



**ContinuityInsights**

**2021 MANAGEMENT  
CONFERENCE**



**19th Annual Conference  
October 4-6, 2021**

**CONTINUITY INSIGHTS MANAGEMENT CONFERENCE**

**2021**

**Conference Session Guide**

October 4-6, 2021

Hyatt Regency Minneapolis

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# 2021 Continuity Insights Management Conference Session Guide

**MONDAY, October 4, 2021**

**8:30 a.m. to 9:30 a.m.**

**PLENARY SESSION**

## **P1: Critical IT Infrastructure Resilience: Pre- and Post-Pandemic**

*(Speaker to be announced)*

Given that critical infrastructures, processes, policies, supply chain, cloud, networking, along with a myriad of essential protocols which were designed and built pre-COVID, what challenges and vulnerabilities did COVID reveal? While many organizations quickly adapted and responded effectively, many did not. Most organizations did not anticipate that 90 percent-plus of their workforce would be remote suddenly. So, what were some of the lessons learned, best practices developed, and how will this look going forward?

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

**BREAKOUT SESSIONS**

## **B1: Operational Resilience – The New Frontier**

*David Halford, Fusion Risk Management*

Enterprise Resilience programs continue to evolve with a convergence of Operational Risk, Third Party Risk Management, and traditional Business Continuity Management. As this evolution continues, the demand for Operational Resiliency is clear and supported by recent events. An Operational Resilience focus provides improved value to the Enterprise and is a key element of several recent financial regulatory guidance and Basel updates. During this session David Halford will provide a directional update and an actionable methodology to stand up an enterprise resiliency program. In addition, he'll demonstrate the value of using a system to support your program enabling you to easily manage, visualize, and use critical enterprise information at time of crisis. You'll leave the session more confident and ready to continue your Operational Resilience journey.

## **B2: Rebuilding for Speed in the Post-Pandemic Era**

*Lynnda Nelson, ICOR*

As a result of the global pandemic, organizations have removed boundaries and have broken down silos in ways no one thought possible. Decisions and processes have been streamlined, front-line leaders have been empowered, and hierarchies and bureaucracies dismantled. It is vital that everyone understands why we can't "return to normal," but need to create a new normal that results in rethinking ways of working, re-imagining structure, and reshaping talent. The year 2021 will differentiate the resilient from the not-so-resilient organizations. Organizations that focus on building sustainable capabilities as a strategy instead of plans for returning to normal, will emerge stronger from the pandemic than those that don't. In this session, we'll share how you can contribute to building your organization's sustainable capabilities as part of building a more resilient organization.

## **C1: How to Work With Consultants to Achieve Nirvana!**

*Dr. Steven Goldman, MIT*

The time may come (or has already arrived) when you need outside expertise for your Business Resiliency, Crisis Management, Crisis Communications, or Disaster Recovery program. Although consultants come in all sizes, shapes, costs, and areas of expertise, there are some guiding principles that you should know when choosing and working with them. In this session you will learn how to find these consultants, define the scope, types of contracts, negotiations, and selecting the right one. Then you will learn how to best

work with and manage your consultants, get the results you want, avoid mistakes, and deal with problems. Included are "Dr. Steve's Top Ten Questions to Ask before Selecting a Consultant" and "Practical Guidelines to get the Most from your Consultant with Nirvana for All."

## **C2: End-to-End Testing**

*Lisa Casteel and Debbie Mason, Primerica*

How to manage End-to-End complete review of BCP ensures all processes are identified. The value of testing your BCP (which includes your recovery steps) is immeasurable. Having a plan, even well documented, will not serve you or your company well if it is not tested. What constitutes a good test? This session will detail the complete scope of what constitutes a true end-to-end test: Plans for the business must be reviewed/updated; the facility where testing is performed must be maintained – workstation software; coordination amongst critical business units to ensure personnel outage support; upper management must be onboard and read into process; all outside support and users are accounted/allocation of workspaces; preparatory meetings with engineering staff are conducted. Ensuring that these good testing practices are in place will only enhance the company's ability to be well-prepared in any event.

## **D1: Ensuring ROI From Your Mass Notification Solution**

*Ann Pickren, OnSolve*

The global pandemic and other crises that have happened in 2021 have created a working environment filled with uncertainty. This is forcing companies to prioritize critical communications strategies in ways they haven't had to before. Through the lens of speed, relevance, and usability, companies and organizations are taking a strategic view of their critical communication solutions to understand what value they provide and where the gaps lie in their critical communications plans. In this session you'll hear how to measure each component of your communication program and understand how to find ways to measure return on the investment of a critical communication.

**11:00 a.m. to 12:00 p.m.**

**BREAKOUT SESSIONS**

## **B3: Return to Work: The Most Important Issue You've Completely Overlooked**

*Bo Mitchell, 911 Consulting*

If you think that plexiglass, hand cream, and desk wipes are the most important issues in your Return to Work, then you will fail with your employees. The most important issue: Trust in You as the Boss. Do your employees today trust you, your property manager, or the government that your workplace is safe for employees' RTW? The learning objective of this session will cover: your legal exposure regarding RTW; data for the new RTW threat: Employee stress, drug/alcohol use, suicide, workplace violence, etc.; the laws, regulations and standards that focus on RTW for employers; and what leadership by you is necessary for a successful employee RTW strategy.

