

# September *in* Chicago

## **IT** Procurement Summit **CAUCUS**



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# October *in* New York

## **Total Vendor Management**

*Get What You Pay For*

## **Software Workshop**

*Issues, Contracts & Negotiations*

## **SLA Lab**

*Results-Based Contracting*

## **Negotiations Training**

*Power, Process, Principles*



**PAGES 12-13**

# 2010 IT Procurement Summit CAUCUS



## Benefits

- Develop relationships with your peers
- Build professional confidence
- Get best practices
- Improve your negotiation techniques
- Gain leverage with your suppliers
- Learn strategic global principles
- Reduce your risk
- Learn how to streamline processes
- Sharpen your skills; improve your overall proficiency
- Earn continuing education credits

## Tracks

- Software/Hardware
- Telecom
- Professional Development
- Vendor Management
- General

**T**his annual conference is an unrivaled event, providing acquisition professionals with state-of-the-art information for all facets of the acquisition process on all types of deals. From the opening orientation—presented by the Caucus Executive Advisory Committee—to the closing luncheon, you're sure to gain insights and new ways to Do Better Deals™.

Networking opportunities are an important benefit of attending this conference, which offers communication with both presenters and attendees. Many of the interactions initiated at the conference develop into long-term business relationships.

### For Professionals in

- Information technology
- IT procurement
- Purchasing
- Finance
- Legal
- Vendor management
- Contract management
- Global strategic sourcing
- Supply chain management
- Telecommunications

**SAVE \$100**

**If you register and pay by  
August 12, 2010**

### Chicago

**September 20–21, 2010**

#### Three ways to register

- Phone 407.740.5600
- Fax 407.740.0368
- Register Online Today at [www.caucusnet.com](http://www.caucusnet.com)

**Nonmembers: \$1,795  
Caucus Members: \$1,495**

# Schedule

# CHICAGO

<b>PreConference September 19, 2010</b>			
5:30 – 8:00 PM	REGISTRATION/RECEPTION (Seville 'Concourse')		
<b>Day 1 September 20, 2010</b>			
<b>Time</b>	<b>TRACK 1</b>	<b>TRACK 2</b>	<b>TRACK 3</b>
7:00 – 8:00 AM	BREAKFAST (Seville 'Concourse' & Ballroom)		
8:00 – 8:30 AM	CONFERENCE OPENING Sarepta Ridgeway & Mike Gonce		
8:30 – 9:30 AM	Networking in the Information Age - Donna Daigle (Seville Ballroom)		
9:30 – 9:45 AM	Refreshment Break		
9:45 – 11:30 AM	The Uniqueness of Software Licensing Agreements	How to Get More Bacon From Your SOW (Statements of Work)	Developing an Objective Supplier Selection & Supplier Management Program
11:30 – 12:45 PM	HOSTED LUNCH (Zest Upstairs / Farris Room)		
12:45 – 2:00 PM	Unraveling the Secrets of Microsoft Volume Licensing	Understanding Boilerplate Contract T&Cs The Devil Really is in the Details	Taming the e-mail Beast
2:00 – 2:15 PM	Refreshment Break		
2:15 – 3:15 PM	Stress for Success	Telecom Networks: A Primer for the Telecom Sourcing Professional	Technology Leasing 101
3:15 – 3:45 PM	BREAK/SNACK (Seville 'Concourse')		
3:45 – 5:00 PM	Hosting Agreements & Co-location	Risk Management and Your Supplier Base - How to Tie Your Supplier Risk Profile to Key Contract Terms	Supplier Relationship Management—The Owens Corning Experience
5:00 – 7:00 PM	RECEPTION (Camelot Ballroom)		

Schedule Continued on Next Page

Day 2 September 21, 2010			
Time	TRACK 1	TRACK 2	TRACK 3
7:00 – 8:00 AM	BREAKFAST (Seville 'Concourse' & Ballroom)		
8:00 – 8:15 AM	Caucus Member of the Year Recognition Sarepta Ridgeway & Mike Gonce (Seville Ballroom)		
8:15 – 8:30 AM	Refreshment Break		
8:30 – 10:00 AM	Software and SaaS— It's a New Day	Telecom Wireless Negotiations	Panel—Consulting Hot Topics
10:00 – 10:15 PM	Refreshment Break		
10:15 – 11:45 AM	How to Align IT Procurement & Asset Management to Reduce Costs	Cloud Computing	IT Hot Topics
11:45 – 1:00 PM	Procurement Transformation: Investing in Systems, Tool, & People		
1:00 – 1:30 PM	DESSERT (Seville 'Concourse')		
1:30 – 2:30 PM	Managed Print Services: Cost Savings From Chaos	Telecom Expense Management: Now More Than Ever	Service Level Agreements— Less is More
2:30 – 2:45 PM	Refreshment Break		
2:45 – 3:45 PM	Social Media for IT Procurement	Telecom 101	Facilitated Networking Session
4:00 – 5:00 PM	KEYNOTE Cross Gender Communications - It's Not A Myth Dr. William Cross Seville Ballroom		

