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# Fall World 2009

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SAN DIEGO, CALIFORNIA

## Strategies for a Successful Business Continuity Program

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**September 13 - 16  
San Diego, California**

**DRJ Presents Its 41st Conference!**

# Strategies For A Successful Business Continuity Program

The World's #1 Conference Dedicated to Business Continuity

Dear Continuity Planner,

When we plan our conference, our most important consideration is our attendees. Our goal is, and always has been, to provide the best conference possible at the lowest cost.

**Why Attend This Conference?** The conference is the place to learn new skills or fine tune your skills, tackle new subjects, network with peers, learn the latest in disaster recovery or business continuity information and find solutions!



We are committed to all of this and more. You'll gain insight into recent trends, meet industry leaders and learn leadership and team-building skills. The five-day conference is loaded with learning opportunities, including workshops, mock disaster, general sessions, breakout sessions and much more. Available at one low cost, this conference is the industry's meeting place.



**Recent events** have shown that we need to be prepared for anything! The emergence of the H1N1 flu outbreak brought pandemic preparedness to the forefront. No matter how the current cases evolve, it is a reminder that we must stay vigilant and be prepared for pandemics and much more.

**Fall World 2009** will feature several sessions on pandemic planning including General Session 4 and Workshop Session 3. Our other sessions also will focus on timely topics. You will find sessions on industry regulations, communications, BIAs, insurance and much more. Browse the brochure and pick the ones that will benefit you the most.

**The Monday Night Hospitality** will be sponsored by **SunGard Availability Services**. Be sure to attend for fun and networking!



**Richard  
Arnold, CBCP**

**DRJ CEO**

Make plans now to attend the world's largest conference dedicated to business continuity. Early registration discounts are only available for a short time. Don't miss your chance to get the lowest price in the industry! See page 17 for registration details.

I look forward to seeing you in San Diego.

## Fall World 2009

**San Diego, CA**  
**Sept. 13 - 16**

Download a  
Conference  
Justification  
Kit and find  
other details  
on Fall World  
2009 at [www.  
drj.com](http://www.drj.com).

## Expert Leadership

We are tackling the topics that matter most for your organization. Our expert lineup of speakers will give you information, advice and tips you can implement immediately. Return to your organization with a wealth of information that could save your company hundreds of dollars or more. The low cost of registration will pay for itself over and over as you learn from the best in the industry. Visit with expert speakers, network with peers and consult with vendors. You can do it all at Fall World 2009 for one low registration fee.



**Financial  
Crisis**



**Pandemic  
Preparedness**



**Case  
Studies**



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Regulations**



**Continuity  
Management**



**Current  
Trends**

## Why Attend Fall World 2009?

This conference offers a unique opportunity for education, networking and entertainment for the lowest price available in the industry. Discover how Fall World 2009 can benefit you and your organization!

1. **Protect your organization** in the toughest times with tips from experts.
2. **Learn how to do more with less.** Discover ways to deal with budget and staffing cuts.
3. **Get complete conference materials** you can share with others!
4. **Discover future trends** in the industry. Get your organization aligned for growth once the economy improves.
5. **Enjoy receptions, the cyber city and more.** Attendees also receive complimentary breakfasts and lunches on three days of the conference as well as refreshment breaks.
6. **Customize your schedule** to include workshops, mock exercises, general sessions, classes and more.
7. **Network** with hundreds of others in the industry.
8. **View the exhibition hall.** Find hundreds of services, wares and products.
9. **Attend pre or post conference courses.** Renew a certification, learn a new skill, earn a specialized certification.
10. **Registration fees are lower** than any conference in the industry.



## Conference Highlights

### Mock Disaster Exercise

Experience an actual disaster situation and learn the techniques needed to act accordingly. This event is sponsored by **Sydion**.

### Welcome Reception

This fun-filled reception is enjoyed by all attendees, exhibitors and speakers on Sunday evening in the exhibit hall.

### Monday Hospitality

Attendees always enjoy the Monday Evening Hospitality. Hosted by **Sungard Availability Services**, the event offers plenty of networking.

### Exhibition Hall

The exhibit hall provides a great opportunity to network. It is open during three days of the conference.

### Cyber City

The Cyber City allows attendees a place to check websites or e-mail in a convenient setting. It is sponsored by Rentsys Recovery Services.

### Attendees Night Out

Attendees can enjoy a dinner cruise or a local casino junket on Tuesday evening. Separate registration and fees are required. Details are mailed after conference registration is received.



# Sponsor Information

## Gold Sponsor



SunGard Availability Services offers a complete portfolio of solutions to help keep people and information connected - no matter what. By designing customized, enterprise-wide solutions that support people, processes and infrastructure, SunGard helps ensure that more than 10,000 customers achieve information availability uninterrupted access to mission-critical data and systems. [www.availability.sungard.com](http://www.availability.sungard.com)

## Bronze Sponsors



Dell MessageOne provides managed services for emergency notification, email continuity, archiving and security to more than 1,000 customers around the world. Dell MessageOne's unique Software-as-a-Service (SaaS) is designed for rapid deployment and immediate realization of benefits for our clients. Dell MessageOne's services include: AlertFind and Email Management Services. [www.messageone.com](http://www.messageone.com)



eBRP Solutions Inc. provides web-based tools and utilities, as well as consulting services for business continuity management. ESN develops tools and utilities focused on core requirements: flexibility, scalability, objectivity and ease of use. ESN's core product is eBRP Toolkit. [www.eBRP.net](http://www.eBRP.net)

## Co-Sponsors



myCOOP is COOP System's breakthrough continuity planning software. Recently selected by a number of substantial private and public sector institutions, the patented design was built from the ground up by world-class eCommerce developers. Visit our website to learn more about myCOOP, the future of continuity planning. [www.coop-systems.com](http://www.coop-systems.com)



Paradigm Solutions International is a trusted provider of emergency planning software and certified consulting services. The OpsPlanner BCM tool delivers web-based, fully integrated BCP/COOP/DR planning, incident management, and automated notification along with the most advanced business impact analysis module on the market. PSI's easy-to-use, yet powerful tool is very affordable and can provide a scalable and reliable business continuity management solution for any organization. [www.OpsPlanner.com](http://www.OpsPlanner.com)



Severe weather. Utility disruptions. Heightened states of alert. Events can stop your time-critical operation centers, but for your company's stakeholders - especially your customers - time and expectations carry on. That's why Pitney Bowes designed a secure business recovery center that can step up when yours goes down. With a fleet of high-volume PB inserters, printers, high-speed data links and experienced staff, we can respond to almost any crisis. We'll keep your communications flowing transparently, minimizing disruptions to customers and regulators alike. [www.pb.com/outourcing](http://www.pb.com/outourcing)



At Verizon Wireless, reliability is in our DNA. It is built into everything we do from network operations to customer service to business continuity and disaster recovery. Throughout the year, we work to build and operate the nation's most reliable wireless network - no matter what disaster or unanticipated event we may face. [www.verizonwireless.com](http://www.verizonwireless.com)

## Silver Sponsors



Since 1971, Forsythe has served as a national provider of technology infrastructure solutions to organizations nationwide, including many Fortune 1000 companies. A trusted, independent advisor, Forsythe brings cross-platform expertise to its technology consulting, technology leasing, and value added reseller services. [www.forsythe.com](http://www.forsythe.com)



IBM Business Resilience and Continuity Services can cost effectively help you rapidly adapt and respond to internal or external dynamic changes - opportunities, demands, disruptions or threats - and continue operations with limited impact to the business. [www.ibm.com](http://www.ibm.com)



Pathway Systems' Relations and Blueprints products enable you to discover and document functional relationships between IT components, and build a working model that gives you control over increasingly complex infrastructure. Nothing else on the market compares to Pathway Systems' ability to express and simulate complex configurations for business continuity planning. [www.PathwaySystems.com](http://www.PathwaySystems.com)

## Cyber City Sponsor



Rentsys Recovery Services is the premier, nationwide continuity provider of recovery and contingency solutions. Our services focus on the recovery of clients' critical business processes through our alternate workspaces, replacement hardware, and restored communications. [www.rentsys.com/recovery](http://www.rentsys.com/recovery)

## Mock Disaster Sponsor



Sydion is a technology-based company specializing in mobile data collection and information dissemination during a disaster, pandemic or large-scale emergency. We have designed a comprehensive system to track patients, people, pets, service animals, beds, staff and asset/inventory during a disaster (eMET Emergency Management Event Tracking). Our system can be used in a wide range of settings - from a business, to a small agency, hospital, fire department to include mega shelters. [www.sydion.net](http://www.sydion.net)

## Non-Profit Sponsors



DRII is a recognized leader in providing education, standards, and professional certification. DRII's goals are to create a base of common BCP knowledge through education, assistance, and the development of a resource base; to certify qualified individuals; and to promote the credibility and professionalism of certified professionals. [www.drii.org](http://www.drii.org)



Private and Public Businesses, Inc. is committed to providing the industry with training and BC solutions in partnership with both private and public agencies that contribute to the effective collaboration required for regional disasters. [www.ppbi.org](http://www.ppbi.org)

**DRJ is proud to partner with the industry's best for this conference! For information on sponsoring the conference, an event, a meal or another option, contact [bob@drj.com](mailto:bob@drj.com).**