## **B4: Privacy Is a Business Continuity Issue Too**

*Steve Ross, Risk Masters, Inc.*

Business Continuity Managers should be concerned about data privacy. Every Business Continuity Plan that contains contact information for key managers and staff is a potential privacy violation unless specific safeguards are observed. Moreover, the files that are used for backup and recovery are subject to the same privacy requirements (such as the right to be forgotten) as the primary databases. Also, responding to privacy breaches can be very disruptive. Organizations should prepare for minimizing the impact of system unavailability, investigations, audits, and access limitations on normal business operations. This presentation will address these and other issues and offer practical guidance on implementing measures to comply with recent legislation and to ensure that the Business Continuity Management function is not contributing to an organization's privacy exposure. These include identification of repositories of personally identifiable information (PII), assessment of the uses to which they are put, obtaining consent from those whose contact information is needed for recovery, and monitoring the use of relevant files.

## **Conference Tracks**

- A. Case Studies
- B. Trending
- C. Program Development and Advancement
- D. Measurement, Metrics, and Maturity
- E. Emerging Technology
- F. Professional Development
- P. Plenary

# 2021 Continuity Insights Management Conference Session Guide

## **C3: Conducting Joint BC/DR Testing With Third-Party Service Providers and What to Do If They Don't Offer Joint Testing**

*Carlo Kelejian, Continuity Innovations*

Third-party service providers deliver critical services to organizations and joint BC/DR testing should be included in your enterprise-wide exercise and BC/DR testing program. Organizations need assurance that all third-party service providers they decide to partner with are resilient, reliable, and transparent. Also, they should have adequate plans put in place, sound risk management programs, solid infrastructure, and personnel to restore critical outsourced services consistent with business and contractual requirements. In this session, we will discuss how to work with your third-party service providers to conduct joint BC/DR tests to validate the effectiveness of their BC/DR plans. We will also cover what to do if your third-party service providers do not offer joint testing. Attend this session to explore the steps you can take to mitigate risks associated with outsourcing critical services.

## **C4: How Software Is Addressing the Continual Evolution of Business Continuity**

*Monica Goldstein, Agility Recovery*

The Pandemic provided a spotlight on organizational resiliency at all levels and tested the activation of Business Continuity Plans throughout the world. The evolution of Business Continuity has seen the development of different approaches and frameworks based on changes in the business and regulatory landscape and having to address differing impacts and threats. Having a software platform that provides for "at your fingertips" action items, automates delegation of authority, stores updated contact information, and houses pre-established communication greatly improves the success of businesses with Plans in place. This session will focus on ways to maximize and fully leverage your BCM software. We will review best practices for utilizing Business Continuity Management software as part of an organization's Planning and Resiliency strategy. If you don't have software, you will gain an understanding on how software can better your program, address pain points and ways of getting started.

## **D2: Metrics That Motivate the Plan Lifecycle**

*Kathy Davis, C.H. Robinson*

Story of how metrics brought more collaboration and energy in the partnership between the business continuity team and the continuity plan owners and senior leadership. Process the business continuity team used so that attendees can consider how to adapt the process we used to their business context. Metrics can motivate! This session will show how the C. H. Robinson team developed metrics that brought new energy into their business continuity plan life cycle. Be prepared for interactivity! We'll go through the key questions in the process so that you can adapt the process to your own business context.

## **1:00 p.m. to 2:15 p.m. BREAKOUT SESSIONS**

### **A1: Tales from the Real World**

*Mark Carroll, Income Research+Management*

In this session approximately 10 individuals, collectively with over 200 years of BCDR experience, will be assembled to present their unique challenge or mini-case that they have experienced that is outside of the business continuity norm; something that you can't address from a textbook of best practices. A cadre of experts will each relay an example of a method, practice, use-case, etc. that they have used or plan to use that is outside of the BC/DR norm.

### **C5: Preparing Your Organization for Anything: The All Hazards Approach**

*Penny Neferis, JetBlue, and Peter Steinfeld, AlertMedia*

The worst time to think about emergency planning is when the threat of an emergency looms over your business. Instead, organizations should take an "all-hazards" approach to crisis management and response. That doesn't mean you should spend countless hours planning for every possible threat,

but you should address the resources and steps your business needs to take before, during, and after an emergency. In this session, the speakers will sit down for an intimate fireside chat. They will discuss the crucial components of an all-hazards crisis management program and response, actionable steps to achieve business continuity, and specific suggestions on how to take your emergency response plan to a level that is effective and scalable.

### **C6: How to Set a Solid Foundation for Operational Resilience Success – Part One**

**(NOTE: Part Two of this session – *Taking Action with Operational Resilience Today* – is scheduled for 2:30 p.m. – 3:45 p.m.)**

*Brian Zawada, Castellan BC*

Over the last year, there have been countless discussions and debates about *what* operational resilience is and *why* you should be addressing this industry shift now. But, while insightful and inspiring, you may be left wondering what steps you need to take to actually get started. Or, more importantly, how you should navigate laying a solid foundation that will engage your senior leadership team and ensure you're focused on protecting the right things. Please join Brian Zawada for an interactive, two-part workshop that will get you started down the right path. In part one of this workshop, we'll cover:

- What operational resilience really means for you – regardless of industry
- How to get started with operational resilience and connect it to business continuity
- How to leverage the BCOS Frame Meeting to get executives engaged and identify your important business services

### **C7: Get Out of Your Comfort Zone**

*Mark Armour, Brink's, Inc., and Joel Navarro, Mary Kay Inc.*

Business Continuity is not easy. And being successful in this discipline takes a lot of courage and hard work. Oftentimes, it means taking steps or stepping into roles for which we feel unprepared or are uncomfortable performing in. During this interactive session, you'll be challenged to think of some of the things that may be holding you back while learning some tips and tricks for overcoming them. We're all capable of much more than we believe we are. By stepping out of our comfort zone, we demonstrate our ability to rise above, not just to others but to ourselves.

