The conference will provide Sponsors access to those buyers at the key point where the delegates will seek to contract with vendors whom can make those theories into systems and processes. Unlike Tradeshows and association events, **IT Financial & Asset Management Summit West** will provide you with an environment where you will have two days amongst the leaders in IT Finance and Governance.

**Specialized Solutions delegates will be seeking include:**

- 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
- Balanced Scorecards

To find out more on sponsorship opportunities at The **IT Financial & Asset Management Summit West**, please contact Shannon Forrester at 212-885-2719 or via email at [sponsorship@iqpc.com](mailto:sponsorship@iqpc.com)

The **IT Financial & Asset Management Summit West** conference is an excellent opportunity to market your company's product or services to executive-level decision makers! This is your chance to provide our attendees with the solutions that they are looking for. Limited Sponsorship and Exhibition opportunities are available, including:

**Refreshment Breaks • Luncheon • Welcome Packs • Exhibits • Co-Sponsorship • Lead Sponsorship • Internet Café**

7:30 **Workshop Registration** – Coffee/Tea

**Workshop A** 8:00am – 11:00am *Choose A or B*

### Best Practice Pricing, Costing & Chargeback Strategies & Tools for IT

If you buy in to the fact that the best way to manage your IT shared service organization, whatever stage you are in, is to manage it like a real business, then certain business/financial knowledge and capabilities are essential. **These include:**

- Developing a "Service Catalog" that your customers can relate to and using Service Level Agreements to establish prices and other performance expectations
- Understanding the volume demands and unit cost of providing those services to your customers and how to manage/effect service unit costs through delivery process performance
- Having the ability to chargeback/bill your customers for the volume of service that 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
- Getting service-level customer satisfaction feedback that supports SLA performance expectations

With this knowledge, steps can be taken to manage unit cost and prices, while maintaining high quality. This adds great financial value to your customers and the entire corporation.

During this workshop, participants will learn how to design, develop and implement a "best practice" solution for a) developing market-

focused SLAs, b) calculating the unit cost of services delivered to customers, c) understanding the annual owning cost of major assets/applications used to deliver services, and d) integrating service delivery performance into your Balanced Scorecards.

This workshop will provide you with the information you need to begin developing a very effective costing and chargeback infrastructure for your IT department. Not only will you get advise from your workshop leader, but you will have the opportunity to interact with your peers to discuss/develop a 'best-in-class' design that you can begin to implement when you return to the office.

**About your workshop facilitator:**

**Ron Bradley, 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 a passion for designing "best-in-class" business solutions, including IT costing and billing. His consulting assignments include process redesign, balanced scorecard, and service and process costing for various industries, including specific balanced scorecards, costing, billing for all shared service functions.

7:30 **Workshop Registration** – Coffee/Tea

**Workshop B** 8:00am – 11:00am *Choose A or B*

### IT Performance Management and Process Improvement: Performance Driven Process Development (PDPD)

World-class business performance is fueled by highly effective and efficient processes. And to be effective, business processes need to be outcome-focused, clearly understood and assimilated, as well as operationally lean.

Too often, process improvement efforts start with the team being given some general guidelines for expected results by the executive sponsor. From there, the team most likely develops the process from beginning-to-end. Meeting real expectations can be challenging with this traditional approach. Why? Poorly defined outcomes leave too much room for error, conjecture, or wandering off course.

Performance Driven Process Development (PDPD) is driven by the concept that the primary purpose of any business process is to provide defined, measurable business intelligence to enable good decision-making, whether it takes the form of a report, metric, or dashboard. PDPD focuses on expected process results in the form of business information outputs, and then builds needed process inputs. Since this right-to-left approach to process development begins with a pre-defined deliverable, a successful outcome is already determined. The result is a performance-oriented process that is efficient and effective, with a higher probability of both adoption and application.

Workshop participants will have the opportunity to participate in a fresh look at the relationships between business processes and performance measurement, including an interactive discussion around what constitute good performance metrics, and how they are applied to effectively guide decision-making. The relationship between the customer and the service provider will be discussed, along with how to use IT performance measures to establish a more collaborative environment. The subject of process automation will also be explored as an effective method of improving adoption and compliance.

**About your workshop facilitator:**

**Terry Doerscher** has over 24 years of practical process development, project management, PMO, business strategy, and work and resource management experience in construction, nuclear, and IT fields. Mr. Doerscher is currently the **Chief Solution Architect for PlanView, Inc.**, responsible for developing PlanView's PRISMSTM Adaptive IT Management Best Practices product, and coordinating it's integration with PlanView Enterprise software functionality. Prior to that, he was Director of Professional Services for PlanView, after several years of business consultant experience.



11:00 **Workshop Registration** – Lunch will be served**Workshop C** 11:15am – 2:15pm *Choose C or D*

## Development Metrics and Dashboards - Managing Your Business in Real Time

All organizations measure some aspect of their performance, with the goal of managing and improving their processes and products. Unfortunately many organizations get 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.

This interactive workshop will provide you with real strategies and implementation insights necessary to set up and sustain a measurement system for monitoring and improving your IT organization. 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. While most organizations possess many sets of metrics, a re-evaluation and re-examination of what exactly is being measured and how it is being reported and used is key.

### Specific topic areas 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 facilitator:

**Ryan Lloyd** is a **Professional Services and Support Manager** for **MKS Systems Ltd**. In this position, he works extensively with customers on the implementation of Configuration Management solutions supporting initiatives such as CMM, CMMI and ITIL.

11:00 **Workshop Registration** – Lunch will be served**Workshop D** 11:15am – 2:15pm *Choose C or D*

## Demonstrating, Documenting & Capturing the Value of Information Technology

Today's IT organizations must exploit every imaginable opportunity to become more productive. It is essential to deliver quality services at a lower cost, drive out inefficiencies and demonstrate the business value of IT.