Day 3 September 22, 2010	
Time	Event
<b>COMPLIMENTARY</b>	
8:00 – 8:40 am	CTPS/CTPE Procurement
9:00 – 9:40 am	CTPS/CTPE Contract Management
10:00 – 10:40 am	CTPE Legal
11:20 – 12:00 pm	CTPE Finance
1:00 – 1:40 pm	CTPE Technology
<b>ADDITIONAL CHARGE</b>	
10:00 – 2:00 pm	CTPS Exam
2:00 – 6:00 pm	CTPE Exam

### **Risk Management and Your Supplier Base — How to Tie Your Supplier Risk Profile to Key Contract Terms**

Now more than ever it's important to know who you're doing business with – and to ensure that you are adequately addressing your supplier risk. Learn why you should care about supplier risk, what the types of risk are, and how to establish a monitoring system. Understand the key contract categories, terms, and conditions that allow you to manage risk and give you the contractual protections that you deserve.

### **Panel — Consulting Hot Topics**

Is managing your consulting vendors a bit like herding cats? This highly interactive session will give you real world tools to help you control these critical relationships."

### **Supplier Relationship Management — The Owens Corning Experience**

Supplier/Vendor Relationship Management is a rapidly growing competency in the Sourcing world. Join in the conversation as we examine a case study of VRM implementation and talk about implementation, organization, scope, outcomes (desired and actual) and how to gain executive buy-in with Owens Corning's Director of Global IT Sourcing and his team.

### **Panel — Developing an Objective Supplier Selection & Management Program**

Learn the ins and outs of how to develop and implement a five-step sourcing process within your organization. From needs assessment to managing the relationship, you'll receive step-by-step guidelines and real-world examples of how to put the program into practice.



**The Uniqueness of Software Licensing Agreements**

The goal of this session is to provoke fresh thinking and lively discussion of some of the issues and situations that are unique to software license agreements. In the course of our discussion, we'll talk about some peculiar licensing situations and vendors and some resulting agreement oddities. Bring your own examples, stories and questions to share!

**Software and SaaS — It's a New Day**

This presentation, done in a vendor/customer point-counterpoint format, discusses the evolution of the software contract, attributes of the SaaS model, and other key issues you need to know when negotiating your SaaS agreement.

**How to Align IT Procurement & Asset Management to Reduce Costs**

In the current economy, the financial

**Unraveling the Secrets of Microsoft Volume Licensing**

Microsoft licensing is very confusing. Many companies wonder which licensing scheme is best for them. In this presentation, you'll learn the differences between the programs and how to determine which is best for your organization. We'll provide you with the tools needed to evaluate whether Microsoft Volume licensing will provide a benefit that is greater than the related costs.

implications of managing your IT assets and procurement practices are more important than ever. This session will help attendees balance the short-term focus of cost cutting and contract negotiations with the longer-term processes of asset tracking, reuse and disposal. Users will gain insights into ways to leverage IT financial, procurement and asset management best practices as well as ways to minimize risk while reducing the total cost of ownership for technology hardware and software.

**Hosting Agreements & Co-Location**

What's the optimal disaster recovery solution? Managed hosting or co-location? In this presentation, we'll discuss the differences among various types of hosting and co-location agreements and under what circumstances each may be appropriate. We'll also explore other key issues in disaster recovery, how to structure your RFX and key considerations when contracting for services.

**Technology Leasing 101**

This session will provide a high-level overview of important terms and conditions in the Master Lease Agreement that should be paid careful attention and how these T's and C's affect end-of-lease decisions/repercussions. It will also briefly touch on leased asset management as a critical component of IT leasing.



### **Telecom 101**

New to telecom deals and don't know where to begin? In this session, you'll learn the essentials of telecom from the types of data and voice networks to the similarities and differences between wireline and wireless networks. You'll learn all about key telecom terms and the telecom contracting process. We'll cover how to handle mergers and acquisitions, invoicing, audits, rate reviews, minimum terms and commitments, service quality, disaster recovery, and much more!

### **Cloud Computing**

Come in out of the cloud!

- Explore what cloud computing is and what it is not.
- Learn about current trends in cloud computing.
- Understand the dynamics of licensing in the cloud environment.
- Obtain the tools necessary to prepare your organization's migration to cloud computing.

### **Telecom Wireless Negotiations**

The cellular and wireless landscape is constantly changing to meet the needs of today's global economy. This information-packed session will give you an overview of the global market situation and identify some tools you can use for your market analysis. You'll learn what it takes to develop and implement an enterprise-wide

strategy, what contracting options are available to you, and what your sourcing options and important considerations are. You'll learn the key elements of a good deal, both in the U.S. and Europe, and you'll be exposed to many cellular and wireless contracting best practices.

