



WELCOME

Thank you for joining us at the **21st Annual Continuity Insights Management Conference**, April 24-26, 2023, Hyatt Regency Minneapolis MN.

New to this year’s event is the addition of the Operational Resilience track, noted by alphanumeric designations beginning with the letter “F.”

REGISTRATION

SUNDAY, APRIL 23, 2023

3:00 p.m. – 5:00 p.m.

CONFERENCE HIGHLIGHTS

MONDAY, APRIL 24, 2023

Plenary Session

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

P1: Operational Resilience is More than BC 2.0

Breakout Sessions

9:45 a.m. to 5:00 p.m.

Times vary (consult the following pages)

Opening Exhibit Hall Reception

5:00 p.m. to 6:30 p.m.

TUESDAY, APRIL 25, 2023

Plenary Session

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

P2: Resiliency in the Cloud

Breakout Sessions

9:45 a.m. to 4:30 p.m.

Times vary (consult the following pages)

Tuesday Night Reception

6:00 p.m. to 9:00 p.m.

WEDNESDAY, APRIL 26, 2023

Breakout Sessions

8:30 a.m. to 3:15 p.m.

Times vary (consult the following pages)

3:15 p.m. Conference Adjourns

PRE- AND POST-CONFERENCE COURSES

Saturday and Sunday, April 22 and 23, 2023, and Thursday, April 27, 2023 (See page 10 for more information.)

EXHIBIT HALL SCHEDULE

| | |
|---------------------------|------------------------|
| Monday, April 24, 2023 | 5:00 p.m. – 6:30 p.m. |
| Tuesday, April 25, 2023 | 11:00 a.m. – 2:00 p.m. |
| Wednesday, April 26, 2023 | 11:00 a.m. – 1:00 p.m. |

Host Hotel

Hyatt Regency Minneapolis
1300 Nicollet Mall, Minneapolis MN 55403
+1 612 370 1234

Continuity Insights has arranged for hotel accommodations at the Hyatt Regency Minneapolis at the special conference rate of \$179.00 for a standard room. (Government rates are available; please email events@continuityinsights.com for more information.)

RESERVE YOUR ROOM TODAY



Registration Information

Full Conference Registration

By February 28th \$1,395.00

By March 25th \$1,495.00

After March 25th \$1,595.00

Register online at: [21st Annual Continuity Insights Management Conference](#)

Group Rates

Register with your colleagues and save on conference registration fees. A 15 percent discount will be applied to groups five or more, provided that the registrations are submitted at the same time. Contact show management for questions regarding other group discounts. bob@continuityinsights.com

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MONDAY, APRIL 24, 2023

7:00 a.m. to 5:00 p.m. Registration Open

7:30 a.m. to 8:30 a.m. Breakfast

Plenary Session

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

P1: Operational Resilience is More than BC 2.0

Operational Resilience is more than a new set of regulations affecting companies around the globe. It is more than putting multiple disciplines under the same umbrella. Resilience is a new way of approaching the promise of continuous supply of products and services to communities who want them. Our panel will answer the questions attendees ponder most.

- How does operational resilience add enterprise value?
- Which elements of operational resilience most increase organization-wide focus and engagement?
- How can more traditional business continuity concepts inform and propel operational resilience initiatives?

9:30 a.m. to 9:45 a.m. Conference Break

Breakout Sessions

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

B1: Work Area Recovery in the Absence of a Work Area

Dr. Tim Mathews, ETS

Now that many organizations have decided to continue or are considering remote/work-from-home strategies, how can BC practitioners adjust their perspectives, programs and recovery capabilities to this new normal? Moving from an impact to a building with 3,000 employees to an impact to 3,000 buildings with one employee, what are the issues/risks to recovering a remote workforce and/or work-from-home?

C1: The Pros and Cons of Having a Third Party Manage Your BCM Program

Kurt Sohn, 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? When does outsourcing your BC program make sense? Real world examples, practical tips, and tools you and your team can use to develop your BC program roadmap.

D1: Metrics That Motivate the Plan Lifecycle

Kathy Davis, CH Robinson

Hear how metrics brought more collaboration and energy in the partnership between the business continuity team and the continuity plan owners and senior leadership. Work through the process the business continuity team used and consider how to adapt the process we used to your business context. Learn how the 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.