# Conference At A Glance

## Sunday

### Onsite Registration

11:00 am - 8:00 pm

### Cyber City

12:00 pm - 8:00 pm

### Workshops

1:30 pm - 4:30 pm

### DRII Meeting and Reception

4:30 pm - 5:30 pm

### Welcome Reception

5:30 pm - 8:00 pm

### Product Demos

5:30 pm - 8:00 pm

## Monday

### Cyber City

6:30 am - 6:30 pm

### Networking Breakfast

6:45 am - 8:00 am

### Onsite Registration

7:00 am - 5:00 pm

### General Session 1

8:15 am - 9:15 am

### General Session 2

9:30 am - 10:30 am

### General Session 3

10:45 am - 11:45 am

### Exhibit Hall Opens

11:00 am

### Lunch

11:45 am - 1:00 pm

### Exhibits/Product Demos

11:45 am - 1:30 pm

### Breakout Session 1

1:30 pm - 2:30 pm

### Break

2:30 pm - 2:45 pm

### Breakout Session 2

2:45 pm - 3:45 pm

### Refreshment Break in Exhibit Hall

3:45 pm - 4:15 pm

### Breakout Session 3

4:15 pm - 5:15 pm

### Exhibit Hall Closes

5:00 pm

### Product Demos

5:30 pm - 6:30 pm

### Hospitality

6:30 pm - 8:30 pm

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## Tuesday

### Cyber City

6:30 am - 6:00 pm

### Networking Breakfast

6:45 am - 8:00 am

### Registration/ Info Desk Open

7:00 am - 5:30 pm

### General Session 4

8:15 am - 9:15 am

### General Session 5

9:30 am - 10:30 am

### General Session 6

10:45 am - 11:45 am

### Exhibit Hall Opens

11:00 am

### Lunch

11:45 am - 1:00 pm

### Exhibits/Product Demos

11:45 am - 1:30 pm

### Breakout Session 4

1:30 pm - 2:30 pm

### Refreshment Break in Exhibit Hall

2:30 pm - 3:00 pm

### Workshop Sessions

3:00 pm - 5:30 pm

### Exhibit Hall Closes

3:00 pm

## Wednesday

### Networking Breakfast

6:45 am - 8:00 am

### Information Desk Open

7:00 am - 12:00 pm

### General Session 7

8:15 am - 9:15 am

### General Session 8\*

9:30 am - 10:30 am

### General Session 9

10:45 am - 11:45 am

### Lunch

11:45 am - 1:00 pm

## Pre-Conference Events

### Saturday and Sunday

PRC-1: Successful Exercise Design

PRC-2: Supply Chain Risks

PRC-3: BC Planning Made Simple

PRC-4: Pandemic Planning

PRC-5: IT/DRP/CBRIT - Sentryx

PRC-6: Leadership in Disasters

## Post-Conference Events

### Wednesday, Thursday and/or Friday

POC-1: EOC: The Critical Tool

POC-2: Seven Steps to BCP

POC-3: Certified Crisis Comm. Planner

POC-4: Ready, Set, Exercise

POC-5: Essentials of Org. Survival

POC-6: CBRA Seminar - Sentryx

*For complete details, including specific times, course descriptions and registration information, see pages 18-19 for pre-courses; 20-21 for post-courses; and 22-23 for DRII information.*

*\* Attendance prize drawing immediately following General Session 8.*

## Sunday Workshop Session 1 *Intermediate/Advanced*



### Dorothy, It's Time To Grab Toto!

Barbara  
Citarella

RBC Ltd.

What happens if a disaster comes in the middle of the night without warning? What about your family? Your employees? Your business?

This workshop will focus on immediate response and conclude with a tabletop exercise. In a world with an economic recession and just in time supplies, this session will focus on immediate response in areas such as:

- medical attention
- mental health needs
- employee needs
- communication issues and business rescue and recovery

During this workshop, participants will have the opportunity to use slow paced problem solving methods to identify gaps in training and education. Attendees will discuss the requirements for long term business sustainability. Participants will be broken down into work groups and given very specific challenges. At the end each group will give a brief description of their solutions and decisions.

*Barbara Citarella is the founder of the award-winning company RBC Limited, a healthcare and management consulting business.*



## Sunday Workshop Session 2 *Novice/Intermediate/Advanced*



Matthew  
Gardner,  
CBCP

Armodis  
Consulting

### Strategic Business Continuity Management

Strategic management is considered the highest level of managerial function and comprised of a combination of three main activities: strategy formulation, strategy implementation, and strategy evaluation.

This workshop will introduce a ten-step strategic management system based on a best practice strategic and systems thinking framework. This strategic business continuity management system can be utilized by virtually any type/size of organization, regardless of industry. Furthermore, this approach can successfully support any of the business continuity industry standards, guidelines, best practices, and regulations. You will find the strategic business continuity management system to be a common-sense, practical approach and one that can provide significant value whether you are in the early phase of business continuity program development or trying to sustain a mature program in an uncertain business environment faced with significant change.

*Matt Gardner is a leading strategic management consultant and president of Armodis Consulting LLC where he offers clients practical solutions to improve performance and attain desired results.*

## Sunday Workshop Session 3 *Novice/Intermediate/Advanced*



### Business Impact Analysis Beginning to End

Barney  
Pelant,  
MBCP

Barney F.  
Pelant &  
Assoc.

The Business Impact Analysis (BIA) project is the logical first step in the development of a business continuity program.

The project provides the business rationale for disaster recovery and business continuity planning.

A BIA can help an organization to learn their current capability to recover from a disastrous event.

Also, the BIA can help validate that the plan in place is really meeting the organization's business needs.

During this workshop we will examine the successful methods for achieving timely desired results.

This workshop will be interactive, so bring your questions and come share your experiences! This speaker will also present a detailed workshop on Tuesday.

*Barney Pelant is owner and director of Barney F. Pelant & Associates.*

*He has held the certification of Master Business Continuity Professional (MBCP) from DRI International since 1997.*

*His experience ranges from the design and development of domestic and international business centers, to the development of contingency plans to ensure their ongoing viability.*





Sessions are rated: novice for those in the industry less than two years; intermediate for those in the industry for two to five years; and advanced for those in the industry for more than five years.



#### Sunday Workshop Session 4 Novice/Intermediate/Advanced



Peter Laz,  
MBCP

Forsythe  
Solutions



Deidrich  
Towne,  
CBCP

Forsythe  
Solutions



David  
Ziev,  
MBCP

Business  
Continuity  
Profes-  
sionals

#### Incident Management Plan Maturity

Learn to use the BCP Audit checklist and the Incident Management Plan Maturity Model developed by PPBI from recognized standards and industry best practices. PPBI has condensed the one and one-half day course into a workshop to share the effectiveness this process can have on your plans. Exposure to the practical experience of the instructors in addition to recognized industry standards in measuring the maturity of your plans benefits both the public and private sectors. You will use the checklist to assess your capability to assemble, coordinate, collect and channel the resources required for critical incident management. The tools are free, the simulation authentic, and the class is practical, immediately useful, and fun!

Peter Laz, MBCP, is a senior business continuity consultant with Forsythe Solutions Group.

Deidrich E. Towne, Jr. CBCP is senior technical consultant for Forsythe Solutions Group.

David Ziev, MBCP, MBCI is the principal of Business Continuity Professionals.

#### Sunday Workshop Session 5 Intermediate/Advanced



Brandon  
Dempsey

Suite  
Commute

#### How to Build a Remote Work Program for a Business Continuity Plan

In June of 2006 the I.R.S.'s headquarters in Washington D.C. was flooded with 24 feet of water. Subsequently 2200 employees were instantly without a place to work.

Issues were quickly addressed, and the majority of employees were able to work productively at home or other remote work location.

The I.R.S.'s Continuity of Operations Plan (COOP) was put to the test and proved effective. Since then Senate Bill 1000, "The Telework Enhancement Act of 2007" has been introduced to the Senate, which will mandate that all Federal employees are eligible for remote work unless proven otherwise.

Learn why remote work is an emerging solution to BC planners everywhere, and what you must do in order to make it successful. Learn how to build a remote work program that limits corporate liabilities, while increasing employees' and the company's ability to respond to an emergency.

Brandon Dempsey is vice president of SuiteCommute. He actively develops formal customized Remote Work programs, trains clients, incorporates virtual work options into BCP, and conducts speaking engagements on the benefits of Remote Work. Dempsey serves as the co-chair of PandemicPrep.org.



#### Sunday Workshop Session 6 Novice/Intermediate/Advanced

#### Mock Disaster Exercise

Sponsored by



Limited to 200  
registrants.

In 2009 we have been impacted by the ever changing volatile economic challenges facing our nation. H1N1 has been a widespread wake up call to evaluate plans, response strategies and sound practices.

This exercise will put your skills to the test even further. An explosion has just occurred at one of your locations. Information is sketchy. What do you do first? How do you determine the impact of the explosion? Have there been any employees injured or killed?

This exercise will evaluate life safety issues; investigate employee accountability issues; recovery team response and short and long term impact to the business. Is your team ready to respond? Participants will be challenged to deal with life safety decisions, fiscal impact control, crisis media intervention, interfacing with fire and law enforcement.

As you learn more about the explosion you will be tasked to deal with media issues, stock fluctuation, public image, death of employees and family outreach issues.

Sydion, LLC is joining with JS Training Institute to conduct 2009 mock exercise. Sydion is a technology-based company specializing in mobile data collection and information dissemination during a disaster, pandemic or large-scale emergency.

