16TH ANNUAL

ContinuityInsights
2018 MANAGEMENT CONFERENCE

April 23-25, 2018
Hilton Miami Downtown
Miami, Florida

2018 CONFERENCE GUIDE

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Pre-Conference Workshops: April 22
Post-Conference Workshops: April 25-28

2018 Conference Session Guide

Conference Tracks

A. Case Studies
B. Trending
C. Program Development and Advancement
D. Measurement, Metrics and Maturity
E. Emerging Technology
F. Professional Development
G. Subject Matter Experts (i.e. Ask the Experts)
P. Plenary

MONDAY, APRIL 23, 2018
8:00 a.m. to 9:30 a.m.   **Plenary Session**

P1: Don't Talk to the Media Until…*Being an Effective Spokesperson in Today's Digital Age*
Gerard Braud, CSP, Fellow IEC, Founder, Braud Communications
In Gerard Braud's keynote session you will explore why speed is critical in both your event response and your communications response. In this digital age, the story about your response can easily get hijacked by others, hastening the need for your organization to issue a statement to all audiences, including the media. If you've ever been in the spokesperson role, you may wonder why you get taken out of context or why your best stuff gets left on the cutting room floor. Braud will unlock his vault of secrets to help you be better prepared to today's communications realities.

9:45 a.m. to 10:45 a.m.   **Breakout Sessions**

A1: So, You Have a Disaster…Now What?
Tom Serio
The presenter will walk you through a real disaster that impacted a large business and forced them to enact ALL of their business continuity plans. What's the reality of the situation? What's were upper management thinking? How do quickly and successfully did employees get back to work? Learn from some very valuable and real lessons learned while recovering a corporate campus from a nine-day outage.

B1: The Internet of Everything (IoE)
Michael Jennings, Director of Consulting Services, Resiliam
The Internet of Everything (IoE), according to Cisco, is a top trend that brings together people, processes, data and things to make networked connections more valuable than ever before – turning information into actions that create new capabilities, richer experiences and unprecedented economic opportunities for businesses, individuals and countries. But what else does IoE bring to the Resiliency equation? In this session we will explore IoE basics; people, data, processes and things that may put your organization at risk.

C1: Using Proactive Steps, Deliver Real Value to Your Company
John Steffen, Director IT – EDC Resiliency and Reliability, Charter Communications
As a DR/BC program grows, there needs to be an evolution beyond the base level processes and procedures that the program manages. Having great plan and exercising it regularly is a great start, but this is a reactive. Take your program to the preventative point of view and reduce the likelihood of ever needing a plan. This will really add value to the company. By looking at the entire lifecycle chain of applications, identify potential risks and develop plans to mitigate them. These can be small things but can cause real outages.

C2: Removing Risk Exposure: Vendor Assurance
Thomas Boehling, Director, IS Resilience & Recovery (R2), Providence St. Joseph's Health
This presentation will discuss ways in which an organization can easily extend the integrity of business continuity, disaster recovery, and operational resilience programs outward to include vendors. We will cover how to engage legal, contract management, and other areas of the organization in ensuring single points of failure introduced by these external dependencies are eliminated. This session will provide tips and examples of how to get involved in and easily navigate contractual language, what to watch out for with force majeure clauses, and provide additional value to any business area in any industry.

D1: Evaluation, Measurements & Benchmarking, It's Not How Good You Are, It's How Good You Want to Be
Phil Lambert, Founder, Ripcord Solutions
Using tools to define, evaluate, and measure performance, activities, and confidence is a skill that can catapult a resiliency program to a greater level of awareness and significance. This session will discuss basic measuring and benchmarking techniques; scorecards, dashboards, matrices, and reports; practical measurements; self-assessments versus external assessments, and best in class performance leverage measurements for success. Use this knowledge to leverage your influence, program significance, and your image by making measurable progress.

F1: Don't Believe Everything You Think: Outsmarting Our Own Biases

Judy Analco, Principal Consultant, ERM

Most of us consider ourselves rational, clear-headed professionals. By its very definition, BC considers non-routine situations on a regular basis. Yet, universal biases can cloud our perspectives in ways we may not realize, and compromise our effectiveness. By anticipating and spotting these common mental errors in ourselves and in our stakeholders, we can design more robust, salient interventions, effectively challenge resistance, enable better decisions, and boost organizational resilience. To increase our professional impact, we can learn ways to 'get out of our own way' and more quickly lead our stakeholders and support them in carrying out their BC roles.

11:00 a.m. to 12:00 p.m. — Breakout Sessions

A2: Metrics and Measures in a Large Enterprise

Robin Martin, Second Vice President – Risk Management, Ameritas

Using metrics and measurements to demonstrate how prepared a company is to recover from a business continuity incident. Metrics, measures, and KPI's are a hot topic in the growing age of big data. But what metrics make sense for business continuity? The presenter will discuss her implementation of capability measures at a large insurance company. By assessing capabilities, setting a baseline, and measuring progress over time, she has been able to demonstrate quantitative progress.

A3: The Need for Real-Time Communication in a Complex Global Threat Environment

Daniel Graff-Radford, Chief Product Officer, OnSolve

Businesses today – from Fortune 100 with geographically dispersed workforces down to SMBs whose workforces are always on the move – are challenged to communicate in real-time with employees and customers. Whether it's severe weather, terrorist and active shooter threats, travel issues, or even cyber security attacks like the recent Petya ransomware attack when many business employees could not access their networks, laptops and email, and executives needed to find other ways to notify employees in real-time.

C3: How Every Business Can Have Their Own Emergency Response Teams

Larissa Paschyn, BC Crisis Emergency Manager, Amgen

This presentation will discuss company-based emergency response teams (ERTs) and how businesses of every size can implement them. It will focus on the key teams for implementation, including developing your own all function CERT teams, and/or creating specific teams for your company's needs, such as evacuation coordinators, medical response, urban search and rescue, ham radio technicians, and hazardous materials (hazmat) teams. In addition, the presentation will discuss how to develop emergency teams and get executive buy-in, how to recruit volunteer staff, the required training for each team, equipment needed and approximate costs, emergency response team plan development, exercise development, and how to integrate these teams with local and state emergency services. It will use case-studies of actual company response teams and their capabilities as examples.