### **D3: 9th Edition Event Impact Management Study**

*Devin Simenis, Witt O'Brien's, and Cheyene Marling, BC Management*

The presenters will be sharing the findings from the 9<sup>th</sup> Annual Event Impact Report. The expanded question set from this year's study has provided additional insights and observations from across the resilience disciplines of crisis management, crisis communications, and business continuity. While corporations continued to invest in these critical capabilities, there are still some key takeaways from the study that should inform organization and investment in these areas in 2021 and beyond.

## **2:30 p.m. to 3:45 p.m. BREAKOUT SESSIONS**

### **B5: How GDPR and CCPA May Impact Your BCM Program**

*Joe Layman, Bright Horizons, and Susan Zielan, Core Logic*

Do you know what consumer and employment information is stored in your company databases? Do you know that data privacy requirements will soon be part of your BCM program? Did you know your company can be heavily fined for non-compliance to privacy regulations? This interactive workshop will assist with understanding the EU Global Data Privacy Requirement (GDPR) and California Consumer Privacy Act (CCPA) regulations and how they will impact your BCM program and your organization. Learn how to be compliant with the GDPR, CCPA, or when it becomes a US regulation.



## **B6: Diversity and Inclusion: A Key Component of Resilience**

*James Green, Origami Risk, and Vanessa Mathews, Asfallis*

Breonna Taylor. George Floyd. Daunte Wright. And Countless Others. First amendment protests, civil unrest, and even riots in Minneapolis, Portland, and other cities across the nation, sparked a movement of 21+ million people last year as a result of the widespread public outcry against racial injustice in the United States, at levels not seen since the 1960s. Why does this matter to the Business Continuity profession? How does racial injustice impact our role? Does your organization need to be inclusive to be truly resilient? Vanessa Vaughn Mathews and James Green, renowned business continuity experts, will share with us their personal stories on what racism and privilege look like in both the real world and the business world today, what we need to do, and how we can all work together to create not just truly inclusive organizations, but an inclusive profession. Starting with their experiences with Diversity and Inclusion, and a look back at how we got here, James and Vanessa will share the differences between check the box "Diversity and Inclusion" and creating a true sense of belonging for all of your coworkers. This session will cover why Diversity and Inclusion matter during a business continuity incident, how to create more inclusive business continuity programs, and actions we need to take as a profession to be genuinely inclusive and sustainable.

## **C8: Taking Action with Operational Resilience Today – Part Two**

**(NOTE: Part One of this session – *How to Set a Solid Foundation for Operational Resilience Success* – is scheduled for 1:00 p.m. – 2:15 p.m.)**

*Brian Zawada, Castellan BC*

Over the last year, there have been countless discussions and debates about *what* operational resilience is and *why* you should be addressing this industry shift now. But, while insightful and engage executives and ensure you're focused on protecting the right things, we're going to dive deeper! In part two of this interactive workshop, Brian Zawada will explore:

- How to build out a more complete, end-to-end view of your organization (with a focus on your customers, channels, suppliers, and what's being supplied)
- How to create plausible scenarios and leverage them to generate clarity and confidence for your senior leadership team
- How to set impact tolerances that take into account the needs and expectations of all stakeholders, including customers and the market as a whole
- How to truly stress test your resilience capability and drive improvement

## **C9: Delivering A Crisis Management Exercise That Challenges the C-Suite!**

*Senad Cehajic, OMERS, and Isabelle Primeau, Premier Continuum*

Executives at the C-Suite level that comprise the crisis management team have limited time and attention to give to an almost unlimited number of issues. As a result, it is vital to optimize the time that you have with the C-Suite to ensure they are ready to respond to a crisis effectively. You will achieve this by delivering an exercise that truly challenges their crisis management reflexes. C-Suite level executives are high achievers who thrive in high pressure environments. Conversely, they can become bored and detached when not adequately engaged. This session will provide the roadmap to deliver an exercise that has the C-Suite feeling more confident in their capabilities and excited about participating in the next exercise. Aspects including selection of the right scenario for the exercise and designing injects that are unexpected but realistic will be explained. Important elements such as effective use of multimedia and pacing of an exercise will also be described. Finally, this session will illustrate the exercise moderation skills needed to conduct a challenging exercise.

## **E1: Achieve "Top Talent" Status by Honing These Five Traits**

*Cheyene Marling, BC Management*

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

**4:00 p.m. to 5:00 p.m.**

**BREAKOUT SESSIONS**

## **A2: Managing Risk Means Never Having to Say "I'm Sorry"**

*Mary Herbst, YMCA of Minnesota*

Come learn how to set up a Risk Management program either from scratch or building on an already established program. As the Sr. Director of Enterprise Risk Management for the second largest YMCA Association in the Country, the speaker will take you through the process of how to learn about a large and complex organization, establish what the key risks are, how to prioritize them, and then manage and mitigate them. In addition, learn how COVID changed the landscape of these risks and how this non-profit incorporated that into the risk landscape.

## **B7: Focusing Your Executives' New Appreciation for Business Resilience Post-COVID**

*Grace Burley, Witt O'Brien's*

How many pandemic scenarios had we all written prior to 2020? While Global Pandemic has always been on our collective crisis management and business continuity planner radar, we now have management's full attention. So how do we leverage it? In this presentation Grace Burley, Managing Director for Witt O'Brien's will outline tangible, tactical steps for crisis management and business continuity planners to leverage leadership's new appreciation for business resilience. Addressing both crisis management and business continuity lessons learned from COVID, the presenter will outline potential steps to drive your program forward. Some of the topics will include: involving your business leaders more deeply, revamping of plans and tools, and how to plan for the next crisis (that will be different from a pandemic). We have a golden opportunity to dramatically improve business resilience. Let's not waste it.

