### Pre-Conference Workshops Day

**Wednesday, April 24, 2019**

<table>
<thead>
<tr>
<th>Time</th>
<th>Workshop</th>
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<tr>
<td>9:00 AM</td>
<td><strong>Workshops Registration</strong></td>
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<tr>
<td>9:30 AM</td>
<td><strong>Workshop A: How Do We Get Back on Track After a Lack Luster Implementation?</strong></td>
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<td>Bad implementations happen – some 30% of ITFM tool implementations fail to meet expectations according to Gartner. In this session you will learn from a Fortune 500 company that went from an unsuccessful ITFM implementation journey to later go on and hit expectations and increase the bottom line.</td>
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<td>- Getting your team back on board after an initially failed implementation</td>
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<td>- Terminating your ITFM vendor relationship in favor of another</td>
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<td>- What can we do different?</td>
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<td>Ted Townsend, Director-Operations Finance and Technology, Asurion</td>
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<tr>
<td>11:30 AM</td>
<td><strong>Lunch</strong></td>
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<td>12:30 PM</td>
<td><strong>Workshop B: How Might Driver-Based Forecasting Support Your Company’s Performance Management Needs?</strong></td>
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<td>A new and urgent imperative is emerging in IT. As business users’ expectations of IT continue to rise, many IT operations and development groups lack the business maturity to effectively demonstrate the business value of IT investments and operations. In this session you will learn how to truly understand costs quickly and accurately along with being able to quantify those costs to outside departments.</td>
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<td>- Real time reporting with visibility to outside departments</td>
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<td>- How do integrate spreadsheets into a software based reporting model</td>
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<td>- Gaining executive buy-in</td>
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<td>2:30 PM</td>
<td><strong>Afternoon Refreshments Break</strong></td>
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<td>3:00 PM</td>
<td><strong>Workshop C: How to Do IT Show-Back or Chargeback Like a Pro</strong></td>
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<td>Many organizations execute show-back and chargeback with success, while others fail. The reasons for failure are almost always the same and are avoidable. This workshop will break down keys to success, common pitfalls, and even offer a few extra tips for achieving customer delight. Walk away with actionable next steps to:</td>
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<td>- Educate and enable decision making. Help consumers completely understand their usage and cost to leverage it effectively.</td>
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<td>- Manage complexity and automate. Avoid common setbacks including bill confusion and manual collection of data.</td>
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<td>- Promote and seek continuous improvement. Implement a communication plan and a program for success beyond implementation</td>
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<td>Rob Mischianti, Chief Evangelist, Nicus Software</td>
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<td>5:00 PM</td>
<td><strong>Close of Workshops Day</strong></td>
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MAIN CONFERENCE DAY ONE | THURSDAY, APRIL 25TH, 2019

8:15 AM
REGISTRATION & BREAKFAST

8:45 AM
CHAIRPERSON'S WELCOME

9:00 AM
OPENING KEYNOTE PANEL: HOW TO SUCCESSFULLY DIGITALLY TRANSFORM YOUR BUSINESS WITH ITFM
In order to compete in today’s ever changing market we must digitally transform the business. You will hear from a Fortune 500 company on how they successfully went through a digital transformation with the help of ITFM. You will also learn how ITFM complemented digital transformation efforts and pushed them to the next level.
Moderator: Manik Patel, Modernization Evangelist, AIG Life & Retirement
Panelists: Pia Wakefield, Lead Program Manager Data Mgmt & BI, Ciena

9:45 AM
IT COST TRANSPARENCY: CREATING A CLEAR VIEW INTO YOUR IT SPEND TO ENABLE DECISION MAKING
When assumptions about spending are replaced with numbers and data, it is much easier for companies to make decisions based on facts rather than emotions. In this session we will explore how businesses identify total expenses associated with IT, with the ultimate goal of driving costs down. Discussion includes:
- Establishing an IT Asset Baseline
- Providing realistic service delivery costs
- Tackling proper data accrual to increase accuracy
Tushar Desai, MBA, Vice President- Program Management, Bank of America Merrill Lynch

10:30 AM
TECHNOLOGY DEMO DRIVE & MORNING COFFEE BREAK
Solutions Speed Dating with a twist! Preview the ITFM tools that will feature in the Process Improvement Clinics at our Demo Drive along with the opportunity to win some fabulous prizes along the way!