E1: IT DR Program Improvements; Working with Improved Technologies and the People Who Know Them Best

Dean Matsuno, Director, Business Continuity Management for Investment Division and Corporate Division, and Stephen Pickford, Global Disaster Recovery Manager, Manulife Financial Corporation

Documenting and exercising IT Disaster Recovery solutions in an evolving environment; from single on-premise application exercises in a day to exercising dozens of applications in mixed environments in a day. As the DR team worked closely with their teammates in IT to go from single application exercises to same-day exercises of dozens of related applications. The IT teams implemented technologies that allowed for near-instant failover of dozens of databases and front ends. The DR team project-managed the coordination of hundreds of participants to improve the failover process and validate that applications were working as expected in the secondary data center. The team continues to help support and evaluate these efforts, and are experiencing the changes that result from solutions being moved off premise to the Cloud.

F2: Round Table Discussion Around Personal Resiliency

Lance Stange, Virtual Corporation, and Stacy Hudson, BC Program Manager, Toyota

As business resiliency practitioners, we often have to perform our jobs under adverse conditions. Often we are planning for crisis scenarios that may or may not occur and often with little or no funding, limited staff, limited support from senior leadership, and sometimes under tight deadlines. This session gives you a short outline of my personal story, some brief descriptions of how to "sell" yourself and your program, but the main emphasis is on the resiliency professionals who are pushing the rope uphill to prepare and herding cats if you are leading response. My goal is that through sharing with each other, each participant may take away coping techniques or nuggets of information that will help them when things are particularly frustrating or when we are feeling burned out.

G1: Exercise Facilitation Techniques

John Jackson, Fusion Risk Management, Moderator (panel TBA)

Exercises are an excellent tool to develop competencies, create organizational awareness, identify opportunities for improvement, engage management, and prove that response and recovery capabilities work. Our panel is highly experienced in developing and facilitating exercise sessions that dramatically improve preparedness and management buy-in. This session will be a highly interactive discussion of ideas and techniques, ensuring that attendees leave with relevant and usable takeaways.

1:00 p.m. to 2:15 p.m. — Breakout Sessions

A4: Crisis Management Event Forecasting

Michael Keating, VP, Business Continuity Management, RGA Reinsurance Company

Probably the biggest change in the way RGA thinks about crisis management, especially at the strategic level, is the introduction of what we call Crisis Risk Forecasting. It's a discipline we train our crisis teams around the world to do to look at a situation to see what changes might alter the trajectory of an event to the good or the bad. Presenters will cover the development process of a real crisis forecast at RGA and work as a team to develop a crisis risk forecast for a fictional scenario.

A5: Paper Is Out, Phones Are In

Andy Waples and Maya Calabrese, Eaton Vance Management

This session will profile the presenters' adoption of a mobile app for their program, perhaps a next generation of distribution channels for BCPs. Topics discussed will include from idea to inception; that is evaluation, selling the concept to senior management, back-end application, employee adoption, client and regulator engagement, and more. At its conclusion, the attendees will have an opportunity to design their own model.

B3: BCI Horizon Scan – Industry Trends, Themes and Statistics

Heather Merchan, Frank Lady, and Lori Norman, BCI US Chapter Board

What are the headlines that you will share when you return to the office after this conference? If your leadership team asks you what the industry hot topics and trends are, what would your response be? This session will cover the key trends, themes and statistics derived from the annual BCI horizon scan report. Our panel of practitioners will share insights as they explore emerging themes, and we will then take comments and questions from the room. You should leave this session armed with and understanding of current industry trends and emerging hot topics, along with practical insights from fellow resilience practitioners.

C4: Redefining Program Success: Establishing Command & Control

David Nolan, CEO, Fusion Risk Management

This session focuses on the key strategies and tactics needed to make your BCM program succeed and thrive now and into the future. Subtle but significant adjustments can make all the difference to your success. Are you in command of your program? Are you in control of the results? Is the core of your agenda strong and stable? Are you flexible and agile enough to address new agendas? Learn what leading organizations do differently with ideas that make sense for the most basic to the most complex enterprise programs. The future is now!

D2: Elevate Your Program with High Value Reporting Through Data Mining

Christopher Duffy, Vice President & Chief Innovation Officer, Strategic BCP

Within a BC/DR program, there is high value data. Learn how to uncover the value and hear on several case studies. Understand Big Data and data mining as it relates to BC &DR. The presenter brings a refreshing and unorthodox view to Business Continuity and Disaster Recovery Programs. This process, "Digging for Gold" is the second in the series, following on the success of the Lizard Brain in Business Continuity. The goal for attendees is to see their data from a different perspective, and elevate the program with high value reporting through data mining.

E2: Next-Gen Business Continuity: The Increased Complexity of Protecting On-Premises and Cloud-Based Workloads

Dennis Wenk, Veritas Global Advisory Consulting Director, Continuity & Resiliency

We live in a digital world that has given rise to a 'next generation' of Business Continuity Management (BCM). The paradigm has shifted; economic losses from natural catastrophes and man-made disasters was $175 billion in 2016 – up from $94 billion in 2015 (source: Swiss Re). This Next Gen BC session will address basic cloud nomenclature, how virtualization and cloud computing are reshaping the face of business, why organization are shifting steadily toward cloud-first strategies, and how to deliver the Next Gen BC solution that is equally effective in supporting the reliable failover of a single application, a specific group of applications, an entire data center, or even cloud-based services.

2:30 p.m. to 3:45 p.m.	Breakout Sessions

A6: Turn Up the Volume PART 2: Developing and Implementing a Global BCM Training Program in a Busy, Distracted World

Lisa Trousdale, Global Business Continuity Leader, EY

Last year we talked about the challenges of training employees and leaders in BCM when everyone (including you!) is stretched thin and pressed for time. Come and see the framework and some of the deliverables that a large multinational company, with over 200,000 employees in 120 countries has put in place. Presenter will show videos developed for all personnel, Crisis Management Teams and Business Continuity Planning team members as well as demonstrate the self-serve virtual learning portal where training facilitators and response team members can access videos and resources. Discuss ideas for measuring effectiveness of training and managing and reporting on compliance.

