

# THE WORLD OF IT FINANCIAL MANAGEMENT JULY 8-12, 2013

SAVANNAH MARRIOTT RIVERFRONT HOTEL • SAVANNAH, GA



Program is held at the Marriott Riverfront Hotel on the River Walk along the Savannah River and in one of the largest National Historic Landmark Districts in the U.S.



## Sample Presentations

- 2013 CIO Predictions & Outlooks
- Applying Rolling Forecasts to IT
- Best Practices to Reduce IT Spend
- Board Room Top IT Questions
- CFO Emerging Issues in 2013
- Cloud Service Fin Mgmt Overview
- Cost Control Best Practice Metrics
- Doing Chargeback the Right Way
- Expense-Optimization with ITIL
- Fin. Managers as a Valued Partner
- Financial Tools That Really Work
- Future Technology Impact on You
- GL Performance & Value Measures
- How to Hire an ITFM Analyst
- Hybrid Cloud Model Financials
- IT Managed Services Business Case
- ITIL Best Practice Views of ITFM
- Key Challenges Facing IT Finance
- Managing & Charging for Clouds
- Optimizing the IT Budget Process
- Portfolio Mgmt. for Greatest ROI
- Real World Best Practices in ITFM
- Regulations Affecting Asset Mgmt

## IT Financial Management Association 26th Anniversary in Celebration of Founding the IT Financial Management Profession

### Monday-Tuesday Optional Workshops & Seminars

You can attend all or any of these  
**12** half-day workshops and seminars:

- IT Financial Management System Design – Tips for Guaranteed Success
- Best Practices or Just Common Practices – How to Tell the Difference
- What Does and Does Not Work Among the Various IT Financial Disciplines
- Cloud IT Service Financial Management: Everything You Need to Know
- IT Financial Techniques for Planning, Controlling, Pricing & Decision Making
- Cost Modeling, Chargeback, Cost Allocation and Unit Costing
- IT Hardware and Software Asset Management Overview and Procedures
- Financial Aspects of Running IT Like a Business to Demonstrate Value
- IT Cost Management Assessment with a Business Value Focus
- Transparency as a Tool for Financial Analysis and Reporting
- IT Managed Service (Outsourcing) Business Case
- Working with Your Legislature on IT Financial Issues

### Wednesday-Friday Conferences

Attend all **4** conferences for the price of one:  
IT Financial Management for Controllers & CFOs



IT Financial Planning, Budgeting & Reporting



IT Asset and Expense Management



Government IT Financial Management

### Message to IT Financial Management Professionals

“The future of IT Financial Management walks through the doors of our conferences every year. We are here to educate you in what few knew yesterday and to prepare you for what even fewer know today.” – ITFMA

Save **\$900-\$1,100**  
if Register by

June 7th  
**Plus Additional**  
10-20% Discount  
for Groups of  
2 or More

### Money Back Guarantee!

Only ITFMA offers your money back if you find more value for the same price at any other conference in 2013

**5-Day** Week-Long  
IT Financial Management  
Program – Only at ITFMA!

**Only at ITFMA!**  
Full Breakfast Buffets  
and Lunch Buffets Every  
Day for Your Unique  
Diet and Appetite

Win **Free** Passes  
to ITFMA  
2014 Conferences

### Free Enrollment in ITFMA Certificate Programs for:

- IT Financial Management Best Practices • IT Asset Management
- IT Financial Management Controllership • IT Financial Planning, Budgeting & Reporting
- ITIL Financial Management • IT Chargeback and ABC Management
- IT Performance Management and Benchmarking • IT Financial Management Accounting
- Government IT Financial Management • Telecommunication Financial Management



ITFMA • [www.itfma.com](http://www.itfma.com) • (805) 687-7390 • [info@itfma.com](mailto:info@itfma.com)

## Why This Program is Unique

- The program is held at the Savannah Marriott Riverfront Hotel is on the River Walk along the Savannah River, in Savannah, GA, one of the largest National Historic Landmark Districts in the U.S. The hotel is steps from the downtown Historic District.
- Free Internet access for those staying at the Marriott Savannah Riverfront Hotel.
- The only 5-day week-long conference that provides you a complete curriculum on best practices in asset and expense management, controllership, financial planning/budgeting/reporting, government financial management and performance management for IT organizations for businesses, government agencies and universities
- Four conferences for the price of one and six half-day workshops each day for the price of one
- Receive handouts for all concurrently held workshops, seminars and conferences held each day you are registered to attend
- Speaker handouts on a single CD replaces the bulky and heavy 700-1,100 page hardcopy booklets
- Offers twice the value at half the price of comparable conferences
- Money back guarantee that you will not find a comparable 4-5 day program on these IT financial disciplines with more renowned speakers, breadth and depth of material, number of presentations, networking opportunities, and for the same reasonable registration fee in 2013
- 30-35% discount for early registration **plus** an additional 10-20% discount for groups of 2 or more
- There will be six (6) lucky winners in the drawing for free passes to the ITFMA 2014 Conference of your choice
- Nearly 100 sessions to choose from!
- Twelve (12) pre-conference half-day workshops and seminars:
  - IT Financial Management System Design – Tips for Guaranteed Success
  - Best Practices or Just Common Practices – How to Tell the Difference
  - What Does and Does Not Work Among the Various IT Financial Disciplines
  - Cloud IT Service Financial Management: Everything You Need to Know
  - IT Financial Techniques for Planning, Controlling, Pricing and Decision Making
  - Cost Modeling, Chargeback, Cost Allocation and Unit Costing
  - IT Hardware and Software Asset Management Overview and Procedures
  - Financial Aspects of Running IT Like a Business to Demonstrate Value
  - IT Cost Management Assessment with a Business Value Focus
  - Transparency as a Tool for Financial Analysis and Reporting
  - IT Managed Service (Outsourcing) Business Case
  - Working with Your Legislature on IT Financial Issues
- Twenty (20) hours of peer networking during breakfasts, morning/afternoon breaks, lunches, and cocktail receptions
- Conference drawings for you to be one of the six (6) lucky winners of free passes to either ITFMA 2014 conference program
- Wide assortment of sessions addressing:
  - Controllership and Financial Management of Information Technology Organizations
  - Tools, techniques and methodologies for IT Financial Planning, Budgeting and Reporting
  - Financial Disciplines for IT Expense Control, Asset Investment, Procurement, Tracking, and Disposal
  - Performance Management and Benchmarking of the IT Enterprise
  - IT Financial Management Practices and Procedures for Government Organizations
- Largest gathering of your peers and leading authorities specializing in IT asset management, benchmarking, controllership, financial planning/budgeting/reporting, government financial management and performance management for the business, government, and education communities with many sessions addressing best practices in IT financial management disciplines and procedures
- Unbeatable quality and variety of speakers and topics at a cost significantly less than alternative conferences
- Latest concepts for financially managing both the distributed and centralized IT environments
- Ample opportunities for you to discuss current issues and to have your problems addressed by other practitioners in your field
- Demonstration of leading-edge and popular software available for IT financial management
- Earn credit in the most extensive IT financial management certification program **at no charge** with certificates in 10 areas of specialty
- Full breakfasts are served daily for you and your family. Conference breakfast and lunch sponsors include ComSci (leader in Automated IT Financial Management Solutions), HP (leader in Building ITFM into Performance Management), N. Dean Meyer and Associates (Consulting/Software, Market-based Resource Governance) and Nicus Software (leader in IT Financial Management Solutions).
- All full breakfasts and lunches are buffet-style to meet your own dietary requirements and appetite
- Complimentary evening reception (hors d'oeuvres, cocktails, and other refreshments) for you and your family on Wednesday is sponsored by VMware (leader in IT Cost Management and Visibility Solutions).

## Money Back Guarantee

If you find another four or five day program focused on these IT financial disciplines with more renowned speakers, breadth and depth of material, number of presentations, networking opportunities, and for the same reasonable registration fee in 2013, ITFMA will gladly refund your registration fee.

# SAVANNAH CONFERENCE REGISTRATION

IT Financial Management Assn., P.O. Box 30188, Santa Barbara, CA 93130  
Phone (805) 687-7390 • Fax (805) 687-7382 • info@itfma.com

Name \_\_\_\_\_ Title \_\_\_\_\_ First Name on Name Tag \_\_\_\_\_  
Company \_\_\_\_\_ Department \_\_\_\_\_ Mail Code \_\_\_\_\_  
Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Email Address \_\_\_\_\_ Phone( ) \_\_\_\_\_

**Check (✓) appropriate personal & company selections:**

**Job Title or Equivalent Level:**

- President/CEO/CIO/EVP/SVP
- CFO/Controller/VP/Financial Mgr.
- Manager/Supervisor
- Senior Officer/Analyst
- Junior Officer/Analyst
- Consultant
- Other \_\_\_\_\_

**Main Job Responsibility:**

- Asset Management
- Chargeback or ABCM
- Controllership/Finance
- Performance Mgmt./Benchmarking
- Planning, Budgeting and Reporting
- Operations/System Support
- Other \_\_\_\_\_

**Industry (or Consultant's Major Client Base):**

- Banking
- Insurance
- Other Financial Svcs.
- Government/Defense
- Education/University
- Healthcare
- Manufacturing
- Retail
- Technology/Telecom
- Other \_\_\_\_\_

**Check (✓) appropriate selections:**

- I wish to register as a member  nonmember
- Enclosed is payment  • Please bill me  • Charge to: Visa  MasterCard  American Express  Diners Club

Card Number \_\_\_\_\_ Expiration Date \_\_\_\_\_ Name on Card \_\_\_\_\_

**Check (✓) seminars, workshops and conferences you are likely to attend most of the time on the following days:**

**Monday 8:00 a.m.-12:00 p.m. Seminars/Workshops**

- IT Financial Management System Design – Tips for Guaranteed Success Workshop
- Cloud IT Service Financial Management: Everything You Need to Know Workshop
- Best Practices or Just Common Practices – How to Tell the Difference Workshop

**Monday 1:00-4:00 p.m. Seminars/Workshops**

- IT Financial Techniques for Planning, Controlling, Pricing and Decision Making Workshop
- Transparency as a Tool for Financial Analysis and Reporting
- IT Managed Service (Outsourcing) Business Case Workshop

**Tuesday 8:00 a.m.-12:00 p.m. Seminars/Workshops**

- What Does and Does Not Work Among the Various IT Financial Disciplines Seminar
- IT Hardware and Software Asset Management Overview and Procedures Workshop
- IT Cost Management Assessment with a Business Value Focus Workshop

**Tuesday 1:00-4:00 p.m. Seminars/Workshops**

- Financial Aspects of Running IT Like a Business to Demonstrate Value Workshop
- Cost Modeling, Chargeback, Cost Allocation and Unit Costing Seminar
- Working with Your Legislature on IT Financial Issues Seminar

**Wednesday-Friday Conferences**

- IT Financial Management for Controllers & CFOs Conference
- IT Financial Planning, Budgeting and Reporting Conference
- IT Asset and Expense Management Conference
- Government IT Financial Management Conference

# WORKSHOP & SEMINAR AGENDA

## Monday, July 8

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### 7:00-8:00 a.m.

#### Conference Registration and Full Breakfast Buffet

### 8:00-11:45 a.m.

#### IT Financial Management System Design – Tips for Guaranteed Success Workshop

Bill Miller, Partner  
ProvenIT

This workshop is for the active practitioner or soon-to-be active practitioner of IT Financial Management. Learn how to define and design common infrastructure products and aggregate those products into common IT services. Define the structure including the expenses and operational data, solve common design problems, including life cycle management, and explore common chargeback model challenges, including how poor design leads to over/under recovery. This workshop is a hands-on, intensive learning experience. Participants should have basic ITFM skills, but even new learners will find many valuable tips and tricks to speed their ITFM capability development.

#### Cloud IT Service Financial Management: Everything You Need to Know Workshop

Khalid Hakim, Cloud Operations Architect  
VMware

How is cloud service financial management different from traditional IT financial management? How could CxOs realize the financial benefits for which they embarked on a cloud transformation program? How could CIOs modernize their IT financial management practice to accommodate cloud computing transformation projects? How does cloud service financial management become a key process to help businesses realize and recognize the value of their investment? This workshop walks you through the cloud IT service financial management cycle considering the various cloud models (Public, Private, and Hybrid). This includes the cloud investment planning and budgeting processes that address demand management and portfolio investment planning and decision-making. The workshop will also address the accounting and cost management processes and demonstrate how to build a costing model for cloud services, showing some of the best practices in transforming traditional IT capital expenditures (CAPEX) into more manageable and optimized operational costs (OPEX) to correctly show how to allocate costs of the shared cloud infrastructure and service consumption models (i.e. SaaS, IaaS, or PaaS). This workshop also discusses the charge/show back mechanisms and helps answer typical business/consumer questions such as “What am I paying for?” and “What am I getting out of it?” We will conclude with an IT financial management maturity model that helps you evaluate your IT organization’s financial management practice readiness for the cloud transformation and build a cloud-ready IT financial management process improvement roadmap.

#### Best Practices or Just Common Practices – How to Tell the Difference Workshop

N. Dean Meyer, President  
NDMA, Inc.

Many so-called “best practices” are nothing more than common practices. How can you discern the difference between truly the right thing to do, and simply what everybody else is doing? As Stephen Covey said, “Begin with the end in mind.” If you have a clear vision of how financial and resource-governance processes are supposed to work, then you can evaluate specific practices that industry pundits may recommend in that

context. Furthermore, a vision of the destination can help you formulate your ITFM strategy, and design solutions to near-term challenges as steps in an evolutionary path toward that end-state.

Drawing on Meyer’s new book, *Internal Market Economics*, this workshop describes a guiding vision and a set of practical principles, and then applies them to describe highly effective, non-bureaucratic processes for:

- Chargebacks and show-backs
- Allocations
- Portfolio management
- Budgeting
- Service cost modeling and rate setting
- Funding for infrastructure, innovation, and enterprisewide services
- Cost management
- Downsizing
- Shared services
- Outsourcing
- Unfunded mandates
- Management financial metrics

Bring your questions, your current processes, and your ITFM projects, and we’ll examine them in light of the vision and principles, and together figure out what the real “best practices” are.