# General Sessions

**General Sessions are held each morning. They are led by some of the industry's most renowned experts, motivational speakers and technical advisors.**

**These sessions are geared to contingency planners of all experience levels. Be prepared to discover a wealth of information and solutions that can be implemented in your organization.**

**Learn Strategies for a Successful Business Continuity Program from the industry's best.**



## Monday

### General Session 1

8:15 - 9:15 a.m.



#### The Resilient Spirit: Staying Right Side Up in an Upside Down World

*Eileen McDargh*

In the business continuity world, there are numerous times of uncertainty and life-altering events. Learning to make quick decisions and take reliable actions are key to success. The ability to not only survive but also thrive is an inside out task. In this session, we'll hear from people who have "made it through." You'll learn coping strategies, how to self-talk for optimism, and the power of synchronicity. There's something here for everyone.

*Eileen McDargh is an award-winning business author, a consultant to national and international organizations, and a skilled moderator/facilitator. She draws upon practical business know-how, life's experiences and years of consulting to major national and international organizations that have ranged from global pharmaceuticals to the US Armed Forces.*

### General Session 2

9:30 - 10:30 a.m.



*Bill Hughes*

*SunGard  
Availability  
Services*

#### Avoiding BC Program Pitfalls

In these economic times the importance of an effective and efficient business continuity management program remains critical. What makes a business continuity management program successful? There's no one answer and there are a lot of opinions, but they all circle around the same things: A balance of technologies, strong processes, organizational commitment and people. But there's more to a successful program than just that. It comes down to knowing your objectives, measuring your progress, and making the program practical, meaningful, and efficient. This session explores pitfalls to avoid and discusses practical principals to focus on with your BCM program to help drive a successful capability.

*Bill Hughes, director of SunGard Availability Services BC/DR Center of Excellence, has 24 years of IT and BC/DR experience. He has worked with large scale programs for a number of large firms both focusing on IT and on BC/DR.*

### General Session 3

10:45 - 11:45 a.m.



*Regina Phelps  
EMS Solutions*

#### Using Emergency Management Principals to Manage "Soft Incidents"

Many of our daily tools, teams and processes can be used to manage soft threats (data compromise, information security issues, bank failures, settlement issues, etc.) versus our usual foe the hard threat (fires, floods, earthquakes, etc.). If you have a fully developed ICS team, you only activate the components that you need. In a fast moving event, what starts out being limited in scope may grow exponentially and ICS is the perfect solution to that challenge. Attend this session and begin to think outside the box.

*Regina Phelps has provided consultation, training, and speaking services to clients in four continents.*

*Liz Granger leads the global crisis management program for Visa Inc.*



*Liz Granger,  
CBCP  
Visa*



**General Session 4**

8:15 - 9:15 a.m.



**Pandemic! Crisis Communication Challenges and Solutions**

Robert Chandler,  
Ph.D.

Univ. of Central  
Florida

Pandemic is a disaster that threatens public health and safety, the national and international economy, society, as well as business operations. One of the most complicated but vital aspects of operations during and after a pandemic is the quality and effectiveness of your communication. This session will cover communication priorities for pandemic; including: audience and message targeting, health risk communication factors; communication planning for pandemic periods; and guidelines for assessing pandemic communication readiness.

Robert Chandler, Ph.D. is the director of the Nicholson School of Communication at the Univ. of Central Florida. He is an accomplished researcher with nearly 200 academic and professional papers.

**General Session 5**

9:30 - 10:30 a.m.



Richard Cocchiara

IBM  
BCRS

**Strategies for a Successful Business Continuity Program**

Companies are under enormous pressure to be more cost effective yet continue to be available at all times for their customers. Learn about the changing marketplace and trends that continue to transform our industry as well as our customers. This includes BC requirements that have evolved from simple protection of business operations to one that also requires the agility to quickly respond to business conditions and events. Included will be a brief review of the evolution of business resilience; new industry requirements such as Cloud Computing; current stresses like pandemic planning; and a step-by-step blueprint to transform a company from reactionary followers to responsive visionaries.

Richard Cocchiara is IBM distinguished engineer and chief technology officer for IBM Business Continuity & Resiliency Services(BCRS).

**General Session 6**

10:45 - 11:45 a.m.



Don Grant

FEMA

**Understanding the Private Sector Preparedness Program**  
*Don Grant*

What does The Voluntary Private Sector Preparedness Accreditation and Certification Program mean for your organization? This voluntary program establishes a common set of criteria for private sector preparedness, including disaster management, emergency management, and business continuity programs. It was mandated as a result of the *Implementing Recommendations of the 9/11 Commission Act of 2007*. The goal is to enhance nationwide resilience by improving private sector preparedness. Learn more about the program and discover how your organization can benefit from participation in this program.

Donald Grant serves as the director of the Incident Management Systems Integration Division, National Preparedness Directorate, Federal Emergency Management Agency (FEMA).

**General Session 7**

8:15 - 9:15 a.m.



**The Financial Crisis and Enterprise Risk Management**

Glen Boyls  
CBCP

AMX Intl. Inc.

As consumers, credit card holders, homeowners, employees, vendors, investors, and taxpayers we are all involved in financial crisis. The US government has committed trillions of dollars to avoid a total economic collapse; however, thousands of organizations have failed and several industries have serious problems. This session takes an "enterprise" view of the impacts, and provides a series of pragmatic recommendations to help organizations eliminate, mitigate or transfer risks; survive the crisis; and prepare for economic recovery and growth. Business impacts and resiliency recommendations focus on customers, supply chains, credit and more.

Glen Boyls is a management consultant. He has helped clients achieve over \$1 billion in stakeholder value through financial and operational improvements.

**General Session 8**

9:30 - 10:30 a.m.



Joseph DesPlaines

Frontier  
Airlines

**Enterprise Risk Management and Chapter 11**

Frontier Airlines sought protection under Chapter 11 of the US Bankruptcy Code in April 2008. Over a year later, the company has reorganized and is stronger, more cost efficient, more focused, and is emerging from bankruptcy while competing successfully with other major air carriers. It is likely that many other organizations will use Chapter 11 as a means to reorganize their business. The presenter has developed a list of ten lessons learned that provide a description of the risks and associated mitigation strategies for ensuring business and workforce continuity through a Chapter 11 bankruptcy.

Joe DesPlaines is responsible for enterprise risk management at Frontier Airlines, which includes business continuity planning, and management and aviation emergency management.

**General Session 9**

10:45 - 11:45 a.m.



Barry Pruitt

Pinnacle  
Business  
Concepts

**Give Them What They Need, Get What You Want: Succeed in Communication**

History indicates that those who communicate get results! Learn to make your point every time while utilizing the essential ingredients of successful communication. Gain ideas on gathering data for management, drafting management reports, and presenting the message. You'll gain proven steps that successful technical professionals employ to build rapport, earn trust, and gain funding. By now you know that you can't rid the office of politics so why not be a "player" without playing the game! Eliminate common DR/ business resiliency communication mistakes before they occur and learn when and if to sidestep, when and why to speak, and when and how to listen.

Barry Pruitt is president of Pinnacle Business Concepts Inc., a global consulting, training and keynoting organization.

**Strategic Session 1**  
*Intermediate/Advanced*



**How Your BC Program Can Flourish In Tough Times**

*Jerry  
Reick  
CBCP*

*Robert W.  
Baird &  
Co.*

You've spent thousands of dollars designing, developing and publishing a BC or DR plan. Every year, you conduct one or two desktop exercises and one big test event at your hot site. Your plan passes the annual audit with no significant findings. But when you really need it, will it actually work? If this question keeps you awake at night, this session is for you. Explore the new reality that businesses face today and challenge the current notions of what BC means. Discover how making some adjustments to the philosophy and application of your BCP can pay big dividends. Stop waiting for "the big one" to find out if your plan works.

*Jerry Reick is currently the business continuity manager for Robert W. Baird & Company, based in Milwaukee, WI. He has more than 25 years combined experience in software development, IT audit and controls, and business continuity planning.*

**Managerial Session 1**  
*Novice/Intermediate*



**DR/BR Plans – Maintenance and Compliance Strategies**

*John  
Kotas  
CBCP*

*Allstate  
Insurance*

A common problem with recovery plans seems to be that once they are written and tested, they are forgotten about. If plans are tested only once a year that means that a year of changes could take place that would make the plans useless in the event of a real disaster. Learn processes that help plans stay accurate. The plan maintenance process is a three phase approach that takes into account exercise results, change management activity, and the compliance process. The exercise process is a four phase approach that Allstate uses to test infrastructure and critical applications.

*John Kotas has 25 years of experience at the First National Bank of Chicago, Bank One, and now at Allstate. His responsibilities are to develop all strategies and processes that Allstate will follow concerning their DR program.*

**Technical Session 1**  
*Intermediate/Advanced*



**Build Your Own High Availability and D/R Hot Site – Virtually**

*Eddy  
Sherman*

*Kitsap  
County,  
WA*

Learn how Kitsap County, Washington built a disaster recovery hot site that would meet the RTO/RPO requirements for law enforcement, fire and rescue and essential government services. This comprehensive plan can work for the most complicated/integrated environment or the simplest data center. It allows you to rebuild a single server or entire data center almost immediately. Learn about data replication and virtual server failover. We will also discuss the ROI of owning your own hot site and the ease of scheduling tests, not to mention allowing failover for upgrade testing. You will learn how to build your test scripts, test on the fly, assess the test and modify as you go. This solution is effective on a regional or nationwide basis. When all is said and done, you will be in charge of your H/A and D/R destiny.