While you know that IT has strategic value, chances are your CEO doesn't, and it's up to you to show him. Especially as you will need credible information to defend an IT budget strategy, integrate a proposed M&A or plan a future initiative.

### 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 facilitator:

**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.

2:15 **Workshop Registration****Workshop E** 2:30pm – 5:30pm *Choose E or F*

## Building an Enterprise Project Portfolio Management Capability in Your Organization

The latest statistics indicate that somewhere near 70% of all project investments deliver nothing or are challenged. The worst case is represented by findings from the Standish Group, which asserts that only 9% of technology investments complete on time, on budget, and within scope. Furthermore, Standish offers that 29% of projects fail outright. Moreover, organizations are increasing under pressure to get more projects done with less – less money, fewer internal resources, lower consulting expenditures. When the economy turns, organizations will need to quickly retool to deliver results through effective project execution.

### This session will address a variety of critical business topics including:

- Business drivers for change
- Creating a project culture
- Delivering results through enterprise project management

At the end of the session, you will understand how organizations are impacted by globalization made possible by computer technology, what your firm can do to be better at getting things done than your

competitors, and how to ensure that your organization generates maximum value from project investments.

After this session, you will be able to identify the key actions necessary to create an effective project culture. Further, the Enterprise Project Management model presented will provide an overall blueprint for developing accountability throughout the organization.

### About your workshop facilitator:

**Rich Murphy** is the **Founding Partner** at **EPK Group LLC**. Rich has more than 35 years of experience in the project management, commercial software development, and engineering fields. His project management experience began when he became the project controls engineer for the engineering and construction effort of a \$4 billion nuclear power plant. He was the original Solution CEO for Microsoft's Enterprise Project Management system. In December 2002, Rich and his team formed EPK Group LLC, to build a comprehensive portfolio and resource management system based on Microsoft's platforms.



## 2:15 Workshop Registration

Workshop **F** 11:15am – 2:15pm Choose C or D

### Developing an IT Governance Framework for Program Management

This workshop will use a combination of lecture, discussion, and facilitation methods to work through each of these pieces of the framework. This workshop will take a specific look at strategic alignment, metrics, reporting, and the skills/strengths needed in a PMO.

**After attending this session, you will be able to answer the following questions:**

- How do I determine what PMO organizational structure is right for my organization?
- How does a PMO align with the strategic plan of the enterprise?
- What metrics make sense, where should I start, and what should my focus be?
- What reports and performance indicators are executives/key stakeholders interested in?
- How do I determine the best utilization of my resources?

#### About your workshop facilitators:

**Susan Roarke** is a **Senior Manager** at **Noblestar** and has a unique blend of business expertise, management experience, and technical knowledge. With Noblestar for over 13 years, she has been responsible for ensuring clients have achieved success through effective program and project management as well as providing thought leadership in the areas of IT portfolio management, enterprise program management, and project management.

**Howard Pope** is a **Senior Manager** at **Noblestar** with a comprehensive background in ensuring IT based initiatives align with business and organizational objectives. With Noblestar for over 8 years, he has worked across industry, successfully elevating our customer's ability to drive program and projects to completion. Howard specializes in building delivery teams that implement pragmatic and practical solutions; ensuring business goals drive IT investment decisions and developing appropriate key performance indicators for measuring success.

## 5:30 Workshop Registration – Dinner will be served

Workshop **G** 5:45pm – 8:45pm Choose G or H

### Shared Services for IT: Building the Strategy & Plan to Run Your IT Function & Processes as a Business

Alignment with business priorities and goals is a frequent concern of IT and business unit management. Most typical organizational and business models attempt alignment through processes or accountabilities, but in the end IT remains the decision maker for resource allocation and priorities. This often puts IT at odds with the business unit and the relationship suffers. The shared services approach removes many of those structural barriers to alignment by giving the business unit the opportunity to make the value decisions concerning much of its IT spend. IT is accountable for overall standards and resource effectiveness, utilizing a well-defined governance process for addressing conflicts.

The workshop will address building a practical and robust shared services infrastructure within the IT organization. **Topics will include:**

- Products and services - definition approaches

- Cost tracking – the right level of detail
- Pricing and chargebacks – market or cost based?
- Service level agreements – when and when not to use
- Business planning and account management –
- Performance management and benchmarking – helping to prove the value
- Organization and implementation - lessons learned

#### About your workshop facilitator:

**Roger McCall** has been a **management consultant** with **Scott, Madden and Associates** for 19 years. He is a principal with the firm and has worked across the enterprise. In the last three years, most of his work was focused on developing effective shared services. His primary interest is in improving the effectiveness of IT as a shared service.

## 5:30 Workshop Registration – Dinner will be served

Workshop **H** 5:45pm – 8:45pm Choose G or H

### A Step-by-Step Guide to Developing a Solid IT Asset Management Program

IT asset management is one of the most important core business practices for any size organization to implement. Salient benefits of a solid asset management program are vast and on-going. Just a few of the more timely benefits currently include; software compliance, just in time sourcing, effective IT chargeback details, IT compliance and significant reduction of IT costs.

In this interactive workshop participants will gain the best practice skills in order to start and sustain a world class IT asset management program. The workshop is the culmination of more than 20 years of experience in managing IT for organizations from 100-300,000 people. The topics include all of the people, processes and tools strategies that are a necessity for successful IT asset management and actionable advice that can be used immediately and into the foreseeable future.

**Benefits that can be achieved by attending this workshop are:**

- Better understanding of how to "set the stage" for the IT asset management program

- Gaining "buy in" from the appropriate people in the organization for IT asset management
- Understanding, streamlining and highlighting opportunities in individual IT asset management processes
- IT asset management tools environment and selection strategies
- Effective use of IT asset management data and reporting best practices
- Individualized activities and timeline development for the IT asset management program

#### About your workshop facilitator:

**Patricia M. Cicala** has served as **CEO and President** of **Cicala & Associates, LLC** for 5 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 workplace development.