### 11:45 a.m.-12:50 p.m.

#### Buffet Lunch

### 1:00-3:45 p.m.

#### IT Financial Techniques for Planning, Controlling, Pricing and Decision Making Workshop

Charles Johnson, President and CEO  
CNJohnson & Associates, Inc.

*IT Cost Measurement Techniques:* This session describes the various types of IT costs required for financial planning, controlling, pricing, evaluation, and decision making. Examples of how to compute these various costs will be illustrated (e.g., resource costs, activity-based costs, product (business unit) costs, decision-making costs, etc.).

*Capital Budgeting Techniques:* This session explains the tools and techniques for evaluating capital budget decisions: cost benefit analysis, payback period, simple rate of return, net present value (NPV), internal rate of return, NPV Profile (graphical analysis), Total Cost Approach, Incremental Cost Approach, and post-audit of investment projects.

*Special Chargeback Costing Techniques:* The session considers alternative methods for handling special billing issues: excess capacity or performance reserve, peak or shift processing, levels of service, and single versus multiple rates. The topics include theoretical and practical approaches.

#### Transparency as a Tool for Financial Analysis and Reporting

Nancy Braun group  
Zuna Infotech, Inc.

Full transparency can be frightening for those un-accustomed to working in this way, but in the current climate of transformation and efficiency, it is too powerful of a tool to be shunned. This workshop will cover the range of knowledge needed to succeed in an atmosphere of transparency, and how to encourage/grow the policy. We will start with how to choose *what* to share, how to build context sensitive Dashboards with complex security and interactivity, how and when to publish. We will look at real life pitfalls and roadblocks and how to avoid them for your initiatives. If you are tracking any efficiency or cost savings initiatives, or if you are

looking for tools that can help to surface new opportunities for cost savings in the services you provide today, this workshop will empower you to leverage transparency as your newest power tool.

### **IT Managed Service (Outsourcing) Business Case Workshop**

**Michael Clark**  
EMC Consulting

In today's dynamic environment of budget, time-to-market and resource constraints, many companies are looking to outsource significant portions of their IT (and other) Business Units. This requires strategic decision making based on complete and dependable business case analysis. Failure to prepare and include the full range of costs will result in a flawed business case and missed commitments. This workshop will expose you to the full range of factors to be considered in developing a managed service outsourcing business case and an approach to:

- Define managed service and its implications on the business
- Identify outside assistance required for a successful initiative
- Assemble current state information for the RFP and develop a base case for analysis
- Prepare for discussions with potential suppliers
- Account for non-obvious and hidden costs associated with an outsourcing effort

**Tuesday, July 9**

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**7:00-8:00 a.m.**

**Conference Registration and Full Breakfast Buffet**

**8:00 a.m.-11:45 a.m.**

### **What Does and Does Not Work Among the Various IT Financial Disciplines Seminar**

**Penny Collen, Consultant - IT Finance and Chargeback**

This seminar is a frank discussion of a variety of topics in the area of IT financial management and cost transparency. Which approaches really work? This will include time for you to bring forward questions about areas of concern or confusion. Topics to be reviewed will include but not be limited to:

- Mainframe cost models
- Distributed usage-based chargeback
- Maximizing impact from chargeback
- Running IT as a business
- ITIL Demand Management
- ITIL Service Management
- ITIL Chargeback requirements
- Financial reporting and scorecards
- Driving user behavior
- Asset management
- Cloud services and charging
- Benchmarks and rate comparisons

### **IT Hardware and Software Asset Management Overview and Procedures Workshop**

**Howard Hastings, Managing Partner and IAITAM Fellow**  
Optimal Assets

*Capturing and Integrating Asset Procurement Data into Your ITAM Program:* Proper management of IT assets ideally begins at the point of acquisition. Processes that effectively capture and utilize early-stage procurement information represent a significant portion of the overall benefit of end-to-end ITAM programs. Once implemented, it's far less costly than trying to piece together a complete picture based on information scattered about in spreadsheets, file cabinets, or the local landfill. The task may seem daunting, but the rewards can't be understated. We will discuss ways of expanding your ITAM program to encompass early

data collection, and explore the resulting "downstream" benefits in terms of asset discovery/identification, compliance analysis, change management, asset retirement, and more.

*Achieving Greater SAM Value with External Software Product Information:* While commercially available SAM tools and internal processes are designed to support identification, tracking, usage measurement and definition of purchasing data for the software assets in your environment, most rely solely on data discovered within the organization. Manufacturer part numbers (SKUs) and Product Use Rights (PURs) are external market information that significantly enhances license compliance and optimization efforts. We will discuss how this information can be used to improve your program, as well as describe both the publicly and commercially available sources.

### **IT Cost Management Assessment with a Business Value Focus Workshop**

**Tony Timbol, Vice President, Sales & Marketing**  
David Consulting Group

Cost Management, to be a competitive weapon, has to do more than just calculate Total Cost of Ownership and other measures, important as they are. Cost Management has to connect the other financial capabilities of the business to produce and realize Business Value. What is the point of Cost Management if it does not help you compete in the marketplace, otherwise it's just recordkeeping. The IT Capability Maturity Framework (IT-CMF) provides a unique Business Value focus on managing the IT budget and managing IT for business value. This half-day workshop is designed to help you understand what business value your IT Cost Management activities and capabilities could contribute to the business to help it succeed. The IT-CMF provides complete and comprehensive coverage of all IT capabilities in a business. It allows organizations to assess major strategic bands of performance. This workshop focuses on the IT Cost Management band of performance to provide participants an understanding of how mature organizations leverage their IT Cost Management functions to create business value. The workshop reviews the following key financial capabilities, their level of maturity, their integration, what benefits could be contributed to the business, their best practices, outcomes and metrics:

- Total Cost of Ownership
- Accounting and Allocation
- Budget Oversight and Performance Analysis
- Budget Management
- Funding and Financing
- Portfolio Planning and Prioritization
- Benefits Assessment and Realization

**11:45 a.m.-12:50 p.m.**

**Buffet Lunch**

**1:00-4:00 p.m.**

### **Financial Aspects of Running IT Like a Business to Demonstrate Value Workshop**

**Ron Bradley, VP of Financial Management Consulting**  
and **Boris Pevzner, President**  
Lontra

This hands-on workshop addresses the foundation of proving "IT value" via implementation of a "Running IT Like a Business" framework. The workshop specifically covers: (1) defining "Services", (2) calculating the unit cost of delivering every service, and (3) managing the service unit costs on an ongoing basis. The implementation of the "Running IT Like a Business" framework enables IT management to readily separate trends in service unit costs from fluctuations in service demand. The unit costs can then be benchmarked against industry peers or external markets. If IT service providers can deliver services with the same quality and at market-comparable unit prices, this provides a measurable

indicator of “IT value.” Developing driver-based planning using unit cost modeling then enables ongoing cost management, sustaining year-over-year comparability with market-based benchmarks. This workshop will give you valuable information on:

- Running IT like a business
- Defining IT services and developing a service catalog
- Designing and implementing a consumption-based service cost model
- Developing a driver-based forecasting/planning discipline
- Implementing unit cost management and ongoing benchmarking
- Making service costing “transparent” to IT managers and business partners
- Creating an effective cost management discipline in the IT organization
- Defining the role of Service Manager

The workshop will be structured to provide you with the knowledge to begin implementing an effective service portfolio, unit costing, pricing and planning infrastructure for your IT business. You will get advice and examples from your workshop leaders and walk away with the knowledge that will enable you to immediately begin the transformation to running IT like a business.

### **Cost Modeling, Chargeback, Cost Allocation and Unit Costing Seminar**

**Penny Collen, Consultant - IT Finance and Chargeback**  
**Charles Johnson, President, CNJohnson & Associates**

This is an opportunity to get your cost modeling, chargeback, cost allocation and unit costing related questions answered by leading experts and by your peers and fellow practitioners in this discussion forum. Hear what the discussion moderators have seen work and not work, whether it deals with why, how and what costs are developed and used for purposes of IT financial planning, controlling, pricing or decision making. Bring your questions and issues that you are wrestling with at work and discuss them with the other practitioners in the audience. Here is a chance for those of you with extensive experience to share your lessons learned with colleagues in your profession.

### **Working with Your Legislature on IT Financial Issues Seminar**

**Karlynn O’Shaughnessy, Senior Fiscal Analyst**  
**State of North Carolina**

Have you ever wondered how best to work with members of your state legislature to accomplish your organization’s goals? What can seem like a simple process rarely ever turns out that way. This seminar will examine how legislatures operate and how you can effectively be a part of the process. The roles and responsibilities of legislative members and staff will be discussed. You will learn how to successfully navigate your state’s legislature and avoid common pitfalls. The budget process will be reviewed, with an emphasis on information technology issues. The importance of thorough planning will be addressed, and you will have the opportunity to develop and explain your own approach. This seminar will be useful for both government attendees and vendors.

**Seminars and workshops are probably the best educational format due to their focus on peer discussions. “Education is a kind of continuing dialogue, and a dialogue assumes... different points of view.”**

*– Robert M. Hutchins, Chancellor  
University of Chicago*

**“The two-day workshop portion of this conference is a great way to find out exactly what is going on in the world of IT Finance, what people are doing about it, and the projected changes.”**

*– Paul Robinson, Jr.  
The P4 Consulting Group*

**“The one real object of education is to have a man [or woman] in the condition of continually asking questions.”**

*– Bishop Mandell Creighton*

# IT FINANCIAL MANAGEMENT FOR CONTROLLERS & CFOs CONFERENCE AGENDA

**Wednesday, July 10**

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**6:45-7:50 a.m.**

**Full Breakfast Buffet sponsored by Nicus Software,  
a leader in IT Financial Management Solutions**

**8:00-8:45 a.m.**

**Key Challenges Facing Today's IT Finance Organizations**

**Robert Mischianti, Vice President  
Nicus Software, Inc.**

The appetite for IT financial data and analysis continues to grow. IT Finance organizations are challenged to balance producing accurate and actionable outputs with keeping the complexity of the processes and data to a minimum. This is just one example of the many challenges facing IT Finance. We will review key challenges and discuss the measures taken to tackle them.

**9:00-9:45 a.m.**

**The Top Five Best Practices to Reduce Your Company's IT Spend and Achieve an ROI from Your ITFM Efforts**

**Brian Stedman, Vice President, Product Management  
ComSci**

This session will share the top five ways to optimize IT resources that impact both top and bottom lines in your organization and to effectively communicate the value of IT throughout the organization. This session is a "must attend" for IT executives (CIO/CFO/Infrastructure Directors) who are looking for the top 5 takeaways from this year's conference that can be used right away. Running IT Like a Business is a commonly expected practice of every C-level executive – CEO, CFO, and CIO. Yet, delivering ROI, creating meaningful budgets, producing understandable IT products and services or just simply sending out an invoice to one's customers, is not as easy as it seems. Once you've decided which cost categories are to be borne by a client, you then have to put in place a mechanism for transferring these costs along with a good explanation from IT to the business. Cost allocation or internal billing based on actual consumption of human and technical resources are fairer, more objective and despite popular myth, not as expensive to implement than the benefit derived from it.

**10:00-10:45 a.m.**

**IDC's 2013 Chief Financial Officer (CFO) Predictions:  
Emerging Issues Driven by the IT Financial Footprint**

**Joseph Pucciarelli, Vice President & IT Executive Advisor  
IDC**

For CFO's their worst problems are typically the ones they do not know about or didn't see coming. In today's presentation, we explore a range of emerging, IT-related finance issues, share case studies and provide guidance on emerging IT finance issues including cloud computing, big data/predictive analytics, mobility and social business technologies. We will also discuss the 10 most critical IT financial management topics crucial to your CFO's agenda in 2013.

**11:00-11:45 a.m.**

**Poor Robert: The Story of a CIO Who Followed Industry  
"Best Practices"**

**N. Dean Meyer, President  
NDMA, Inc.**

Sometimes "best practices" are nothing more than where the lemmings went yesterday! Robert is a fictional CIO (a compendium of real-life CIOs) who followed all the common practices we've seen. And at every turn, his best efforts backfired, creating more problems than solutions. Laugh or cry, this story will hit home. It illustrates mistakes to be avoided, and suggests critical thinking about "best practices" and open-mindedness about new approaches. It lifts you out of the weeds, inducing a more strategic approach to IT financial management systems and processes. This session covers:

- Preparing the budget
- Allocations
- Priority setting
- Service delivery
- Alignment and governance
- Cost cutting
- Outsourcing
- Shared services consolidations
- Help! What can poor Robert do?

**11:45-12:50 p.m.**

**Buffet Lunch sponsored by ComSci,  
a leader in automated IT Financial Management Solutions**

**1:00-1:45 p.m.**

**IT Financial Management Overview**

**Charles Johnson, President and CEO  
CNJohnson & Associates, Inc.**

A truly effective technology enterprise needs to integrate a variety of important financial disciplines to provide their client community with Total Technology Financial Management. Strategic planning, capital budgeting, project planning, project evaluation, project tracking, expense budgeting, expense reporting, activity-based costing and management, product and service pricing, chargeback, resource planning, asset management, benchmarking, and balanced scorecard all will be discussed during this two-hour session as the essential elements to Total Technology Financial Management.

**2:00-2:45 p.m.**

**IT Financial Management Overview (continued)**

**Charles Johnson, President and CEO  
CNJohnson & Associates, Inc.**

**3:00-3:45 p.m.**

**To Infinity and Beyond – The Impact of the Future  
of Technology on Your Job**

**Robert Stroud, Vice President, Service Management  
CA, Inc.**

Technology change continues to accelerate; bringing with it new capabilities arising from areas such as big data, cloud, consumerization, mobile, and social. The pace of change for businesses is also accelerat-

ing. This is driven by demanding consumers, new competition, globalization, economic factors, and changing regulations. The combination of these forces is leading to business areas relentlessly pursuing faster time to market, looking to take advantage of new market opportunities, and seeking greater autonomy to select, design, and implement their own solutions to satisfy their own needs. Business is demanding faster decisions, minimum coordination overhead without losing benefits, and greater flexibility to change direction and pursue opportunities. Organizations that exhibit these qualities are delivering greater market and business success, and the organizations that don't, will lose out to those who do. As all these business and technology changes intersect in IT, IT sees the challenge of continuous change as it seeks to balance the goals of responsiveness to business and control of risk. This session will explore the intersection of the forces of change, their impact on you, your roles and how the new knowledge worker will demand the delivery of capabilities.