*Eddy Sherman, PMP, is a technology professional that has been involved in the technology and disaster recovery field for more than 30 years. He has written custom D/R solutions and utilized the latest/greatest commercial recovery management software packages.*

**Emergency Response Session 1**  
*Novice/Intermediate/Advanced*



**The Human Side of Business Continuity**

*Stephanie  
Balaouras*

*Forrester  
Research*

Results from the 2nd Annual Disaster Recovery Journal and Forrester BC/DR Market Study show that of the companies that have declared a disaster in the last five years, all said they underestimated the challenge of communication and coordination during a disaster declaration. We'll explore this human factor of business continuity, discussing the current trends in workforce recovery and automated communication. Learn results from the study and find answers, including what solutions companies are using for workforce recovery and options for virtual workplace solutions. This is a good session for anyone wanting to understand new solutions and approaches for workforce recovery and to hear case studies.

*Stephanie Balaouras is the principal analyst of business continuity and disaster recovery for Forrester Research.*

**Advanced Session 1**  
*Advanced*



**Leading in a Crisis: Gaining Decision Advantage**

*Phillip Van  
Saun*

*Univ. of  
California  
San Diego*

People turn to their leaders when a crisis strikes. Leaders anticipate, plan and prepare. The best leaders make a pre-emptive strike and forecast the predictable surprises that their organization could encounter. They prepare to steer their company through any crisis with confidence. This presentation will provide an overview of research and practical application of crisis 'decision advantage.'

*Prior to serving as the director of continuity and emergency services and faculty director of the leading in a crisis program at UC San Diego, Phillip Van Saun was an assistant chief in the emergency operations section of the California Governor's Office of Emergency Services.*

**Information Session 1**  
*Intermediate/Advanced*



**Are You Ready? Think Again!**

*Michael  
Schroeder,  
CBCP*

*US  
Equities*

More than 13,000 people come and go at the Sears Tower on a daily basis. Thousands more visit the 103rd floor observation deck. This presentation will include: Inspecting what you're expecting; Customize your approach to emergency response at any scale; Identifying training needs and levels; Fine tuning each emergency response plan to shave off critical seconds and minutes; How and why to consider the psychology of occupants; Linking response levels; Common sense tips and the key ingredient to success. The attendee will walk away with a working knowledge of emergency response strategies from beginning to end. Valuable time saving techniques will be learned and can be applied in any environment.

*Michael Schroeder oversees life safety operations at the Sears Tower. He is responsible for planning, training, response and recovery efforts for the buildings emergency response team as well as serves as the business continuity coordinator.*

**Monday 2:45 - 3:45 p.m.**

**Choose One Selection Per Track**

# Breakout Sessions 2

## Strategic Session 2

Novice/Intermediate/Advanced



### Critical Tools for Developing an Action Plan

What is your process for assessing an event? Who comes together to make the decision to activate the plan? What criteria do they use? This relatively straightforward process is often overlooked in companies. Once the decision has been made to activate your plan, how do you get organized? What tools do you use? How do you communicate status? This second critical step is often completely absent in an incident or crisis management plan. Attend this fast paced session to learn everything you need to know about initial assessment and developing an action plan.

Regina Phelps, CEM, RN, BSN, MPA, is an internationally recognized expert in the field of emergency management and contingency planning. She has provided consultation, training, and speaking services to clients in four continents. She is founder of Emergency Management & Safety Solutions.

## Managerial Session 2

Novice/Intermediate/Intermediate



### How To Get Them to Drink the Koolaid

Whether you have been just assigned responsibility for business continuity or you are trying to make changes to your existing program, you will need to get the initiative accepted throughout the organization to ensure lasting success. This requires getting colleagues on the same page and changing some of their closely held views or positions. In this session you will learn how McKesson utilized one of its organizational development tools to lead organizational change to ensure that the technical strategy for IT business continuity was in sync with cultural and organizational strategy.

Tonya T. York, director of McKesson's availability program office, has more than 20 years of senior-level experience. Prior to McKesson, York was the business continuity management practice director at Seagate Services (EVault).

## Technical Session 2

Intermediate/Advanced



### BCP Software and Plan Automation (To Infinity and Beyond)

Have you exercised plans as part of an ongoing testing program or in response to an actual disaster? Have you successfully automated any of the recovery processes? Many organizations have taken steps to automate aspects of their IT DRP plans and many have taken steps to automate BCP/DRP emergency notification processes. The software of the future will focus on the enablement and automation of actual response and recovery procedures. This session will explore the direction BCP software is taking and the types of cost effective solutions that are predicted to be reality in the not too distant future.

Cheryl Bieson has more than 25 years disaster recovery and business continuity planning experience. She is very active in the industry having held various positions on boards and committees.

Robert Wolf is founder, president and CEO of E-SPONDER, formerly Convergence Communications. Under his leadership the organization created a cutting-edge, innovative and highly relevant software solution.

## Emergency Response Session 2

Novice/Intermediate



### Making the Case for Pandemic Flu Preparedness: Lessons Learned

Although certain employers have not yet initiated pandemic planning, others are well on their way. Based on independent research conducted with business continuity managers from a range of organizations and their public sector counterparts, this session will first discuss barriers to preparedness, followed by lessons learned, and mitigation strategies utilized by organizations for the purpose of pandemic flu preparedness. The session will then apply these lessons to preparedness for other threats, especially those which impact employee health.

Jennifer Lachance, MSE, is a candidate for the Doctor of Public Health (DrPH) degree at the University of California, Berkeley studying issues of preparedness for emerging infectious disease outbreaks among businesses.

## Advanced Session 2

Advanced



### Making Disaster Recovery Standard Operating Procedure

Is disaster recovery an afterthought in your organization? Are you constantly faced with the challenge of finding budget and building DR strategies for systems after they go into production? In many organizations disaster recovery is treated as the black sheep in the family. No one wants to talk about it until an auditor shows up or even worse when faced with an actual disaster. Discover the best practices for incorporating DR into your company's standard operating procedures and processes. Learn strategies for making disaster recovery part of the responsibility of management, operations, application developers and other groups.

Tom Lee, executive vice president, professional services, is a senior business resilience consultant. He has more than 24 years of overall Information Technology experience with 15 dedicated to data center disaster recovery.

## Information Session 2

Novice/Intermediate



### Rules and Regulations

The DRJ rules and regulations database is intended to provide each of us a singular resource where we can go to and find the most complete and comprehensive list of BC-related rules and regulations. This session is intended to review how this database is organized and used as a reference source. We will also introduce how you, the BC professional, can help us keep this valuable tool up to date. One goal is to broaden its international rules and regulations, as well as gather new sources of interest to the BC profession.

Martin Myers, MS, MBCP, serves as co chair for the EAB rules and regulations committee. He is a business continuity manager in the card services division of Bank of America. He has more than 19 years of experience in developing and evaluating disaster recovery and business continuity plans.

Other EAB committee members will also be presenters in this session.



## Strategic Session 3

Novice/Intermediate



Peter Laz,  
MBCP

Forsythe  
Solutions



Lewis  
Cox,  
CBCP

Forsythe  
Solutions

### Effective Business Continuity Program Frameworks

In today's challenging economic times, protecting corporate assets and business viability is more important than ever. Strong and effective business continuity programs must include proper accountability and governance mechanisms. Learn information on the critical elements needed to maintain high-value BC/DR programs. Clear and actionable guidance will be given on how to structure a program for maximum success and sustainability. Attendees will leave with tangible illustrations of critical BC/DR program elements they can customize for their organizations.

Peter R. Laz, MBCP, is a senior consultant with Forsythe Solutions Group. He is a member of the DRJ Editorial Advisory Board and a Board of Director of PPBI.

Lewis Cox, CBCP, is a managing consultant with Forsythe Solutions Group. He was instrumental in establishing the methodologies and best practices for Forsythe's BC/DR Practice.

## Managerial Session 3

Novice/Intermediate/Advanced



Daniel  
Evenson

Pathway  
Systems

### House of Cards: Visualizing and Documenting Business Process and IT Infrastructure

Many organizations have business processes and IT infrastructures that resemble a "house of cards" that become increasingly complicated and vulnerable as additional components are added. As the "house of cards" gets taller, understanding and documenting this tangled web of complexity becomes nearly impossible. What are the odds of being able to quickly and successfully recover from a crisis without a set of blueprints to rebuild from? Large complex systems often hide dangerous dynamic behaviors. Utilizing real world examples and case studies, we'll discuss approaches to understanding and visualizing these complex systems, and incorporating such understanding into BC/DR plans.

Daniel Evenson, CTO of Pathway Systems, has been in the IT industry for more than 15 years and has a very broad knowledge base. He is an expert in the modeling and simulation of complex IT environments.

## Technical Session 3

Novice/Intermediate/Advanced



Dan  
Bailey  
MBCP

Hitachi  
Data  
Systems

### Deduplication: Shrinking Your Backup Footprint And Backup Window

Data deduplication is one of the latest and greatest backup technologies on the market today. While it has many benefits to both production and restore/recovery environments, there is still much that is unknown about the technology; What is in-line versus post-processing? What are the real differences? How do you really measure performance factors? What are the scalability capabilities? We will discover the answers to these question and more.

Dan Bailey, Americas data protection lead for Hitachi Data Systems, has served on DRI International's Certification Commission, and most recently served as the Chairman of DRI International's Education Commission.