7:00 – 8:00  
Registration & Breakfast

8:00 – 8:15  
Welcome & Introduction To Conference By the Premier Chairperson

8:15-9:15  
**Running IT as a Business: Transforming IT from a Cost Center to a Profit Center**

Keynote Presentation

In previous positions at other organizations, Mark West learned some painful lessons about business that he's taken back to the IT department to focus them on running like a business.

Topics of discussion will focus on the number one rules a business follows: generating revenue, getting paid and reducing operating margins.

These are the only metrics that really matter to the business. If your goal is to converge and create visible value or run your IT shop like a business you need to understand and apply the same measure and principles the business does.

These are not the usual metrics that IT departments use to measure themselves. The challenge is for IT executives to stop communicating performance in terms of uptime and on-time, on-budget delivery of systems. Instead you have to measure your performance using the same metrics the business uses to measure its success.

The business develops a passion for whatever they do. They believe that if customers go anywhere else, they'll be underserved. Imagine capturing that in an IT organization. If people need to go somewhere else to get goods and services, you're under-creating value for them.



**Marc West**  
CIO  
H&R BLOCK

9:15-10:15  
**EXCLUSIVE CIO PANEL**

This is a terrific opportunity for you to gain access to the leading minds in the industry as they present meaningful content and practical knowledge from real world experiences.

**As one of the highlights of IT Financial & Asset Management Summit West, these CIOs will deliver excellent insight on the following issues:**

- IT governance structure and portfolio management
- Project prioritization
- Requirements management
- IT investment planning for projects
- IT asset management and tracking

**Sam Coursen**  
CIO

**NCR CORPORATION**

**2005 IT Financial Management Excellence Award Winner**

**Ken Fell**  
CIO  
NYISO

**Autumn Bayles**  
CIO  
TASTY KAKE

**Russ Finney**  
VP & CIO  
TOKYO ELECTRON AMERICA

10:15-11:00  
Morning Break & Exhibit Viewing

Choose a Track or Bring a Team and Attend Both!

Track **A** **IT Chargeback, Cost Allocation & Shared Services**

Track **B** **IT Governance & Portfolio Management**

11:00 – 11:05

Track A  
**Chair's Address**  
**Andrew Labovitch**  
Manager, IT  
CONECTIV ENERGY

Track B  
**Chair's Address**

11:05 – 11:50

Track A  
**Chargeback vs. Cost Allocation**

This interactive session will cover how various organizations track their labor and non-labor costs, allocate costs and recover the costs of overhead with the use of a cost allocation or chargeback method.

**Panelists Include:**

**Robert Brown**  
IT/CRP Planning/Economics Principal  
TIMKEN COMPANY

Panel Discussion

**Karen Ellers**  
Director, Program Management & Quality Assurance  
LANIER, A RICOH COMPANY

**Kumar Das Gupta**  
IT Controller  
METLIFE

**Kevin Batke**  
Billing Manager  
EXELON

Track B  
**Building an Effective Framework for IT Governance and Portfolio Management**

Within VeriSign's corporate systems group, they have implemented governance for each business unit. A governance process exists for each business unit for both product releases as well as corporate systems projects. In addition, a governance process has been implemented at the corporate level for all corporate projects. Across all business units and at the corporate level, a governance meeting is held to resolve any dependencies or resource allocation issues. A project portfolio and roadmap is maintained for each business unit as well as corporate. By implementing this, VeriSign has achieved the following:

- Better linked corporate system resource planning to business strategy and objectives
- Ensured business and corporate system resources are focused on the right priorities

- Introduced benefits measurement and accountability for approved initiatives
- Maintained a 3 year rolling roadmap for the end state to ensure priorities are mapped against the longer term roadmap and objectives
- Provided consistent high level status reporting across initiatives to VCS leadership

**Chris Bedi**  
Director, IT  
VERISIGN

11:55 – 12:40

Track A

### Implementing and Managing an IT Chargeback System

Ricoh Family Group (RFG) is in the process of implementing an IT chargeback system, while concurrently developing an IT Shared Services Center (SSC).

The shared services and chargebacks are across disparate legal entities, although the IT organizations report to an overall IT Lead/CIO.

Since a major ERP project is occurring at the same time, a phased approach was selected. Areas for consolidation have been prioritized and a road map has been developed along with the chargeback system. IT is working closely with the Finance organization as well as senior management to ensure overall buy-in of the allocation and chargeback processes. **Learn from Karen how the road map was defined, the successes and lessons learned, and future challenges.**

**Karen Ellers**  
Director of Planning, Strategy and Governance  
LANIER, A RICOH COMPANY

Track B

### Managing, Measuring and Evaluating Risk Across IT Projects

Wachovia Corporate & Investment Banking Technology manages risk by making risk assessment and risk control integral parts of the overall IT project life cycle process. This starts very early in the process during initiation and is required at specific intervals throughout the life cycle as part of the criteria required to pass the quality gates.

This session will look at the different types of risk inherent in projects and look at methods to identify and quantify risks, involve stakeholders in risk issues and integrate risk into procedures and communications. Additionally, you will look at 6 dimensions of technology project risk.

**You will walk away from this session having learned:**

- Why risk management should be an integral part of your project management process
- How to include risk issues in project management processes
- How to determine a project's risk profile through methods for identifying and assessing project risks
- An understanding of both qualitative and quantitative methods for identifying and measuring risk

**Chris Deger**  
Vice President, CIBT Process Improvement & Governance  
WACHOVIA

12:45-2:00 Birds of a Feather Luncheon

2:05-2:50

Track A

### Planning and Managing Change Within the Chargeback System: Pitfalls and Lessons Learned

Many companies expend a great deal of effort implementing chargeback systems. But if the system and surrounding processes are not architected to anticipate change, considerable heartburn can result. This presentation will identify major areas of change within a chargeback system and share some real world experiences dealing with those changes.