### 3:45-4:45 p.m.

#### **Book Signing & Sale: Internal Market Economics: practical resource-governance processes based on principles we all believe in**

**N. Dean Meyer, President  
NDMA, Inc.**

Chapter 1 begins: "We all believe in market economics..... Why, then, do we drop our common sense when we walk in the office door?" This just-released book brings together all the concepts of IT financial management within the common-sense framework of market economics. It describes best practices in budgeting, catalogs, service costing (rates), chargebacks, allocations, invoicing, portfolio management, financial reporting, and more. And it shows how all these pieces of the puzzle fit together to create a sensible, effective, and entrepreneurial system of financial management and governance. *Internal Market Economics* offers solutions to challenges IT leaders face every day, like:

- "You cost too much"                      • "My allocation is too big."
- "Do more with less!"                    • "Cut X percent."
- "You don't need all that training."   • "We should outsource you."

The book is both visionary, and full of pragmatic guidance on how to implement internal market economics. At this special book-signing session, you have an opportunity to purchase a signed first edition (at a special ITFMA price), and chat with the author.

### 4:00-4:45 p.m.

#### **ComSci's Software Live Demonstration as a Service & Business Process as a Service Offering Along With a Question & Answer Session with a Prominent Customer**

**Brian Stedman, Vice President and Jeff Yoder, Vice President  
ComSci**

This session will share best practices for how to optimize IT resources utilizing one of the market's successful software products. Through the lens and testimony of a prominent and successful customer, attendees will be guided through each of the following Business as Service solution components:

- IT Financial Management – Facilitates the budgeting and forecasting requirements within an enterprise. Most organizations do this via Excel, which is not scalable or efficient and repeatable.
- Service Costing & Benchmarking – Provides the capabilities to allocate IT department and GL costs to customers' products, services and application from their service catalog.
- Bill of IT – Provides a view of business unit costs to report to the business unit management the cost, quality and value of the IT services each business unit consumes.
- Analytics, Reporting & What If – These capabilities are included for all modules and include an "out-of-the-box" set of standard reports, graphs and dashboards; rate & what if analysis, a simple and easy to

use reporting and graph wizard to support filtering, pivoting and download capabilities, and an executive dashboard manager with the ability to create individual and multiple dashboards using "drag and drop" functionality.

### **IT Financial Management Best Practices with VMware ITBM Suite**

**Scott Moore, Technical Marketing Manager  
VMware**

In this session we'll talk about how automating the processes of collecting, aggregating and allocating IT spend with commercially available tools, like those available from VMware, enable ITFM practitioners to spend more time analyzing spend and improving value delivery. This session will include:

- Introduction to how ITFM tools work – data gathering, allocations, reporting, and automating otherwise manual processes
- How to get started and how long it can take based on your organization's IT Finance maturity
- Live demonstration of the VMware IT Business Management suite including modeling, computation, "what-if", and analysis
- Best practices for getting more from an ITFM implementation including using peer and industry benchmarks

We will also include real-life examples of how our customers are using our solutions to solve their ITFM challenges.

### 5:00-7:00 p.m.

#### **VMware - IT Business Management Reception**

VMware invites you to join us for some delicious food, refreshing drinks, and informal conversations in a relaxing atmosphere. This will be an enjoyable opportunity for you to network with other conference attendees and (if you feel so inclined) learn about VMware's IT Business Management Solution.

## Thursday, July 11

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### 6:45-7:50 a.m.

#### **Conference Registration**

and

**Full Breakfast Buffet sponsored by HP Software,  
a leader in Building ITFM into Performance Management**

### 8:00-8:45 a.m.

#### **Skillsets and How to Hire an ITFM/TBM Analyst**

**Edward Brown, Senior Consultant  
Zuna Infotech**

Getting the right person to do the ITFM and/or Technology Business Management (TBM) analysis for your company can be the difference between having some nice reports to look at and proactively transforming your business. Our company has been hiring, training and growing people with these skills for several years with a high success rate. We will discuss how to work with HR to find the right people, critical skillsets to look for, personality traits that make a difference, and share some technical assessment tools that put you five steps ahead in hiring. We will also cover training/growth and how to empower your analyst to help you.

### 9:00-9:45 a.m.

#### **Why Savings Do Not Reduce Spend**

**Jon Maxim, President  
Maxelerate Systems Ltd.**

"How come, the more my IT Procurement department saves me, the



more we seem to spend?" We heard this from the frustrated CIO of a large global company. As so often happens in these cases, this led to a study of the spend patterns in the organization. What emerged from this and other instances that we have studied revealed a surprising set of conclusions. This presentation will give you an overall perspective on this issue as to its reasons. It will then give you an overview of the steps to take to ensure that savings achieved in negotiation with suppliers translates into spend reductions.

### 10:00-10:45 a.m.

#### **IDC's 2013 Chief Information Officer (CIO) Predictions and Outlook: Leading in the Era of Business Productivity**

**Joseph Pucciarelli, Vice President & IT Executive Advisor**  
IDC

IT financial managers struggle to bring structure, planning and financial discipline to the sometimes unruly world of IT. This presentation provides a business overview of the critical trends shaping the CIO's agenda. Over the next decade, organizations will harness the investments around cloud, mobility, big data/analytics and social business technologies to reduce organizational costs, improve business processes, introduce new products and services, and better serve existing customers. With these technology investments come fundamental changes in the role of IT and the CIO, as well as the role of business in the strategic use of technology. Join us as we discuss how the role of the CIO will evolve in the era of business productivity – and what it means for IT financial managers.

### 11:00-11:45 a.m.

#### **Outsourcing IT at Marriott Vacations Worldwide Corporation – What We Learned**

**Michael Kiely, Senior Director of IT Finance**  
Marriott Vacation Club International

This presentation discusses the IT financial analysis that was conducted in an effort to save on IT labor costs within our organization. Working with a Big Four consulting best practice firm, we looked at a total sourcing solution internationally for many areas of the IT organization (e.g., Development, Helpdesk, Infrastructure Support, Architecture, Governance, etc.). We performed RFP's with a number of key company's that are also internationally based. We learned some surprising things that even our consultants didn't realized. Performing this analysis helped us better prepare for future years and growth. We developed a multifaceted approach to outsourcing that appears to be a key to our success.

### 11:45 a.m.-12:50 p.m.

#### **Buffet Lunch**

### 1:00-1:45 p.m.

#### **Using an ITFM Maturity Model to Maximize IT Financial Management Dollars**

**Christopher Dederer, Principal Consultant**  
RPC Solutions, LLC

IT Financial Management can satisfy many different goals and objectives. Various stakeholders will have different opinions on which objectives are most important. Without an effective method to identify the most critical objectives, IT Finance usually attempts to immediately satisfy all objectives, thereby diluting the effectiveness of IT Financial Management. An ITFM Maturity Model is an effective tool to help IT management prioritize objectives and the use of limited funds. This session will review the structure of an ITFM Maturity Model and discuss how to use the model's results to prioritize IT Financial Management

efforts. The key learning points are understanding the ITFM Maturity Model and how to use the results to prioritize the goals and objectives for IT Financial Management.

### 2:00-2:45 p.m.

#### **IT Transparency Powering New Business Capabilities - Top of Their Minds in the Board Room**

**Steve Bates, CIO Advisory Principal**  
KPMG

*Reactive. Defensive. Unconvincing. Non-value added. Lacking insight.*

These are not terms by which anyone would like to be characterized, least of all a CIO. However, as senior leadership teams become more mature in dealing with the traditional black box of IT, the CIO is required to answer harder questions about not simply the cost of IT, but the tangible value it delivers in terms of market share, customer satisfaction, product differentiation and return on capital. Boards and executive leaders are demanding a significant step-change in capabilities out of IT that are altering the very fabric of how organizations invest in and interact with both customers and suppliers. In this session, we will address the top priority questions coming from the board room impacting IT financial management including:

- How is the organization extracting residual value from existing internal data and integrating external sources to deliver additive value and relevant customer insight?
- How is IT leveraging metrics and business cases to clearly articulate the value proposition of investing in analytics to the business?
- How is the CIO enabling the business to adjust operating models and capabilities in order to better develop mutually beneficial partnerships?
- How is the organization preparing to take advantage of leveraging cost savings opportunities into new investments and contracts as the operating model evolves?

This discussion is targeted for mid-to-senior level IT and business executives seeking to gain better insight into the drivers influencing C-suite decision making.

### 3:00-3:45 p.m.

#### **Beyond Facts & Figures: IT Financial Managers as Valued Business Partners**

**Lee Jaffe, Controller, Data Center Services**  
ADP, Inc.

For most businesses, technology is a strategic asset that drives a company's competitiveness and profitability, but it also continues to be an area of focus for cost containment and reduction. Today's IT finance leaders need to be able to guide their business partners in financial management and investment decisions required to balance the needs for capabilities that drive profitability and minimize risk while continuing to meet aggressive financial targets. In this session, learn how as a finance leader, you can increase your effectiveness and be seen as a true ally to your IT leadership in meeting these very real business challenges. Topics covered include:

- Moving beyond the IT Basics – Most IT finance leaders have mastered the IT basics. Learn how understanding current trends and risks can keep your perspective fresh and valuable. This includes a discussion of the importance of understanding Information Management, Security & Risk Management
- Become a leader in data management – Packaging financial data to tell the IT value story and secure your role as a trusted advisor
- Build a cross functional team – Bringing Finance, IT, Procurement, Security & Risk Management together to create greater value
- Focusing on What Matters – Using the lens of materiality to manage more with a leaner finance team

**4:00-4:45 p.m.**

**Automating IT Finance Demonstration**

**Robert Mischianti, Vice President**  
Nicus Software, Inc.

M-PWR enables customers to transition from spreadsheet-based IT financial management tasks to a process-centric application that delivers automation, scalability, detail audit tracking, web-based reporting and much more...Define and validate your own processes, integrate all of your data elements in one place, satisfy stringent audit requirements, and automate to save time.

**Automation is the Key to Cost-effective IT Analytics Demonstration**

**Richard Hawes, Senior Manager**  
HP Software

We know that improving financial management and IT's business performance and alignment is not just about the technology or any one tool; it must include the right approaches to people and process as well. However we are finding that applying business intelligence approaches to ITFM by making them innovative and simpler to implement through automation is making a huge difference to how our clients tackle the problems of managing finance. In this session we want to show you the latest innovations HP has applied to IT finance and provide examples of the way in which clients really have taken a new look at financial management. In turn they have helped their organizations to build a performance-driven culture and align with the rest of the business.

**Friday, July 12**

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**6:45-7:50 a.m.**

**Full Breakfast Buffet sponsored by N. Dean Meyer and Associates, a leader in Consulting/Software, Market-based Resource Governance**

**8:00-8:45 a.m.**

**IT Business Performance: Balancing Effectiveness and Efficiency when Managing IT Resources with Costs of IT**

**Robert Nelson, IT Solutions Architect**  
SAS Institute

Managing IT as a business is now imperative to an organization, not an option. No longer can IT be seen as a technology supplier. It must be seen as adding value to the business and providing corporate strategic capability. IT business performance allows IT to change the focus from technology and production to customers and services. It enables IT to become service-oriented, aligning itself with the organization to provide customer-driven solutions to business problems. With increased investment comes increased scrutiny, so CIO's and IT financial managers are having to show greater maturity and expertise in performance management and financial disciplines to show how the money is being spent, the returns they are getting for their investment, and how IT is driving corporate performance. Forrester Research highlights that "business users are demanding greater IT cost transparency and financial analysis in order to understand the true cost of IT." The focus of CIO's and CFO's either emphasizes how to improve the effectiveness of IT or how to run

the shop more cost efficiently. The more successful CIO's and CFO's create a balance between improving operational effectiveness with cost efficiencies of IT. This presentation focuses on how an organization can achieve the alignment of IT with the business mission of the organization through the implementation of processes and technology to improve the balance between resources and costs while requiring a focus of transparency on services, costs, demand, processes and the impact on corporate performance.

**9:00-9:45 a.m.**

**Effective Innovation Mandates Strategy to Execution**

**Robert Stroud, Vice President, Service Management**  
CA, Inc.

As you strive to drive innovation to meet business needs, there is an urgent requirement to build an efficient IT service model to support those business initiatives. After all, the time it takes IT to provision and onboard applications directly impacts the growth of the business. You will need to model your portfolio and services to optimize the return of investments in order to achieve the capability of assembling new services quickly and easily. In this session we will explore optimizing your portfolio for greatest return, leveraging strategies to drive innovation, responding quickly and dynamically to changing business demands, and demonstrating effective spend management.

**10:00-10:45 a.m.**

**Wrap Up Panel Session for Those from Businesses**

**Panelists to be determined**

You have been at the conference for three to five days. You have heard a lot of opinions by speakers and from your colleagues, but was everything covered that you wanted to hear? These wrap up general sessions are your last chance for clarification and getting your questions answered by the panelists and your peers in the audience. There is no reason for you to go back to the office with unanswered questions. Even if you have no lingering questions, hearing the dialogue among your peers will be enlightening because their issues are likely your challenges too. This session allows you to gather one last time with all of those from organizations in the business sector.

*Note: During this session, there will be three (3) lucky winners at a drawing for free passes to the ITFMA 2014 Conference of your choice.*

**Wrap Up Panel Session for Those from Government Agencies and Universities**

**Panelists to be determined**

You have been at the conference for three to five days. You have heard a lot of opinions by speakers and from your colleagues, but was everything covered that you wanted to hear? These wrap up general sessions are your last chance for clarification and getting your questions answered by the panelists and your peers in the audience. There is no reason for you to go back to the office with unanswered questions. Even if you have no lingering questions, hearing the dialogue among your peers will be enlightening because their issues are likely your challenges too. This session allows you to gather one last time with all of those from organizations in the government and education sectors.