B4: View from the Top: What Regulators, The Board, and Executive Leadership Want to See From You

Courtenay Enright, Vice President, Business Continuity, Vantiv

This session will show you how to translate the wealth of enterprise knowledge and data into reporting that resonates with regulators, the Board, and your executive leadership, and highlights your program's strengths and accomplishments. Make your upward reporting relevant to the market, business and cultural strategy of your company. Tying into your corporate values and goals. How to get help from department allies to layer and magnify your message. Translate resilience efforts to revenue wins and mining the data you have a different way. Leveraging company communication channels to get recognition for your achievements.

C5: Towards the BC PMO (Business Continuity Portfolio Management Office)

Howard Mannella, Managing Principal, Alternative Resiliency Services Corp.

The BC industry is evolving – are you? Savvy practitioners are moving away from jargon-speak and all-or-nothing solutions to sophisticated business-based approaches with measurable KPI's. The most mature BCM programs create and manage portfolios of integrated capabilities scalable to meet demand; executives are more engaged and supportive within these types of programs. This session will share the vision for the BC PMO, an office that advises the enterprise on existing capabilities and shapes recovery portfolio options across the organization. Takeaways will include: how to communicate to executive stakeholders in their native tongue; how to define and implement relevant solutions with every day value; and, how to position BCM away from 'the disaster geeks' to generate true business value!

D3: Assessing Residual Risk in Your BCM Program

Michael Herrera, CEO, MHA Consulting

You have addressed compliance, but do you know where the greatest residual risk lies in your program? The assessment of residual risk (the risk remaining in your plans after all mitigating actions have been taken into consideration) gives you the opportunity to identify where your greatest exposures exist as well as where you may have over-planned. In this session we will discuss the connection between compliance and residual risk, understanding residual risk and the key components of

risk tolerance, inherent risk, threat landscape, and mitigating controls. We'll also look at the benefits of understanding the residual risk in your program, managing risk appetite, plan mitigating controls, and potential ways to target your efforts to minimize risk in your program.

E3: Live Hack Cyber Attack
Frank Shultz, Managing Director, BC in the Cloud, and Derek Uzzle, Sr. Solutions Architect, Alert Logic
Watch a live demo of the tools attackers use to leverage vulnerabilities and compromise systems. See the most frequent attacks against web applications and user accounts/passwords, opening a path for attackers to upload malicious code, crawl deeper within your systems and export data. Attendees will have a better understanding of how these hacking tools function and learn how to better prepare for these instances going forward.

G2: Major Challenges to Implementing an Effective Risk Mitigation Program and How to Overcome Them
Mike Janko, Director, Global Business Continuity,The Goodyear Tire & Rubber, and Chris Summerrow, Director, Insider Threat Management, UPS
Join us for this session which will include an overview of many key techniques relating to implementing your Business Continuity and Insider Threat processes. There are many textbook definitions and opinions as to what makes your Risk Mitigation program a success, yet many believe an effective program is one that is recognized as having business value. How do you accomplish this? Risk Mitigation may be a Business Continuity program in one organization, or a separate program in another. What are some of the many obstacles you will likely face on getting personnel at all levels and job functions to "buy into your risk mitigation process?" Specific topics presented will include who you should engage, what are the most common issues that could stall your progress and the impact of human element factors as a key contributor to your program's continued success.

4:00 p.m. to 5:00 p.m.	Breakout Sessions

A7: Implementing a Global Travel Security Program at T. Rowe Price
Blaise D'Ambrosio, Global Business Continuity Manager, T. Rowe Price
T. Rowe Price recently implemented a global Travel Security program utilizing a leading in industry vendor. Attendees will learn the good and the not so good of the planning and implementation process. The session will cover criteria used to determine that a program was required, a brief and agnostic discussion of the available 3rd party providers, and a review of the protocols for our various travel security related incidents such as, medical emergencies, "high risk location" travel, high casualty international events, and executive flight concentration. Also covered will be a review of the vendor's tools, the communication campaign, and what to expect when you "Go Live."

A8: A Roadmap to Improving Your BCMS Capabilities
Lynnda Nelson, President, ICOR
IGT is the world's leading end-to-end gaming company, with its holding company headquarters in the UK, with operating headquarters in Italy, Nevada, and Rhode Island. IGT provides the gaming industry with proven solutions for gaming, lottery, interactive, and social, through every channel across the spectrum, including retail, web, and mobile. Take a journey with IGT as they share how they improved their business continuity capabilities over the past three years by conducting a gap analysis of their alignment to ISO 22301 and became certified to ISO 22301.

B5: Bridging the Gap Between Malicious Threat Awareness and Business Continuity Response
Brandon Tanner, Senior Manager, Rentsys Recovery Services
With malicious threats such as ransomware continually in the news, it's hard to deny the reality that cybersecurity is one of the top issues facing businesses today. Planners often fall short in ensuring employees are properly trained on cybersecurity best practices and often don't always have the technical knowledge required to engage IT personnel and support them during an attack. This session will provide guidance for incorporating cybersecurity into your business continuity program. You'll receive tips for training employees in security roles, defining information security needs and creating strong security policies.

B6: Why You Need a Holistic Approach to Managing Critical Events
Imad Mouline, CTO, Everbridge
While critical events have become more frequent, more complex, and costly to businesses, organizations' plans and processes have remained surprisingly siloed and constrained by an inability to holistically manage the lifecycle of a critical event – from assessment, to communication, to analysis. This session will discuss how security and IT managers can combine communication systems, incident management systems and threat visualization tools to empower critical event management, improving the way that they identify risks, communicate through an Integrated Security Operations Center to help keep their businesses safe and operating during critical events.

C6: Documenting an Exercise
Monica Goldstein, CEO, RecoveryPlanner
Knowing how to plan and prepare all the documents for a Business Continuity exercise is fundamental to a successful exercise. In this session we will review designing and documenting a Business Continuity Table-top Exercise. Gartner says that the prep work for an exercise is approximately 60% of an Exercise. So, what are you prepping? The U.S. federal government Frameworks, like NIST and NIMS, give examples of the documents to prepare but it may not be relatable or clear to the user. This session will review the information that needs to be in the documentation of an Exercise. We will provide each participant with a document that gives them guidance on exercise documentation and during the session they will work on their own Exercise Documentation.