E1: How to Internally Market (and Sell) Your Resiliency Program

Paul Lambert, Ripcord Solutions

Do your company's employees care about resiliency? Do they understand the "Why?" Maybe it's time to start marketing and selling your program internally. This presentation will cover the importance of a well-organized strategy utilizing marketing best practices and sales techniques. After all – your "customers" are your company's employees and recovery teams. And you need them to "buy-in" to accomplish your program goals and objectives.

F1: Operational Resilience – Focusing on What's Most Important

Mike Keating, Reinsurance Group of America

Sure, ISO 22301 talked about scoping your BC program based on products and services. Learn how to reset your program based on your organization's most "important business services" and how to establish impact tolerance to clarify expectations regarding resilience. Learn how this approach drives far better engagement with executive management and ways in scoping by business service and setting impact tolerance connects seamlessly with leading BC practice.

10:45 a.m. to 11:00 a.m. Conference Break

Breakout Sessions

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

B2: Remote Worker' Business Continuity Plan

Carol Moffitt, BGIS

Our world is changing as is our business environment. We need to shift with it. Even before the pandemic many organizations had remote workers, as did BGIS due to the nature of our business, our clients and our collective multiple locations. Learn how BGIS introduced the Remote Worker Business Continuity Plan, how it is incorporated into their overall program and more importantly leveraged during adverse situations.

C2: Balancing Business Continuity and Explosive Growth – 15 Years Later

Leah Andrews, Zoom Video Communications, Inc

The presenter will review and update the three factors she presented back in 2008, which were: 1) Know your culture, 2) Test first and often, and 3) Lead the way. A comparison with her former experience at Go Daddy and compare/contrast to building a continuity program at Zoom today, 15 years later. Zoom has experienced explosive growth due to the pandemic. And as a throw-back bonus, she'll touch on the buzz word of 2008 - what ever happened with convergence?

LEGEND

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| A Case Study | D Measurement, Metrics, and Maturity |
| B Trending | E Professional Development |
| C Program Development and Advancement | F Operational Resilience |



MONDAY, APRIL 24, 2023
Breakout Sessions (cont'd)

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

D2: What's Risk Got to Do with It? A Proactive Approach to Risk Management

Mary Herbst, YMCA of the North

In order to effectively manage our risk and insurance, the presenter has developed an Enterprise Risk Management program to proactively identify the top risks in the organization and to make recommendations on to mitigate, transfer and/or effectively manage risks in an association that has high risk tolerance.

D3: Resilience is a Team Sport -- Driving Broader Organization Engagement and Impact

Ray Bonilla, Meta

The presenter will share how Human Centered Design principles can be applied in any organization to power (and achieve) higher levels of organizational resilience. Learn how to galvanize resilience within your organization by driving engagement at all levels. Approaching resilience as a team, it significantly boosts our ability to overcome anything! Everyone has a role to play in resilience and are stronger as a team, organization, community, and world!

F2: Ensuring Your Third Parties Can Deliver

Phil Bigge, Citi

Confidential. Classified. Proprietary. These are common answers organizations receive when trying to assess specifics on critical Third-Party preparedness. Summaries and SOC reports are nice, but often lack specifics your organization seeks to ensure Operational Resilience. The more we outsource, the bigger the issue becomes. Learn how to get the answers you seek, measure preparedness, and ensure your third parties are compliant at the start of your engagement to mitigate this growing problem.

12:00 p.m. to 1:00 p.m.

Lunch

Breakout Sessions

1:00 p.m. to 2:15 p.m.

A1: Tales from the Real World

Mark Carroll, Income Research + Management

In this session approximately 10 individuals, collectively with over 200 years of BC/DR 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.

C3: Getting the Most Out of Your Cyber Exercises

Grace Burley and Melissa Mack, Witt O'Brien's

Cyber crises are a breed of their own. They affect companies in diverse ways, but often the only focus of a cyber exercise is the IT component. It makes sense: Cyber incident = IT. However, the effects of the crisis are broad and typically include legal, communications, HR, sales, marketing, and the rest of your company's leadership team. In this session, the

presenters will walk through the planning process and how to make the most of your leadership's time and help your company prepare in a holistic way for a cyber crisis.

C4: Standards, Standards, Standards

Carol DeLette, Exeter Finance

This session will facilitate a discussion on the many standards options currently available for Business Resiliency, with an emphasis on Business Continuity and Disaster Recovery. It will include a brief history of standards, why they're important (or are they?). Finally, should standards become a deal-breaker in an interview process? Would you be so attached to a standard that you would turn down an otherwise great opportunity?