## **B8: Searching for Risk in All the Wrong Places**

*Geary Sikich, Logical Management*

Much like the song, "Lookin' for Love in All the Wrong Places" sung by Johnny Lee, risk management professionals need to ask the question "Are we searching for risk in all the wrong places?" Are risk professionals being deluded or deluding themselves by seeing risk based on media driven analysis; applying outmoded tools, models, etc. that no longer reflect the reality of risk? COVID-19 has captured headlines as the pandemic rages worldwide. So, much of risk management seems to be focused on COVID-19 impact, "the new normal," and "the great reset" as touted by high profile consulting firms like McKinsey & Company, Booz Allen, PriceWaterhouse, Boston Consulting Group, and sage gurus. The coronavirus, like all viruses, mutates nearly constantly, and while our attention is focused on the COVID-19 headlines, are risk professionals taking into account the touchpoint relationships to other risks?

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## **C10: Evolve! Real World Steps to Leverage Today's Crises for Tomorrow's Resilience**

*Jason Jackson, Infinite Blue*

Real-world talk and experiences around what it takes and how to grow your program to achieve greater future organizational resilience with Jason Jackson, former head of Global Emergency Management / Business Continuity for Walmart and Chief Security Officer for the Great American Outdoors Group (Bass Pro Shops, Cabela's, Big Cedar Lodge, White River Marine Group). Attendees will walk away with valuable and practical action steps to apply to their own programs and organizations in developing a holistic approach towards constant program evolution to achieve greater outcomes.

## **D4: Developing KPIs for Organizational Resilience**

*Vik Bhatia, United Nations*

The presentation will provide an overview of the ORMS (Organization Resilience Management System) at the United Nations headquarters. The discussion will cover how the Key Performance Indicators (KPIs) and criteria for completion or percentage completion were developed. Other essential topics include KPIs: key components of Policy, Governance, ME&R, Risk management and Planning; reviewing the rating structure; compliance criteria – partial or full compliance; and percentage compliance. Then finally, present the status of preparedness of business units on a dashboard for senior managers and for reviewing the progress on maturity.

## **TUESDAY, October 5, 2021**

**8:30 a.m. to 9:30 a.m.**

**PLENARY SESSION**

## **P2: Reimagining Organizational Resilience: Achieving Best in Class**

*Chris Duffy, Infinite Blue (Moderator); Panelists: Thomas Boehling, Amazon; Mike Janko, Goodyear Tire and Rubber Company; Carlos Moran, Toppan Merrill; (other panelists to be announced)*

Traditionally, building plans has been the foundation for our profession. But the Pandemic, compounded with layers of man-made and natural disasters, have shifted our reality and focus to identifying and mitigating process risks. In this panel session, you'll learn how other companies have enhanced their BCM by focusing on operational risks, and the benefits that can bring to your program.

**10:00 a.m. to 11:00 a.m.**

**BREAKOUT SESSIONS**

## **C11: What the Board Wants**

*Ted Brown, KETCH Consulting*

You've been giving the opportunity to present to your organization's Board of Directors; or you're seeking that opportunity. What should you say? What do they want to hear? What do you want them to hear? How can this help your BCP, Risk Management, or Crisis Management? This session will be presented by a Board Member and Chair and Founder of the Risk sub-committee.

## **C12: The Pros and Cons of Having a Third Party Manage Your BCM Program**

*Scott Ream, Virtual Corporation*

Congratulations! You've been tapped by leadership to lead the BC program. Whether starting from scratch or inheriting a program that has struggled to meet management expectations, how do you choose the best path forward? Where can external resources be effectively leveraged? What are the pros and cons of outsourcing parts of or the whole program? When does outsourcing your BC program make sense? Real world examples and practical tips and tools you and your team can use to develop your BC program roadmap and resourcing plan are the basis for this session.

## **D5: Data-Driven Decision-Making: How Operational Resilience Helps to Make Smarter Decisions**

*Tejas Katwala, Continuity Logic*

Organizations now have more access to operational data than ever before. But what happens to this data – do you let it degrade over time, or are you using it to improve resilience and decision making? Companies can leverage data to drive decision-making, gain a competitive advantage, improve resiliency, and even business performance. But how?

## **E2: Organizational Resilience Is Hard: The Soft Skills to Make It a Success**

*Alex Fullick, Stone Road*

COVID has proven that to be resilient you must look beyond usual 'response' mechanisms – BCM, IT DRP, Incident Management, Crisis Management – and look at the secret to the success of resiliency: people. We must understand people, their well-being, empowerment, contribution, and their own level of resilience. Response and recovery mechanisms may contribute to organizational resilience, but it's the people that develop those responses and if they are to be successful, they need to be nurtured and managed in a way to build success. This means leaders must look at the soft skills involved to create that success and create more resiliency. It ain't easy honing soft skills, in fact it's hard. Organizations are waking up to the challenge that IT DRP, response plans, and contingency plans aren't enough to create a sense of resiliency because resilience is not a destination but a state of mind. That means people. If the worst-case disaster has changed – as COVID has shown – then so too must the way organizations address their resilience and address more than just response plans. The secret to organizational resilience will be in its people and leaders must learn how see them as people, not employees.