G3: The Case for Developing Organizational Resilience Capability
Mark Carroll, Income Research, Moderator (panel TBA)
Out of the box thinking and taking creative, innovative actions to address those ideas are a few of the keys to developing the capability for organizational resilience. Attendees will learn of and discuss examples of creative and innovative actions taken to improve the resilience capability of the organizations profiled. This session will consist of a series of five to seven-minute presentations by various practitioners on innovative approaches that have been taken to enhance organizational resilience capability that were neither intuitive nor obvious and the capabilities that have been put in place. The session will include a brief Q&A with the practitioners profiled.

P2: Business Interrupted – Cyber Risk Gets Physical

Dr. Nader Mehravari, Chief Scientist, and David White, Founder and Chief Operating Officer, Axio

The magnitude of recent events is posing unprecedented challenges to corporate boards, C-suite executives, and shareholders. It is critically important for business continuity, incident management, disaster recovery, and emergency management professionals to stay informed of developments in the cybersecurity arena. This session will (1) characterize the expanding cyber risk environment, (2) review key cyber threats, including threats to the ever-increasing convergence of physical and cyber domains, (3) discuss key challenges faced by organizations in effectively managing their cyber exposure, and (4) present actionable strategies for successfully managing the risk of cyber business interruption. While cyber risk cannot be eliminated, it can be effectively managed (or solved) through cyber resilience optimization to meet the business needs of our organizations.

A9: What Works: Cisco Services Supply Chain Risk Management

Don Hall, MBCP, CBCLA, ARMP, Cisco Services Business Continuity Program Manager, Cisco Systems, Inc.

This presentation shares Cisco Services' supplier BC processes highlighting assessment scoping, questions, risk dialogue, metrics, and supporting supplier contracts language. Cisco Services customer support and service supply chain organization implements an effective, practical approach to identifying, prioritizing and managing supplier business continuity (BC) risk using limited resources. Focusing efforts on critical suppliers (aka vendors) enables a small team to address important risks to the organization. Actionable metrics reflect risk reduction efforts and accountability.

A10: The Evolution of Crisis Management Planning and the Escalation of Threats Facing a Global Media Company

Paul Arbet, Manager Business Continuity, CBCP, MBA, and Tiffany Sudderth, Director, Business Continuity Management, Turner

With today's global political and social unrest, Turner's News and Entertainment brands routinely face threats to the business as well as to its employees. These can range from boisterous protests and intimidation against employees to more clandestine calculated actions intended to harm our operations. Given that Turner's Business Continuity Management group owns Crisis Management, it has become our responsibility, in partnership with our Corporate Security colleagues, to lead those efforts that anticipate, respond to and, in best cases, prevent those actions that trigger a crisis declaration. Join us as we share Turner's approach to mitigating risk though our Crisis Management Plan framework.

B7: Pain, Problems, and Possibilities: The Adaptive BC Manifesto

David Lindstedt, Founder, Readiness Analytics

You may not have heard of the Adaptive BC Manifesto, but it was formed in response to the pain and problems we all face as BC professionals. We lack executive support; participants are not engaged; we cannot demonstrate our value; and we are too heavily focused on documentation and compliance. But there is hope! Come learn an alternative approach that incorporates proven practices from Agile, Lean, Six Sigma, Motivation 3.0, the Growth Mindset, and other related disciplines. Get a fresh perspective on your practice and experience new possibilities in preparedness with this interactive and engaging session. Participants work together to identify current pain points in the profession.

C7: Seven Steps to Building a Rock Solid Resilient Enterprise

Tejas Katwala, CEO & Co-Founder, Continuity Logic

This presentation will detail the seven steps that every organization can take to build a resilient enterprise. From evaluating your current state using best practices and industry standards to implementing a continuous resilience improvement plan, this will deliver practical steps and takeaways that you can use in your organization today.

C8: Simplifying Crisis Management and Business Continuity Development for the Medium-Sized Company

Grace Burley, Managing Partner, Strategic Crisis Advisors

For a medium-sized company, the challenge of developing and maintaining crisis management and business continuity programs can be overwhelming. While large companies have the resources and bandwidth for development of these programs independently, most medium-sized companies do not. In many ways, medium-sized companies have an often-overlooked advantage over their larger counterparts: agility and inherent cross-functionality. In this session, we will discuss how the medium-sized company can simplify and streamline the development and maintenance of their programs. The presentation will include real life examples and clear guidelines to assist risk managers integrate two key elements of your enterprise risk program.

G4: Millennials: The Future of Business Continuity

Jeremy Gudgeon, CBCP, Senior Business Continuity Analyst, Vanguard, Moderator
Panelists: Vanessa Vaughn, Asfalis; Larissa Paschyn, Amgen; Michael Bratton, Avalution

As baby boomers approach the backside of their careers, the long-term future of our profession falls squarely upon Millennials. This select panel of experienced and ambitious millennial professionals will share their thoughts, experiences, and answers to such questions as: How must communication channels change? How do we create a positive environment where all constituents flourish? How best do we execute this institutional knowledge transfer? What tools, metrics, methodology, and other skills need to improve to ensure collective success? How do we hire, train, manage, and retain millennial talent? Please come with your questions for this highly interactive session.

A11: How to Engage C-Suite Team Members Using Bite-Size Training

Christopher Sarcletti, Specialist, Enterprise BCM, BMO Harris Bank, and Eric Thompson, CEO, Crisis Guardian

Getting time with C-Suite executives to train them on their role and their responsibilities in a crisis has been a mission impossible task. The process was long and protracted – setting aside training sessions that executives found difficult to attend. A new approach was required. One that grabbed their attention, could be

delivered to any team member across any state. An approach that could get all the messages across in less than 10 minutes. Without the constraints of eLearning and platform requirements. And so flexible that it could be delivered on any device as well as through conventional intranet and sharepoint channels.

A12: Building an International Business Continuity Program at Staples
Leah Sawyer, Business Continuity Manager, Staples Inc., and Christopher Britton, RockDove Solutions
"Big-box" retail organizations must provide customers with their orders even if the company has an emergency. Building a business continuity program across international borders can come with many challenges. Learn how Staples is addressing and overcoming those challenges in their business continuity program and through the use of mobile technology. Also, attendees will walk away with real life lessons learned from the 2017 hurricane season.