### **Telecom Networks: A Primer for the Telecom Sourcing Professional**

This session is meant to make sourcing professionals more effective in obtaining the right services for their companies.

All telecom sourcing professionals should have a basic understanding of their corporate telecom networks. Attendees at this session will learn the basics of an enterprise's telecom network. This includes the services and hardware in data and voice networks, Internet service, and audio conferencing services.

### **Telecom Expense Management: Now More Than Ever**

This session will review the requirements essential to selecting, implementing, and managing a third-party telecom expense management (TEM) service. In today's economic environment, the ability to control and manage telecom expenses is more important than ever. Having an effective TEM solution is necessary to prevail and bring real savings to the bottom line.

**Stress for Success**

If we control stress we can improve the quality of our work, and the quality of our lives. This session provides a road map for that control.

What's all the fuss about stress? Doesn't some stress just make you focus better? What is the real impact of stress on quality of work and your personal success? This fun, lively session will address these and other questions you may have. We'll describe stress, its unique impact on IT professionals, and where you fit in the picture. You'll get a proven method to deal with stressors and improve your career. The value of this session goes beyond your work environment to life after work. This session has been selected as Best of Share at SHARE International and Best Session at Guide International.

**Other Key Elements:**

- A clear definition of stress
- The debilitating effects of too much stress
- Proven strategies for controlling stress
- A view of the impact of stress on quality and effectiveness of work

**Taming the E-mail Beast**

Every day, managers and professionals are getting buried deeper and deeper under a continuing stream of both useful and useless e-mail and information overload. Randy Dean's Taming the E-mail Beast program, based on his Amazon bestseller, shares proven strategies for effective and efficient e-mail management and administration. Get your account under control rather than letting it control you!

**Social Media for IT Procurement**

This session will introduce LinkedIn to those who are not familiar with it and demonstrate how to grow their professional networks. It will also show seasoned users how to use LinkedIn groups for the sharing of IT procurement questions/issues. Additionally, there will be an introductory piece on Listserv within the Caucus website, and the ways users develop network relationships through regular communication with other IT sourcing/procurement professionals will be explored.

**Cross-Gender Communications—  
It's Not a Myth**

Men and women do indeed think and communicate differently. In this interactive, lively session we will examine the physical, mental, and emotional aspects of male and female differences, and learn ways of using this understanding to enhance our communication.

This session should help women and men who are seeking answers as to why it is so challenging to understand one another.

- Differences in male and female communication styles
- Why we are so different
- What to do when you are not being understood
- Verbal and nonverbal communication tools to bridge the gap

**Networking in the Information Age**

How is professional networking changing? Is your time really your own? How can social networking affect you professionally? Get the answers in this informative session.

### **How to Get More Bacon From Your SOW (Statement of Work)**

Understand how to capture and define work activities, deliverables and timelines in a Statement of Work to ensure success.

### **Understanding Boilerplate Contract T's & C's—The Devil Is Really in the Details**

This session covers why simple, often overlooked standard terms can have significant impact if there are disputes days, weeks, or years after the contract is signed. Many times the business pushes procurement to move ahead and accept the T's and C's of a contract so the project can get started. Don't do it! Because when things go south the business is going to look back on procurement and legal to save the day, and those T's and C's are either going to save you from the Devil or make you the Devil.

### **Service Level Agreements — Less Is More**

Service Level Agreements (SLAs) define the service levels required to ensure high product performance, reliability and availability. Many SLAs are designed to be painstakingly comprehensive, providing every level of protection for your organization. However, often these all-inclusive SLAs are unmanageable. Learn how your organization can produce and provide simple, effective, and, most critical, manageable SLAs. This session will also include a question-and-answer discussion designed to educate attendees on specific SLA issues.

### **IT Hot Topics**

The changing landscape of IT provides its own set of challenges to the technology procurement professional. This discussion forum will examine the challenges presented by various types of licensing models and breakthroughs in technology. We'll review key components of terms and conditions and other elements that you should consider in your deals.



### **Managed Print Services: Cost Savings from Chaos**

This session is to help understand the processes associated with contracting for Managed Print Services. An experienced panel of procurement professionals who have recently been through the process will share the critical data points needed to ensure like for like competition among the vendors. They will also discuss considerations for technologies and potential vendors in the market place. There are great potential savings in this business area, but there are also many ways vendors can hide costs and grow margins at your expense.

### **Facilitated Networking Sessions**

You and your colleagues will determine the issues that are brought to the table. As a result, you'll get real-time answers to real problems by leveraging the experience of your fellow attendees. Benefit from their experience so you don't have to reinvent the wheel.