## Emergency Response Session 3

Novice



Robert  
Giffin

Avalution  
Consulting

### Who Knows Our Business Continuity Strategy?

What to do with your BIA results? Does your management team question the usefulness of the BIA? Have you conducted a BIA questionnaire and done little with the results? Are you stuck in auto-pilot when it comes to doing the same BIA over and over again? If so, please join us to look at how leading business continuity programs utilize the BIA as the catalyst to drive business continuity decision-making and value. We will re-examine every aspect of the BIA, from scope to summarized results, and provide a blueprint to connect executives to the business continuity program and increase your level of support.

Robert Giffin, CBCP, CISA, is a director and co-founder of Avalution Consulting, a firm specializing in business continuity solution design, development, implementation and long-term maintenance.

## Advanced Session 3

Advanced



Sam  
Stahl,  
CBCP

EMC

### Exercise Options

There are many ways to exercise the disaster recovery, business continuity, crisis management, emergency response, and evacuation plans within your organization. This presentation will give you a comprehensive view of the many options on exercising these recovery plans. Tests can be conducted in simple to complex and from inexpensive to costly ways. This presentation will show you how to get the most out of your recovery exercises within limited budget. The presentation will include the examples and details for developing, promoting, scheduling, and delivering a professional recovery exercise.

Sam Stahl's experiences include business continuity, disaster recovery, and emergency response planning for a number of large and small organizations.

## Information Session 3

Novice/Intermediate/Advanced



Lee  
Yeaton

Pitney  
Bowes

### The Value of Testing Print-to-Mail Recovery Solutions

Most businesses know that a well-designed BCP is critical to maintaining business operations at the same level pre-crisis. What many don't know is that conducting regular tests of your plan can optimally benefit business operations. Why is regular testing so important? Statistics show that the frequent changing of technology and various applications can have a negative impact on even the most well-designed BC plans. After all, what good is backing up operations if the technology and applications supporting these operations are out-of-date? The importance of keeping equipment and applications up-to-date will be discussed. Several case studies will be presented as well as industry statistics. The importance of testing in order for businesses to know what has changed will be discussed, and how testing technology and applications can be achieved.

As vice president, global account executive for Pitney Bowes Management Services (PBMS), Lee Yeaton has accountability for developing and growing the PBMS Business Recovery and Transaction Mailing operations.

## Strategic Session 4

Novice/Intermediate/Advanced



### Building Successful BCM Awareness Programs: Tips and Techniques

Clarence Richardson Jr.

Richardson Consulting 360

This presentation will show participants how to design, develop, implement, evaluate, and manage successful and self-sustaining corporate-wide BCM education and awareness programs. Participants will learn effective tips and techniques on how to use available resources, free industry products and services in designing awareness week/month activities and events. Learn proven methods, approaches, and best practices. Participants will leave this presentation with standardized templates for project activities, event schedules, checklist, a 12 month strategic plan; participant evaluations and coordinator critiques.

Clarence Richardson, a U. S. Air Force and service-disabled veteran, is founder, principal owner, and president of Richardson Consulting 360.

## Managerial Session 4

Novice/Intermediate



### Crisis Management: Making It Work – Studies From Hurricanes, Wildfires, and Other Major Events

Ira Messer

Verizon Wireless

In this session, hear a case study describing how the crisis management teams responded to major events, such as hurricanes, flooding and wildfires over the past several years. The discussion will highlight the roles and responsibilities of the team, their interactions with other regional and HQ teams. Specific examples of team responses during recent events will also be highlighted. The study will describe how the teams were developed and trained to provide a coordinated response to assure network functionality, provide services to local and national government agencies, customers, and assist employees in need.

Ira Messer is involved with developing and managing recovery strategies for Verizon Wireless. His responsibilities include standard BC/DR disciplines of BIA and recovery plan development along with playing a major role in crisis management.

## Technical Session 4

Intermediate/Advanced



### Delivering Communications Out of Chaos

George Ragsdale

Proactive Comm.

In the wake of a natural or man-made disaster, the lack of an operable terrestrial communications structure becomes a severe problem. Satellite solutions are ideally suited to help bring order out of chaos by quickly restoring the communications capabilities that are so necessary for first responders to do their jobs. Satellite technologies can efficiently establish voice over Internet Protocol (VoIP) telephone and data service via portable satellite terminals. Learn best practices in deploying an emergency network that allows disaster victims to contact their families and helps contractors and aid workers do their jobs with the aid of phone service, email, and Web access.

George D. Ragsdale serves as director of engineering for Proactive Communications, Inc. in Killeen, Texas. Ragsdale designed, implemented, and managed the company's network engineering department including VPN tunnels, Cisco PIX Firewalls, Checkpoint firewalls, Cisco routers, switches, and Cisco Security Manager Servers.

## Emergency Response Session 4

Intermediate/Advanced



### Insurance: Are You Covered? What's the Process? Should You Care?

Donald Long, Jr. MBCP

Kingsway America, Inc

The insurance process can be confusing. Different policies and coverage lead to questions. Is building a continuity plan enough? Does the company carry enough coverage on the buildings? What costs would be incurred during a recovery? Learn the answers to these questions and more as we do a complete review of coverage of your insurance plan and identify specific areas. We'll walk through a claim process. You'll gain more understanding of how insurance can aid or wreck your business recovery plans.

Don Long has worked in the business continuity and disaster recovery area for more than 20 years. Since 2001, Long has primarily focused on business continuity and disaster recovery preparation, plan development, and testing within industry and state government.

## Advanced Session 4

Advanced



### Leading Your People Through an Event

Kathryn McKee

Human Resources Consortia

When disaster strikes and your plan becomes operational, how well will your workforce cope with the chaos and confusion as you move from the event into recovery? How will your managers deal with employees who cannot function due to fear, stress or concern for their families? How have employees prepared their families to deal with the disruption in their lives? By attending this session you will gain insight into the competencies required in planning for and then leading people through an event and how your leadership style fits the model. You'll also learn about a training program developed to help managers manage employees in trying times which kept worker's compensation claims to a minimum. Discuss the role of human resources on your planning teams and what contingent policies and programs should be considered; Consider the importance of personal preparedness and walk away with tools to take back to your HR colleagues

Kathryn McKee, SPHR, is president of Human Resources Consortia and previously served as SVP HR for Standard Chartered Bank and First Interstate Bank Limited. She speaks frequently to HR groups on their roles in disaster preparedness/planning.

## Information Session 4

Novice/Intermediate/Advanced



### The DRII Certification Process

You've taken a few DRII courses, even sat for the certification exam – now what? You've heard the stories of how intense the application process is – where do you start? This session will be chaired by members of the DRII Certification Commission and the DRII Certification Manager, and will focus on the application process to successfully become certified. The session is targeted to those individuals who have either begun or wish to begin this process, and will feature a "how-to" approach to this topic. Participants are encouraged to bring specific questions concerning their applications.

Disaster Recovery Institute Intl. is a recognized leader in providing education, standards, and professional certification.

## Workshop Session 1 Intermediate/Advanced



Randall  
Till,  
CBCP

### How To Maintain The Readiness Of Your Business Continuity Program During A Difficult Economic Climate

Building and maintaining a strong BCP is a difficult challenge in the best of times. With today's focus on making the highest return on investment, business continuity is an area most often at the bottom of a company's priority list. However, it is imperative that we look at how we can refocus our planning efforts and strategies to maintain the highest level of readiness as possible.

Learn how to focus on the highest risk areas, and concentrate planning efforts on the components that are mission-critical.

This session will challenge the audience to share experience from other organizations, while engaging participants in an interactive dialog to answer questions and gain industry insights.

**Pandemic Update:** During the workshop a portion of the session will be dedicated to looking at the recent Influenza A (H1N1) event and discussing the best practices and strategies for preparing your organization for a global pandemic event

*Randall Till, CBCP, is a leading industry expert in the business continuity field and has worked as a BCP practice leader for several large corporations.*



## Workshop Session 2 Novice/Intermediate/Advanced



Regina  
Phelps

EMS  
Solutions.



Lessly  
Field

Pacific  
Gas and  
Electric.

### Incident Command System – Best Practices in Emergency Management

How does a major company go about implementing a significant change to its emergency management structure? Pacific Gas & Electric embarked on a journey to convert its old system to the Incident Command System (ICS) over an 18-month period. This workshop will share how PG&E went about it, their challenges and opportunities and real life lessons you can take back to your business.

The session will conclude with an orientation exercise to give you a chance to "test-drive" the Incident Action Planning process in real time. Attend this hands-on workshop to learn how to implement ICS in your company and walk out with can-do tools under your arm!

*Regina Phelps is an internationally recognized expert in the field of emergency management and contingency planning. She is founder of Emergency Management & Safety Solutions, a consulting and training firm.*

*Lessly Field is the director of business continuity management and emergency planning at Pacific Gas and Electric Company. She has provided field-level emergency response, run large-scale regulatory projects, implemented various governance improvements, and managed capital spending policy and programs.*

## Workshop Session 3 Intermediate/Advanced



Harlan  
Dolgin

Dolgin  
Consulting



Brandon  
Dempsey

Suite  
Commute

### Exercising a Pandemic Plan

You're in management at XYZ Company. You know a pandemic is coming, and suddenly, it's here! The World Health Organization has just raised the alert level from Level 3 to a Level 4. Now you sit at the planning table with your peers and have to make decisions.