B8: Coordinating Business Continuity and Information Security
Rob Giffin, CBCP, CISA, Co-founder and President, Avalution Consulting
Information Security and business continuity have so much in common! Join us to discuss how to better coordinate and leverage each group's strengths. This presentation will explore the potential integration points between the two disciplines, real world examples and practical recommendations on how to implement them.

C9: How Your Critical Suppliers Demonstrate Their Resilience
Tim Mathews, DSc, MBA, MBCI, Executive Director, Enterprise Resilience, ETS
Supply chains and critical third parties continue to add complexity to understanding our overall resilience. No matter where you are on the ISO 22301:2012 (or other) standard continuum; certified, aligned to, familiar with or haven't thought about it – the use of a Self-Declaration or Conformity (SDOC) methodology will improve transparency and overall resilience. This presentation will explain what SDOC is, why you may want to implement a SDOC methodology and considerations for getting started.

D4: Process Maturity vs. Program Capabilities – Panelist Discussion with Live Audience Polling
David Sarabacha, Deloitte
Back by popular demand, join us in revisiting a modern BCM program assessment approach that answers some of executive's most important questions – 'Can we recover? How confident are we? Are we making the right investments?'. Traditional assessments fall short, overemphasizing documentation and adherence to industry standards while overlooking results. In contrast, the Resilience Strategy and Operating Effectiveness (RSOE) concept focuses on determining the operating effectiveness of your program processes and the level of recoverability it has created for your mission critical functions. It helps with the discovery of recoverability gaps, including business readiness, validation of recovery resource priorities, vetting of documented strategies and project assumptions, and evaluation of recovery capabilities. Following a brief presentation, engage in an interactive panelist discussion supported by live audience polling that lifts to veil on how prepared organizations are today.

E4: Cloud Architecture at Turner Leveraging the Cloud for Operational Resilience and Technology Risk Mitigation
Gail J. Grimes, Senior Business Continuity Consultant, and Don Browning, VP Cloud Architecture, Turner
What does DR Planning look like when your company takes a bold move away from on premises architecture and moves its most critical functionality into the cloud - all into the cloud? Join Turner's VP of Cloud Architecture and the Turner Business Continuity team for a presentation on how Turner is re-architecting in cloud environments to get product to market, attract consumers, and improve operations, while improving technology resilience and mitigating risk. Turner is going beyond "Disaster Recovery" and living our "No Fear, All In" culture to meet industry challenges as a premium content provider.

3:30 p.m. to 4:30 p.m.	Breakout Sessions

A13: Building Resiliency in 12 Months or Less
Dov Gardin, Associate Director Risk and Resiliency, Allergan
You've been tasked with building a business continuity program, you have to show results now, and you have limited resources. Join the presenter, head of risk and resiliency at Allergan, as he uses Allergan as a case study to walk through 10 key steps of building a fast, effective, and sustainable business continuity program in 12 months or less – without breaking the bank.

A14: The Critical Need for VOAD Participation
Dan Schreiter, ABCP, PHR, SHRM-CP, Business Continuity Manager, Kwik Trip, Inc.
Kwik Trip is a chain of more than 400 convenience stores with more than 18,000 employees. This presentation will share why becoming a local Volunteer Organization Active in a Disaster (VOAD) member or establishing a Public/Private Partnership with your local Emergency Management officials will be a key component when it comes to response/recovery operations, not just for the community, but for your business, too. Hear about real-life situations in which Kwik Trip worked with state and local emergency management officials in their critical events planning exercises. Learn how your organization holds the key in establishing public/private partnerships.

B2: Sheltered Harbor: Protection Against Potential Significant Cyber Risk
Matt DeFrain, Cyber/Business Resilience, KPMG
For financial institutions, a cyber-attack that exposes their customers personal identifiable information is bad enough. But even worse is the 'doomsday' scenario where the hacker destroys or lock up that data, making it impossible to retrieve. Such an attack could leave a bank helpless, unable to operate for days or even weeks, and potentially damage its reputation for security. Additionally, if news got out that there was a lockdown in people's access to their money, it could have a ripple effect on other banks, causing customers to pull their funds in fear a similar attack might cripple their institutions. To guard against that kind of panic, the financial services industry has created Sheltered Harbor, a voluntary initiative that provides financial institutions and their customers with an extra layer of protection. This session will explore the scope of the Sheltered Harbor initiative, industry adoption and key components of the solution.

B9: An Emerging Practice Challenges the BIA: SIPOC (Suppliers, Inputs, Process, Outputs, Customers)
Charlie Brown, Director of Enterprise Risk Management, Primary Residential Mortgage, Inc.

An emerging practice challenges the BIA: SIPOC (suppliers, inputs, process, outputs, customers). Mythical creature or magic potion? Neither, but what if you could have all the benefits of a BIA in a fraction of the time? The SIPOC model, adapted from SixSigma, could be just the answer you've been searching for! In this interactive session, you will learn the basics of the SIPOC model, hear case studies, and engage with others as you explore how to put this new tool into practice at your organization.

C10: Achieving an Actionable Corporate Workplace Violence Program, Overview – Realities of the Risk

Cynthia Simeone, Corporate Director, Business Resilience Officer, Excellus Blue Cross Blue Shield
While OSHA clearly identifies the requirements for establishing a workplace violence program, successful implementation requires finesse and enhanced partnerships with organizational Compliance, Physical Security, Legal, Human Resources, Business Leadership, and, of course, Executive Leadership. This session will provide proven steps required to establish and operate a value added corporate workplace violence program that promotes identification and reporting of potential internal and external threats, ongoing evaluation and monitoring of threats, swift action to mitigate threats to the workplace, and actionable awareness, training and exercising components to provide employees with the skills they need in order to survive an actual workplace violence incident.

D5: Technology Recovery for the Next Decade

Dan Dorman, ITS Service Continuity Program Manager, Alaska Air Group, and Karen Lowham, Head of Global Disaster Recovery Program, eBay
What does readiness look like as our technology ecosystem becomes more diverse and complicated with Cloud, mobile, increasing reliance on third party critical services and in-house systems that are complex, interdependent, and evolving? How do we simplify our planning efforts to be more effective and expedient? The presenters will share the concept of adaptive technology recovery and why this is needed, how to reduce complication and layers of processes, keep what works, establish clear objectives, and the ability to build/demonstrate value of resiliency program earlier vs later down the road.