E2: Using a Storytelling Approach to Develop Highly Effective Exercises

Senad Cehajic, OMERS, and Marie-Helene Primeau, Premier Continuum

Storytelling has long been used as a method to educate and train people across cultures, and industries. This workshop provides a roadmap to develop a highly effective exercise using a storytelling approach in tandem with established BCI exercise design principles. The presenters will share the "brain" science supporting the use of storytelling. The four structural pillars of storytelling, which include 1) Choosing the Setting, 2) Identifying the Characters, 3) Defining the Conflict, and 4) Finding the Resolution, will be explained.

F3 Reporting Operational Resilience to Directors and Senior Executives

Tejas Katwala, CL Digital

A review of common pitfalls of board-level reporting and discuss the preferred alternatives to assess and report Operational Resilience effectively. How to provide senior leaders with correct information to make well-informed decisions, such as using various alternatives to characterize operational resilience, including impact tolerance metrics that matter, quantitative and qualitative estimation methods, and the advantages and disadvantages of each alternative. Understand the essential tools and techniques used to measure operational resilience, and the various reporting examples that can be used as a guide for communicating operational resilience assessments to senior leaders.

2:15 p.m. to 2:30 p.m.

Conference Break

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MONDAY, APRIL 24, 2023

Breakout Sessions

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

A2: Communication Holes with Your Business Users

Lisa Casteel and Debbie Mason, Primerica

This presentation will focus on some of the potential holes in communications between the BC/DR Team and the business areas they are supporting. It will focus on some real-life experiences and how they addressed them, with regards to the efforts to bridge the gap between what is taking place in the BC/DR world and the business areas. Do you offer annual awareness training to all employees? How do you educate your employees about BC/DR awareness? What avenue do you use to provide updated information about your company's BC/DR response plan?

C5 Supply Chain Risk Assessment

Ted Brown and Dave Hunt, KETCHConsulting

Many of the greater risks facing organizations today relate to supply chain. Years ago, the FFIEC implemented a regulation called Appendix J which required financial institutions to evaluate the BCPS of their technology service providers (TSP). That regulation was incomplete because it ignored other providers. They will review how to analyze the risks of your broader supply chain: TSP, material suppliers, international risks, workplace violence/active assailant preparedness, etc.

E3: How to Maintain a High, Productive Standard for Your Growing Company Team

Blaise D'Ambrosio, Federated Hermes, and Margaret Millett, Uber Technologies, Inc.

Congratulations, you have changed jobs internally or started at a position at a new organization. Now you need to prepare a Business Continuity Management (BCM) Assessment for executive management on how well the organization will continue to function. This session will focus on 1) Define what you need from the program, 2) Review documentation, 3) Talk with the team and stakeholders, 4) Create a program maturity model, and 5) Document a strategy.

E4: Career Resilience - It's Time to Take Charge!

Tracey Rice, Fusion Risk Management, and, Alice Kaltenmark, BCI USA Chapter

Everyone has a different career story, starting with how you came to the industry and the path you took into the role you hold today. While each journey is a little different, common successes and challenges are shared by many during career growth - moving up the ranks, recognizing opportunities, taking responsibility and being accountable. During this session, you will answer the questions: where am I, where am I going and how do I get there? Leave feeling empowered and ready to take action on your career resilience!

F4: Operational Resilience – Getting Proactive and Understanding End-to-End

Chuck Wachter and Travis Morehouse, Northwestern Mutual

The term Resilience is everywhere and we're quickly reaching information overload. Some companies are moving down the

resiliency path while others are trying to determine how to begin. This interactive session will break Operational Resilience down into its basic concepts and provide methodologies and resiliency objectives that you can incorporate into your recovery program and establish a roadmap towards resiliency. The session will discuss translating Operational Resilience, understanding end-to-end services, creating meaningful communications with executives, how BC exercising needs to change, execution obstacles and what's needed to achieve success.

3:45 p.m. to 4:00 p.m.

Conference Break

Breakout Sessions

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

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. Hear a real-life disaster that impacted a large business and forced it to enact ALL of its business continuity plans. Take 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?

B3: Preparing Your Business for Cyberattack Recovery

Steven Ross, Risk Masters International

Success in recovering from cyberattacks – especially destructive ones like ransomware – does not happen when the attack begins. There are business components, especially in reaching contingent agreements with customers and vendors. Management should prepare by determining their loss tolerance and the conditions under which they will pay a ransom. Hear an action plan for preparedness, cost considerations, personnel, procedures, and maintenance.