“Excellent forum to connect and network with ITFM practitioners. Real life examples and practical advice that are very helpful.”
- Prudential Financial

**PANEL: LEARNING HOW TO SPEAK THE ITFM LANGUAGE WHILE CREATING A SOLID FRAMEWORK FOR STRATEGIC GOALS**

Many projects are derailed by a misalignment of strategic and tactical goals or even outright disagreement between IT staff and leadership – who is responsible for defining the strategic goals – and ITFM staff – who are responsible for executing against those goals. This disconnect is often the result of poor communication, unrealistic expectations or understanding. In this session you will learn how to set yourself up for a solid framework and how you can use that during the ITFM journey.

- Defining departmental goals within your ITFM framework early and consistently
- Establishing who the key decision makers are; who is part of the story?
- Deciding what is crucial and setting realistic goals


**INNOVATE DON’T STAGNATE! ACHIEVING TRANSPARENCY WITHOUT HOLDING THE BUSINESS BACK**

In a time where transformation is a requirement not an option many businesses struggle to conserve costs while still keeping ahead of the competition. In this session we will learn how one company was able to transform itself while still maximizing its ITFM efforts.

- How do we avoid getting bogged down with cost tracking?
- Using ITFM to help accelerate the business transformation efforts
- Leveraging ITFM as a benchmarking tool against competitors

Joe Mitchell, Business Operations Manager - Infrastructure Business Office, LinkedIn

**INTERACTIVE DISCUSSION GROUPS**

Our facilitated, small group discussions optimize peer-to-peer learning by ‘crowdsourcing’ practical solutions to common ITFM challenges—an immersive experience where you’ll have the opportunity to build upon one another’s expertise. Attendees choose two of the four topics below with 40 minutes to discuss each topic.

**IDG 1:** NEGOTIATING CONTRACTS WITH ITFM
Facilitator: Pia Wakefield, Lead Program Manager Data Mgmt & BI, Ciena

**IDG 2:** FIXING THE DISCONNECT BETWEEN IT & FINANCE DEPARTMENTS
Ted Townsend, Director-Operations Finance and Technology, Asurion

**IDG 3:** MANAGING AND TRACKING SHADOW IT
Facilitator: Manik Patel, Modernization Evangelist, AIG Life & Retirement

**IDG 4:** SERVICE-BASED AND DEPARTMENTAL REPORTING
Facilitator: Steven Morley, Technology Business Manager, Intermountain Healthcare
### TRACK A: STARTING YOUR ITFM JOURNEY

#### BEGINNING YOUR ITFM JOURNEY: WHERE DO YOU EVEN START?

ITFM is a journey with many starting points and milestones along the way. The key to success is getting internal management and executives on-board and having the right partner to help guide you along the way. In this session you will hear from a company in the early stages of their ITFM Implementation journey.

- What factors to consider when choosing your ITFM vendor
- Why do companies make the first initial investment?
- Gaining initial buy-in across the enterprise

**Ruben Muniz, ITFM Lead, JM Family Enterprises**

### TRACK B: HONING YOUR ITFM EXPERTISE

#### PANEL: SHOWBACK & CHARGEBACK: KEYS TO SUCCESS NOW AND IN THE FUTURE

In this panel discussion, ITFM experts from various industries will share their expertise on how to get beyond defending the bill, enabling customers of IT to understand spend and value, and changing the conversation and relationship between IT and the business.

Hosted by **Nicus**
Moderator: **Rob Mischianti, Chief Evangelist, Nicus Software**
Panelists: **Jennifer Garcia, IT Financial Advisor, American Family Insurance**

### CASE STUDY: CONSERVE YOUR TIME; DITCH YOUR SPREADSHEET

Many seasoned professionals love their trusty spreadsheets. Take a look into common flaws of relying on spreadsheets and how to arm yourself with the tools to ditch them along with integrating legacy systems into your ITFM portfolio.

- How do you fit legacy systems into your ITFM portfolio?
- Learn how much time you really save by getting rid of your spreadsheet
- Examine how much more accurate ITFM platforms are than excel

**Ekiti Lowe, Director of Finance, Duke Health System**
**Janine Reid, Finance Manager, Duke Health System**

### GETTING A HANDLE ON SOFTWARE LICENSING AND MITIGATING EXPOSURE TO AUDITS

Ensuring compliance and ensuring that a firm is not under-licensed are often the primary objectives for software asset managers. But license optimization, IT security and implementing processes and policies are just some of the areas in which Software Asset Management (SAM) can save money for companies. Attend the session to understand issues that bog SAM teams down and their solutions as well as:

- Consider implementation, training and process rollout practices for efficiency
- Review and optimize time consuming transactional License Management for freeing up time
- Examining how to manage complex software licenses
- How to engage stakeholders to drive successful SAM implementations
- How does Cloud impact my SAM strategy?