WEDNESDAY, APRIL 25, 2018
9:00 a.m. to 10:00 a.m.
Plenary Session

A15: Implementing Adaptive Business Continuity at Brink's

Mark Armour, Director Global Business Continuity, Brink's Inc.
This will be a comprehensive look at exactly what was done at Brink's to align the company with Adaptive BC Principles. Whether you are already familiar with the adaptive framework or are just learning about it now, this should answer many of your questions about how Adaptive BC is implemented and managed in the real world. You'll learn about some of the challenges, difficulties and problems that an experienced practitioner can have in abandoning legacy BC practices.

A16: Lessons Learned from Hurricane Irma and Other Disasters

Beverly Schulz, CBCP, Director, RJF Operational Risk Management, Raymond James Financial
A Category 4 storm is headed straight for your town. What do you do when a critical recovery team member refuses to evacuate without their pet pot-bellied pig and no hotel will allow it? Well, you rent them a furnished apartment, that's what you do. The 2017 Hurricane Season was memorable, setting numerous records and leaving devastation behind for many parts of our country. During this session, the presenter will cover lessons learned from the response to these storms and numerous other crises. Tips for improving your Crisis Management and Incident Response Programs will also be shared.

C11: Raising Awareness and Bridging the Gap between Disaster Preparedness at Work and Home

Kathy Lee Patterson, Business Continuity Manager, and Hannah Zimmerman, Business Continuity Analyst, Independence Blue Cross
Disasters happen whether we know they are coming or not. Preparing your employees for when they do occur is sometimes a challenge, especially when you have a few thousand or more. Bringing their home preparedness into the picture can help make everything more relatable and improve overall awareness. This presentation will present ideas on how to raise awareness of your Business Continuity Program and how to bridge the gap between having employees prepared at work and at home. Recent experiences will be discussed.

C12: Improve Emergency Outcomes with Process and Technology

Peter Steinfeld, Director of Sales, AlertMedia
Successful incident management includes understanding and executing against each phase of the incident: preparing, monitoring, communicating, and resolving. Preparing – Understand the potential risks your organization faces. Monitoring – Keep your eyes on the world around your people and organization. Communicating – While an incident unfolds, you will need to direct your organization through any related dangers, manage required actions, and interact with your people to ensure their confidence and safety. Resolving – Putting an emergency event to rest requires an event audit and analysis to help minimize future risks.

D6: Let's Measure Our Capability to Recover – Take Two!

Michael Harding, BCM Program Lead, Automotive Resources International (ARI)
Are you being challenged by senior management to answer the question, 'Can we recover?' Is your response, 'Yes, we have documented business continuity plans.' Unfortunately, having a documented continuity plan does not translate into being able to recover. This session will provide the audience with a real-world method that the presenter implemented to measure business unit recoverability in our organization. It has helped provide senior management with a solid understanding of our capabilities to recover business operations. After you collect the required resources for business operations (people, processes, technology etc.) and document their strategies, it is extremely helpful to understand whether adequate components will be readily available following a disruption to ensure the department can recover within the Recovery Time Objective (RTO). The takeaways of the session will include being able to implement a similar measurement within their own environment.

E5: Cyber Risks and Emerging Technology/Threats

Frank Leonetti, FBCI/CBCP, CEO, NorthStar Advisory Services, LLC
Some of the highly publicized cyber-attacks have illustrated that adversaries are interested in more than incidents. How does preparedness planning for cyber incidents differ from traditional business continuity planning? What other precautions should be taken to prepare for cyber-attacks?

A17: The Mary Kay Way – How the Culture Leads to Our Program Success

Joel Navarro, Global Manager, Business Continuity, Mary Kay Inc.

Mary Kay Ash started the company by stepping outside of the standard practices and created something new and meaningful for millions of women around the world. Similarly, the BC program did not follow the traditional BCP steps and developed a culture which strayed from accepted practices. This presentation will discuss challenges faced, consistent and frequent exercising focused on resiliency, a global resiliency committee focused on decision making (not steering committee), and expansion into all MK markets in nearly 40 countries.

A18: Our Evolving World of Disaster Recovery

Larry Heck, Disaster Recovery Manager, Weill Cornell Medical College

As the landscape of BC and DR rapidly changes, we may sometimes struggle with how to maintain control of our environments and plan for resiliency if a disruption occurs. This case study will explore how our team worked within our IT organization to adapt to changes in technology strategy and to discover opportunities to improve the program. We'll discuss changes in organizational alignment, determine if an onsite, cloud, or hybrid solution is best, measuring compliance, among other risks.

B10: The "Non-Standard" BIA

Kathleen Lucey, FBCI, President, Montague Risk Management

Faced with a client that had the results of a BIA that took two years to complete, cost $400,000, did not provide the necessary information to develop recovery plans, and where much of this information was outdated, the presenter developed a combined BIA/Risk Assessment. This allowed the rapid collection of the information necessary to develop recovery plans. It was much easier (and much faster) to get to the necessary decisions with this approach. It also provided the information necessary to complete both business unit and technology recovery plans. This approach has been used multiple times now; it is both effective and efficient. This presentation describes how this methodology works and why it is effective.

C13: Effective Risk Management Through ERM/BCM Integration and Collaboration

William C. Hord, VP – ERM Services, Quantivate

The integration of enterprise risk management (ERM) and business continuity management (BCM) by organizations not only enhances the value proposition for both disciplines, more importantly, it enables organizations to better execute and achieve their strategic vision. ERM is a top-down discipline that seeks to mitigate risks that have an adverse impact on the organization's strategic objectives. ERM is assessing both the likelihood and impact of various categories of risk at the strategic and operational levels, whereas BCM is determining the response to an impact regardless of the cause at an operational level. The presentation is designed to provide an understanding of the current challenges risk managers are facing when they have separate ERM and BCM departments, committees, management and/or reporting lines.

D7: Ranking the Maturity Level of Your Business Continuity Plan Using a Resiliency Maturity Model

Greg Holdburg, CBCLA, CRM, MRP, Manager, Global BC/DR, First Advantage

This presentation will assist you with the process of measuring your existing Business Continuity plan against a Resiliency Maturity Model. This will allow you to determine where your plan ranks on the six levels of maturity and allow you to accurately predict the probability of a successful recovery: Level One (Self Governed), Level Two (Departmental), Level Three (Cooperative), Level Four (Standards Compliant), Level Five (Integrated), and Level Six (Synergistic).