At Southern California Edison, they have planned for change by developing a flexible modeling tool that facilitates the modification of existing product offerings, the rapid addition of new products and services to the portfolio, and changes in the internal organizational structure. They manage change through well-defined review processes with critical stakeholders and product owners.

**In this session you'll see how managing change in their chargeback system has benefited the IT department by:**

- Ensuring adequate resources to meet client demand
- Clarifying our dual role as both a service provider and governance organization
- Causing product owners to assess the costs of client requests prior to making commitments
- Driving clients to assess the value of requests when asking IT for new or enhanced services

**David Gillich**  
IT Finance & Department Manager  
SOUTHERN CALIFORNIA EDISON

Track B

### Best IT Project Portfolio Management Structure

The Chicago Mercantile Exchange repeatedly faced complex decisions between technology investment demands and available resources. 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. Chicago Mercantile Exchange, Inc. was awarded first prize for Best IT Project Portfolio Management Structure at the IT Financial Management Week gala awards ceremony on March 1st, 2005 in Miami, Florida and will discuss their winning presentation.

**Mark Bennett**  
Associate Director, Project & Financial Controls  
CHICAGO MERCANTILE EXCHANGE

**Michael Lester**  
IT Solutions Specialist  
ARTEMIS INTERNATIONAL SOLUTIONS CORPORATION



2:55 – 3:40

Track A

### Activity Based Management and 'Process Based Costing & Budgeting' for IT

The search for a way to organize IT activities and related processes is never ending. Integrating activity based

management functions and processes is both complex and constantly changing. After several years of effort, Verizon settled on a comprehensive approach that has stood the test of time.

**Come and hear about a few of the lessons learned on:**

- Organizing to align business and IT processes
- IT activity based metrics versus business drivers
- Budgeting for a process versus costing out a function

**Gregory S. Uchimura**

**Director - Financial Planning & Analysis  
VERIZON COMMUNICATIONS**

Track B

**Establishing an IT PMO to Achieve Process Excellence**

Myrna will discuss how she established and contributed to a Business Solutions/IT PMO Framework for organizations such as American Express, Broadspire Services, Royal Caribbean Cruise Lines, and the related work he was responsible for at Mandalay Resort Group prior to its merger with MGM MIRAGE. In this session you will understand the steps required to achieve process excellence and what's required to succeed as well as to maintain continuous improvement.

**Discussion will also include:**

- Critical information for you to know on establishing an IT PMO
- Delivering excellence - setting performance objectives for your project managers
- Establishing a Project Management Center of Excellence
- Managing expectations - building success one project at a time
- Establishing core stakeholder relationships and sponsorships
- Formulation of value added processes to ensure business and IT alignment and partnerships
- How a PMO can contribute to strategic alignment and improve technology investment decisions

**Myrna Soto**

**Solutions Director - Corporate IT  
MGM MIRAGE INFORMATION SYSTEMS (formerly  
Mandalay Resort Group)**

**3:45 – 4:15 Afternoon Break & Exhibit Viewing**

**4:20-5:05**

Track A

**Using IT Chargeback to Drive Significant IT Value Add**

IT chargeback is often used to influence process changes that drive cost reductions. However, IT chargeback methodologies can also be useful in application life cycle management. Additionally, IT chargeback, in conjunction with a full cycle IT governance program, creates synergy that can take IT value add to a new level. Apurva will discuss the benefits which include:

- A better understanding of value added by new projects
- A bottom line approach to project portfolio management
- Increased business accountability and partnership in IT projects
- Reduced IT backlogs, as low value add projects are removed

**Apurva Shrivastava**

**Director, IT Technical Development  
SCIENTIFIC ATLANTA**

Track B

**Best Practices in IT Governance Methodologies, Tools & Processes**

Tokyo Electron's technology governance business committee ensures that IT investments are aligned and integrated with the enterprise-wide strategic direction. Their program

management office governing IT efforts provides the framework for IT governance, program methodology, portfolio management, training and associated tools. Hear from Russ the tools and methodologies Tokyo Electron uses in order to ensure that IT governance is strategically aligned with overall corporate objectives. In addition, he will discuss how they:

- Identify projects that match strategic objectives
- Eliminate redundant or off-strategy projects
- Analyze portfolio and project management tools to find the right one

**Russ Finney**

**VP & CIO  
TOKYO ELECTRON AMERICA**

**5:10 – 5:55**

Track A

**Shared Services for IT: Running IT as a Business**

Having a complex centralized IT organization necessitates the need to understand how much in IT expenses are required to 'keep the lights on'.

Breaking down the 'non-discretionary' as opposed to the discretionary funding amounts help IT fulfill the new business requirements. At MetLife they have made significant strides in having a governance process, bringing in the right tools and using proper project management techniques to be able to work side by side in growing the MetLife business. The IT chargeback model is a self supported, fully recoverable framework that continues to mature.

**In this session you will walk away having learned how to:**

- Follow a business case and ROI process to help prioritize requested funds
- Develop a governance process to help IT and business stick to strategic goals
- Provide IT services that are customer centric not technology centric, thus easier for the business to understand
- Understand IT total cost of ownership

**Kumar Das Gupta**

**IT Controller  
METLIFE**

Track B

**Best Practices in Aligning IT Staff & Resources with Projects**

This is an overview of a new company-wide process that performs analysis of the project portfolio in the context of multiple types of resource constraints, and creates a realistic portfolio fulfillment plan within the company's execution capacity. Fulfillment planning serves as the mechanism for portfolio-related decisions, as well as the basis for detailed project, resource and workforce planning.