E5: Resilience and the Changing Role of the Continuity Leader

Ann Pickren, Onsolve

It's more important than ever for organizations to take a more holistic approach to dynamic and evolving risks. The presenter explains how the role of the business continuity professional is changing as organizations shift to a focus on operational resilience. Attendees will learn what it means to have an operational resilience culture, five ways continuity leaders can drive resilience, and the new skills continuity leaders will need to lead to influence change.

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MONDAY, APRIL 24, 2023
Breakout Sessions (cont'd)

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

E6: How Professional Associations Create Value During Mandated Shelter-in-Place and Social Distancing

Tonya York, Business Recovery Managers Association
As President of the Business Recovery Managers Association, 2020 required a large pivot in order to be In-Service to its members. Explore strategies used to support membership during the pandemic while navigating COVID19. Discussed will topics like moving from monthly in-person meetings to weekly/bi-monthly webinars, conducting virtual in-person meetings via Zoom complete with food and entertainment, creating opportunities for "connection," leveraging social media, and dealing with the lasting changes post-pandemic.

F5: Operational Resilience – Beyond Planning

Brian Zawada, Riskonnect, Inc.
One of the most common points of feedback on operational resilience is that the outcomes are much clearer for executive management. But why is that? Join us for this session where we discuss how the use of "severe yet plausible scenarios" make preventing and preparing for disruption "real" for different stakeholder groups. We'll discuss how to identify them, how to use them to improve resilience, and how they related to testing and exercising. We will also discuss how they relate to key risk indicators and measures that illuminate vulnerabilities to disruption and where recovery strategies fail to align to business objectives.

5:00 p.m. to 6:30 p.m. Opening Exhibit Hall Reception

TUESDAY, APRIL 25, 2023

Plenary Session

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

P2: Resiliency in the Cloud

Robert Fucito, Fannie Mae, and Harsha Nippani, AWS
Two veteran resilience professionals will share their complementary expertise on resiliency in the cloud. Learn about cloud foundational knowledge versus legacy environments. What are the complexities of the various configurations and available tools? Can the cloud reduce time to recover, provide for global backup configurations in minutes, and reduce costs? Learn "cloud speak." How can the cloud reduce testing timelines to benefit both technology and business partners? This case study will review practical problems and solutions common to the cloud and its value to traditional BCM and third-party risk practitioners

9:30 a.m. to 9:45 a.m. Conference Break

Breakout Sessions

9:45 a.m. to 11:00 a.m.

A4: Cyber Resilience: What's New and What to Do

Roberto Zegarra, DRI International
Attend this timely, informative session for an in-depth analysis of current cyber threat vectors. Learn how to create a cyber-resilient organization, including how preparation can

effectively assist in cyberattack prevention, detection, response and recovery. Hear a case study and discuss how to increase collaboration among information security, business continuity, and business recovery teams.

C6: Get Out of Your Comfort Zone

Mark Armour, Brinks, 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. By stepping out of our comfort zone, we demonstrate our ability to rise above, not just to others but to ourselves.

C7: How "Not To" Conduct an Exercise

Mark Carroll, Income Research; Dr. Steve Goldman, MIT; Jennifer Park, Boston Scientific; and, Chris Wright, Deloitte
To the organization it is an exercise, the annual or semi-annual tabletop engaging key individuals in a simulated recovery event; but for you it is a test, an event via which you are evaluated for your ability to organize and deliver as you work through a crisis event. While "How To" sessions are the norm, How Not To is even more important as there are approaches, actions, decisions and results that just about guarantee an ineffective exercise and your personal failure. This will guide you through the "don't do" aspects of an exercise, leaving you with the confidence to navigate your own course to exercise success.

C8: Managing Organizational Resilience in Outsourced Functions

Tahir Rao, Canadian Premier Insurance
Dependency on third parties and outsourced companies is increasing while responsibilities remain with the principal company. It is challenging for the principal companies that how to get assurance from third parties/outsourced companies about their business continuity/operational resilience.

F6: Ready for Anything: Building Total Enterprise Resilience

Frank Shultz, Infinite Blue
For years, organizations have been striving to achieve operational resilience. Now, as risks increase in frequency and severity, businesses need higher levels of preparedness and the ability to respond to incidents in a more comprehensive, agile, and dynamic way. In this session, learn about the principles of total enterprise resilience, how it goes beyond traditional business continuity and disaster recovery programs and, given the emerging threats, is necessary to enable a rapid response to any impact.