**2:00 p.m. to 3:15 p.m.**

**BREAKOUT SESSIONS**

## **A3: So, You're Having a Disaster... Now What?**

*Tom Serio, MTS*

This session will not only take into consideration the countless hours and resources you've spent on planning to find out if you're truly ready when the time has come to put your plan to the test but highlight areas of concern you may have never thought of or put way down on the priority list. Respected industry authority Tom Serio will lead the presentation and walk you through a real-life disaster that impacted a large business and forced it to enact ALL of its business continuity plans. He'll take you on an up-close, inside look at the reality of the situation: What was upper management thinking? How quickly and successfully did employees get back to work? How did the company make the disaster transparent to the customers? This session will address some valuable and real lessons learned as the organization's corporate campus recovered from a nine-day outage.

## **C13: Is Your Crisis Team Prepared for an Actual Crisis?**

*Sherri Flynn and Kianna Freeman, Agility Recovery*

Effective crisis management means more than just acknowledging the likelihood of a crisis or understanding the nature and stages of crisis management. Crisis events can happen to any company, at any time. The one thing all crises have in common is that they are all unplanned. While you can't stop a crisis from happening, you can prepare your organization and make sure you have the right people in place to act. Effective crisis management is largely dependent on the people you have in place to address an emergency situation. Often organizations assign crisis roles by job title, not experience. How do you prepare a team who does not have a background in leading through a crisis? Do you have the right people in place?

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## **C14: Crisis Management vs. Crisis Communications**

*Dianne Stephens and Ashleigh Allison, Globe Life*

This session will help you, your teams, and your organization understand key differences between these two separate disciplines. It is imperative that teams understand the difference between the roles and responsibilities of a crisis management team versus crisis communications. Using an active assailant scenario, the presenters will take a deeper dive into: – WHICH types of communications need to be sent; – WHO they need to go to (Audience Groups); – Who needs to APPROVE the messages; – WHEN the messages need to be sent do you think of Crisis Management and Crisis Communications as one discipline? You'll leave with an invaluable document with sample scripting and appropriate time intervals for sending out communications. This session will have you contemplating pre-scripted, pre-approved messaging to help prepare your teams before anything happens. You will gain a better understanding of typical audience groups, collaboration, and flow of communication approval.

## **E3: Breaking the Mold – Innovative Perspectives on Leadership**

*Tracey Rice, Fusion Risk Management (Moderator); Alice Kaltenmark, BCI USA Chapter; Mitzi Harlor, Marriott International; and Cheyene Marling, BC Management*

This inspirational group will share the stories of how four of the industry's most successful members shaped their careers and pushed our profession in new directions. A mix of humor, struggle, success, and lessons learned, this session will offer advice on how to stay energized and smash the glass ceiling through hard work and positivity, while never accepting "good enough" as an answer.

**3:30 p.m. to 4:30 p.m. BREAKOUT SESSIONS**

## **A4: Reflections on Nashville Christmas Day Bombing**

*Ray Holloman, NCA Healthcare*

On Christmas Day 2020, Nashville was struck by a bombing that took down phone service, Internet, and televisions throughout multiple states. This bombing showed what many of us in the industry already know: our telecommunications systems do not have the level of redundancy that would be expected for how highly available these systems should be. Many people exclaimed that something should be done, but they have not been forced to actually make a change. Even the systems/applications that had built redundancy went down during this outage. In this presentation, will take a look at how different organizations responded during this event and the aftermath. Also, gain insights into how to help your organization be better prepared for this type of event. We will be asking questions, such as: How do you let your employees know an event has happened if you can't reach them? How do you access your plans if there is no Internet and your plans are in the cloud? Have you even thought about losing your main internet provider and what would you do? What do you do if you have no access and need to communicate with others, such as emergency services?

## **B9: Planning for Protests and Civil Unrest – Case Studies and Lessons Learned**

*Suzanne Bernier, SB Consulting*

The emerging threat of protests, riots, and civil unrest during mass gatherings has become a disturbing reality across the globe. This session will highlight the various types of threats to critical infrastructure that could occur during mass gatherings and the types of plans that should be in place to mitigate and respond to civil disturbances. During this session attendees will be presented lessons learned from recent protests/civil disturbances that have occurred around the globe. The learning objectives of this session include: – How to identify various types of threats to critical infrastructure that could occur during mass gatherings – And how to develop mitigation and response plans in advance of possible protests and civil unrest that could threaten critical infrastructure.

## **C15: How to Enhance the Effectiveness of Third-Party Risk Management**

*Mike Jennings, Infinite Blue*

Learn how your organization can enhance the effectiveness of third-party risk management. Regulations are growing more complex as leaders face increasing difficulty determining and managing risks that could cause severe impact to your organization. This session will cover the struggles and solutions business continuity, resiliency, information technology, and compliance leaders face when determining third-party risk.

## **D6: Enhancing Agility Through Consequence Based Risk Analysis**

*Jay Johnson, Mayo Clinic*

We all use scenarios to build context for planning, training, and education. The challenge is that the variability of scenarios makes it very difficult (if not impossible) to provide detailed plans for everything that we could face. We also know that the consequences of events and emergencies have a lot of overlap. What we have done is work from the consequence perspective to build foundational plans that allow our teams to begin response with processes that support their needs in many scenarios and facilitate graceful transition into more detailed efforts.