**Asif Bhaidu, Senior Partner – IT | Global Portfolio & Program Director, Ogilvy**

### EVENING WELCOME RECEPTION

5:15 PM

### CLOSE OF CONFERENCE DAY ONE

6:30 PM

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<tr>
<th>Time</th>
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<th>Description</th>
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<td>9:00 AM</td>
<td>CHAIRPERSON’S DAY ONE RECAP &amp; REMARKS</td>
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| 9:15 AM | QUANTIFYING IT VALUE                                                        | **CASE STUDY: RATIONALIZE YOUR VENDOR PORTFOLIO TO OPTIMIZE SPENDING AND IMPROVE PERFORMANCE**  
IT cannot exist on its own; it must rely on a variety of outside services and contractors. In this session you will learn how one company was able to provide an accurate and complete breakdown of vendor spend, ultimately saving costs.  
- Using ITFM to better negotiate vendor contracts  
- Identify which vendors are providing the greatest return and how to communicate to outside departments  
- Planning a roadmap for future IT vendor relationships  
*Paul Matthews, Director of Finance, University of Pittsburgh Medical Center*  
**IT ACCOUNTING: HOW TO GET YOUR CURRENT IT ACCOUNTING SYSTEM TO MATCH YOUR ITFM INITIATIVE?**  
Traditional approaches to IT Cost accounting for application development don’t work when enterprises transition to a Lean Budget paradigm. Learn to decrease the overhead of traditional project cost accounting, while still providing the governance enterprises need to assure that application development and maintenance investments align with strategy.  
- Streamlining the accounting function to work quicker and with increased accuracy  
- How to gain value from AR Days  
- Examining Leasing Requirements  
- ASC-842 Focus  
| 10:00 AM | MORNING COFFEE BREAK                                                        |                                                                                                                                                    |
| 11:15 AM | MOVING BEYOND COSTS AND INTO VALUE                                           | While costs of IT services are necessary to make sound business decisions, they are only one part of the equation. In this session we’ll look at ideas on how to paint more of the picture by capturing and measuring value in the eyes of your internal partners.  
- Utilization of a framework to optimize the business model for your services  
- Ideas on how to define value  
- Using ITFM, and beyond, to make smarter business decisions that will increase the value IT brings to each partnership  
*Steven Morley, Technology Business Manager, Intermountain Healthcare*
## MAIN CONFERENCE DAY TWO | FRIDAY, APRIL 26TH, 2019

### TRANSFORMING THE BUSINESS: THE TIME IS NOW!

**12:00 PM**

**CASE STUDY: HOW MACHINE LEARNING AND AI WILL INCREASE YOUR ITFM VALUE: WHY NOW MORE THAN EVER?**

With so many advancements within the field of technology the more current practices can almost seem like science fiction. It seems like to keep up we have to have it all, but it’s hard to measure what software is actually producing returns! ITFM can assist you with quantifying these returns, let’s find out how.

- Providing a means to model and calculate metrics and KPIs
- Utilizing technology to create new revenue streams
- Optimizing existing processes and gaining competitive edge

**12:45 PM**

**NETWORKING LUNCHEON**

**1:45 PM**

**BUILDING HOMEGROWN SYSTEMS, USING EXISTING ERP SYSTEMS WHILE LEVERAGING BUSINESS INTELLIGENCE TOOLS**

With so much talk about ITFM many companies find themselves wondering; can we do this in-house, should we be using an outside system or a mix of both? This session will focus on the complexities of building a system in-house and if it is financially sensible to outsource.

- Is it possible to build out a system in-house?
- Comparing costs of using an outside system vs. outsourcing
- Why doesn't everyone do it? What are the challenges of keeping your system homegrown?

Invited Speaker: **Manish Agarwal, Executive Director, MGM Resorts**

**2:15 PM**

**QUANTIFYING THE VALUE OF THE CLOUD WITH THE HELP OF ITFM**

Many companies are converting software as services in the cloud. In this session we will take a look into how companies transitioned into the cloud assisted by there ITFM strategy.

- Cloud and agile, moving to the applications within the budget while measuring the benefits of each app
- Tracking and billing cloud implementation costs within the enterprise
- Cloud isn’t for every cloud, can you judge if it will benefit your company?

**3:00 PM**

**CLOSING TOWN HALL**

A series of open-forum Q&As addressing any remaining questions you may have

**3:30 PM**

**AFTERNOON GRAB-AND-GO REFRESHMENTS BREAK**

**4:00 PM**

**CONFERENCE ADJOURNS—SEE YOU NEXT YEAR!**