

FORUM INFORMATION

SENIOR EXECUTIVE RETREAT

*February 27 - 28, 2012
One Ocean Resort Hotel & Spa
Atlantic Beach, FL*



Security & Privacy Standards for Outsourcing

IT's Role in Enhancing Customer Experience

Planning for & Managing the IT Skills Gap

Enterprise Program Management Office

Data Center Migration to Green IT

Best Infrastructure Funding Model

Agenda

Monday, February 27th

8:00 Breakfast

8:45 Introductions and Company Updates

9:45 Break

10:00 IT's Role in Enhancing the Customer Experience

James Lutz, Vice President of IT Enterprise & Infrastructure Business Systems, USAA



IT's contribution to the total customer experience is critical and growing in every industry. USAA is a company known in the financial services industry for excellent customer satisfaction and customer retention. James Lutz, Vice President of IT Enterprise & Infrastructure Business Systems, will lead a discussion on the role IT plays in improving the customer experience.

11:00 What is the Best Infrastructure Funding Model

Christian Torres, Sr. Finance Manager, Microsoft



There many kinds of IT infrastructure funding models available these days. They each have their positives and negatives but how do you know which one is right for your organization. Mr. Torres is going to discuss some of these models and help the group figure out if their IT department is headed in the right direction in regards to funding.

12:00 Lunch

Agenda

Monday, February 27th cont'd...

1:00 **Data Center Migration to Green IT**

*Tim Grimes, U.S. IT Operations Leader,
PricewaterhouseCoopers*

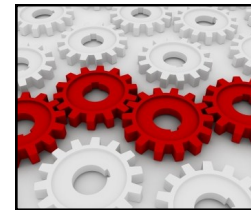


When the need first arose for a Data Center in PwC it was built out close to the IT department. Learn how PwC migrated the Data Center to a low risk location, earned a Green IT award for the new state of the art facility, and then executed on a multi-year migration plan that finished ahead of schedule. Find out about the financial benefits of a green Data Center on both the organization and its customers.

2:00 **Break**

2:15 **Implementing the Enterprise Program Management Office at SunTrust**

Ann Jacobs-Long, GVP, Finance/Enterprise PMO, SunTrust



The banking industry's unprecedented change and operating pressures will require SunTrust to manage a massive portfolio of performance improvement and regulatory reform projects. SunTrust has implemented an Enterprise PMO and Project Management Model to deliver the right projects, at the right time, for the right costs in the right way.

3:15 **Break**

3:30 **Facilitated Discussion**

4:15 **Adjourn**

6:30 **Dinner & Cocktails**

Agenda

Tuesday, February 28th

8:30 Breakfast

9:00 Security & Privacy Standards for Outsourcing

Jack Lewis, Vice President of Global Workforce Strategies, Ceridian



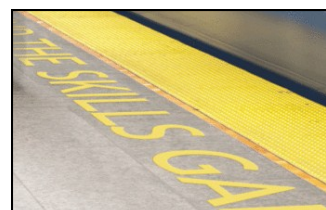
Ceridian has chosen an international staffing model to support its global business footprint. This session will provide an overview of the various safeguards and practices that have been implemented to enforce the Security and Privacy policies that govern Ceridian's business model, both domestically and overseas. Topics that will be addressed include:

- Physical Security
- Information Security and Data Privacy
- Systems Security
- Network Security
- Personnel Pre-employment Screening

10:00 Break

10:15 Planning for & Managing the IT Skills Gap

Kandy White, Director, IT Self Service & New Products, Verizon



Despite persistently high unemployment, many CIOs cite talent shortages as one of their most serious challenges. IT's skills needs are changing fast, and few people out there have what organizations need to drive the business forward.

11:15 Future Meeting Planning

Here we will talk about future IMF meetings to better serve you, our members. We want to hear what is on your mind and what topics you would like to potentially discuss at the next meeting. This will also be a time for you to ask any questions to the group that may have not been answered during the meeting or review a particular topic.

12:00 Adjourn

Hotel Information

Location:

[One Ocean Resort Hotel & Spa](#)

1 Ocean Boulevard

Atlantic Beach, FL 32233

1-800-874-6000

Details:

Reservations can be made by calling the hotel directly at **904-249-7402** or toll-free at **1-800-874-6000**. You must call the Hotel prior to **February 6, 2012** and identify yourself as being part of the Information Management Forum group at the time the reservation is made in order to receive the special group rate.

Attendees may also [book their stay online](#) through a customized IMF Link.



Outdoor veranda of the Azurea Lounge