*Note: During this session, there will be three (3) lucky winners at a drawing for free passes to the ITFMA 2014 Conference of your choice.*

**"The quality of a conference is measured more by the kind of person it turns out, rather than the kind it takes in."**

**– Terence Quinlan, ITFMA**

**"Anyone who stops learning is old, whether at twenty or eighty. Anyone who keeps learning stays young. The greatest thing in life is to keep your mind young."**

**– Henry Ford**

# FINANCIAL PLANNING, BUDGETING AND REPORTING CONFERENCE AGENDA

## Wednesday, July 10

### 6:45-7:50 a.m.

**Full Breakfast Buffet sponsored by Nicus Software, a leader in IT Financial Management Solutions**

### 8:00-8:45 a.m.

#### **Closing the Budget Loop**

**Julien Nadaud, Founder and CEO and Customer Representative, TBD b-pack inc.**

This session sets out best practices that will optimize your budget management process and impact not only profits but the overall sales of your organization. In the first part of this session, you will learn how to drive better budget planning and better execution. In the second part, we will examine how to manage operations against budget and how it can benefit organizations. Thanks to the presence of [customer representative, TBD], we will illustrate alternative solutions that [the client] has implemented, leading to better budget management and better overall efficiency.

### 9:00-9:45 a.m.

#### **The IT Financial Manager, aka, Foreign Language Interpreter?**

**Carissa Albers, Vice President  
Commerce Bank**

When you took your job, did you expect to be a foreign language interpreter? Acting as a liaison between IT and the business side of your company is a significant part of the job. It's like being the arbitrator between two countries that have different cultures. Each country is unique and your job is to ensure both parties' needs are met within the limitations of your human and technology resources, your corporate policies, and your company culture. Your solution clearly has to be formulated specifically for your situation. This is a review of how we've evolved our budget process to meet Corporate Finance and IT expectations within our unique limitations.

### 10:00-10:45 a.m.

#### **IT Planning and Budgeting in Healthcare**

**John Jarvis, Director, IT Finance  
Molina Healthcare, Inc.**

Can we predict Information Technology spend yearly based on something other than Per Member Per Month (PMPM)? Healthcare has always used Per Member Per Month as a measurement of success. Providing quality of services to members at a low rate is difficult when administrative costs are through the roof. Much of IT budgeting in Healthcare is based on projected membership growth, and although this makes sense for most of the administrative areas in healthcare, IT is different. IT continues to have an increase in demand, increase in technology, and a decrease in funding. Come see how I have challenged this method of predictive spending in IT to look at other and potentially better options for controlling IT costs.

### 11:00-11:45 a.m.

#### **Cost Management of Infrastructure Projects**

**Bethany Matejin, Control Portfolio Lead  
Progressive Group of Companies**

Every organization faces upgrades to their infrastructure on a periodic basis. These upgrades have unique challenges such as vendor dependencies, change/implementation windows, and risk resulting from unsupported equipment. This presentation will address the challenges faced by financial management of infrastructure projects that come from both internal and external sources and provide tips on overcoming those challenges. We will also go over how to ensure that benefits are realized as a result of the project.

### 11:45-12:50 p.m.

**Buffet Lunch sponsored by ComSci, a leader in automated IT Financial Management Solutions**

### 1:00-1:45 p.m.

#### **Comparing On-premise, Cloud or Hybrid Options for IT**

**Mark Bradley, Senior Product Manager  
HP Software**

How do you make an apples-to-apples comparison when what you have are oranges and bananas? The financial measurement and management of on-premise IT systems is very different from what is offered by cloud service providers. So how do you answer questions from your business colleagues such as "why do we use an internal system versus something from Amazon", or "how much will it cost to add 25 users to this service and add a new application?" Historically, financial reporting for IT has been in terms of IT cost centers and intended purely for IT eyes. Now IT needs to be more accountable and show how their activities align with the business in terms the business can understand like services and utilization. In this session, we will discuss how IT can build a service-based view of IT costs for chargeback and showback and alignment with usage and other business performance data.

### 2:00-2:45 p.m.

#### **Cost Transparency for IT Managed Services**

**Michael Davis, President  
Resource Guidance, Inc.**

For many organizations, the individual business units provide their own services and use the central IT group for related support. While this distributed use of resources is effective, it is costly and is growing out of favor. The current trend is to relocate the autonomous business services into a central location and have them managed by a single group. This is forcing some IT groups to provide Managed Services for the first time. IT will now incur the responsibility to deliver services to the business units, and to minimize the associated costs. This requires the use of a centralized platform (such as a Software Defined Datacenter) and injects a new complexity for using shared resources among multiple business units. The ability to identify who is using what, and at what cost will be essential. In this session we will:

- Define what is IT Managed Services
- Define a platform for IT Managed Services
- Discuss the Service Catalog and Cost Allocation issues
- Discuss the implications for budgets and forecasts
- Discuss a model for IT Cost Transparency

At the completion of this session you will have a good understanding of IT Managed Services and the associated requirements for Cost Transparency. This will assist you in developing a plan for centralized services along with the ability to manage the cost of these services in a business manner.

### **3:00-3:45 p.m.**

#### **Funding IT for Implementation of the Affordable Care Act**

**Kenneth Hoffman, Principal  
Kenneth F. Hoffman, Inc.**

Health care reform is no longer a maybe – the new health insurance exchanges are only months away from operation and information technology is central to their success. In October 2012 the U.S. Department of Health and Human Services finally issued detailed guidance on cost allocation requirements related to the funding of state-based information technology systems for state-operated health insurance exchanges under the Affordable Care Act. There remains an important time-limited exception to the standard cost principles that expires in December 2015 – an opportunity of considerable benefit to states – which potentially makes available millions in Federal funds for core components of health program eligibility system design and development costs. This session furnishes the critical guidance states need to take full advantage of these funding opportunities.

### **3:45-4:45 p.m.**

#### **Book Signing & Sale: Internal Market Economics: practical resource-governance processes based on principles we all believe in**

**N. Dean Meyer, President, NDMA, Inc.**

See description on page 8.

### **4:00-4:45 p.m.**

#### **ComSci's Software Live Demonstration as a Service & Business Process as a Service Offering Along With a Question & Answer Session with a Prominent Customer**

**Brian Stedman, Vice President and Jeff Yoder, Vice President  
ComSci**

See description on page 8.

#### **IT Financial Management Best Practices with VMware ITBM Suite**

**Scott Moore, Technical Marketing Manager  
VMware**

See description on page 8.

### **5:00-7:00 p.m.**

#### **VMware - IT Business Management Reception**

VMware invites you to join us for some delicious food, refreshing drinks, and informal conversations in a relaxing atmosphere. This will be an enjoyable opportunity for you to network with other conference attendees and (if you feel so inclined) learn about VMware's IT Business Management Solution.

## **Thursday, July 11**

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### **6:45-7:50 a.m.**

**Conference Registration  
and**

**Full Breakfast Buffet sponsored by HP Software,  
a leader in Building ITFM into Performance Management**

### **8:00-8:45 a.m.**

#### **Modeling the Relationship Between Service Costs, Budgets and Forecasts for Analytics and Reporting**

**Nan Braun, Manager  
Zuna Infotech**

Based on leading ITFM modeling tools, we will discuss the building of an integrated set of reports and processes that allowed a leading insurance analytics company to transform to an IT Services model and complete budgeting by services with impact to the general ledger (GL), rather than budgeting by GL directly. By modeling the process, it becomes easy to do "what if" exploration for proposed organizational, infrastructure and/or service rate changes and immediately see the impact not only to the IT Budget but the impact out to the Business as well.

### **9:00-9:45 a.m.**

#### **Applying Principles from a Rolling Forecast to ITFM**

**Jason Byrd, Strategic Advisory Services Partner  
RPC Solutions, LLC**

We all know that a major component of IT Financial Management can be defining an organization's IT Services and then determining their associated IT chargeback rates. However, because a company's chargeback process is so intrinsically tied to its budgeting process, many of the limitations and traps of traditional fixed budgets can manifest in different ways and terms inside an IT organization. This session discusses lessons learned on how the annual budgeting cycle can limit IT Chargeback.

### **10:00-10:45 a.m.**

#### **Best Practices: Why Business Planning, Budgeting, Rate Setting and Service Catalogs are All One Thing**

**N. Dean Meyer, President  
NDMA, Inc.**

Believe it or not, many organizations treat service catalog definitions, business planning, budgeting, and rate setting as four separate processes. And in many cases, they're only loosely linked (at best). This session explains why they all should be implemented as one integrated annual planning process. This session overviews the steps in the process to show how all four types of plans are intertwined. You'll see a practical approach that brings together these four distinct but interrelated initiatives and delivers results quickly. This session covers:

- The four pieces of the puzzle: business planning, budgeting, rate setting, service catalogs
- Why they should be integrated
- The steps in an integrated annual planning process

### **11:00-11:45 a.m.**

#### **IT Financial Management at a Canadian Government Agency**

**Speaker to be determined  
HP Software**

The fields of IT Financial Management and IT business management may still be described as nascent but IT groups are beginning to discover how analytical tools can help them to manage IT more like a business operation. This Canadian government agency was looking for something based on industry best practices that could automate the activities associated with allocating IT expenditures to services or customers. Through this project they achieved simpler budgeting, consistent billing and greater transparency over the whole process. In this sessions we'll look at how they approached the project and what changes they implemented.

### **11:45 a.m.-12:50 p.m.**

**Buffet Lunch**

### **1:00-1:45 p.m.**

#### **Best Practices in Accounting for Internally Developed Software**

**Michael Kiely, Senior Director of IT Finance  
Marriott Vacation Club International**

This session will discuss the current financial accounting guidelines for internally developed software. We will specifically cover FASB ASC 350-40, Internal-use software and how best to apply them. This discussion will be a thorough walk through of a step-by-step Guide developed by the speaker, as well as a detailed review of IT activities that are either expensed or capitalized in accordance with the accounting guidelines. We will discuss an ITFMA "Best Practices" approach including an IT activity guide and a working session review of an example project cost estimating template. The template is designed in accordance with the FASB guidelines.

### **2:00-2:45 p.m.**

#### **Planning for Disruptive Technologies**

**Robert Howard, CIO  
Armstrong Atlantic State University**

Even as we gain solid footing for planning the lifecycle for major technology services and infrastructure, there is always an undercurrent of disruption that continually threatens old business models. This presentation will attempt to give the audience an idea of how to plan service delivery and cost models for these disruptions. Most of the time there is a period of overlapping costs where your organization must continue funding the old service even while investing in the new. This presentation will cite examples and principles that will minimize that overlap, help you understand when you can eliminate that overlap, and how to ensure that you will minimize the over investment in unproven technologies or services.

### **3:00-3:45 p.m.**

#### **The President's 21st Century Government Initiative: New Changes to IT Cost Principles for Educational Institutions, State and Local Governments, Nonprofit Organizations, and Hospitals**

**Kenneth Hoffman, Principal  
Kenneth F. Hoffman, Inc.**

In February 2013 the U.S. Office of Management and Budget published in the Federal Register a notice of long-awaited proposed changes to cost principles for educational institutions, state and local and Indian tribal governments, nonprofit organizations, and hospitals. Budgets for contingency funds for the construction or upgrade of a large facility or instrument, or for IT systems, are now proposed to be allowable costs of Federal awards. Also allowed would be costs for excess or idle capacity in consolidated data centers, telecommunications, and public safety facilities. Some recommendations of the National Association of State Chief Information Officers were also introduced in the areas of allowable costs of interest and financing, and in equipment and property disposition. OMB Circulars A-21, A-87, A-122 and the hospital regulations at 45 CFR Part 75 are all affected. The information discussed in this session will help officials stay up to date on the latest guidance and regulatory developments, and will help them to take the fullest advantage of the changes.

### **4:00-4:45 p.m.**

#### **Automating IT Finance Demonstration**

**Robert Mischianti, Vice President  
Nicus Software, Inc.**

See description on page 10.

#### **Automation is the Key to Cost-effective IT Analytics Demonstration**

**Richard Hawes, Senior Manager  
HP Software**

See description on page 10.

## **Friday, July 12**

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### **6:45-7:50 a.m.**

#### **Full Breakfast Buffet sponsored by N. Dean Meyer and Associates, a leader in Consulting/Software, Market-based Resource Governance**

### **8:00-8:45 a.m.**

#### **IT Business Intelligence – Capturing Statistical Measures in the G/L**

**Lawrence Bua, Executive, Business Vision and Innovation  
BestIT**

Business Intelligence is not just intended for Sales and Business Operations. A general ledger (G/L) based financial data mart for CFO organizations can provide a 360-degree view of IT performance tailored to the enterprise. Often overlooked as a source of critical data to drive Business Intelligence (BI), the General Ledger can deliver statistical measures around IT performance and value delivered to the business. Utilizing specific KPI's derived for ITSM and PMO frameworks, the G/L as a BI tool can measure and statistically track the contribution of IT to the bottom line. In this session we will:

- Identify applicable ITSM and PMO KPI's
- Discuss Integration aspects into statistical G/L accounts and hierarchies
- Building the 360-degree view; current state, historical data and benchmarks
- Value based utilization of statistical measures

At the completion of this session you will have a better understanding of how to construct analytics to measure the contribution of Information Technology to enterprise performance. Capturing these measures will help you to identify if IT is focused on prioritized, organizational objectives.