The method supporting the fulfillment planning process is based on concepts of industrial operations planning, and is beneficial in complex business and IT environments.

**Adriana Chmiel**

**Senior Manager, Project Portfolio Management  
HEALTH CARE SERVICES CORPORATION**

**5:55-6:10**

**Chairs' & Speakers Summary & Conclusions**

**6:15pm-7:15pm Cocktail Reception**

Meet delegates, speakers and sponsors after the first day of conference sessions to discuss concepts and tools presented during the day's sessions.

**7:30 – 8:00**  
**Breakfast in Exhibit Hall**

**8:00 - 8:15**  
**Recap and Setting of Objectives & Direction for the Day by the Premier Chairperson**

**8:15 – 9:15**  
**Creating Transparency: Implementing a Governance Model that Enables Cost Visibility and Demand Management**

Successful IT organizations have discovered that managing the supply side is the easy part. Creating a governance model that allows effective management of the demand side is a much harder proposition. Hillenbrand Industries, in learning from past mistakes, has created a governance model that they believe delivers value on multiple fronts.

In this presentation, you will learn the governance framework under which they operate, how this new model created transparency in their organization, and the value it has provided to their customers.

**Some of their benefits which will be discussed include:**

- Much better business alignment
- Demand management through the PMO
- Visibility to true costs
- Adherence to architectural standards
- Improved communications within our organization



**Todd Brabender**  
**VP, Information Systems**  
**HILLENBRAND INDUSTRIES**



**9:15-10:15**  
**EXCLUSIVE VENDOR PANEL**

This is a terrific opportunity for you to gain access to the leading vendors in the industry as they present meaningful content and practical knowledge from real world experiences.

As one of the highlights of IT Financial & Asset Management Summit West, **these vendors will deliver excellent insight on the following issues:**

- IT governance and portfolio management tools and systems
- Project prioritization tools and systems
- Performance measurement tools

**Panelists include:**

**Rich Murphy**  
**Founding Partner**  
**EPK GROUP, LLC**



**Albert Subbloie**  
**President**  
**TANGOE**



**Lori Ellsworth**  
**Director, Product Management**  
**COMPUWARE**



Visit website for updated list of panelists

Choose a Track or Bring a Team and Attend Both!

**Track C**  
**Measuring, Benchmarking and Improving your IT Functions and Processes**

**Track D**  
**IT Asset Management**

**11:00 – 11:05**

**Track C**  
**Chair's Address**  
**Andrew Labovitch**  
**Manager, IT**  
**CONECTIV ENERGY**

**Track D**  
**Chair's Address**

**11:05-11:50**

**Track C**  
**Developing a Structured IT Measurement & Benchmarking Program**

Chubb Commercial Insurance has a structured approach to business planning which incorporates a structured IT measurement and benchmarking program. The program, which is directly mapped to the company strategy, and includes a list of metrics, a clear definition for each metric, a description of how it will be measured, and a list of initiatives that the IT organization must undertake in order to be able to measure and benchmark performance.

**During this session, you will learn how Chubb Commercial Insurance has developed and built a strategic measurement and benchmarking program across IT functions and processes. In addition, you will learn how to:**

- Develop your own measurement program
- Identify key components to benchmark
- Analyze the data and productivity
- Build and maintain support for your program

**Bill Bollwage**  
**Governance & Budget Manager**  
**CHUBB COMMERCIAL INSURANCE, HOME OFFICE SERVICES**

**Track D**  
**Controlling IT Costs Through Effective Asset Management**

Controlling IT costs can be significantly influenced by effective asset management. Maintenance cost can constitute as much as 40% of IT expenses. This presents a huge opportunity for improvement. Shaving even a few percent off this amount can have radical consequences for the bottom line.

In this session, you will hear from the panelists on how they have controlled their IT costs with asset management.

**10:15-11:00 Morning Break & Exhibit Viewing**

**Panelists Include:**

**David Farrow**  
**Director of Business Operations**  
**Information Technology**  
**SMURFIT-STONE CONTAINER CORPORATION**

**Mark Moroses**  
**Senior Director Technical Services / Security Officer**  
**MAIMONIDES MEDICAL CENTER**

**Caren Weiner**  
**Technical Procurement Manager**  
**XEROX CORPORATION**

**Bernie Donnelley**  
**VP, Quality Assurance**  
**PHILADELPHIA STOCK EXCHANGE**



bottom line of their IT organization's operating budget. Besides cost reduction, they've also leveraged the information to improve help desk support and be more proactive in lease management and planning. **In this presentation, Dave will:**

- Blueprint the steps for building a business case for IT asset management
- Discuss cost categories that yield promising return
- Share key learnings from Smurfit-Stone's IT asset management program

**David Farrow**  
**Director of Business Operations**  
**Information Technology**  
**SMURFIT-STONE CONTAINER CORPORATION**

**12:45 -1:45 Functional Peer Luncheon**

**1:50-2:35**

**11:55-12:40**

**Track C** **Designing & Developing IT Metrics to Drive an Estimation Program**

How do you evaluate and select the most valuable projects? What information and measurements can be collected to help evaluate projects?

These are often asked questions that are answered through using best practices during the project initiation phase. During this presentation, Allstate will focus on each step of the project initiation process, beginning from the filtering of the opportunity through the gathering of requirements, the development of estimates, and the creation of the statement of work.

Since inherent in a solid project initiation process is the capturing of key metrics, Allstate will discuss some key metrics as well as additional project management metrics that, when captured throughout the life cycle of the project, form the basis for sound process improvements.