This workshop will challenge participants with scenarios and injects that develop along a timeline of a pandemic outbreak. Groups will deal in-depth with company-related issues such as work from home, HR issues, legal issues, social distancing, and other pandemic-related topics. For communities, the session will identify working partners that also want to prepare for a pandemic and strategies for gathering those partners together.

*Harlan Dolgin is president of Dolgin Consulting, which opened its doors in February, 2009. He was founder and co-chair of PandemicPrep.Org. He became executive director of the organization in April 2009.*

*Brandon Dempsey is vice-president of SuiteCommute, LLC. His professional background is in telecommuting and remote work options.*





Sessions are rated: novice for those in the industry less than two years; intermediate for those in the industry for two to five years; and advanced for those in the industry for more than five years.



#### Workshop Session 4

Novice/Intermediate/Advanced



##### Comprehensive Healthcare BC Planning: Let's Get Down To The Nitty-Gritty

Stuart Weiss,  
CBCP

MedPrep  
Consulting



Angela Devlen

Wakefield  
Brunswick

Back by popular demand, this session will get down into the details of actually creating a comprehensive BC plan. Discussion will include pandemic planning and processes. Additional topics include:

- How to do a risk assessment and develop action plans
- How to do a BIA
- How to capture and report data, questions to be asked, what pitfalls to avoid.
- The Healthcare GAP for BC
- How to integrate healthcare quality and safety, risk management and your BC program
- How to tie everything together

This workshop will focus on tried and true best practices. You will walk away with tools and actual documents you can use in your facility. Come prepared to immerse yourself in this topic.

*Dr. Stuart Weiss, FACEP, CBCP, CEO of MedPrep Consulting Group LLC, has provided BC and disaster preparedness guidance and assistance for more than 15 years.*

*Angela Devlen is managing partner with Wakefield Brunswick and a founding board member of the Business Continuity Planning Workgroup for Healthcare Organizations.*

#### Workshop Session 5

Novice/Intermediate/Advanced



Barney Pelant,  
MBCP

Barney F. Pelant &  
Assc.

##### Developing the Recovery Strategy: The Next Step

Once the business impact analysis (BIA) has been completed, the next logical step in the development of a business continuity program is the formation of the business recovery strategy.

The results of this effort provide us the infrastructure for carrying out the successful recovery of the organization in case of a disastrous event or business interruption.

This infrastructure is also the foundation for the procedures that we develop next, a.k.a. our business recovery plan.

This session is a former breakout session that has been expanded by popular request to a workshop.

During the workshop we will examine a proven methodology for taking the findings of the BIA and developing successful strategies.

Learn important and logical steps to take when structuring the business recovery strategy. You'll take home answers and solutions that you can implement immediately.

*Barney Pelant is owner and director of Barney F. Pelant & Associates. His professional background includes more than 30 years focusing on business continuity planning, disaster prevention and recovery.*



#### Workshop Session 6

Novice/Intermediate/Advanced



##### Ready, Set, Exercise! How to Develop and Conduct a Successful BCP/DRP Exercise

Steve Goldman

Goldman  
Mgmt.  
Consultants

Successful crisis management and disaster recovery takes more than a plan: it requires realistic testing and validation.

How do you do that properly?

Do your exercises provide as-close-to-real situations as possible? How does your program compare? How can you improve?

During this hands-on workshop, learn how to set up and conduct a successful BCP/DRP exercise. Students will master the aspects of effective exercise preparation and execution, including:

- Types of drills and exercises
- Elements of a successful exercise
- Scope, objectives, and extent of play
- The scenario team
- Scenario ideas and events
- Resources and props
- Scheduling and coordination
- Goldman's highly acclaimed Exercise Planning Checklist.

Learn how to avoid common pitfalls during the development process and how to anticipate and resolve potential problems.

*Steve Goldman is a leading crisis management and BCP consultant and former global BCP manager for a Fortune 500 company.*

# Conference Venue

## Hotel Reservations

The official conference hotel is:

### Sheraton San Diego

#### Hotel and Marina

1380 Harbor Island Drive

San Diego, CA 92101-1092

877-734-2726 Refer to Booking #20716

*Attendees are responsible for making their own hotel reservations by calling 877-734-2726. Refer to Booking #20716. Ask for DRJ's special room rate. Email: [drj@drj.com](mailto:drj@drj.com) for information on government rooms.*

**Make your reservations early.** A block of rooms has been reserved at the Sheraton San Diego Hotel and Marina and they fill fast!. Once the block is filled, reservations will be made on a space available basis, *with the rate subject to change at the discretion of the hotel.*

## Conference Attire and Climate

The average daytime temperature in San Diego in September is 73 degrees. The suggested dress code for the conference is business casual, which should include a jacket or sweater. Temperatures in the meeting rooms can fluctuate. No shorts or jeans please.

## Conference Registration Fee

For one low fee you receive: admission to all sessions, including workshop sessions; conference material for sessions on CD; networking breakfasts and lunches; use of the Cyber City; and admission to the Monday night hospitality and a welcome reception. Browse the conference book store and tour the exhibit hall.

## Transportation Information

**Airlines:** American Airlines is DRJ's official airlines for Fall World 2009. In order to make your reservations, please call 800-433-1790 or visit [www.aa.com](http://www.aa.com). Use file #A3699AA for the discounted rate on American Airline flights.

**Car Rental:** Avis is DRJ's official rental car service. When making reservations call 800-331-1600 or reserve your car online at [www.drj.com](http://www.drj.com). Use file #D005078 to receive the discounted rate.

**Local Transportation:** The Sheraton San Diego Hotel and Marina provides free shuttle service to and from the airport, from 5:30 a.m. to midnight. Shuttles run approximately every 15 minutes.



**Strategies for a Successful  
Business Continuity Program**

Date \_\_\_\_\_ List Your CBCP, FBCI, CRP# \_\_\_\_\_

Mr/Mrs/Ms \_\_\_\_\_ First Name \_\_\_\_\_ Last Name \_\_\_\_\_

Company \_\_\_\_\_

Title \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_ Mail Stop \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Country \_\_\_\_\_ Telephone \_\_\_\_\_ Fax \_\_\_\_\_

Print Name As It Should Appear On Badge \_\_\_\_\_

List Any Designations For Badge \_\_\_\_\_

Emergency Contact Name/Phone Number \_\_\_\_\_

Check here if you require special needs \_\_\_\_\_ Please specify \_\_\_\_\_

Notify conference personnel during Onsite Registration of your arrival and special needs.

## Industry Information

**Indicate Your Industry:** \_\_\_\_\_ Banking/Financial \_\_\_\_\_ Public Utilities \_\_\_\_\_ Transportation \_\_\_\_\_ Insurance  
 \_\_\_\_\_ Communications \_\_\_\_\_ Manufacturing \_\_\_\_\_ Government \_\_\_\_\_ Education \_\_\_\_\_ Computer Services  
 \_\_\_\_\_ Wholesale \_\_\_\_\_ Health Care \_\_\_\_\_ Petroleum \_\_\_\_\_ Mgmt. Consultant Other: \_\_\_\_\_



Rank Your Experience Level \_\_\_\_\_ Novice (less than 2 yrs) \_\_\_\_\_ Intermediate (2-5 yrs.) \_\_\_\_\_ Advanced (5+ yrs.)  
 Is This Your First Conference at DRJ? \_\_\_\_\_ Yes \_\_\_\_\_ No

## Payment Information

\_\_\_\_\_ Check enclosed for \$ \_\_\_\_\_ Which Discounts Apply (if any) ? \_\_\_\_\_

\_\_\_\_\_ Bill my company, Attn: \_\_\_\_\_

\_\_\_\_\_ Purchase order attached, P.O. # \_\_\_\_\_

\_\_\_\_\_ Bill my  \_\_\_\_\_ Bill my  \_\_\_\_\_ Bill my AMEX \_\_\_\_\_ Bill my DISCOVER \_\_\_\_\_

Security Code \_\_\_\_\_ (three-digit number found on back of card, four digits on front for AMEX)

Account # \_\_\_\_\_ Exp. Date \_\_\_\_\_

Signature \_\_\_\_\_

## Policy Information

**Cancellation Policy (Must be in writing):** Conference enrollment may be cancelled through August 13, 2009 without penalty. No refunds or credits will be given for cancellations received after August 13, 2009. All no shows will be charged the full amount. All cancellations must be received in writing.

I have read and understand the cancellation policy. \_\_\_\_\_

**Promotional Policy:** DRJ retains the right to use attendee images and comments for promotional purposes.

## Session Information

Name: \_\_\_\_\_ Company: \_\_\_\_\_

Please complete this section to make your **breakout** and **workshop** selections. Circle only one session per time slot. **General sessions** are held each morning and are open to all conference attendees.

### Sunday, September 13

Workshop Sessions	SWS-1	SWS-2	SWS-3	SWS-4	SWS-5	SWS-6
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### Monday, September 14

Breakout Session 1	SS-1	MS-1	TS-1	ES-1	AS-1	IS-1
Breakout Session 2	SS-2	MS-2	TS-2	ES-2	AS-2	IS-2
Breakout Session 3	SS-3	MS-3	TS-3	ES-3	AS-3	IS-3

### Tuesday, September 15

Breakout Session 4	SS-4	MS-4	TS-4	ES-4	AS-4	IS-4
Workshop Sessions	WS-1	WS-2	WS-3	WS-4	WS-5	WS-6

## Registration Rates

Registration rates for the conference are as follows:

- only \$895.00 through July 13, 2009
- only \$995.00 through Aug. 13, 2009
- only \$1095.00 through Sept. 13, 2009

Make conference checks payable to Disaster Recovery Journal. All fees must be paid in US currency only and payment must be drawn on a U.S. bank.