### **9:00-9:45 a.m.**

#### **Best Practices in Cost Control: Supply Versus Demand Management**

**N. Dean Meyer, President  
NDMA, Inc.**

Traditionally, costs are controlled by limiting the budget given to the IT department and by measuring managers by how well they stick to that budget (variances). As familiar as it is, this approach causes many problems – it induces inappropriate decentralization and outsourcing, undermines sustainability, and reduces agility, to name a few. Even worse, it may drive costs up instead of down! This session explains why controlling the supply of IT services doesn't work, and why demand management is a far more effective approach to cost control. This session suggests management metrics that ensure frugality within IT, and processes for getting business clients to cut costs by cutting their demands. This session covers:

- Why cutting the IT budget might not cut costs
- Why measuring budget variances is a bad idea
- The alternative: market economics
- Three elements of cost control: value, breakeven, demand management

**10:00-10:45 a.m.**

### **Wrap Up Panel Session for Those from Businesses**

**Panelists to be determined**

You have been at the conference for three to five days. You have heard a lot of opinions by speakers and from your colleagues, but was everything covered that you wanted to hear? These wrap up general sessions are your last chance for clarification and getting your questions answered by the panelists and your peers in the audience. There is no reason for you to go back to the office with unanswered questions. Even if you have no lingering questions, hearing the dialogue among your peers will be enlightening because their issues are likely your challenges too. This session allows you to gather one last time with all of those from organizations in the business sector.

*Note: During this session, there will be three (3) lucky winners at a drawing for free passes to the ITFMA 2014 Conference of your choice.*

### **Wrap Up Panel Session for Those from Government Agencies and Universities**

**Panelists to be determined**

You have been at the conference for three to five days. You have heard a lot of opinions by speakers and from your colleagues, but was everything covered that you wanted to hear? These wrap up general sessions are your last chance for clarification and getting your questions answered by the panelists and your peers in the audience. There is no reason for you to go back to the office with unanswered questions. Even if you have no lingering questions, hearing the dialogue among your peers will be enlightening because their issues are likely your challenges too. This session allows you to gather one last time with all of those from organizations in the government and education sectors.

*Note: During this session, there will be three (3) lucky winners at a drawing for free passes to the ITFMA 2014 Conference of your choice.*

**“Learning should be a joy and full of excitement. It is life’s greatest adventure; it is an illustrated excursion into the minds of noble and learned men [and women]...”**

*– Taylor Caldwell*

**“I have found the ITFMA conferences to be by far the most informative IT conferences available.”**

*– Kay Gonzalez, IT Hardware Asset Manager, Siemens IT Solutions & Services, Inc.*

**“The jewel to be found in attending ITFMA conferences is not only in the broad-based knowledge exchange during the plentiful sessions, but in the networking opportunities and shared experiences with peers of all stages in their career.”**

*– Gail Pennington, IS Asset Manager, Raytheon, IIS*

# IT ASSET & EXPENSE MANAGEMENT CONFERENCE AGENDA

**Wednesday, July 10**

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**6:45-7:50 a.m.**

**Full Breakfast Buffet sponsored by Nicus Software,  
a leader in IT Financial Management Solutions**

**8:00-8:45 a.m.**

**Data Does and Don'ts for Financial Management of Assets**

**Jim McCoy, Senior Consultant  
Zuna Infotech**

Correct financial management of assets that maximizes utilization requires data coordination between many systems. The General Ledger, the Asset Ledger, the CMDB, and Ticketing Systems are just a few. The right data alignments can make this analysis and reporting significantly easier. This talk will share tips on the critical points of alignment and how to achieve them in your systems. This session will cover things to avoid, traps that make analysis more difficult, and show real life examples that include the use of easy ETL tools, as well as integration points built into some of the leading software systems.

**9:00-9:45 a.m.**

**ITIL View of Financial Management in a Service Economy**

**Penny Collen, Consultant - IT Finance and Chargeback**

ITIL mentions many links to financial management in its journey through Service Management. This session reviews the guidance in ITIL and suggests practical ways to bring your financial processes into alignment with service management.

**10:00-10:45 a.m.**

**Overview of Cloud Service Financial Management**

**Khalid Hakim, Cloud Operations Architect  
VMware**

This session will focus on the basic concepts of cloud IT service financial management best practices and how you can enable a sustainable cloud service financial management practice. The goal of this session is to raise the ITFM practitioners awareness around the key considerations in the cloud computing space and discuss how to transform from traditional IT financial management to a cloud services enabled costing model.

**11:00-11:45 a.m.**

**Union Pacific Railroad IT Case Study: Building a Service Catalog and Consumption-Based Service Cost Model**

**Thomas Milone, Senior Manager, Project Management Services, and  
Yien-Wah Wong, System Consultant, Transparency and Costing  
Union Pacific Railroad**

In May 2012 - January 2013, we designed and successfully implemented a service catalog, service-based costing, and business partner "show-back" solution. During this session, we will show you how we:

- Scoped and staffed the project
- Secured buy-in from IT leadership
- Designed and built a 3-tiered IT Service Catalog
- Designed and built the service-based costing model for the cataloged services
- Established ongoing transparency and cost management processes

• Communicated the benefits of the solution to our Business Partners  
Union Pacific IT managers and Business Partners now have insight into consumption and unit cost data for over 200 services (internal to IT, infrastructure, and business-facing), including the Total Cost of Ownership of over 100 specific applications. See how it was done!

**11:45-12:50 p.m.**

**Buffet Lunch sponsored by ComSci,  
a leader in automated IT Financial Management Solutions**

**1:00-1:45 p.m.**

**IT Consolidation in Minnesota: Making the Transition from Chart of Accounts to a Service Costing Model**

**Kelly Berry, IT Consolidation Financial Analyst and Tony Rees, Manager,  
Financial Planning and Analysis  
State of Minnesota**

During the 2011 State of Minnesota legislative session, legislation was passed that mandated the consolidation of all information technology staff and spending under the State CIO. This legislation further required that Service Level Agreements (SLA's) be established by July 1, 2012 with each of the 67 executive branch agencies. In order to provide an estimate of the cost of IT Services within each agency's SLA, MN.IT Services Central worked with 20 agency CIO's to make the transition from a chart of accounts focused product costing process to a service costing model. The starting point was a Service Reference Model that defined 4 major categories of IT services: Standard IT Services, Applications, Projects and Initiatives, and IT Leadership. In this presentation, you will hear about the process followed and assumptions used in mapping IT-related costs in the chart of accounts to services, as well as subsequent efforts to develop an on-going IT service billing methodology that meets agency as well as regulatory requirements.

**2:00-2:45 p.m.**

**How To Outsource IT Infrastructure So That It Meets Your Goals**

**Jon Maxim, President  
Maxelerate Systems Ltd.**

After consulting with over 100 of the Fortune 500 corporations, we have noticed that none of them is satisfied with their outsourced IT infrastructure. So much so that we have noticed a trend to seriously consider bringing their IT infrastructure back in house, which some have actually accomplished. While some individuals have expressed satisfaction, they have usually been those who had a stake in showing that the outsourcer is performing correctly while the rest of the organization is dissatisfied. This presentation is based on our experience in helping many organizations improve the performance of the outsourcer. It will show you a rational and logical process that covers infrastructure outsourcing from the initial decision making through to selection, transition and ongoing implementation.

**3:00-3:45 p.m.**

**The Rules Have Changed: What You Should Know About Standards and Regulations Affecting SAM and IT Asset Management**

**Howard Hastings, Managing Partner  
Optimal Assets**

We've all heard of the seemingly endless string of acronyms that com-

prise the alphabet soup of laws, regulations and standards that we've been told we must follow: SAS 70, Sarbanes-Oxley, Title 17, HIPAA, FDA CFR 21 Part 11 and the ISO/IEC 19770 standard series. But what do they have to do with how you run your Software Asset Management (SAM) and IT asset management program? This session will cut through the marketing hype and legalese to explain in simple business terms what you should be concerned about and how it applies to the practices and technologies at your organization.

### **3:45-4:45 p.m.**

#### **Book Signing & Sale: Internal Market Economics: practical resource-governance processes based on principles we all believe in**

N. Dean Meyer, President, NDMA, Inc.

See description on page 8.

### **4:00-4:45 p.m.**

#### **ComSci's Software Live Demonstration as a Service & Business Process as a Service Offering Along With a Question & Answer Session with a Prominent Customer**

Brian Stedman, Vice President and Jeff Yoder, Vice President  
ComSci

See description on page 8.

#### **IT Financial Management Best Practices with VMware ITBM Suite**

Scott Moore, Technical Marketing Manager  
VMware

See description on page 8.

### **5:00-7:00 p.m.**

#### **VMware - IT Business Management Reception**

VMware invites you to join us for some delicious food, refreshing drinks, and informal conversations in a relaxing atmosphere. This will be an enjoyable opportunity for you to network with other conference attendees and (if you feel so inclined) learn about VMware's IT Business Management Solution.

## **Thursday, July 11**

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### **6:45-7:50 a.m.**

#### **Conference Registration and**

**Full Breakfast Buffet sponsored by HP Software,  
a leader in Building ITFM into Performance Management**

### **8:00-8:45 a.m.**

#### **How To Do IT Chargeback**

Peter Hidalgo Jr., Senior Manager  
Ernst & Young

This presentation covers the key components of how to design and implement an effective IT chargeback program. Key topics will include guiding principles, the various types of chargeback models, the advantages and disadvantages of each, and a review of our chargeback development methodology.

### **9:00-9:45 a.m.**

#### **Cloud Economics: Which Cloud is Right for Your Organization?**

Mary Lou Alter, Solution Partner  
EMC Consulting

Organizations are increasingly including cloud in their IT delivery strategies. They are motivated by the need to increase agility and scalability while reducing cost of service. Cloud decisions are not black and white, but highly dependent on the profile of both users and services/applications. As a result, many organizations are adopting hybrid cloud models that provide them flexibility and a migration path for legacy applications. What may surprise you is that a public cloud is not always the least expensive. In this presentation we will compare the financial impact of various cloud models.

### **10:00-10:45 a.m.**

#### **Software Asset Management – The Next Great Opportunity**

Penny Collen, Consultant - IT Finance and Chargeback

How you acquire, distribute, renew and reclaim software are important activities. Many organizations start out simply, only to realize quickly that this is a very complex process. Tools can help but they can also flood the user with more data than can be managed. This session will provide a comprehensive look at managing software costs including tips on procurement policies, software inventories, license compliance and governance processes.

### **11:00-11:45 a.m.**

#### **Leveraging Metrics to Better Discover, Manage and Charge for Cloud Services**

Robert Stroud, Vice President, Service Management  
CA, Inc.

IT professionals often consider metrics as simply the means of measuring system performance, often without a relationship to how those metrics are used to effectively run the business. In this session we will discuss how to connect business performance to IT metrics, how to identify which metrics are meaningful and appropriate, and the use of an effective proxy for service management. This will include a review of how other industries leverage proxies for service measurement, management, capacity planning and finance.

### **11:45 a.m.-12:50 p.m.**

#### **Buffet Lunch**

### **1:00-1:45 p.m.**

#### **Best Practices In ITFM – Real World Cases**

Anthony Pantaleo, IT Strategist  
VMware

Explore the best practices in automating ITFM, and begin the journey of maturing your IT organization. This presentation will share insights from real world examples that we have been involved with over the years.

### **2:00-2:45 p.m.**

#### **The Intersection of Cost Transparency, Chargeback, and Third-Party Vendor Management**

Craig Winn, Senior Consultant  
Swingtide, Inc.

Everyone is in favor of full transparency and fair allocation of IT costs—at least in theory. In practice, doing all the things necessary to achieve transparent, fairly allocated costs is dauntingly difficult. Part of the dif-



faculty lies in comparing fully loaded internal costs with both third-party costs and the costs of managing a stable of third-party vendor relationships. In this presentation you will learn how one of the essential tools of IT service management—the true chargeback service catalog—has evolved to enable a new, more comprehensive view of the nuances of IT costs, and how this enhanced view can serve as important business intelligence that informs an enlightened approach to third-party vendor management.

### **3:00-3:45 p.m.**

#### **Capturing the Future Economic Value of Strategic Initiatives**

**Don Winans, Senior Enterprise Analyst**  
BestIT

Organizations often find themselves rallying around initiatives that will drive their strategic goals for revenue or cost efficiency. Metrics like increased revenue rarely reflect the end result. The distance between the benefits promised and the actual benefits gained is often as large as 40% for strategic initiatives. You need to have the full picture in hand when making decisions by capturing the true economic value. In this session we will:

- Discuss why some measures just don't work
- Review economic models for capturing future value
- Infuse financial models into the technology lifecycle
- Explore how to carry the torch forward

As financial leaders within your organization, you can help guide your fellow leaders to better models for determining the value of strategic initiatives!

### **4:00-4:45 p.m.**

#### **Automating IT Finance Demonstration**

**Robert Mischianti, Vice President**  
Nicus Software, Inc.

See description on page 10.

#### **Automation is the Key to Cost-effective IT Analytics Demonstration**

**Richard Hawes, Senior Manager**  
HP Software

See description on page 10.

## **Friday, July 12**

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### **6:45-7:50 a.m.**

#### **Full Breakfast Buffet sponsored by N. Dean Meyer and Associates, a leader in Consulting/Software, Market-based Resource Governance**

### **8:00-8:45 a.m.**

#### **Telecom Financial Management: Delivering Significant Automation and ROI to the Enterprise**

**Richard Janis, Senior Vice President**  
Asentinel

Telecom Management applies governance principles to what is typically one of the top five expenses in an organization. Adoption of this discipline – be it a managed service or outsourcing solution – delivers cross-functional automation and tangible, immediate and recurring cost reductions across both fixed and mobile expenditures. This session will focus on the opportunities and strategies to maximize your visibility, control and expense containment of telephony services.

### **9:00-9:45 a.m.**

#### **TCO/ROI Methodology for Your IT Infrastructure Automation Services Based on ITIL v3 Best Practices**

**Anupam Maheshwari, Infrastructure Consultant**  
Infosys Limited

Globally, IT Delivery Excellence is a reflection of the capability to implement and deliver on time, on budget, and aligned with the business. However, technology leaders embarking on a long-term winning strategy soon realize that implementing a technology solution itself is merely a step towards realizing the ultimate vision of business optimization. One such IT transformation path is IT Infrastructure Automation (ITIA), which supports strategic business initiatives that help businesses to become more competitive by significantly improving the time to market of their products. ITIA involves implementation of integrated and orchestrated processes to enhance IT service delivery and operational experience for complex, heterogeneous environments. Through such differentiating services overarching the technology solutions, it is possible for technology leaders to exhibit to their business partner's sustainable cost benefits of their technology investments.