**Cheryl Saar**  
**Consultant, Estimation and Metrics Center of Expertise**

**Jorge Rojas**  
**Pursuit Manager, Allstate Protection Technology**  
**ALLSTATE INSURANCE**

**Track D** **Building a Business Case for IT Asset Management**

Logically, managing and accounting for your IT assets is the right thing to do. But how do you convince executive management to spend several million dollars to track the assets you already own? The business case is there; and it's proven. At Smurfit-Stone the business case was built, the investment dollars approved, and they are now in their fourth year of an organized IT asset management program. With better asset information, they've driven 5% (in hard dollars) off the

**Track C** **Best Practices in Building an IT Scorecard**

An IT scorecard is a valuable tool that tells an organization about its performance through the use of key metrics. Wouldn't it be great if you had unlimited resources and could bring in expertise to help facilitate and build an IT scorecard for your organization?

Wouldn't it be even better if your company had a corporate scorecard you could align with? What can you do if these things are not available?

This is a terrific opportunity that we set aside for you to participate in an interactive and informal discussion with the speakers. You can explore new ideas and strategies, benchmark your policies and strategies, or ask any questions.

**Hear from the panelists on how their organization:**

- Builds and maintains employee and manager support
- Determining, implementing and refining measurements
- Ongoing scorecard development

**Panelists Include:**



**Bob Wittig**  
**Corporate IT Manager**  
**INDEPENDENT ELECTRIC SUPPLY**

**Christina Carbone**  
**Quality & Measurements Director**  
**NIELSEN MEDIA RESEARCH**

**Cheryl Saar**  
**Consultant, Estimation and Metrics Center of Expertise**  
**ALLSTATE INSURANCE**

**Jorge Rojas**  
**Pursuit Manager, Allstate Protection Technology**  
**ALLSTATE INSURANCE**

Track D

**Implementing an IT Asset Management Program**

MMC instituted an IT asset management program via a culture change in IT by establishing each IT associates stake in the program. Through the education of it's user base of each constituencies benefit in an accurate inventory and asset management program, MMC was able to adopt institutional policies and procedures to help maintain the continued success of the 99% accuracy of its assets in a diverse environment. The asset management program rollout was completed in 18 months, and immediately provided an increase in application availability, a decrease in help desk calls further savings in new system deployment. Additional savings were generated in cost avoidance of increased staff based on installed PC/ support tech ratios and software licensing costs.

**In this session, hear from the panelists on how they have increased security and reduced costs in:**

- Software licensing and hardware maintenance
- Help Desk calls
- Problem resolution time
- New hardware and application installation time

**Mark Moroses**

**Senior Director Technical Services / Security Officer  
MAIMONIDES MEDICAL CENTER**

**2:40-3:25**

Track C

**Developing & Utilizing Metrics for IT Investment Planning & Budgeting**

Imagine a division of a multi-million dollar company managing its portfolio and IT process independently, using only a handful of unrelated software products.

The Local Business unit of Nielsen Media Research was such a division until late last year when the Mercury IT Governance (ITG) tool was brought in to integrate these processes. This journey began when 55 identified and approved projects quickly turned into 118 where resource and budget collisions seemed insurmountable.

Follow their journey from paper and pencil management to the goal of seamless integration shepherding a product from its idea phase to end-user launch.

**In this session they will discuss how this division has worked with IT, product management, finance as well as senior management to implement this software product (ITG) to improve their reporting and accountability across the software development process.** Various areas will be discussed including: portfolio management, resource planning, project management, budget development and tracking, and quality control.

**Christina Carbone**

**Quality & Measurements Director  
NIELSEN MEDIA RESEARCH**

Track D

**Demonstrating the Value of Your IT Asset Management Program**

This case study provides some insight on the implementation of an IT asset management program at

Xerox Office Group, including the implementation strategy, benefits gained, lessons learned and obstacles encountered. Caren will discuss how they have demonstrated the value of their IT asset management program.

**Caren Weiner**

**Technical Procurement Manager  
XEROX CORPORATION**

**3:30 – 3:50**

**Afternoon Break & Exhibit Viewing**

**3:50 - 4:35**

Track C

**Utilizing IT Metrics & Benchmarking to Improve Performance Across the Organization**

Sony Pictures Entertainment has benchmarked and developed metrics based on time-tracking. You'll hear how they have developed a service catalogue with customer-direct services, enterprise-wide services and enabling services (services contained with IT). Using their catalogue, they track time for each individual and have estimated costs per person to salary.

**In this session hear how Sony Pictures Entertainment:**

- Mapped each task to service
- Calculated cost & compared industry norms
- Benchmarked to improve performance across the organization

**Mary Becquet**

**IT Controller  
SONY PICTURES ENTERTAINMENT**

Track D

**Integrating IT Asset Management with Change and Configuration Management**

A formalized change process is key to ensuring that the IT organization implements or installs hardware and software into production that satisfy request for services without adversely impacting the overall processing environment. This process can be used to provide: metrics that track success rates of installs, an audit trail of changes, and records demonstrating appropriate authorization.

When fully utilized to record all changes to the production environment an organization can now have a running history of configuration modifications along with a dynamic hardware inventory of assets.

**Bernie will discuss how they have:**

- Controlled introduction of changes to the production environment
- Increased success rates
- Complied for Sarbanes-Oxley with an inventory of assets
- Centralized database of all changes

**Bernie Donnelley**

**VP, Quality Assurance  
PHILADELPHIA STOCK EXCHANGE**

**4:40 Close of Conference**

## Day 3 Wednesday, October 26, 2005

## Dinner Workshops

4:45 **Workshop Registration** - Dinner will be served

**Workshop I** 5:00pm – 8:00pm *Choose I or J*

### Developing Measurements and Metrics Across the Application Development Life Cycle

Studies show that the software development industry has historically been challenged to deliver projects on time, within budget and with acceptable quality. **Many organizations have application development goals that impact:**

- Project quality: implementing applications with fewer defects
- Speed to market: reduce the amount of time required to develop and implement applications
- Project cost: reduce the effort and cost of developing applications

In addition, management expects that projects will be delivered at or near the initial project estimates. Allstate Insurance has developed a full life cycle approach for driving value from the measurement process by leveraging data throughout the development lifecycle.