## **WEDNESDAY, October 6, 2021**

**8:30 a.m. to 9:30 a.m. BREAKOUT SESSIONS**

**A5: (TBA)**

## **B10: Buying Down the Risk of a Failed Ransomware Compromised Data Recovery Effort**

*John Beattie, Sungard Availability Services*

In order to create the opportunity to extort a ransom payment, ransomware threat actors must make it compelling for you to consider it. They must make it a viable option – one you have to consider. In fact, they will be working diligently to make sure it's your only option. And that happens when they successfully encrypt or disable your data replicas and backups as well as your production data. They must attack the data that you care about: data that's important to your organization's success; your "must-have" data; your vital data. They are thinking ahead. Are you? It is therefore essential to extend your thinking beyond your Cyber Security Incident Response Plan and your Disaster Recovery Plan. You need to think about a Cyber-compromised Data Recovery Management Program. This session will explore exactly that and what you need to put in place to have the right thinking, the right approach, the right team, the right plan, and the right capabilities that buy down your risk of a failed data recovery effort in the aftermath of a successful data compromising cyberattack.

## **D7: Three Steps Towards Becoming ISO 22301 Compliant**

*Tim Woodcome, NQA*

This presentation will focus in-depth on three key components of a successful BCMS under ISO 22301: Internal BCMS Audit, BCMS Corrective Action, and BCMS Management Review. These key requirements are the building blocks to any robust management system and need to be understood and implemented effectively to achieve ISO 22301 conformance. The presenter will go in-depth to the specifics of these requirements, providing interpretations, guidance, and potential tools and templates to be used. Takeaways of this session include the inside knowledge and expectations of the requirements, examples to demonstrate best-practices, and templates to be brought back to organizations for potential use.

## **E4: Resiliency Training for a Virtual Workplace**

*Paul Lambert, Ripcord Solutions*

Your fellow employees are working from home. You are probably still working from home. But best practices, experience, standards, and regulators keep whispering that training and awareness are required for a continuously improving program. Odds are 2020, and now 2021, have ushered in an

incredible amount of change to your program – such as new software, evolving methodology, new team members, etc. And we can't train everyone on Zoom! This presentation will cover the importance of a well-organized resiliency training strategy including: the different types of effective training, delivery models that will work for you, how to train a dispersed and overwhelmed workforce, and how you can do it yourself. Following the presentation, all attendees will receive a free training video titled, "Back to the Office after Covid-19" branded for your organization and licensed to use internally.

## 9:45 a.m. to 11:00 a.m. BREAKOUT SESSIONS

### **C16: Cyber Resilience and Business Continuity: Establishing Cohesion Without Losing Your Marbles!**

*Raymond Seid, DRI International*

Cyber resilience and business continuity – both are super important and both work best when they work together! That's not easy to accomplish, but not to worry. Attend this mind-blowing session to learn how to establish cohesion between the two at an entity level without sacrificing your sanity. We will tackle typical organizational barriers impacting resilience and what to do about them. Where does business continuity sit in the organization and why does that matter? How do you get the CISO and BCO on the same page? How do you link plans and processes? What about including BC in cyber incident response planning? And how to you bring it all together? You'll leave this session energized, informed, and with a BC and cyber resilience checklist to help you obtain and maintain cohesion – and calm.

### **C17: Effective Resilience Builds Customer Confidence**

*Dave Sarabacha and Mitesh Shetty, Deloitte LLP*

To build a brand that customers can trust, we need to embed resiliency into our organization's culture. And to do that we need to transform the resilience of traditional processes or locations to resilience of critical customer-facing business services and advance to a proactive, integrated, and responsive capabilities. Join us as we discuss how to start your journey to develop an end-to-end resilience framework that guides the identification of the most critical enterprise-level services (and underlying processes) for your customers and operations and delivers resilience through a holistic combination of prevention, continuity and response, and recovery planning for each service.

### **D8: ISO 22301 and Its Suite of Standards to Evaluate Business Continuity Program Performance**

*Marie-Helene Primeau, Premier Continuum*

Despite the utmost importance of having a working BCM program in place, there is yet no consensus among BCM practitioners on which metrics to use to evaluate program performance and how to implement them successfully and cost effectively. This session will provide an overview of the standards that can be used as the foundation of an efficient business continuity program evaluation approach. It will bring participants up-to-speed on the 2019 update of the ISO 22301 standard and, accordingly, provide sound guidance on setting the right metrics to meet organizational objectives. It will offer insight into the planning phase meant to lead to stronger execution and results. This session will offer a roadmap on how to implement standard-based metrics with a focus on solidity, efficiency, and the beneficial impacts on the organization.

### **E5: Managing Team Mental Health During Crisis**

*Dawn Grzena, Zendesk*

As the leaders during a crisis, we are expected to be calm, cool, and collected no matter what the crisis is. What happens when crisis exhaustion starts to creep in by either your executives, response teams, or those that you manage? What are the burnout warning signs that you should be watching for? Finally, how do you manage the team beyond this single event? This session will go over what I've learned over the years on what to watch for during a crisis for burnout, exhaustion or team members being overwhelmed. We'll go over the various tools and tips to help both your direct and extended teams. By the time this session is over, you will walk away with solid strategies, ideas, and more tools for your crisis response toolbox.

## 1:00 p.m. to 2:00 p.m. BREAKOUT SESSIONS

### **A6: Executing Adaptive Business Continuity in the Real World**

*Mark Armour, Brink's, Inc.*

No doubt you've heard of Adaptive Business Continuity. Perhaps you've read the book or attended one of the many presentations on the subject. You have probably also heard of Brink's, the worldwide leader in secure logistics and cash management solutions. What does Adaptive look like at a global organization that operates in 53 countries with over 76,000 employees and \$3.6 billion in annual revenue? What are the challenges and benefits of adopting a brand new approach that doesn't come with a step-by-step instruction manual? Now is the time to find out! Join this highly engaging session to get a look at a genuinely adaptive business continuity program. You'll see how the results speak for themselves in terms of the program's growth as well as the experience of responding to numerous disruptive events (hurricanes, civil unrest) while also dealing with a global pandemic.