In this session, we have two objectives to fulfill: (1) institutionalize a cost-optimized service oriented approach aligned to ITIL best practices as our recommendation to build, manage and operate ITIA services; and (2) articulate the expected bottom-line business impact of ITIA services as distinctive benefits of the chosen technology solutions. We will dwell deeper into arriving at a TCO/ROI Methodology for ITIA services and touching upon a generic approach to drive financial summaries, e.g., TCO, Savings, investments, ROI, Payback Period, etc. calculated for these services in a way that the business can understand better. We will share real-life implementation experiences delivering these strategies.

### **10:00-10:45 a.m.**

#### **Wrap Up Panel Session for Those from Businesses**

**Panelists to be determined**

You have been at the conference for three to five days. You have heard a lot of opinions by speakers and from your colleagues, but was everything covered that you wanted to hear? These wrap up general sessions are your last chance for clarification and getting your questions answered by the panelists and your peers in the audience. There is no reason for you to go back to the office with unanswered questions. Even if you have no lingering questions, hearing the dialogue among your peers will be enlightening because their issues are likely your challenges too. This session allows you to gather one last time with all of those from organizations in the business sector.

*Note: During this session, there will be three (3) lucky winners at a drawing for free passes to the ITFMA 2014 Conference of your choice.*

#### **Wrap Up Panel Session for Those from Government Agencies and Universities**

**Panelists to be determined**

You have been at the conference for three to five days. You have heard a lot of opinions by speakers and from your colleagues, but was everything covered that you wanted to hear? These wrap up general sessions are your last chance for clarification and getting your questions answered by the panelists and your peers in the audience. There is no reason for you to go back to the office with unanswered questions. Even if you have no lingering questions, hearing the dialogue among your peers will be enlightening because their issues are likely your challenges too. This session allows you to gather one last time with all of those from organizations in the government and education sectors.

*Note: During this session, there will be three (3) lucky winners at a drawing for free passes to the ITFMA 2014 Conference of your choice.*

# GOVERNMENT IT FINANCIAL MANAGEMENT CONFERENCE AGENDA

**Wednesday, July 10**

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**6:45-7:50 a.m.**

**Full Breakfast Buffet sponsored by Nicus Software,  
a leader in IT Financial Management Solutions**

**8:00-8:45 a.m.**

**Key Challenges Facing Today's IT Finance Organizations**

**Robert Mischianti, Vice President  
Nicus Software, Inc.**

The appetite for IT financial data and analysis continues to grow. IT Finance organizations are challenged to balance producing accurate and actionable outputs with keeping the complexity of the processes and data to a minimum. This is just one example of the many challenges facing IT Finance. We will review key challenges and discuss the measures taken to tackle them.

**9:00-9:45 a.m.**

**The IT Financial Manager, aka, Foreign Language  
Interpreter?**

**Carissa Albers, Vice President  
Commerce Bank**

When you took your job, did you expect to be a foreign language interpreter? Acting as a liaison between IT and the business side of your company is a significant part of the job. It's like being the arbitrator between two countries that have different cultures. Each country is unique and your job is to ensure both parties' needs are met within the limitations of your human and technology resources, your corporate policies, and your company culture. Your solution clearly has to be formulated specifically for your situation. This is a review of how we've evolved our budget process to meet Corporate Finance and IT expectations within our unique limitations.

**10:00-10:45 a.m.**

**IDC's 2013 Chief Financial Officer (CFO) Predictions:  
Emerging Issues Driven by the IT Financial Footprint**

**Joseph Pucciarelli, Vice President & IT Executive Advisor  
IDC**

For CFO's their worst problems are typically the ones they do not know about or didn't see coming. In today's presentation, we explore a range of emerging, IT-related finance issues, share case studies and provide guidance on emerging IT finance issues including cloud computing, big data/predictive analytics, mobility and social business technologies. We will also discuss the 10 most critical IT financial management topics crucial to your CFO's agenda in 2013.

**11:00-11:45 a.m.**

**Poor Robert: The Story of a CIO Who Followed Industry  
"Best Practices"**

**N. Dean Meyer, President  
NDMA, Inc.**

Sometimes "best practices" are nothing more than where the lemmings went yesterday! Robert is a fictional CIO (a compendium of real-life CIOs) who followed all the common practices we've seen. And at every turn, his best efforts backfired, creating more problems than solutions. Laugh or cry, this story will hit home. It illustrates mistakes to

be avoided, and suggests critical thinking about "best practices" and open-mindedness about new approaches. It lifts you out of the weeds, inducing a more strategic approach to IT financial management systems and processes. This session covers:

- Preparing the budget
- Allocations
- Priority setting
- Service delivery
- Alignment and governance
- Cost cutting
- Outsourcing
- Shared services consolidations
- Help! What can poor Robert do?

**11:45-12:50 p.m.**

**Buffet Lunch sponsored by ComSci,  
a leader in automated IT Financial Management Solutions**

**1:00-1:45 p.m.**

**Comparing On-premise, Cloud or Hybrid Options for IT**

**Mark Bradley, Senior Product Manager  
HP Software**

How do you make an apples-to-apples comparison when what you have are oranges and bananas? The financial measurement and management of on-premise IT systems is very different from what is offered by cloud service providers. So how do you answer questions from your business colleagues such as "why do we use an internal system versus something from Amazon", or "how much will it cost to add 25 users to this service and add a new application?" Historically, financial reporting for IT has been in terms of IT cost centers and intended purely for IT eyes. Now IT needs to be more accountable and show how their activities align with the business in terms the business can understand like services and utilization. In this session, we will discuss how IT can build a service-based view of IT costs for chargeback and showback and alignment with usage and other business performance data.

**2:00-2:45 p.m.**

**IT Financial Management Overview**

**Charles Johnson, President and CEO  
CNJohnson & Associates, Inc.**

A truly effective technology enterprise needs to integrate a variety of important financial disciplines to provide their client community with Total Technology Financial Management. Strategic planning, capital budgeting, project planning, project evaluation, project tracking, expense budgeting, expense reporting, activity-based costing and management, product and service pricing, chargeback, resource planning, asset management, benchmarking, and balanced scorecard all will be discussed during this two-hour session as the essential elements to Total Technology Financial Management.

**3:00-3:45 p.m.**

**Funding IT for Implementation of the Affordable Care Act**

**Kenneth Hoffman, Principal  
Kenneth F. Hoffman, Inc.**

Health care reform is no longer a maybe – the new health insurance exchanges are only months away from operation and information technology is central to their success. In October 2012 the U.S. Department

of Health and Human Services finally issued detailed guidance on cost allocation requirements related to the funding of state-based information technology systems for state-operated health insurance exchanges under the Affordable Care Act. There remains an important time-limited exception to the standard cost principles that expires in December 2015 – an opportunity of considerable benefit to states – which potentially makes available millions in Federal funds for core components of health program eligibility system design and development costs. This session furnishes the critical guidance states need to take full advantage of these funding opportunities.

### **3:45-4:45 p.m.**

#### **Book Signing & Sale: Internal Market Economics: practical resource-governance processes based on principles we all believe in**

N. Dean Meyer, President, NDMA, Inc.

See description on page 8.

### **4:00-4:45 p.m.**

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Brian Stedman, Vice President and Jeff Yoder, Vice President  
ComSci

See description on page 8.

#### **IT Financial Management Best Practices with VMware ITBM Suite**

Scott Moore, Technical Marketing Manager  
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## **Thursday, July 11**

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### **6:45-7:50 a.m.**

#### **Conference Registration and**

**Full Breakfast Buffet sponsored by HP Software,  
a leader in Building ITFM into Performance Management**

### **8:00-8:45 a.m.**

#### **Skillssets and How to Hire an ITFM/TBM Analyst**

Edward Brown, Senior Consultant  
Zuna Infotech

Getting the right person to do the ITFM and/or Technology Business Management (TBM) analysis for your company can be the difference between having some nice reports to look at and proactively transforming your business. Our company has been hiring, training and growing people with these skills for several years with a high success rate. We will discuss how to work with HR to find the right people, critical skillsets to look for, personality traits that make a difference, and share some

technical assessment tools that put you five steps ahead in hiring. We will also cover training/growth and how to empower your analyst to help you.

### **9:00-9:45 a.m.**

#### **Applying Principles from a Rolling Forecast to ITFM**

Jason Byrd, Strategic Advisory Services Partner  
RPC Solutions, LLC

We all know that a major component of IT Financial Management can be defining an organization's IT Services and then determining their associated IT chargeback rates. However, because a company's chargeback process is so intrinsically tied to its budgeting process, many of the limitations and traps of traditional fixed budgets can manifest in different ways and terms inside an IT organization. This session discusses lessons learned on how the annual budgeting cycle can limit IT Chargeback.

### **10:00-10:45 a.m.**

#### **Software Asset Management – The Next Great Opportunity**

Penny Collen, Consultant - IT Finance and Chargeback

How you acquire, distribute, renew and reclaim software are important activities. Many organizations start out simply, only to realize quickly that this is a very complex process. Tools can help but they can also flood the user with more data than can be managed. This session will provide a comprehensive look at managing software costs including tips on procurement policies, software inventories, license compliance and governance processes.

### **11:00-11:45 a.m.**

#### **IT Financial Management at a Canadian Government Agency**

Speaker to be determined  
HP Software

The fields of IT Financial Management and IT business management may still be described as nascent but IT groups are beginning to discover how analytical tools can help them to manage IT more like a business operation. This Canadian government agency was looking for something based on industry best practices that could automate the activities associated with allocating IT expenditures to services or customers. Through this project they achieved simpler budgeting, consistent billing and greater transparency over the whole process. In this sessions we'll look at how they approached the project and what changes they implemented.

### **11:45 a.m.-12:50 p.m.**

#### **Buffet Lunch**

### **1:00-1:45 p.m.**

#### **Using an ITFM Maturity Model to Maximize IT Financial Management Dollars**

Christopher Deder, Principal Consultant  
RPC Solutions, LLC

IT Financial Management can satisfy many different goals and objectives. Various stakeholders will have different opinions on which objectives are most important. Without an effective method to identify the most critical objectives, IT Finance usually attempts to immediately satisfy all objectives, thereby diluting the effectiveness of IT Financial Management. An ITFM Maturity Model is an effective tool to help IT management prioritize objectives and the use of limited funds. This session will review the structure of an ITFM Maturity Model and discuss how to use the model's results to prioritize IT Financial Management efforts. The key learning points are understanding the ITFM Maturity Model and how to use the results to prioritize the goals and objectives for IT Financial Management.

**2:00-2:45 p.m.**

### **Planning for Disruptive Technologies**

**Robert Howard, CIO**  
Armstrong Atlantic State University

Even as we gain solid footing for planning the lifecycle for major technology services and infrastructure, there is always an undercurrent of disruption that continually threatens old business models. This presentation will attempt to give the audience an idea of how to plan service delivery and cost models for these disruptions. Most of the time there is a period of overlapping costs where your organization must continue funding the old service even while investing in the new. This presentation will cite examples and principles that will minimize that overlap, help you understand when you can eliminate that overlap, and how to ensure that you will minimize the over investment in unproven technologies or services.

**3:00-3:45 p.m.**

### **The President's 21st Century Government Initiative: New Changes to IT Cost Principles for Educational Institutions, State and Local Governments, Nonprofit Organizations, and Hospitals**

**Kenneth Hoffman, Principal**  
Kenneth F. Hoffman, Inc.

In February 2013 the U.S. Office of Management and Budget published in the Federal Register a notice of long-awaited proposed changes to cost principles for educational institutions, state and local and Indian tribal governments, nonprofit organizations, and hospitals. Budgets for contingency funds for the construction or upgrade of a large facility or instrument, or for IT systems, are now proposed to be allowable costs of Federal awards. Also allowed would be costs for excess or idle capacity in consolidated data centers, telecommunications, and public safety facilities. Some recommendations of the National Association of State Chief Information Officers were also introduced in the areas of allowable costs of interest and financing, and in equipment and property disposition. OMB Circulars A-21, A-87, A-122 and the hospital regulations at 45 CFR Part 75 are all affected. The information discussed in this session will help officials stay up to date on the latest guidance and regulatory developments, and will help them to take the fullest advantage of the changes.

**4:00-4:45 p.m.**

### **Automating IT Finance Demonstration**

**Robert Mischianti, Vice President**  
Nicus Software, Inc.

See description on page 10.

### **Automation is the Key to Cost-effective IT Analytics Demonstration**

**Richard Hawes, Senior Manager**  
HP Software

See description on page 10.

**Friday, July 12**

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**6:45-7:50 a.m.**

### **Full Breakfast Buffet sponsored by N. Dean Meyer and Associates, a leader in Consulting/Software, Market-based Resource Governance**

**8:00-8:45 a.m.**

### **IT Business Performance: Balancing Effectiveness and Efficiency when Managing IT Resources with Costs of IT**

**Robert Nelson, IT Solutions Architect**  
SAS Institute

Managing IT as a business is now imperative to an organization, not an option. No longer can IT be seen as a technology supplier. It must be seen as adding value to the business and providing corporate strategic capability. IT business performance allows IT to change the focus from technology and production to customers and services. It enables IT to become service-oriented, aligning itself with the organization to provide customer-driven solutions to business problems. With increased investment comes increased scrutiny, so CIO's and IT financial managers are having to show greater maturity and expertise in performance management and financial disciplines to show how the money is being spent, the returns they are getting for their investment, and how IT is driving corporate performance. Forrester Research highlights that "business users are demanding greater IT cost transparency and financial analysis in order to understand the true cost of IT." The focus of CIO's and CFO's either emphasizes how to improve the effectiveness of IT or how to run the shop more cost efficiently. The more successful CIO's and CFO's create a balance between improving operational effectiveness with cost efficiencies of IT. This presentation focuses on how an organization can achieve the alignment of IT with the business mission of the organization through the implementation of processes and technology to improve the balance between resources and costs while requiring a focus of transparency on services, costs, demand, processes and the impact on corporate performance.