During this workshop, the presenters will discuss how organizations can capitalize on their investment in a measurement program. They will discuss their use of the Goal-Question-Indicator-Measurement (GQIM) methodology for defining the reports, and share lessons learned with the workshop participants. **They will dive deep into:**

- Measurement and analysis
- Project tracking and control
- Project estimation

#### About your workshop facilitators:

**Feno M. Monaco, PMP**, is the manager for the **Estimation & Metrics (E&M)** team at **Allstate Insurance**. Additionally, Feno has nearly 10 years global consulting experience, where he spent 5 of those years managing a global E&M team. Mr. Monaco took the team from idea to full operational capability while implementing processes to support external assessments of CMM L3 maturity in multiple geographies. Along with his PMP certification, Mr. Monaco is a SW-CMM assessor and CMMI SCAMPI team member trained.

**Marty Safirstein** is responsible for the **Holistic Measurements Program** within **Allstate Insurance Company's Protection Technology** area. He created the measurement program vision, identified the individual initiatives needed to implement the vision, and supervises these initiatives as they unfold. Prior roles at Allstate include development of the Architecture Governance processes, Pursuit Manager in the Demand Management organization and authoring a comprehensive document presenting guiding principles for the migration of legacy applications for the Claims IT department.

**Kishore Shetty** is a **consultant** for the **Allstate Estimation and Metrics Center of Expertise**. As part of the E&M COE, he developed estimation tools, templates and process. He consults with clients on the implementation and ongoing support of estimation and metrics process throughout the Allstate Protection Technology Organization.

4:45 **Workshop Registration** - Dinner will be served

**Workshop J** 5:00pm – 8:00pm *Choose I or J*

### IT Investment Planning: Budgeting, Forecasting & Business Planning

CIO's lead the often heard charge to transform IT from a cost center to an engine for growth and value creation for business. IT finance plays a critical strategic role in accomplishing this transformation by managing IT investment planning.

Learn IT investment planning best practices from industry experts and from your colleagues in similar organizations. You will look at how to streamline core budgeting, forecasting, and business planning processes. You will also review the impact of control and governance requirements on the IT planning cycle.

**In this interactive workshop, you will survey best practices in the following areas:**

- Portfolio management and project portfolio management
- Increasing growth-oriented project spending while controlling maintenance and operations cost
- Chargebacks and spending allocations

- Performance measurement
- Risk and uncertainty analysis

#### About your workshop facilitator:

**Javier Sloninsky, PMP**, is a **Co-Founder and Managing Director** of **EcoSys Management**, a provider of enterprise project management and financial management solutions with headquarters in New York City and international operations based in London. Prior to founding EcoSys, Javier was one of the original designers of Primavera's enterprise project management suite and is a recognized expert in implementing project management, financial management, and risk management solutions for IT organizations. EcoSys has worked closely with financial services firms, government organizations, technology companies, oil gas, and utilities companies, including Shell, Motorola, United Utilities, Mellon Financial, State Farm Insurance, SunTrust Banks, US Navy, US Army Corps of Engineers and many others around the world.



## Day 4 Thursday, October 27, 2005

## Post-Conference Workshops

7:30 **Workshop Registration** – Breakfast will be served

**Workshop K** 8:00am – 11:00am *Choose K or L*

### Maintaining & Ensuring Compliance with an IT Asset Management Program

Large enterprises have a critical need to maintain accurate IT asset inventories. Compliance audits will now include the IT operations, and areas of software license compliance and utilization, lease management, hardware upgrades and retirements will go under the auditor's microscope. This workshop will discuss the needs, risks and solutions associated with automated IT asset management as a key component of IT related regulatory and contractual compliance issues.

IT asset management related compliance issues span the gamut from reconciling software usage to software purchases, limiting organizational vulnerabilities related to acts by individuals, meeting Sarbanes Oxley, HIPPA, and Gramm Leach Bliley requirements, establishing internal IT standards and strengthening IT security measures.

**Attendees will take away information on the following topics:**

- Software license compliance
- Regulatory requirements and IT asset management

- Surviving an internal audit
- Enforcing and ensuring compliance with internal IT standards
- How IT asset management reinforces IT security

#### About your workshop facilitator:

**Ed Cartier** is the **Vice President of Marketing and Corporate Communication** for **Eracent, Inc.** Mr. Cartier is a frequent contributor to various IT asset related publications and speaks on IT asset management issues at major national conferences. Eracent Inc. develops and sells a comprehensive suite of IT asset management solutions for enterprise level organizations. Serving all industries in both domestic and international markets, Eracent's core business strategy has been, and continues to be, to develop technologies that provide a rapid return, ease of use and complete access to the precise data needed by IT professionals to manage complex IT infrastructures.

**Workshop** **L** **8:00am – 11:00am** *Choose K or L*

### Creating & Capturing IT Value with Balanced Scorecards

IT organizations are increasingly adopting the balanced scorecard as a tool to measure progress towards achieving strategic objectives and to monitor performance. By utilizing the Balanced Scorecard IT organizations are able to better align resources and decisions to achieve breakthrough results. The objective of this workshop is to familiarize the participants with the steps necessary to successfully develop and implement a Balanced Scorecard within their IT organization. Participants in the workshop will use a number of case studies to drive customization of sample strategy maps, selection of metrics, balanced scorecard design, and, data collection and reporting processes. Topics include :

- Review of Balanced Scorecard concepts
- Review of the IT Balanced Scorecard development process

- Strategy map development based upon case study examples
- Metrics selection based upon case study examples
- IT Balanced Scorecard design and tool selection
- Data collection and quality assurance
- IT Balanced Scorecard implementation & critical success factors

**About your workshop facilitator:**

**Mark Bierbaum** is the **Program Director of IT Performance Analytics unit at The Hartford**. His unit implemented a Balanced Scorecard for IT executive level management. Previously, he was the program director in their P&C Strategic Program Office which was responsible for planning and management of a \$29M service portfolio.