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11:00 a.m. to 2:00 p.m. Exhibit Hall and Lunch

Breakout Sessions

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

A5: Avoiding the Domino Effect

Will Scobie, Horizonscan

This session is a case study of a company with more than 15,000 suppliers, and their concern about rising exposure down their supply chain and the impact of escalating contingent business interruption insurance costs. The presenter surveyed 50 of their critical suppliers, using a document called a Resilience Assessment, based around ISO 22301 and used to assess the maturity of the suppliers. All 50 suppliers were sent resources, videos and templates to improve their resilience. The final step was to select some of the suppliers to complete a validation test of their resilience. This collated evidence will be shared along with surveying support, and validation model for their supply chain in 2023.

B4: Fumbling for Resilience

David Lindstedt, PhD, Adaptive BC Solutions

Dr. Lindstedt will discuss the some unexpected findings after years of research. The presentation will provide an overview of 14 key aspects of resilient organizations. These aspects recur time and time again in anecdotes, case studies, interviews, narratives, research, and stories of resilient organizations. The 14 aspects can be arranged into four major categories: Crews, capital, a culture of experimentation, and exponential leadership. Resilience is not about “bouncing-back,” nor is it really about “bouncing-forward.”

C9: Crisis Management: Bridging the Gap Between Business Continuity and Incident Response Planning

Margaret Millett, Uber Technologies, Inc., and Tracy Hall, Wolf and Company

This session will focus on the differences and similarities between Business Continuity Planning and Incident Response Planning, the need for an overall Crisis Management response structure that precedes both, and the importance of training and awareness across the entire organization. Although Business Continuity and Incident Response Planning are two separate animals, there are parallels to the two that should be understood to strategically align these initiatives.

C10: Dynamic Resilience: An Agile Approach for a New Era

Marcus Vaughan, Illuminr

Traditional resilience focused on some level of return-to-normal, but COVID and the events of the past two years have taught us that there is a new and developing NORMAL. Dynamic resilience seizes that opportunity via a lens of engagement-driven business practices. Is there demand for the product we make or the services we provide? Are we agile enough to make the necessary adjustments to stay relevant in this new world? Discussed will be the mind-shift and opportunity considerations of moving beyond survival to embrace the resilience opportunity. The culture shift required to move beyond response teams into value-add strategies.

F7: How to Drive Operational Resiliency Through Business Continuity

Jenn Park, Boston Scientific

Join the presenter as she shares key insights into how they use their business continuity program to bring together siloed data sets to identify risks to core business areas. Learn how they gather and organize data to visualize their supply chain, identify critical system failure points, and prioritize business decisions. It's through this process that they are bringing cross-functional teams together to drive improvements in operational resiliency.

3:15 p.m. to 3:30 p.m.

Conference Break

Breakout Sessions

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

C11: Journey to Resilience

David Halford, Fusion Risk Management

The Journey to resilience continues to evolve and is different in many cases based on your Enterprise, business requirements, and relevant regulations. As a result, the program components and areas of desired improvement are also different. In this session, the presenter will explore programs area you should consider as part of your resilience journey, discuss the overall journey, and share practical ideas on how to plan and move the relevant journey along.

C12: I Inherited a Business Resiliency Program! Now What?

Dr. Steve Goldman, MIT

This session discusses what professionals should do when they are assigned the role of Business Resiliency Manager: where to start, what to do, how to lead, how/when to communicate, and how to track success. Topics include acquiring executive support, figuring out what was left to you, resources available, assignment of responsibilities, office politics, needed leadership skills, and action plan development. You will determine where you are, where you need to be, and how to get there.

D4: Developing BC/DR Metrics to Measure Success

Carlo Kelejian, Continuity Innovations

Metrics, metrics, and more metrics. This interactive session will identify and focus on effective business continuity KPIs/KRIs that will interest executives, spur action, and allow you to succinctly explain the worth of your business continuity/disaster recovery program.

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You've Earned It!