**9:00-9:45 a.m.**

### **Best Practices in Cost Control: Supply Versus Demand Management**

**N. Dean Meyer, President**  
NDMA, Inc.

Traditionally, costs are controlled by limiting the budget given to the IT department and by measuring managers by how well they stick to that budget (variances). As familiar as it is, this approach causes many problems – it induces inappropriate decentralization and outsourcing, undermines sustainability, and reduces agility, to name a few. Even worse, it may drive costs up instead of down! This session explains why controlling the supply of IT services doesn't work, and why demand management is a far more effective approach to cost control. This session suggests management metrics that ensure frugality within IT, and processes for getting business clients to cut costs by cutting their demands. This session covers:

- Why cutting the IT budget might not cut costs
- Why measuring budget variances is a bad idea
- The alternative: market economics
- The three elements of cost control: value, breakeven, demand management

**10:00-10:45 a.m.**

**Wrap Up Panel Session for Those from Government Agencies and Universities**

**Panelists to be determined**

You have been at the conference for three to five days. You have heard a lot of opinions by speakers and from your colleagues, but was everything covered that you wanted to hear? These wrap up general sessions are your last chance for clarification and getting your questions answered by the panelists and your peers in the audience. There is no reason for you to go back to the office with unanswered questions. Even if you have no lingering questions, hearing the dialogue among your peers will be enlightening because their issues are likely your challenges too. This session allows you to gather one last time with all of those from organizations in the government and education sectors.

*Note: During this session, there will be three (3) lucky winners at a drawing for free passes to the ITFMA 2014 Conference of your choice.*

**“The [ITFMA conference] is a one-stop shop for getting an overview of the tools, concepts and processes that IT Financial Managers can use to add value to both their IT organization and the business that IT serves.”**

*– Terri Cull, IT Director,  
Advance Auto Parts, Inc.*

**“The ITFMA conference introduced me to a wonderful community of practice and a community of support for the journey of costing IT.”**

*– Tricia Fazzini, Business Analyst,  
State Farm Insurance Companies*

**“These [ITFMA] conferences perfectly fill a big gap for those of us in this space... since we have so few coworkers or other people/groups locally who can relate to what we do.”**

*– Dwight Schlenker, Manager, Computer  
Services Business Planning,  
United Health Group*

# Conference Value and Benefits

## How to Register

To register electronically, please visit our website ([www.itfma.com/wfm](http://www.itfma.com/wfm)) and submit the Conference Registration form. To register by mail, complete and mail the Conference Registration form in the front of this brochure and a check made out to "ITFMA" or "IT Financial Management Association." All major credit cards are accepted. To register by fax, send the registration form to (805) 687-7382 (no cover letter required). To register by telephone, call (805) 687-7390.

	<u>Register by June 7</u>		<u>Register June 8-21</u>		<u>Register after June 21</u>	
	Member	Nonmember	Member	Nonmember	Member	Nonmember
Conferences Only (July 10-12)	\$1,595	\$1,695	\$1,995	\$2,095	\$2,495	\$2,595
Conferences + 1 Seminar Day (July 8 + July 10-12)	\$2,095	\$2,195	\$2,595	\$2,695	\$3,095	\$3,195
Conferences + 1 Seminar Day (July 9-12)	\$2,095	\$2,195	\$2,595	\$2,695	\$3,095	\$3,195
Conferences + 2 Seminar Days (July 8-12)	\$2,595	\$2,695	\$3,195	\$3,295	\$3,695	\$3,795

The registration fee covers all seminar/conference sessions, presentation handout material, attendee list, full breakfast buffets, refreshment breaks, lunch buffets, and receptions. Families are invited to the breakfasts and receptions. You may apply for ITFMA membership (January-December) with your registration for an additional \$100.00.

Cancellations received after **June 7** are subject to a \$200 fee. Cancellations received after **June 21** are charged 50% of the registration fee. Nonattendance without cancellation is subject to the full fee.

## Group Fee Discounts

For group registrations **submitted at the same time**, group conference registration fee discounts are:

Group of 2: 10% discount

Group of 3: 15% discount

Group of 4 or more: 20% discount

## 4 Conferences for the Price of 1

There are twelve (12) half-day seminars/workshops held on Monday and Tuesday as well as four (4) conferences held on Wednesday to Friday. You will receive handouts for all workshops and conferences held each day you are registered to attend. So if you wish to drop in and out of the concurrent workshops and conference sessions, you will have handouts to follow along with the speakers.

## Conference Attendees

This is the first of ITFMA's two extensive educational programs in 2013 addressing the wide range of responsibilities in the field of IT financial management. It meets the educational needs of IT financial professionals, clients of IT organizations, and IT service providers, whether they be from senior management or entry-level positions involved with the various IT financial management disciplines as applied to computer operations, distributed processing, application development, telecommunications, and IT support. Meet your peers with the following IT-related responsibilities to establish networking opportunities during and after the conferences:

Activity Based & Product Cost Management	Cost Accounting, Analysis & Control	Performance Management & Measurement
Asset & Project Portfolio Management	Expense Management	Portfolio Management & Risk Analysis
Asset Acquisition & Procurement	Financial Planning & Budgeting	Project Management
Asset Management & Inventory Control	Financial Reporting & Analysis	Resource Management
Balanced Scorecard Analysis	Financial Programming & Support	Service Management & Service Level Agreement
Benchmarking & Metrics Analysis	Financial & Fiscal Services	Shared Services
Business/Demand Management	Government IT Financial Mgmt.	Software and License Management & Evaluation
Capital Budgeting & Investment Analysis	Information Management	Strategic Planning & Sourcing
Chargeback & Cost Allocation	ITIL Financial Management	Telecommunication Financial Management
Contract Management & Negotiation	Operations & Telecom Management	Vendor Management

## Dress Code

Attendees and speakers are requested to dress casually in order to promote an informal and relaxed atmosphere.

## Purpose of Each Conference

*The World of IT Financial Management Program* held on July 8-12 is the only “must attend” program for IT financial management practitioners as this four-conference program offers the most sessions and networking opportunities related to the planning, acquisition, management, and evaluation of IT assets and expenditures. It is the most highly regarded IT financial conference of its kind because it is conducted by many of the leading experts and attended by more practitioners of IT financial management than comparable conferences.

*The IT Financial Management for Controllers and CFOs Conference* provides a comprehensive overview of the major financial disciplines every Controller, CFO, Financial Manager, CEO, and CIO should understand to perform his or her responsibilities. There is no university or educational program that offers such a complete agenda for IT organizations that addresses the planning, controlling, pricing, evaluating and decision making aspects of IT financial management. Many of the speakers were selected from among the leading experts in their field.

*The IT Financial Planning, Budgeting and Reporting Conference* is the first known conference of its kind. It is filled with case studies and hands-on experiences regarding trends, models, techniques, best practices, and new ideas for effective IT financial planning, forecasting, budgeting, reporting and cost control. You should come away with a number of good ideas for improving your current practices and procedures.

*The IT Asset and Expense Management Conference* brings together the vast experiences of practitioners and leading experts with experiences from best practice organizations. It provides speakers who are highly experienced experts in this field and creates a forum of asset and expense management practitioners to discuss their hot issues, challenges and solutions. The material covers practices and procedures in the design, implementation and application of a wide spectrum of tools and techniques used in the financial management of IT assets and expenses.

*The Government IT Financial Management Conference* is specifically designed to educate those in the government by those with hands-on experience in IT financial management issues and practices applicable to the government sector. The agenda is a combination of sessions conducted by government IT financial practitioners and some of the best sessions applicable to government and business IT organizations. The agenda is mainly designed by and for those in government.

## Win a Free Conference Pass

As a reward to those who see the value of attending the outstanding sessions regularly scheduled on the last day of ITFMA conferences, there will be a drawing in each of the concurrent sessions scheduled at 10:00 a.m. on Friday, July 12. There will be six (6) lucky winners – three lucky attendees at each of the two concurrent sessions will win a pass to attend the 2014 ITFMA program of their choice by having their 3-day conference registration fee waived – a value of \$1,700. The pass is transferable to a colleague if the winner is not able to attend in 2014. Names will be collected and picked during the 10:00 a.m. sessions. Winners must be present to receive their passes.

## Luncheon Peer Discussions

To establish peer contacts and to discuss common interests over lunch, many of the tables are reserved for seating by job responsibility and industry on Wednesday and Thursday. All lunches are buffet style to meet your dietary requirements and appetite.

## Continuing Education

IT Financial Management Association is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.learningmarket.org](http://www.learningmarket.org). This **five-day program offers up to 33 hours of continuing education credit** for CPA, CMA, ITFMA, CIA, CISA and other certifications. There are no prerequisites or advance preparation required for attending the conferences for continuing education credit. The program objectives are to learn best practices, cutting-edge procedures, experiences of your colleagues, and solutions to current issues. For more information regarding administrative policies such as complaint and refund, please contact ITFMA at (805) 687-7390.

## ITFMA Certification

ITFMA's Education Certificate Program is the most recognized program to certify completion of an extensive curriculum in IT financial management and related financial disciplines. Certificates are awarded upon completion of 60 class hours at ITFMA programs in the following financial disciplines in order to certify education in IT financial management's various areas of knowledge and specialization:

- IT Financial Management Best Practices
- IT Financial Planning, Budgeting and Reporting
- ITIL Financial Management
- IT Financial Management Controllershship
- IT Chargeback and Activity Based Cost Management
- IT Asset Management
- IT Performance Management and Benchmarking
- IT Financial Management Accounting
- Government IT Financial Management
- Telecommunication Financial Management

A transcript documenting your attendance in over 150 subject categories is mailed to you following each attended conference. There is **no cost to enroll** in the Certificate Program and you may apply for multiple



certificates. Advanced certificates are awarded for each additional 60 class hours of attendance. For more details, call (805) 687-7390 or go to the ITFMA home page at [www.itfma.com](http://www.itfma.com) and click on "Certificate Program".

## Meet Our Sponsors



ComSci delivers Technology Financial Management solutions that empower organizations to implement m IT Financial Management. ComSci helps IT organizations enhance transparency and visibility, which in tu business units to understand and optimize demand and utilization of technology resources. ComSci clients of New York Mellon, NYU Langone Medical Center, 1-800-FLOWERS.COM, MSKCC, SAP, and UBS.



HP Software is a leading provider of solutions and services for ITFM. At the heart of the HP IT Performance Suite is the ITFM solution for service-based costing, bill-of-IT, cloud finance, etc. HP also covers related IT processes such as asset management, software license management/compliance and vendor contract management.



Dean Meyer is the author of Internal Market Economics, plus seven other books including the Full-cost Maturity Model. He consults with CIOs and IT leaders on business/budget planning, catalogs, rate setting, business-driven portfolio management, and ITFM strategies. He invented FullCost, software for investment-based budgeting and rate setting.



Nicus M-PWR IT Financial Management provides solutions for IT Chargeback, IT Cost Modeling & Analysis, Budgeting, Forecasting and Web-based Financial Reporting.



From the leader in virtualization and cloud infrastructure, VMware IT Business Management (ITBM) solutions enable CIOs to have unprecedented visibility into their cloud costs to make fact-based decisions. Our suite gives you financial discipline, SLA management capability and vendor governance for your entire service portfolio.

## More About ITFMA

The IT Financial Management Association (ITFMA) was established in 1988 when ITFMA founded the IT Financial Management profession 26 years ago. ITFMA is the only association dedicated to this profession and provides a comprehensive education program on the principles and practices used to financially manage Information Technology (IT) organizations. ITFMA is the national leader in the education of IT financial management professionals and the only recognized provider of certification in the various financial disciplines of IT financial management. Their *Journal of IT Financial Management* is the only magazine devoted to issues of interest to our profession and their website ([www.itfma.com](http://www.itfma.com)) is the only site focused on peer networking, research, surveys and publications in this field.

## Why Register Early

- Receive a \$900-\$1,100 discount off the registration fee by registering by June 7.
- Those attending the July 10-12 conferences can attend the July 8-9 workshops/seminars for \$500 per day (\$600 per day for registrations after June 7).
- There is a limited number of hotel rooms available at substantially reduced room rates for our group. Hotel reservations made after June 7 will cost much more than our special group room rates.

## Important Dates

- June 7: Discounted conference registration fee deadline. Hotel reservations after this date are on a space and current available rate basis. Cancel registration without incurring a \$200 late cancellation fee.
- June 21: Cancel registration without 50% fee. Deadline to avoid conference registration fee increase.

## Benefits of Registering as a Member

To sign up for an individual membership in ITFMA for 2013, simply indicate upon registering for the conference that you wish to register for the conference as a member. The membership dues for January to December 2013 is \$100. Why should you register for this conference as a member? Among the various benefits of membership, your membership dues is returned to you in the form of a \$100 lower registration fee paid by members. Before registering for the conferences, you need to complete the Membership Application on our website ([www.itfma.com](http://www.itfma.com)) to activate your membership and to submit your unique user name and password in order to access the exclusive members only areas of the ITFMA website.