F3: Millennial Continuity Career Ladder – How to Work Your Way to the Top!

Suzanne Bernier, CEM, CBCP, MBCI – President, SB Crisis Consulting

Part 'career continuity' and part motivational session, the presenter will share tips, strategies and guidance to assist millennials advance in your continuity career, based on some of her own experiences and findings over her past 20 years in crisis management. From working with international governments and the United Nations, to publishing a book, to sitting on several high-profile industry boards, and recently speaking at the White House, she will share her insights and tips on how to enhance your own skills and marketability to reach the pinnacle of success in your chosen career. Whether it's advancing yourself within your own organization or increasing your profile globally, this session will share tips and personal insights on how to get there, one step at a time.

A19: Nationwide's Crisis Management Journey

Joni McLean, Manager, Nationwide

Learn how Nationwide, a leading insurance and financial services company, implemented their crisis management program throughout the company for senior executives, board members, the business and remote locations. Nationwide will share how the program matured, the current tools used to keep executives prepared (including a mobile application) and simulation techniques.

A20: Lessons Learned from REAL Life Events

Reta Setrak, MBCP MBCI, Senior Manager, Business Continuity Management, Canada Pension Plan Investment Board

Business continuity planning is a dynamic discipline and regardless of how robust and complete your program is, lessons learned from real events are often your best teacher. Hear how such diverse disruptions such as Hurricane Sandy, the Toronto ice storm, Japan earthquake and tsunami, New Delhi fire, and City of Calgary flood, have strengthened their program. Best practices will be shared in structuring the crisis management team, training, table top exercises and building the tools to support executive level participation. The presenter will also stress the critical importance of collaboration with Emergency Response, Business Continuity, IT Disaster Recovery and crisis management.

B11: Achieving Greater ROI on BC: Emerging Trends in the Industry

Rod Crowder, CEO, OpsCentre

There has been a groundswell in recent years of organizations looking for a greater return on their business continuity investments. The need for faster results and demonstrable improvements in actual preparedness has made binders, documentation, and "shelf-ware" both obsolete and undesirable. In this presentation, the presenter will cover a range of industry trends that are breaking through the traditional thought processes and BCM industry standards to ensure that organizations, regardless of size or industry, maximize the benefits of their BCM program from the outset, while continuing to build value as their program develops. With anecdotes, case studies, and the latest in BC models, this may challenge the way you think about managing your BCM program.

C14: Improved Resilience: Strengthening the Relationship with Your Insurance Partners

Frank Russo, Executive Vice President, Procor Solutions + Consulting

Strong operational risk management can reduce or eliminate risk for a business, lead to a smoother insurance claims recovery process, and ultimately result in a reduction in the price of insurance. Using the recent events of Hurricanes Harvey, Irma, and Maria, the presenter will discuss key loss mitigation steps, initial insurance industry response, and best practices of submitting and settling complex insurance claims. He will review the many business interruption challenges that were faced by businesses during these events, both direct and indirect. Participants will also learn how continuity costs post-disaster are prepared and presented for insurance recovery.

C15: Crisis Action Teams and Incident Management

Mel Curtis, Business Continuity Consultant, Aflac

Incident management is different in each company. Corporate culture, funding, management interest and understanding all impact if and how Incident Management are handled. One tool that I have found useful is the Crisis Action Team. These are teams of internal and external subject matter experts who are trained to handle specific situations that you will probably encounter during a major incident. A good understanding of the role of an Incident Management Team is essential to building an effective team. We will discuss what the Incident Management Team's role is during a disaster.

E6: Cyber Security – It's Not Just Your Data!

Laura A. Mosley, Business Continuity Program Manager, Southern Glazers Wine & Spirits

This presentation will review the facts about where cyber is in 2017 and where it's headed. We'll look at area-by-area examples of significant cyber impacts, with key takeaways for each of the areas. We'll also review legal, risk management, safety systems, physical security, public infrastructure and the energy grid, alarms, cameras, supply chain, transportation, telematics, and more.

2:15 p.m. to 3:15 p.m.	Plenary Session

P3: New Thinking in Active Assailant Prevention, Response & Recovery: Maturing Organizational Violence Prevention Programs

Steve Crimando, Principal, Behavioral Science Applications

Law enforcement and emergency management authorities repeatedly warn that no organization or community is immune from active assailant threats – an evolving term intended to encompass the possibility of attacks involving not only firearms, but explosives, vehicles, knives and other forms of violence. Whether committed by a current or former employee, an enraged ex-domestic partner or an extremist propelled by a destructive ideology, it is essential that leaders and decision-makers are preparing for today's threat landscape.

This presentation will introduce:
- An expanded typology of workplace violence
- Extending violence prevention practices to mobile and home-based workers
- The concept of Hybrid Targeted Violence (HTV)
- The Eight Warning Behaviors associated with mass violence
- Transitioning from "Run>Hide>Fight" to "Stop the Killing>Stop the Dying>Stop the Crying"
- Leveraging bystander/employee intervention in prevention, response and recovery

This dynamic multimedia program is intended provided attendees with timely and actionable approaches to aligning their current violence prevention posture with the realities of the contemporary threat landscape. Operating with dated models and approaches to violence prevention can threaten the safety and security of a community, campus or corporation, as well as the defensibility of decision-making around threats of violence.

3:15 p.m. – CONFERENCE ADJOURNS

Certification: You'll earn 14.5 Continuing Education Points for attending the 2018 Continuity Insights Management Conference. Your certificate will be available post-conference

Additional Education and Special Events

(All sessions are optional. Times vary.)

PRE1: Super Leaders: An Assessment and Development Workshop for Crisis Management Leadership
Presented by: Robert C. Chandler, Ph.D.
8:00 a.m. to 5:00 p.m. (full-day workshop)
Leadership is the most influential and critical element of successfully managing a contingency or crisis. Effective leaders have the necessary knowledge, skills and abilities to inspire and impact others. Super Leaders are defined by their abilities and actions, not their titles or positions. A Super Leader understands the core mission and objectives, as well as the situation contingency actions plans and goals of effective crisis management.