11:00 **Workshop Registration** – Lunch will be served

**Workshop** **M** **11:15am – 2:15am** *Choose M or N*

### Best Practice Pricing, Costing & Chargeback Strategies & Tools for IT

If you buy in to the fact that the best way to manage your IT shared service organization, whatever stage you are in, is to manage it like a real business, then certain business/financial knowledge and capabilities are essential.

**These include:**

- Developing a "Service Catalog" that your customers can relate to and using Service Level Agreements to establish prices and other performance expectations
- Understanding the volume demands and unit cost of providing those services to your customers and how to manage/effect service unit costs through delivery process performance
- Having the ability to chargeback/bill your customers for the volume of service that 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
- Getting service-level customer satisfaction feedback that supports SLA performance expectations

With this knowledge, steps can be taken to manage unit cost and prices, while maintaining high quality. This adds great financial value to your customers and the entire corporation.

During this workshop, participants will learn how to design, develop and implement a "best practice" solution for:

- a) developing market-focused SLAs

- b) calculating the unit cost of services delivered to customers
- c) understanding the annual owning cost of major assets/applications used to deliver services
- d) integrating service delivery performance into your Balanced Scorecards

This workshop will provide you with the information you need to begin developing a very effective costing and chargeback infrastructure for your IT department. Not only will you get advise from your workshop leader, but you will have the opportunity to interact with your peers to discuss/develop a 'best-in-class' design that you can begin to implement when you return to the office.

**About your workshop facilitator:**

**Ron Bradley, 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 a passion for designing "best-in-class" business solutions, including IT costing and billing. His consulting assignments include process redesign, balanced scorecard, and service and process costing for various industries, including specific balanced scorecards, costing, billing for all shared service functions.

## What past attendees had to say about IT Financial Management events:

*"Good information-targeted at the challenges I'm facing today."*

**- TRW/Automotive**

*"Award ceremony was very nice-this conference provided plenty of opportunities for networking. Thank you for providing the presentation CD-ROM. I will refer to it often and use it to create presentation with my company."*

**- Citigroup**

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### About CIO Insight

CIO Insight is the business journal of record for today's CIOs. Every month, CIO Insight provides subscribers with cutting-edge IT business strategies, management techniques, case studies, proprietary research/analysis and actionable tools all designed to help IT business leaders achieve success.

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

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.

Since its inception in 2001, Baseline has achieved critical acclaim from technology and business leaders as well as industry peers. In addition to being named to BtoB's Media Power 50 list for four consecutive years, the publication has won several Jesse H. Neal Awards, including the 2005 Grand Neal Award for the magazine that best exemplifies editorial excellence in the business press. Additionally in 2005, Baseline was nominated for a National Magazine Award which are given out annually by the American Society of Magazine Editors to magazines that consistently demonstrate superior performance in delivering stated editorial objectives.



### About eWEEK

eWEEK is the essential strategic technology information resource. As the only complete provider of news analysis, product reviews and unbiased expert opinion, eWEEK is unique in its ability to guide IT decision-makers to the best choices for their companies. The readers of eWEEK use the publication to successfully evaluate, deploy and leverage new technology solutions to provide their companies with competitive business advantage. eWEEK delivers breaking news, technology evaluations and strategic analysis covering the technologies, platforms and trends important to enterprise-wide computing.

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IT Business Edge offers a collection of 10 free weekly reports that provide the most current and relevant information on an organization's top IT priorities. Our reports are delivered weekly via email so you are guaranteed to receive the most current and actionable information. Some of our weekly topics include Maximizing IT Investments, Aligning IT and Business Goals, Managing Compliance Standards and Outsourcing for Strategic Advantage.



The Association of Information Technology Professionals (AITP) offers opportunities for Information Technology (IT) leadership and education through partnerships with industry, government and academia. AITP provides quality IT related education, information on relevant IT issues and forums for networking with experienced peers and other IT professionals for over 7,000 members. AITP is the Information Technology professional organization of choice for providing leadership opportunities, professional development and personal growth.



### IT & Telecom PMI

Project Management Institute (PMI) Information Technology and Telecommunications Specific Interest Group (IT&T SIG). The PMI IT&T SIG is a component of PMI dedicated to project managers in the Information Technology and Telecommunications fields. We commit to:

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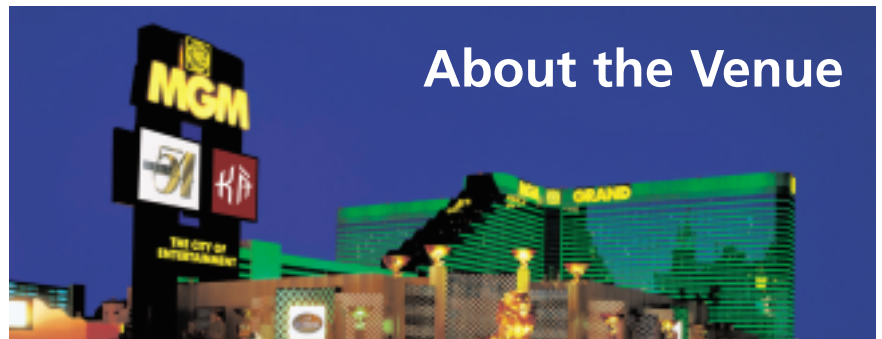
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# IT Financial & Asset Management Summit WEST

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