### **A7: Elements of a Successful Resilience Program**

*Jeremy Boccabello, Covenant Park*

Many attempts at building a resilience program focus on the risk mitigation activities of an organization. They fail to take into consideration the changes to the way of doing business that a company must go through in order to integrate the communication and reduction of risk throughout the organization. They also fall short of bridging the gap between resilience efforts and the opportunity and competitive advantages of the organization in the marketplace. Based on 2 decades of program building experience for highly critical corporate entities and at the highest levels of all three branches of the federal government, this presentation will detail the lesser understood but critical program needs for changing every day business to build adaptive capacity into the entire organization. This is primarily for people engaged in program building efforts, or who desire to transition from project based compliance management to consistent year-over-year management of resilience for the organization. It includes many practical lessons learned for institutionalizing resilience, building leadership roles and processes, and tailoring the basic principles to a specific organization.

### **C18: Why You Need More Than a Simple Weather Forecast**

*Allison Svrek, StormGeo*

Since 1980, there have been more than 240 weather-related disaster events in the U.S. that have exceeded \$1 billion in impacts with a total cost exceeding \$1.5 trillion dollars. FEMA reports that weather is the #1 natural disaster affecting businesses in the U.S.; 40% of businesses fail to recover after a significant weather event. In this session, some of the recent headline-grabbing weather events (including Hurricane Dorian and Tropical Storm Imelda) will be examined and include a review of:

- Lessons learned from organizations that withstood weather disasters and improved their processes
- An early preview of the upcoming hurricane season
- How savvy, resilient organizations successfully incorporate the latest weather insights and technologies into their continuity planning
- How to immunize your business against the significant risks posed by weather-related hazards, which have the potential to impact your business more than the "major" storms dominating the headlines

## Conference Tracks

- A. Case Studies
- B. Trending
- C. Program Development and Advancement
- D. Measurement, Metrics, and Maturity
- E. Emerging Technology
- F. Professional Development
- P. Plenary



# 2021 Continuity Insights Management Conference Session Guide

## C19: Updated Strategies on Developing a BCDR Training Program

Linda Pace, *Certified Business Continuity Professional*

This session will provide tools, techniques, and actionable steps to create a new business continuity or disaster recovery training program. Create the right type of training for your audience, determine who can facilitate the training, understand how to measure results and show the return on investment (ROI). Regardless of experience, the maturity of your business continuity programs, or your industry, having a training program is vital to your business. Participants will build an actionable plan to identify needed skills and training to design and implement a comprehensive training program. Topics will include classroom training, e-Learning, and structured walkthroughs. You'll earn the components of a viable training program and how to measure the results. **Bonus:** Updating your training program during COVID-19 & Hurricane Season; practical tools and resources included.

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

**BREAKOUT SESSIONS**

## A8: How Was Canadian Premier Able to Manage During the Pandemic?

Tahir Rao, *Canadian Premier Life Insurance (Subsidiary of Securian Financial)*

Before November 2019, there was no Business Continuity or disaster recovery plan available in the company, and it was an uphill task to build end to BCM framework, including developing of BCM Policy, identification and training of BCP Coordinators, identification of mission-critical systems, processes, data, people, and preparation of data. The other challenge was to eliminate traditional off-site/alternate locations and while creating a capability of working remotely in crisis/emergency, impacting all the locations like the current pandemic. This presentation will describe the success story of Canadian Premier Life Insurance where within a short period of six-months a complete BCM framework was built, including preparation and approval of BCM Policy, Procedure, getting buy-in from businesses, the nomination of BCP coordinators, their training, conducting BIA, the testing of BCM Plan, and seamlessly transition to working from home.

A9: (TBA)

## B12: Where Do We Go From Here? Continuity in Higher Education in the Post COVID World

Brandon Robbins, *Washington University in St. Louis*

Prior to COVID-19 emergency managers and business continuity professionals may have developed continuity plans primarily focused on continuity following a large-scale disaster resulting in destroyed buildings, staff that may have been killed or injured, total loss of information and communication infrastructure, and governments and businesses with the ability to only focus on their essential functions. COVID-19 was not an apocalyptic incident. Rather, it challenged planners because staff was lost but they were lost from being on campuses, officed, or government complexes. Employees could still do all their functions but were away from their hardened offices. Functional areas were disrupted, not because of the loss of resources or personnel, but rather the demand increased too much. What if there was a way to streamline planning efforts to reduce the amount of time spent on risk assessments? What if there was an approach to focus on continuity capabilities rather than restrictions of time, cost, and scope? What would happen if we adapted planning to areas rather than completing templates provided by FEMA? This presentation will introduce the audience to adaptive business continuity strategies that all emergency managers can understand and implement in their current environments and plans. We'll explore the streamline impacts and risks for your areas to only include 7 key areas. In addition, this presentation will explore planning utilizing a competency, resources, and procedures approach focused on the capabilities of an area. Lastly, the discussion will include the new roles and responsibilities for leadership and continuity planners in this post COVID-19 era. In the end, the audience will take away the ability to focus their time and efforts, clarity to their roles and responsibilities, a notion of thinking inward rather than just externally, and lastly, the notion of building a culture of continuity to increase resilience.

E6: (TBA)

3:15 p.m.

**CONFERENCE ADJOURNS**

## ADDITIONAL EDUCATION

### PRE-CONFERENCE COURSES – SATURDAY AND SUNDAY, October 2-3, 2021

#### PRE1: *Business Continuity Review (BCP 501): Two-Day Course*

Saturday and Sunday, October 2-3, 2021, 8:30 p.m. to 5:00 p.m.