This interactive learning workshop focuses on "Super Leadership" know-how, skills and abilities. It is appropriate for a professional at any level or career stage who wants to assess their own strengths and needed areas of for improvement. The course would benefit leaders of every experience level and any assigned role. The workshop is most appropriate for those who currently lead, plan to lead or who want to be prepared to lead when called upon to do so during critical situations.

Workshop Agenda:

- Review the traits, characteristics, and factors of superhero leadership
- Reflection and self-assessment
- Identify key focal areas for improvement in superhero leadership knowledge, skills and abilities
- Create a personalized superhero leadership road map to more effective leadership skills and abilities
- Applications to develop ability to recognize and critically evaluate superhero leadership in action.
- Super leadership simulation exercises for participation, analysis and discussion

Registration Fee: $495

PRE2: Media Training for Business Continuity Professionals
Presented by: Gerard Braud, CSP, Fellow IEC
Sunday, April 22, 2018, 1:00 p.m. to 5:00 p.m. (half-day course)
Communications about your response to an event is critical. It affects the reputation and revenue of your organization. When the rumors start to fly, when social media blows up with false information or eyewitness accounts, and when the media come knocking at your door, are you ready to communicate at your best?

Leaders on five continents know the rule: Don't talk to the media until you talk to Gerard Braud. In this pre-conference workshop, media training and crisis communications expert Gerard Braud opens his vault of secrets to help you be a great spokesperson.

In this program you will:

- Discover why the facts don't matter
- Learn why you get taken out of context
- Explore what really gets left on the cutting room floor
- Unlock the secrets to controlling every question and every answer

Registration Fee: $350

PRE3: Learn to Create a Table Top Exercise – An Exercise in Business Continuity/COOP Preparedness!
Presented by Ted Brown, President and CEO of KETCHConsulting
Sunday, April 22, 2018, 1:30 p.m. to 5:00 p.m. (half-day course)
In this class presented by KETCHConsulting, you will be given four different Table Top scenarios, including the injects, and will learn how to:

- Create a situation, scenario and injects for your audience, your business, your location and your BCP maturity.
- Identify operations, decisions and policies that impact the ability of a business unit to execute
- End the exercise with conclusions and discussions that will change, emphasize, and otherwise affect your business continuity/COOP plan.
- Conclude with an "after action" report that will lead to effective modifications and improvements to the plans being exercised.

Participants will be given the complete set of injects for four different Tabletops.

Registration Fee: $350

All conference attendees are invited to attend the Business Continuity Institute's "Get Certified" Welcome Reception on Sunday, April 22, 2018, from 5:00 p.m. to 6:00 p.m. Join your business continuity colleagues for some informal networking and relationship-building, cocktails, and light fare in a relaxed atmosphere as you ease into three full days of education, inspiration, and information exchange.

(All sessions are optional. Times vary.)

POST1: BCI Good Practice Guidelines Training Course (CBCI)

Presented by Kathleen Lucey

Wednesday, April 26, 2018, 3:30 p.m. to 5:30 p.m., Thursday and Friday, April 26-27, 2018, 8:30 p.m. to 5:00 p.m., and Saturday, April 28, 2018, 8:30 a.m. to 12:00 p.m. (three-plus day course)

This classroom-based course is aimed at individuals who prefer learning in an interactive environment, led by an experienced business continuity professional. The beginner benefits from a solid description of the methodologies that enable an organization to develop; implement and maintain an effective Business Continuity Management (BCM) program, whilst the experienced professional gains an in-depth look at the Good Practice Guidelines (GPG). This course is excellent preparation for the BCI Certificate Examination that leads to the post-nominal designation CBCI, a recognized industry credential and the launching pad for Statutory membership of the BCI. It is also the perfect choice for business continuity professionals already working in the field who are looking to complement their experience thorough some formal training on business continuity (BC). The course provides an in-depth study of the Business Continuity Management (BCM) Lifecycle. The subject matter addresses the six BCI Professional Practices as defined in the GPG, including Technical and Management Practices, taking the candidate through each stage of the BCM Lifecycle step by step. Using case studies and examples based on real-life experience, the instructor provides practical insights into all aspects pertaining to the development, implementation and management of a BC program within an organization.

Registration Fee: $2,156

POST2: Adaptive Business Continuity: A Hands-On Workshop

Presented by Dr. David Lindstedt and Mark Armour, Brinks, Inc.

Thursday, April 26, 2018, 8:30 a.m. to 4:30 p.m.

Adaptive Business Continuity is a flexible and outcome-oriented alternative to traditional continuity planning. Drawing on advances in Agile, Lean, SixSigma, Motivation 3.0, the Growth Mindset, and other related disciplines, Adaptive BC facilitates the rapid enhancement of recovery capabilities. Adaptive BC brings preparedness planning up to date, aligning it with the current practices of how business actually works in today's global environments. In a day of Bitcoin, Blockchain, and the internet of things, we are a long way from mainframes, Blackberries, and Y2K. Get a fresh perspective on your practice and experience new possibilities in preparedness! With a blend of lecture, group discussion, hands-on software, case study exercises, and even a free book, this will be a workshop you will NOT want to miss!

Registration Fee: $775

POST3: BCM 4000: ISO 22301 Assessor

Presented by ICOR

Thursday, April 26, 2018, 8:00 a.m. to 4:30 p.m., and, Friday, April 27, 2018, 8:30 a.m. to 12:00 p.m. (two-day course)

Learn how to align your BCM program to the requirements of ISO 22301. Gain an understanding of the key practices of a Business Continuity Management System for organizations of all sizes and the essential elements of ISO 22301 and 22313. The focus of BCM 4000 is on the requirements of ISO 22301 and how these requirements are implemented in a Business Continuity Management System. Using the ISO 22301 Maturity Model as a tool for measuring alignment to ISO 22301, attendees receive a FREE electronic copy of the self-assessment tool as part of the course fee. Completion of the course includes a certificate as an ISO 22301 Assessor.

- Wondering how your BCM program aligns to ISO 22301?
- Looking for a way to measure your current capabilities?
- Need to identify gaps for program improvement?
- Not ready for a formal third-party certification but ready to self-declare conformity to ISO 22301?
- Looking for a consulting tool to meet client needs?

Registration Fee: $995