## Three Easy Ways To Register

Fax: 636-282-5802  
24-hours a day

Mail: DRJ Registrar  
P.O. Box 510110  
St. Louis, MO 63151

Web: [www.drj.com](http://www.drj.com)

## For information

636-282-5800  
9 am - 5 pm CST  
-or email-  
[mercedes@drj.com](mailto:mercedes@drj.com)

## Registration Discounts

DRJ offers a 10% discount on registration fees if you meet certain criteria. Review the restrictions below. If you are eligible, mark the appropriate place on the registration form.

- Three or more employees from the same company who register at the same time are eligible for a 10% discount.

- All certified individuals (**must be certified at the time of registration**) are eligible for a 10% discount.

- All contingency group members are eligible for a 10% discount with proof of membership.

These discounts must be requested at the time of registration. No refunds of the discount will be issued, and **only one discount per registrant will apply.**



# Pre-Conference Courses

## PRC-1: Everything You Need To Know to Design The Successful Exercise



Sat., Sept. 12, 9:00 a.m. - 5:00 p.m.  
Sun., Sept. 13, 8:30 a.m. - 11:30 a.m.  
\$995 per person  
Presenter: Regina Phelps

Learn from the exercise master – Regina Phelps conducts 50+ exercises a year! Do you have a plan but have not yet tested it? You might discover that your document is less than sufficient. There are really only two ways to find that out. One is to have an actual disaster; the other is to do an exercise. The latter is usually a better learning experience and certainly a lot less stressful! The workshop details everything you need to do to design a successful exercise from the ground up. You will walk out of this workshop with your next exercise planned and under your arm!

- Five types of exercises
- Exercise design team
- The development of the exercise plan
- Selecting & training a simulation team
- Rules of exercise facilitation
- Participate in an advanced tabletop exercise
- Develop the outline for your own tabletop exercise
- Receive feedback on your exercise design.

*Regina Phelps, CEM, RN, BSN, MPA is founder of Emergency Management & Safety Solutions, a consulting and training firm.*



## PRC-2: Supply Chain Risks and the Business Resiliency Plan: Selling the BRP through Economic Analysis



Sat., Sept. 12, 9:00 a.m. - 5:00 p.m.  
Sun., Sept. 13, 8:30 a.m. - 11:30 a.m.  
\$995 per person  
Presenters: Barry Pruitt,  
Lehr McKenzie, Ph.D.



A BRP expands upon and improves a BCP. This course assists you in defining supply chain risks and then understanding how to develop a Business Resiliency Plan (BRP) that covers these risks, including a business case and cost/benefit analysis using standard Economic Analysis Methodologies.

The end result is a report that enables quantifying cost and benefits of the BRP in "operations" and "finance language" for those responsible for supporting and funding the BCP process.

A case study to cement the logic and methodologies presented and provide a venue for applying logic/methodologies is completed in class. Final output is a completed list of supply chain risks and an "Income Statement" and "Statement of Cost/Benefit."

Gain "hands on" experience using the Economic Analysis methodologies and gain another tool for your BCP tool box to gain the financial/business support necessary for a successful BCP. Risk Vault Software included (\$99 value) so please bring your laptop.

*Barry Pruitt and Lehr McKenzie, Ph.D., are co-owners of J&B Pinnacle Business Concepts Inc., an organization specializing in comprehensive business continuity planning.*

*Pruitt has more than 22 years experience managing major projects, teaches at USC School of Business, and has experienced a major business interruption.*

*McKenzie has more than 20 years of consulting experience with mid-size to fortune 100 companies.*

## PRC-3: BC Planning Made Simple



Sat., Sept. 12, 9:00 a.m. - 5:00 p.m.  
Sun., Sept. 13, 8:30 a.m. - 11:30 a.m.  
\$795 per person  
Presenters: Norm Harris, CBCP,  
Tracy Cowan, CBCP



Since 9/11 what are we most worried about? Network Security? Physical Security? Terrorist Threats? Loss of Critical Staff? Power Outages? Natural Disasters? This interactive class will teach the student everything he/she needs to know to get started on their DR/BCP. Bring your laptop to this class and we will provide you with a CD full of resources, forms and questionnaires to utilize.

The following will be covered: Risk Assessments Questionnaires; Network Security Questionnaires; Development of Business Processes; Recovery Time Objectives; Time Lines for Recovery; Development of DR/BCP Teams; and Impact on Operations

During the class the instructors will assist you with your DR/BC plan. Come to this class for one-on-one training, but register early. Space is limited.

*Norm Harris, CBCP, Certified Recovery Planner, is chairman, president and CEO of Norman L. Harris & Assoc.*

*Tracy Lee Cowan, CBCP, CRP is business continuity/disaster recovery consultant for ICSI Consulting Services, Inc.*

## PRC-4: Pandemic Planning for Business



Sat., Sept. 12, 9:00 a.m. - 5:00 p.m.  
Sun., Sept. 13, 8:30 a.m. - 11:30 a.m.  
\$950 per person  
(includes Pandemic book)  
Presenter: Harlan Dolgin

A pandemic is coming. The experts agree that it is very likely to happen within the next 10 years.

Planning for a pandemic is not like planning for any other type of disaster. You can have a terrific BC/DR plan, and a pandemic might still significantly impair your ability to service your clients. It may even put you out of business. This course will give you all the tools you need to build a pandemic plan in your company.

We will address strategies such as planning

**Earn up to 16 CEUs per class by attending a pre-conference or post-conference course.**

for major absenteeism, social distancing at your workplace, HR issues, legal considerations, work from home, communications planning, and other prudent steps you can take now to lessen the impact.

This course will end with a pandemic simulation exercise. This course comes with a copy of the book Pandemic: Business Continuity Planning Priorities for the Coming Outbreak, by authors Robert C. Chandler, Ph.D. and Sue Peterson.

This is the one course you cannot afford to miss!

*Harlan Dolgin is president of Dolgin Consulting, which opened its doors in February, 2009. He was founder and co-chair of PandemicPrep.Org. He became executive director of the organization in April 2009.*

#### **PRC-5: IT/DRP/Certified Business Resilience IT Professional**



Sat., Sept. 12, 9:00 a.m. - 5:00 p.m.  
Sun., Sept. 13, 8:30 a.m. - 11:30 a.m.  
\$1650 per person  
Presenter: Rick Wellman

This CBRITP course teaches students how to develop, test, and maintain an IT

disaster recovery plan for recovering IT and telecommunications systems and infrastructure in the event of a disaster or business disruption.

The workshop provides a comprehensive step-by-step IT disaster recovery plan development methodology, and presents key IT availability planning concepts and principles.

Students will learn various recovery techniques, strategies, and practical methods that will help them to build a robust and resilient technology support infrastructure and critical process recovery capability to ensure a fast and efficient recovery of business operations and mission-critical IT systems, applications, and data.

Students will receive a workbook and take-home disaster recovery plan templates

Students may also take the optional multiple-choice CBRITP (Certified Business Resilience IT Professional) certification exam.

For more information on this course and outline, please visit [www.sentryx.com](http://www.sentryx.com) or call 1-800-869-8460.

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

#### **PRC-6: Leadership in Disasters: BC Practitioner's Guide to Senior Management Support**



Sat., Sept. 12, 9:00 a.m. - 5:00 p.m.  
Sun., Sept. 13, 8:30 a.m. - 11:30 a.m.  
\$695 per person  
Presenters: David Ziev, MBCP, Fred Luevano



Six reasons senior management needs to support BC/DR. Learn why management involvement in BC/DR is critical to the success of critical incident management. Roles of senior management in support of BC/DR will be presented. An excellent course for practitioners and/or managers.

Modules will include the following:

1. Incident Command
2. Crisis Communications
3. Emergency Policies
4. Exercise Program Design
5. Business Units and Business Continuity Planning
6. Assessment, Evaluation, and Improvement Plans

*David Ziev, MBCP, MBCI is the principal of Business Continuity Professionals and serves on the PPBI Board of Directors.*

*Fred Luevano serves on the PPBI Advisory Board. He is the former chairman of PPBI Board of Directors.*

Mail form to: Systems Support Inc., PO Box 510110, St. Louis, MO 63151 or fax to (636)282-5802. Make check payable to Systems Support Inc. or provide credit card information.

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☐ PRC-2: Supply Chain Risks (\$995)      ☐ PRC-5: IT/DRP/CBRIT (\$1650)  
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*Cancellation Policy (Must be in writing): Course enrollment may be cancelled through Aug. 13, 2009 without penalty. No refunds or credits will be given for cancellations received after Aug. 13, 2009. All no shows will be charged the full amount. All cancellations must be received in writing.*

*Note: A class will be cancelled if less than three participants are registered.*

# Post-Conference Courses

Earn up to 16 CEUs per class by attending a pre-conference or post-conference course.

## POC-1: EOC: The Critical Tool for Event Management



Wed., Sept 16, 1:30 p.m. - 5:00 p.m.  
Thurs., Sept. 17, 8:30 a.m. - 5:00 p.m.  
\$995 per person  
Presenter: Regina Phelps

An Emergency Operations Center (EOC) is critical for effective management of an event. It allows for command, control, and communication, and also helps to prevent the formation of "silos" that commonly develop in an emergency environment.