Up to 29 Continuing Education Activity Points
Post Conference Contact: bob@continuityinsights.com

TUESDAY, APRIL 25, 2023
Breakout Sessions (cont'd)

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

E7: Individual Resilience – Where Organizational Resilience Begins

Lynnda Nelson, International Consortium for Organizational Resilience

The presenter will identify the behaviors it requires to be more resilient and how to applying this to hiring and professional development practices. Takeaways included in this workshop: 1) An understanding of the globally recognized definition of organizational resilience – what are we talking about? 2) Examples of attributes and capabilities of more resilient organizations. 3) Understanding of the relationship between an organization’s culture, its behavior, and the resilience of its people. 4) How to identify behaviors, what types of behaviors the organization is seeking, and how to apply this knowledge in hiring and professional development practices.

E8: Defining Your Personal Brand and How to Drive BCM Program Adoption and Career Elevation

Aaron Callaway, ServiceNow

The presenter will discuss the simple power of connection (Professional vs Personal). What does building a personal brand mean? Why is it important to you, to building high potential teams, and personal/professional satisfaction? Culture Eats Strategy for Breakfast... What is yours? And how do we apply this into our daily lives. The presenter will share his personal journeys, BCM/Ops Res program challenges, and how to connect and grow with others.

4:30 p.m. to 5:45 p.m.

Free Time

6:00 p.m. to 9:00 p.m.

Tuesday Night Reception

WEDNESDAY, APRIL 26, 2023

Breakout Sessions

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

C13: Aligning Disaster Recovery to Company Technical Direction and Objectives

Andrea Houtkin, Houtkin Consulting, Inc.

Our DR environments are being left behind - because of cloud migrations and the fact that the enterprise tends to separate production and DR - a fault of our own doing. Building a load-balanced set of data centers, expanding the change management process to include simultaneous implementations for both data centers, integrating DR documentation in the production-related technical repositories and refining the technical processes and procedures can help a company keep focused on the importance of DR prep and readiness.



C14: Crisis Communications: Always Acknowledged, Never Planned or Trained - The Impact on Your Sustainability

Bo Mitchell, 911 Consulting

All the crisis plans your workplace is supposed to have require crisis communications with internal and external audiences. Yet most employers have not planned, trained, drilled or exercised these procedures and systems important to our sustainability after an emergency. This presentation employs case histories that will focus on the tactical and strategic communications that are required by law; mandated by standards and best practices; as well those that can save your job when an emergency strikes.

E9: You're a CISO and Now you're Running a BC Program

Kevin Finch, Sayers

Three CISO's in disparate industries (Banking, Healthcare, and Home Services) have recently been tasked with overseeing and improving their company's business continuity program. This presentation looks at this trend, and how synergies between the goals and works of InfoSec and Business Continuity can make this marriage between disciplines viable. It also looks at a few pitfalls to avoid if this is happening at your company, and then explores seven specific actions that CISO's can take right away if they suddenly find themselves running a BC Program Office.

E10: Bricolage: Professional Relationship Management Strategies for Practitioners

Jay Johnson Ed.D, Mayo Clinic

The presentation is an exploration of how the continuity practitioner can benefit professionally and personally through a thoughtful and intentional approach to professional relationship management strategy. We often approach relationships without a methodology, either because doing so come naturally to us, or because we feel that using a methodology casts shadow of insincerity or superficiality. The takeaways are all about how we can recognize our skills, and the areas where we are less skilled, so that we can work to build networks of valued colleagues who can support one another professionally and personally.

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WEDNESDAY, APRIL 26, 2023 (cont'd)

9:30 a.m. to 9:45 a.m. Conference Break

Breakout Sessions

9:45 a.m. to 11:00 a.m.

A6: Hackers, #Hashtags and Health Emergencies: Does Your Crisis Communications Plan Reflect Today's Reality?

Suzanne Bernier, McKesson

Specific case studies and lessons learned from events like recent terror and mass attacks across the globe, ransomware attacks, severe weather events across North America, and of course, health emergencies like the pandemic. Lessons learned will be shared, as well as some of their communications challenges and successes. The session will also review traditional tips and tools required to ensure your organization can communicate effectively during any crisis, while avoiding any reputational damage or additional fall-out that could arise.