An unbelievable amount of information is packed into this newly updated, fast-paced course built for experienced business continuity professionals. If you're in a hurry to take your career to the next level, Business Continuity Review (BCP 501) is for you. This short, yet highly effective, refresher course will re-acquaint you with the key elements of business continuity and is based on the recently revamped DRI Professional Practices for Business Continuity Management – the most utilized and time-tested standard in the field.

**Note:** A computer is required for this course. Your courseware will be available through your account profile 7 days prior to the course start date. Please contact DRI at 1-866-542-3744 for all questions.

Registration Fee: \$1,750

Presented by: DRI International

For more information and to Register: <https://drii.org/events/course/9104bc2606>

#### PRE2: *Adaptive Business Continuity Foundations: Training and Certification Class*

Saturday and Sunday, October 2 and 3, 2021, 8:30 p.m. to 5:00 p.m.

Concerned about BC's role (or lack thereof) in COVID-19 responses? Frustrated with drawn-out and laborious traditional approaches to BC? Interested to learn and apply new discoveries from Agile, Cynefin, Growth Mindset, Lean, Organizational Resilience and others? Challenging times call for innovative responses, and many Fortune 500 organizations have adopted the Adaptive BC approach for their programs. Join us for a two-day training and certification course. Using case studies, hands-on tools, breakout discussions, exercises, templates, and feedback, you will learn the foundations of Adaptive BC and how they can be applied. Instructors will provide interactive and engaging instruction – we promise this will not be like other BC classes you've taken!



Because evaluation takes place organically during the course, there is no exam required. High-level Course Outline:

- Part one: Start with Why – Past, problems, principles, and the promise of improvement
- Part two: Theory – Research and models that (finally!) ground our discipline
- Part three: Practice – Concrete steps to execute
- Part four: Case Study – Designing (or transitioning) to an Adaptive BC program
- Part five: End with Who – Who YOU need to be for future success

With full participation in the course and in-class evaluations, you will earn the Adaptive BC Foundations™ (cABCF) certification.

Presented by: Dr. David Lindstedt and Mark Armour

Registration Fee: \$1,750 (course book, materials, and certification costs included)

### **PRE3: Learn To Create A Table Top Exercise – An Exercise in Business Continuity/COOP Preparedness!**

Sunday, October 3, 2021, 1:30 p.m. to 5:00 p.m. (half-day course)

Creating an Effective Tabletop Exercises – A 3.5 hour class

In this class you will be given five different table-top scenarios, including the injects, and you will learn how to create a situation, scenario, and injects for your audience, your business, your location, and your BCP maturity. You will identify operations, decisions, and policies that impact the ability of a business unit to execute plans. The exercise helps you address conclusions and discussions which can change, emphasize, and otherwise affect your business continuity/COOP plan. You will conclude with an “after action” report which will lead to effective modifications and improvements to the plans being exercised.

Registration Fee: \$350

Presented by: Ted Brown

## **POST-CONFERENCE COURSES – THURSDAY AND FRIDAY, October 7-8, 2021**

### **POS1: The Business Impact Analysis Course**

Thursday, October 7, 2021, 8:30 a.m. to 5:00 p.m.

Business Impact Analysis (BIA) – An 8-hour class

This course is an in-depth look at how to conduct a Business Impact Analysis (BIA). The class is for both BIA novices and experienced professionals. It provides you with the opportunity to gain a deeper knowledge and understanding of the BIA. The course will explore the concept of the BIA. You will be taught two different approaches to a BIA – interviews and workshops and the value of each. You will also be provided with an actual BIA survey and the results of clients BIA's. The objectives of this class are:

- Understand the BIA process
- Understand how to structure a BIA
- Apply the standard methods to conduct a BIA
- How to determine the results of the BIA & identify the critical functions for recovery strategies.

Registration Fee: \$695

Presented by: Ted Brown

### **POS2: COR: Organizational Resilience Behaviors and Structure – What do you need to know to increase the resilience of your organization?**

Thursday and Friday, October 7 and 8, 2021, 8:30 p.m. to 4:30 p.m.

Attend ICOR's Certified Organizational Resilience two-day course and learn how to increase the resilience of your organization. With a focus on Organizational Behavior and Infrastructure, you will gain valuable insight into the importance of the following competency areas:

1. Leadership Qualities for Resilient Organizations
2. Culture & Its Impact on an Organization's Resilience
3. Knowledge Management
4. Agile Change Management
5. Agile Project Management
6. Structure & Design
7. The Agile Workplace
8. Facility Management
9. The Resilient Workforce
10. Agile Finance

This course is intended for those responsible for increasing the resilience of the organization and for managing risk throughout the organization. This course includes 2 of the 5 clusters (10 of the 25 competencies) offered as part of ICOR's Certified Organizational Resilience Certification series that provide you with the knowledge of how to build more resilient organizations. ICOR's organizational resilience competency-based certification program identifies and evaluates what it takes to be a leader in organizational resilience — across the globe; and across all career levels, job roles, and job functions. To earn certification as a Certified Organizational Resilience Manager, Professional, or Executive requires completion of additional competency courses.

See the ICOR website to learn more: <https://www.build-resilience.org/cred-path-2.php>

Presented by: ICOR

Course Fee: \$1,295.00 USD

Includes course book, instruction, and 10 competency (COR 1-10) exams.

Each competency area has one 30-minute online exam to be completed outside the course schedule.

For more information regarding this course contact ICOR at: [education@theicor.org](mailto:education@theicor.org)

Phone: 1-866-765-8321 or +1-630-705-0910