**"Education levels the playing field, allowing everyone to compete."**

– Joyce A. Myers

**"The ITFMA conferences continue to be the best source of industry news and friends."**

– Robert LeFevre, IT Finance Specialist,  
ATK Launch Systems

**"ITFMA events are top-notch – both in content and in style."**

– Susan Racimora, Associate Director,  
Project Administration,  
Universal Music Group



# Hotel & Travel Reservations

## Hotel Room Reservation

The four conferences will be held at the Savannah Marriott Riverfront Hotel in Savannah, GA. The hotel will provide free **Internet access** to all attendees staying at the hotel in their guestrooms. The hotel room rate is \$155 for single/double occupancy. The government per diem rate is \$95 single/double. To make room reservations, call (912) 233-7722 or (800) 285-0398 and mention “IT Financial Management Association” to get the discounted room rate. The hotel may be sold out during this popular time of the year and there is no other hotel nearby that is comparable in quality and price. Reservations must be made by **June 7** after which reservations will be accepted on a space and current available rate basis. Calling the hotel before the cut-off date does not guarantee rooms will be available at our special group rate as the hotel is not required to honor this special rate after our block of rooms has been filled, so reserve your room early. You can always cancel it. For complete information about the hotel, go to [www.marriott.com/savrf](http://www.marriott.com/savrf)

## Hotel & Nearby Attractions

To make it most attractive for you to attend ITFMA conferences in 2013-2015 while the economy slowly gets back on its feet, the goal of ITFMA is to provide you with the most attractive locations at the most attractive prices. The intent is to maximize quality, minimize cost, and select fun and interesting places to visit. The first step was to identify a quality hotel chain for negotiating a package deal for the next three years in order to get the best room rates for you. We chose Marriott International for their history of quality facilities, central locations, and willingness to negotiate reasonable room rates. Next step was to personally research all of Marriott’s 3,425 hotels in the U.S. for the six (6) best sites that met our criteria of economy, fun and interest to those of all ages. Some of the reasons for selecting the Savannah Marriott Riverfront Hotel in Savannah, GA as the site for this conference are:

- The Marriott Savannah Riverfront Hotel is on the River Walk along the Savannah River and steps from the downtown Historic District
- Savannah was established in 1733 and is one of the largest National Historic Landmark Districts in the U.S. The downtown area includes the Savannah Historic District, the Savannah Victorian Historic District, Savannah Avenue Historic District, and 22 park-like squares. The city has the reputation for Southern charm, hospitality and referred to as the “Hostess City of the South.”
- CAT shuttles offer free transportation from the hotel to Savannah’s historic sites, squares, River Street, Belles Ferry & other attractions
- Hotel is steps from the free ferry service across the Savannah River that connects to Hutchinson Island
- Riverfront Plaza and Factors’ Walk consists of world-famous River Street’s restored 19th century cotton warehouses and passageways with shops and restaurants
- City Market is Savannah’s restored central market featuring antiques, souvenirs, small eateries, as well as two large outdoor plazas
- Tybee Island is a popular coastal city with public beaches and attractions
- Pirates’ House is a historic restaurant and tavern established in 1753 and located in downtown Savannah. It has 15 dining rooms, serves a variety of southern dishes, and is home to rare early edition pages of Treasure Island by Robert Louis Stevenson. The pages can be seen hanging on the walls of the Captain’s Room and the Treasure Room in the Pirates’ House.
- Hilton Head is just 30-40 miles away
- For complete information about the Marriott Savannah Riverfront Hotel, please go to [www.marriott.com/savrf](http://www.marriott.com/savrf)

## Airline Reservations

The speakers and topics scheduled on Friday, the last day of the conference, are among the best at the conference and do not forget the Friday drawings for free passes to next year’s ITFMA conferences. So make your return flight reservations for Friday afternoon or consider staying over Friday evening to see some of the local attractions. Search any of these websites for special airfares to and from Savannah.

[www.cheapfares.com](http://www.cheapfares.com)  
[www.expedia.com](http://www.expedia.com)

[www.hotelsandflights.com](http://www.hotelsandflights.com)  
[www.orbitz.com](http://www.orbitz.com)

[www.travelocity.com](http://www.travelocity.com)



Historic District Carriage Ride



Savannah Market Dining

## Sneak Preview of ITFMA's 2014-2015 Conference Sites

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To make it most attractive to you to attend ITFMA conferences over the near future while the economy slowly gets back on its feet, the goal of ITFMA is to provide you with the most attractive locations at the most attractive prices. The strategy is to maximize quality, minimize cost, and select fun and interesting places to visit. The first step was to identify a quality hotel chain for negotiating a package deal for the next three years in order to get the best room rates for you. We chose Marriott International for their history of quality facilities, central locations, and willingness to negotiate reasonable room rates. Next step was to personally research all of Marriott's 3,425 hotels in the U.S. for the best sites that met our criteria of economy, fun and interest to those of all ages. Below are the dates, locations and some of the local attractions of the six chosen sites. The average room rate will be \$145 – some a little more, some a little less. All of these hotels provide complimentary Internet access in the sleeping rooms and generally in the meeting rooms.

### Norfolk Waterside Marriott Hotel • Norfolk, VA • April 14-18, 2014

- The city of Norfolk borders six other cities including Virginia Beach, Portsmouth, Newport News, and Chesapeake
- Norfolk Waterside Marriott, on the Elizabeth River, is in the heart of the Historic District
- FRED is a **free** shuttle service consisting of road-ready golf carts that can take as many as five passengers around the downtown area. It's an extension of the escort service that allows downtowners to request a **free** walking escort from one location to another.
- The hotel is two blocks from MacArthur Center Mall (features over 140 shops and restaurants), the Chrysler Museum of Art (free demonstrations at the Glass Studio), Nautical Museum, Battleship USS Wisconsin, and historical St. Paul's Episcopal Church
- Nauticus Maritime Museum presents 225 years of naval history and has a maritime-themed science center for kids with an aquarium, hands-on exhibits, interactive theaters, and a variety of educational programs
- Norfolk Botanical Garden is the only botanical garden in the nation that can be toured by trackless train and by boat. This magnificent 155-acre botanical garden has one of the largest collections of roses, azaleas, camellias, and hollies on the East Coast. It also features over 25 themed gardens, bridges, coastal waterways, and 12 miles of pedestrian trails.
- The 1797 Moses Myers House offers an exceptionally accurate portrayal of life in the 18th century and remarkably, 70 percent of the original contents still remain there today.
- Steps from the hotel you can catch the ferry across the river to Portsmouth's Olde Towne featuring a scenic waterfront, upscale dining, a plethora of antique and boutique shops, and the largest collection of historic homes between Alexandria, VA and Charleston, SC.
- For complete information about the Norfolk Waterside Marriott Hotel, please go to [www.marriott.com/orfws](http://www.marriott.com/orfws)

### The Dearborn Inn, a Marriott Property • Dearborn, MI • July 14-18, 2014

- The Dearborn Inn on 23 lush acres is a AAA Four Diamond rated Marriott property built in 1931 and near downtown Detroit.
- ITFMA will host an open bar after the Monday and Tuesday workshops and seminars in the gorgeous wood-paneled Lincoln Room, a private room previously called the Golden Eagle Lounge Bar
- Two blocks from the hotel is Greenfield Village consisting of famous historic buildings relocated by Henry Ford to create a fascinating village comprised of buildings linked to such luminaries as George Washington Carver, Thomas Edison, Henry Ford, Robert Frost, William Holmes McGuffery, Noah Webster, Wright Brothers and others. Just some of the historic structures are: Armington & Simms Machine Shop, Carriage Barn, Cider Mill, Cohen Millinery, Cotswold Cottage, Eagle Tavern, Edison Illuminating Company Station, Firestone Farm, Henry Ford Home, George Washington Carver Cabin, Glass Shop, Grimm Jewelry Store, Gunsoly Carding Mill, Henry Ford Museum, Herschell-Spillman Carousel, J.R. Jones General Store, Liberty Craftworks Store, Logan County Courthouse, Martha-Mary Chapel, Miller School, Model T Loading Dock, Noah Webster Home, Oxbow Island, Phoenixville Post Office, Pottery Shop, Printing Office & Tin Shop, Railroad Roundhouse & Turntable, Richard Wagon Shop, Robert Frost Home, Rocks Village Toll House, Sir John Bennett Sweet Shop, Stony Creek Mill Pond & Sawmill, Susquehanna Plantation, Suwanee Island & Lagoon, Swiss Chalet, The Workshop & Guild Beer Hall, Town Hall, Tripp Saw Mill, Village Green & Pavilion, William Holmes McGuffery Birthplace, Wright Brothers' Cycle Shop, and much, much more...
- Go back in time and take a historic ride on a Vintage Model T, a 1931 Ford Model AA Bus, a horse drawn Omnibus Shuttle, a Weiser Train pulled by a steam or diesel locomotive, and a 1913 Herschell-Spillman Carousel.
- The Henry Ford Museum features huge galleries entitled: Fully Furnished, Automobiles in American Life, Heroes of the Sky, Your Place in Time, Made in America, With Liberty & Justice for All, Presidential Vehicles, Museum Gallery, Genius at Play Store, Agriculture, Home Art, Dymaxion House, Clockwork, Transportation, Goldenrod, and Anderson Theater
- The Ford Rouge (River) Factory Tour is a self-guided five-part experience that includes: [Legacy Theatre](#) (history of the Rouge through rare, never-before-seen historic footage); [Art of Manufacturing](#) is a multi-sensory 360-degree look at how automobiles are made; [Assembly Plant Walking Tour](#) where the new Ford F-150s are assembled from an elevated walkway; [Legacy Gallery](#) to view five historic vehicles made at the Rouge and hop in the new F-150
- For complete information about The Dearborn Inn, please go to [www.marriott.com/dtwidi](http://www.marriott.com/dtwidi)

### Renaissance Pittsburgh Hotel • Pittsburgh, PA • April 13-17, 2015

### Evergreen Marriott Stone Mountain Resort • Atlanta, GA • July 13-17, 2015

## 2012 Conference Award Ceremony for the 25 Major Educators in the Profession of IT Financial Management



*Front Row: Robert Gold, Page Hite, Penny Collen, Mary Lou Alter  
 Second Row: Mark Berg, George Bonifant, Jon Maxim, Christopher Dedera  
 Third Row: Thomas Hawn, Charles Johnson, Randy Numbers, Kenneth Hoffman, Robert Mischianti  
 Fourth Row: Terence Quinlan, Mark Pringle, Leonard Bergstrom, Gary Eckert,  
 Fifth Row: Timothy Partlow, Jeffrey Lockenvitz, Dean Verhaeghe, N. Dean Meyer, Steve Wheeler  
 Not Pictured: Brian Jeffery, Gary Pereyo (recently deceased) and Robert Simko  
 (Photo supplied by Mark Pringle)*

Over the years there have been many pioneers and leading experts from our profession who were major contributors to the education of those in the field of IT Financial Management since Terence Quinlan founded the IT Financial Management Association 25 years ago. In celebration of ITFMA's 25th anniversary, many of the more prolific speakers who provided the most years of support and contribution to ITFMA educational programs were honored by ITFMA as the Leading Educators to the IT Financial Management Profession at last year's World of IT Financial Management Conference held at The Phoenician Resort in Scottsdale, AZ.

These and the hundreds of other speakers at ITFMA conferences are the true leaders of our profession. There may be some more well known experts out there who required a speaker fee of tens of thousands of dollars and all of their expenses paid, but all of the past ITFMA speakers gave freely and unselfishly of their time, energy and knowledge to educate you and the others in our profession. It is these leading educators and all of the other speakers, panelists, attendees and sponsors at ITFMA conferences who have been willing to share their knowledge and experiences with their peers over the past 25 years that have shaped, nurtured and advanced the profession of IT Financial Management.

Below is the list of the award winners, their titles and companies during the majority of the 1988-2012 period when they participated as speakers at ITFMA conferences, workshop and seminars.

Mary Lou Alter, Vice President & COO, The CMX Group  
 Mark Berg, Principal, The Gettysburg Consultancy  
 Leonard Bergstrom, President, Real Decisions  
 George Bonifant, Product Manager, CIMS Lab  
 Penny Collen, Finance Manager, U.S. West Technologies  
 Christopher Dedera, Consultant, Grant Thornton  
 Gary Eckert, President, Telytics, Inc.  
 Robert Gold, Practice Leader, Compass America  
 Thomas Hawn, I.S. Controller, Progressive Companies  
 Page Hite, Director Customer Support, PACE Applied Technology  
 Kenneth Hoffman, Principal, Kenneth F. Hoffman, Inc.  
 Brian Jeffery, Managing Director, International Technology Group  
 Charles Johnson, President, CNJohnson & Associates  
 Jeffrey Lockenvitz, I.S. Finance Manager, United Parcel Service  
 Jon Maxim, President, Maxelerate Systems Ltd.  
 Dean Meyer, President, NDMA, Inc.  
 Robert Mischianti, Vice President, Nicus Software  
 Randy Numbers, Vice President, JP Morgan  
 Timothy Partlow, CFO, HCA – Information Technology & Services  
 Gary Pereyo, Vice President, PACE Applied Technology  
 Mark Pringle, Senior Associate, CNJohnson & Associates  
 Robert Simko, Executive Director, International Technology Group  
 Robert Stroud, Vice President, CA, Inc.  
 Dean Verhaeghe, Product Manager, Legent Corporation  
 Steve Wheeler, Director of Financial Analysis, First Data Corp

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Marriott Riverfront Hotel  
Savannah, GA  
July 8-12, 2013

## What Others Said About This ITFMA Conference in the Past

“This is the best source of continuing professional education credits that I have found in my career. Even in tough economic times, it’s easy to justify the cost of attending this conference!” – *Marsha Watkins, Business Manager, The Ohio State University*

“I got more out of this conference than any other that I have attended.” – *Kirk Johnson, IT Financial Analyst, Cox Enterprises*

“This is by far my favorite conference to attend. I always come away with new knowledge gained.” – *Kay Gonzalez, IT Hardware Asset Manager, Siemens Power Generation, Inc.*

“ITFMA is a quality organization. Some of the conference take aways were: identifying common practices, networking with people, finding solutions, reducing cost by knowing issues in advance, identifying IT relationships with almost every aspect of business, and learning best practices to improve earnings.” – *Touraj Iranipour, IT Business Manager, Raytheon Company*

“One of the best uses of time and financial resources. So much to learn at every session. ITFMA does an excellent job of selecting speakers.” – *Patti Harceg, Vice President, Wachovia Corporation*

“The ITFMA conference offers a roadmap to finding practical solutions to universal issues affecting IT Financial Management in all industries.” – *Susan Racimora, IT Finance Manager, Universal Music Group*

“Excellent choice of speakers and the chance to share best practices with others really delivers the value of this conference.” – *Chuck Cicora, Manager, Progressive Casualty Insurance*

“Your seminars have had a huge impact on my career and the networking was fantastic. I feel your organization is terrific and I have forwarded your brochures to my IT group.” – *Cindy Spencer, Institutional Banking Controller, Mellon Financial Corporation*

“All IT managers should be required to attend ITFMA conferences to gain a fresh perspective on the value of IT to their business.” – *Carla Curtis, President, SBB Works, Inc.*