B5: Building and Conducting a Cyber Tabletop Exercise

Kevin Johnson, Secure Ideas, and, Chris Duffy, Infinite Blue

This will be an interactive session where you will learn the foundations of building an effective Cyber Tabletop Exercise as well as participate in a specific scenario-based simulation as a stakeholder. Learn how to work together with various departments of your organization to better inform decision making. Assess the possible impacts of a cyber threat or attack. Identify areas of improvement for incident response best practices. Evaluate and clarify the different roles and responsibilities of individuals and teams within an organization

C15: Recovery Strategies: Moving Beyond the Rubber Stamp

David Schwartz, Catalyst Corporate Federal Credit Union

Recovery strategies are easy to overlook but extremely valuable in the overall maturation of a Business Continuity Program. This session will help develop and enhance recovery strategies by providing templates and industry best practices that will apply to any organization. It's one thing to fulfill a regulatory requirement, but it's much more valuable to make them actionable and tailored to the needs of the company. Takeaways: the scope of a recovery strategy, leverage "all-Hazards" methodology, develop a tactical approach to building strategies, and consider ongoing maintenance and exercises.

E11: A Tale of Our Community: Continuity and Crisis Response Strategies for Concurrent and Cascading Events

Terri Greenberg, Securian Financial

A panel of professionals from the local Minneapolis/St Paul business community sharing local perspectives on continuity and crisis management incidents and events. The panel will be comprised of professionals in Continuity and Crisis Management from a variety of industries representing Minnesota business and government. While COVID has been global, Minnesota was at the center of concurrent events when the death of George Floyd resulted in protests and violence in our community and across the Nation.

11:00 a.m. to 1:00 p.m.

Exhibit Hall and Lunch

Breakout Sessions

1:00 p.m. to 2:00 p.m.

B6: Executing Adaptive Business Continuity in the Real World

Mark Armour, Brink's, Inc.

Perhaps you've heard of Adaptive Business Continuity. 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 new approach that doesn't come with a step-by-step instruction manual? 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.

C16: Rebooting and Refreshing Your BC/DR Program

Linda Pace, City National Bank

Whether new threats, the global pandemic, changes in strategic direction or the "Great Resignation", every organization must re-evaluate their program. This session provides real, actionable steps to improve your program and identify gaps. Evaluate your program to align with the various regulatory bodies and ensure your program is in step with the company's strategic direction. Discuss lessons learned and recommendations for a refreshed pandemic planning process. Understand the importance of a robust testing plan Demonstrate value to your stakeholders and build resiliency.

D5: Using Dashboards to Engage Leadership and Drive Plan Consistency

Scott Mulert, Ameriprise

How we have utilized dashboards, reporting, and tools to engage and educate leadership and to drive greater consistency in business continuity planning across a large and diverse business. A case study of how dashboards and reporting were developed to raise executive awareness of key business continuity program elements, risks, and issues. The same tools are being used to drive greater consistency in business continuity plans across a large and diverse financial company. Learn how the reporting was developed and implemented, as well as provide examples of actual dashboards, including in common tools.

LEGEND

| | |
|---------------------------------------|--------------------------------------|
| A Case Study | D Measurement, Metrics, and Maturity |
| B Trending | E Professional Development |
| C Program Development and Advancement | F Operational Resilience |



WEDNESDAY, APRIL 26, 2023 (cont'd)

Breakout Sessions

1:00 p.m. to 2:00 p.m.

E12: The Surprising Value of Industry-Specific Networking Groups

Ashley Goosman, Liberty Mutual

The Business Continuity Resilience Insurance Network (BCRIN), founded in June 2021, is a peer-to-peer networking group created as a forum for networking among colleagues in the insurance industry. With the pandemic as its catalyst, the opportunity to share challenges and opportunities to evolve its programs. The BCRIN has experienced great value in connecting colleagues within the sector, where it can share expertise, develop a knowledgebase, and increase the overall Return on Value (ROV) across the group.

2:00 p.m. to 2:15 p.m. Conference Break

Breakout Sessions

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

B7: Keeping Your BC Plan Current in a Shifting Cyber Landscape

William Malik, Trend Micro

You aim to create a business continuity strategy with staying power, but constantly evolving cyberthreats create the need for regular updates to that leg of your plan. Hear case study examples of organizations who created unique BC drills and tactics that stand apart. Attendees will walk away with ideas for how to make their own continuity plan more resilient, even in an unpredictable environment.

C17: Agile Business Continuity: Engaging All in Continuous Improvement

Bruce McIndoe, McIndoe Risk Advisory LLC

Working with a Fortune 500 company, the presenter applied most of the principles of Adaptive Business Continuity, but it lacked a program execution framework. They took Adaptive BC and married it with the agile methodology to create Agile Business Continuity. Understand the objectives for creating Agile BC. Walkthrough how the agile methodology – sprint planning, execution, and retrospective – were applied at the unit and organizational level.