This workshop covers everything you need to know to design both the center and the management concept. Topics covered include: Physical design factors; Incident Command System; Equipment and tools; Sustained operations; Forms and processes; Virtual EOCs and more.

*Regina Phelps is an internationally recognized expert in the field of emergency management and contingency planning. She is founder of Emergency Management & Safety Solutions, a consulting and training firm.*

## POC-2: Seven Steps Required to Implement a Comprehensive BC Program



Wed., Sept 16, 1:30 p.m. - 5:00 p.m.  
Thurs., Sept. 17, 8:30 a.m. - 5:00 p.m.  
\$995 per person  
Presenter: Randall Till, CBCP

It's one thing to develop and test business continuity plans. It's quite another to implement an effective and comprehensive business continuity program. In this class, you'll learn how to identify risks, avoid common pitfalls and develop effective business continuity practices. The seven steps will cover:

- Step 1 - Understanding and Defining the BC Program
- Step 2 - Establishing the BCP, Providing Oversight and Governance
- Step 3 - Establishing Emergency Management Plans
- Step 4 - Identifying Business Requirements and Driving Recovery Strategies

- Step 5 - Developing Business Continuity Plans
- Step 6 - Developing Disaster Recovery Plans
- Step 7 - Managing and Maintaining the BC Program

In this class, you'll learn from the real-life experiences of an industry veteran with 20+ years spent developing and building programs in large organizations with global operations. Get practical, proven solutions and learn how to identify risks, avoid roadblocks and implement your business continuity program so that emergency response and recovery can go according to plan. To help ensure the success of your company's program, you'll leave this class with a firm foundation in the seven critical steps necessary for comprehensive BC Program implementation. Both experienced planners and newcomers to the field will benefit from this workshop.

**Pandemic Planning Step:** An additional step will be added to the class to discuss the practices and strategies for preparing your organization for a global pandemic event.

*Randall Till, CBCP, has 20+ years implementing business continuity plans and practices within large organizations and has worked to develop a "Best in Class" approach for developing a comprehensive business continuity program.*

## POC-3: Certified Crisis Communications Planner - CMC 2050



Wed., Sept 16, 1:30 p.m. - 5:00 p.m.  
Thurs., Sept. 17, 8:30 a.m. - 5:00 p.m.  
Fri., Sept. 18, 8:00 a.m. - 12:00 p.m.  
\$1495 per person  
Presenter: John Cullen

The most serious threat facing an organization is the threat to the organization's most important asset - its reputation. To protect the organization from reputational threats requires careful, thoughtful, detailed planning and a methodology for inculcating a culture of organizational crisis preparedness.

In this two-day course, you will learn how to prepare the organization for inevitable threats to reputation, execute the crisis communications plan, and after a crisis assess and do what must be done before the next threats occur. Attendees will be certified as crisis communications planners.

For more information, contact Lynnda@theicor.org or to download a brochure visit <http://www.theicor.org/pages/courselistings.html>.

*John Cullen is an ICOR faculty member and a partner with Foresight PR, a full-service public relations firm. Foresight PR's specialty is the prevention of communications crises, or, if called in the midst of a crisis, a minimization of reputational harm.*

## POC-4: Successfully Conduct Your First BCP/DRP Drill!



Wed., Sept 16, 1:30 p.m. - 5:00 p.m.  
Thurs., Sept. 17, 8:30 a.m. - 5:00 p.m.  
\$850 per person  
Presenter: Dr. Steven B. Goldman

Your first BCP (or DRP) tabletop or drill can make or break all your BCP/DRP efforts, including your career. A good job is not sufficient; your first drill needs to be outstanding. This course will teach you how. During this hands-on class, you will learn the elements of how to organize, set up, conduct, and evaluate a successful first BCP/DRP drill. Topics include:

- How and where to begin
- The company politics of your first drill
- Goldman's "First Drill" Planning Checklist
- Using incomplete department plans to your advantage
- Painlessly involve IT, PR, and management
- More than 100 ideas for scenarios
- Expected problems and their solutions
- Critique the drill and still keep your job
- Using the leverage from this drill

Attendees receive a CD of all forms and templates presented in class. You will also realistically practice what you learned as you participate in an in-class tabletop drill.

*Dr. Steve Goldman is a leading crisis management/BCP consultant and former global BCP manager for a Fortune 500 company. Over his long career Dr. Goldman has developed, conducted, and evaluated drills and exercises ranging from one-hour tabletops to massive three-day full-scale exercises involving hundreds of responders.*



## POC-5: Essentials of Organizational Survival



Wed., Sept. 16, 1:30 p.m. - 5:00 p.m.  
Thurs., Sept. 17, 8:30 a.m. - 5:00 p.m.  
\$875 per person

Presenters: Human Resiliency  
Training Institute (HRTI) Gerald  
Lewis, Ph.D, Barbara Citarella



What are the characteristics of an organization that can survive a disaster? Why do some organizations survive but not others?

This workshop will delve into the factors that make a difference in determining whether your organization and its employees will be able to sustain a disaster.

The workshop will include such characteristics of the human factor, leading up, communication, employee personal preparedness and building a crisis response team.

The culmination of the program will be a hands-on exercise that will facilitate the participants applying their own knowledge and experience in conjunction with the information gained from the workshop.

Each participant will receive a comprehensive packet of materials including policies, checklists, articles and other documents that may be easily incorporated into plans for their own work organization.

Registration will be limited. For more information: (508) 872-6228 or info@hrti.us.

*Dr. Gerald Lewis, is president of Gerald Lewis & Assoc. He is a partner with Human Resiliency Training Institute (HRTI).*

*Barbara B. Citarella RN, MS, CHCE, Human Resiliency Training Institute (HRTI) is certified in Homeland Security CHS-V. She is founder of RBC Limited Healthcare & Management Consultants.*

## POC-6: CBRA Seminar: Advanced BC Program Audit



Wed., Sept 16, 1:30 p.m. - 5:00 p.m.  
Thurs., Sept. 17, 8:30 a.m. - 5:00 p.m.  
Fri., Sept. 18, 8:00 a.m. - 12:00 p.m.

\$2900 per person; \$2610 for DRJ  
conference attendees  
Presenter: Rick Wellman

The CBRA Seminar teaches students how to conduct a business continuity program audit. It provides a comprehensive and in-depth audit methodology to help you determine the effectiveness, adequacy, and quality of an organization's business continuity program and is designed for anyone who wants to:

- Learn audit concepts, principles, and a step-

by-step methodology

- Conduct a BC program assessment within their own organization
- Provide BC program audit consulting services

CBRA (Certified Business Resilience Auditor) is BRCCI's business resilience auditor designation. A CBRA provides independent and objective assurance and consulting expertise to organizations throughout the initiation, analysis, development, implementation, testing, and maintenance process of the business continuity and resilience program.

Take the optional CBRA certification exam and become a CBRA. Learn more about becoming a CBRA at BRCCI website, [www.sentryx.com](http://www.sentryx.com) or call 800-869-8460.

*Rick Wellman, a senior business continuity and resilience trainer and consultant for Sentryx, is a highly skilled subject matter expert.*

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\_\_\_\_ POC-1: EOC: The Critical Tool (\$995) \_\_\_\_\_ POC-4: Successfully Conduct Your Drill (\$850)  
\_\_\_\_ POC-2: Seven Steps to BCP (\$995) \_\_\_\_\_ POC-5: Essentials of Org. Survival (\$875)  
\_\_\_\_ POC-3: Cert Crisis Comm. Plnnr (\$1495) \_\_\_\_\_ POC-6: CBRA Seminar (\$2900/\$2610)

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## Certification Especially for Vendors

Now there is a certification that is designed exclusively for individuals selling or providing services to the business continuity community—the CBCV—Certified Business Continuity Vendor.

CBCV is designed to help bridge the credibility gap with your clients and customers. It provides an assurance that a product or service-provider representative understands the complexity of a client's business recovery needs.

CBCV is for individuals with some knowledge in business continuity planning who are not practitioners within an organization, but rather provideservice to the industry and have acquired the necessary experience for certification.

For more information, visit the DRI International Web site at [www.drii.org](http://www.drii.org).



# You have the knowledge.

## Courses and Exams Available at DRJ's Fall World 2009 in San Deigo

### Pre-Conference Course and Qualifying Exam

9/10-12 BCP 501 Business Continuity Planning Review \$1405.00\*

### Post-Conference Course and Qualifying Exam

9/16-18 BCP 501 Business Continuity Planning Review \$1405.00\*

9/16-20 BCLE 2000 Business Continuity Planning Accelerated \$2550.00

9/16-18 BCP 601 Master Case Study Review \$1645.00

### Qualifying Exam Schedule \$500 (exam only)

9/12	8:30 am - Noon
9/18	1:30 pm - 5:00 pm
9/20	1:30 pm - 5:00 pm

### Master Case Study Exam Schedule \$300 (exam only)

9/18	1:30 pm - 6:00 pm
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9/17 BCP-AUD Business Continuity Planning for Auditors \$795.00

This one-day seminar takes the auditor through the processes used to create a successful Business Continuity Management program, providing insights into organizational structure, analysis, strategy options, plan development, testing, and maintenance. It presents the attendee with a working knowledge of the elements that constitute a "Good Practices" business continuity environment.

### Certifications available through DRI International

ABCP	Associate Business Continuity Professional
CBCV	Certified Business Continuity Vendor
CFCP	Certified Functional Continuity Professional
CBCP	Certified Business Continuity Professional
MBCP	Master Business Continuity Professional

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