C18: Continuity Confessions: Crowd-Sourced Case Studies

Howard Mannella, Alternative Resiliency Services

So many conference sessions feature buzz phrases such as Best Practice, Innovation, etc. Ever want to hear how someone got it wrong? Hear some real lessons from candid practitioners who were not afraid to admit "Here's where it went wrong and here's what I would do differently next time." The presenter will share a list of potential pitfalls and how to avoid them, innovative ways to look at programs critically and improve using the experience of others as guideposts, and take comfort that no program or practitioner is perfect, that it's OK to make mistakes, and how to recover from them

C19: Best Practices for Creating a Comprehensive Vendor Risk Management Program for Your Business

Kathryn Scourby, KNS Consulting,

Businesses face an environment full of increased cyber threats, data breaches, supply chain issues and risks from vendors/business partners who create risk for our organizations. That clients are now directing changes in business practices to ensure that there are stricter RFP, audit and vendor guidelines for all businesses if they want to gain new clients and keep their existing clients. Having a comprehensive Business Continuity plan and Vendor Risk Management program is no longer a "nice thing to have," but instead critical to continue to provide services to clients and maintain an excellent reputation in the face of any threat. Participants will take away best practices to create a comprehensive Vendor Risk Management program that will help ensure that their business stays resilient in today's global world of cyber threats and data breaches.

3:15 p.m. Conference Adjourns

LEGEND

| | |
|---------------------------------------|--------------------------------------|
| A Case Study | D Measurement, Metrics, and Maturity |
| B Trending | E Professional Development |
| C Program Development and Advancement | F Operational Resilience |

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Continuity Insights 2023 MANAGEMENT CONFERENCE

*Winners to be announced on Wednesday, April 26, 2023 during lunch in the Exhibit Hall.

Pre-Conference Courses (Optional)

Saturday and Sunday, April 22-23, 2023

PRE1: Business Continuity Review (BCP 501)

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 For more information and to Register:

<https://drii.org/events/course/3abc6f6cd0>

Presented by: DRI International

PRE2: Crisis Leadership for Your Executives – and for You Sunday, April 23, 2023, 8:30 a.m. to 5:00 p.m.

This one-day intensive workshop provides the Business Resiliency Program (BRP) Manager with the background, tools, and insight to prepare the organization's executives to lead through a crisis. This session draws from research, and more important, includes many case studies of previous crisis response leadership – successful and not-so-successful – with the lessons learned. This unique workshop also offers the Business Resiliency Program Manager the tools and experience to lead the BRP Program prior to the event, and how to lead senior executives through the event.

Ample discussion with sharing of information and experience is part of this workshop. Attendees will be able to provide their executives/leaders with much needed information and skills to make them successful crisis leaders. The session concludes with a tabletop exercise where the learning experience can be applied and adapted to your organization. Registration Fee: \$695.00

Presented by: Dr. Steven Goldman, MIT

PRE3: Learn to Create A Table-Top Exercise – An Exercise in Business Continuity/COOP Preparedness!

Sunday, April 23, 2023, 1:30 p.m. to 5:00 p.m.

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 you address conclusions and discussions which can change, emphasize, and otherwise affect your BC/COOP plan. You will conclude with an "after action" report which will lead to effective modifications and improvements.

Presented by: Ted Brown, KETCHConsulting

Post-Conference Course (Optional)

Thursday, April 27, 2023, 8:30 a.m. to 5:00 p.m.

POS1: The Business Impact Analysis Course

Business Impact Analysis (BIA) (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.

Presented by: Ted Brown, KETCHConsulting

HOTEL AND TRAVEL INFORMATION

Host Hotel: Hyatt Regency Minneapolis
1300 Nicollet Mall, Minneapolis MN 55403
+1 612 370 1234

Continuity Insights has arranged for hotel accommodations at the Hyatt Regency Minneapolis at the special conference rate of \$179.00 for a standard room. (Government rates are available; please email events@continuityinsights.com for more information.)

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NOTE: Please ignore any attempts by unsolicited telemarketers claiming to work on behalf of Continuity Insights to reserve your hotel room. The hospitality industry has seen an increase in activity by these "hotel reservation pirates" who purport to secure the best rates possible. The only way to ensure the security of your credit information is to use the above approved reservation link.

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