## FACULTY

**Donna Daigle**

*Principal  
DoubleD Coaching & Consulting*

**Mike Gonce**

*Caucus Vice Chair  
Global IT Procurement & Contracts Manager  
Eastman Chemical Company*

**Conrad Banks**

*Senior Manager  
Pfizer, Inc.*

**Elgin Ward**

*Senior Consultant  
ICN*

**Dr. William Cross**

*Chief Information Officer  
Seminole Electric Cooperative, Inc*

**Benjamin Kern**

*Partner  
McGuireWoods, LLP*

**Ravi Singh**

*Commodity Manager – IT Strategic Sourcing  
Intel Corporation*

**Terry Doumkos**

*Director of Strategic Sourcing  
Department of Administrative Services –  
State of Georgia*

**Jeff Kennelly, JD**

*Senior Director IT Contracting  
Ascension Health Information Services*

**Mark Dehnert**

*Contracts Manager  
Unisys Corporation*

**Stephen Covert**

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Highlights for Children*

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**Daniel M. Gora**

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**Randall Dean**

*President  
Randall Dean Consulting & Training*

**Kevin Green**

*Director, Global Technology and Marcomm Services  
Genworth Financial*

**Sarepta Ridgeway**

*Caucus Chair,  
Lead Sourcing Specialist,  
CenterPoint Energy*

**Tracy Barrett**

*IT Vendor Manager, Information Technology  
Symantec Corporation*

**Al Dunn**

*IT Procurement Manager  
YRC Enterprise Services, Inc.*

**Gary Albers**

*Technology Sourcing Leader  
Owens Corning*

**Kumar Kannan**

*Director of Sourcing  
Owens Corning*

**Atul Agnihotri**

*Leader, Sourcing M&A  
Owens Corning*

**Roy Schleiden**

*Director, Enterprise Strategic Sourcing  
H&R Block, Inc.*

**Mike Ushijima**

*IT Procurement Manager  
Pactiv Corporation*

**Steve Jeffery, CTPE**

*Senior Manager I.T./Telecomm Procurement  
KCI, Inc.*

**Deb Mogensen**

*Sr. IT Sourcing & Category Manager  
Best Buy Co., Inc*





# Testimonials

*"The sessions were well-organized and the facilitators were professional and very knowledgeable regarding the subject matter.*

*I was able to gain knowledge in the areas of software license agreements and contract negotiations, which were areas of interest for me."*

# Registration

# CHICAGO



## IT Procurement Summit CAUCUS

**Chicago**

**September 20–21, 2010**

**Three ways to register**

- Phone 407.740.5600
- Fax 407.740.0368
- Register Online Today at [www.caucusnet.com](http://www.caucusnet.com)

**Nonmembers: \$1,795**

**Caucus Members: \$1,495**

**\$100 Early Bird Discount  
if you register and pay by  
August 12, 2010**

**Hotel Information**

InterContinental Chicago  
505 N Michigan Ave • Chicago, IL 60611  
Hotel Phone 312- 944-4100  
Hotel Fax 312-944-1320

## Total Vendor Management

### Getting What You Pay For

**T**ired of worrying about your vendors' performance? Concerned about contractual disagreements and products/services that don't measure up to standards? This workshop will show you how to control your vendors and get what you pay for. You'll learn techniques to establish and meaningful working with your key vendors—discover how to leverage that improves vendor performance.



### Benefits

- Reduce Risk
- Gain Flexibility
- Resolve Problems Early
- Save Bottom-Line Dollars
- Improve Vendor Performance
- Gain Efficiencies
- Achieve Strategic Goals
- Obtain Competitive Advantages
- Understand and Control Spending
- Get What You Pay For

## SOFTWARE™

### Issues, Contracts & Negotiations

**I**n recent years, software deals have grown even more complicated and difficult to both understand and manage. This is where ICN steps in. We deliver the latest information you need to know about software issues, contracts and negotiations. This workshop is typically presented by at least one attorney and one procurement executive, both of whom have years of practical experience reviewing and negotiating software deals. As a result, you'll get valuable insights and tips you can put to use immediately. What you learn at this workshop translates directly into greater protection and more flexibility in every agreement you negotiate.

### Benefits

- Understand current market trends
- Learn negotiating tactics you can use
- Learn and understand remedies to use for noncompliance
- Avoid litigation
- Save your assets
- Learn keys to success in development contracts
- Obtain meaningful warranties and remedies

Complete Course Content Available at [DoBetterDeals.com](http://DoBetterDeals.com)

**Total Vendor Management**  
2 Days • \$1,495  
New York • Oct. 5–6, 2010

**Software**  
2 Days • \$1,495  
New York • Oct. 7–8, 2010

Caucus Members  
**Save \$100**

Today, negotiating has become a science that involves sophisticated systems, complex laws and interrelated business practices.

At ICN, we've perfected that science and made our knowledge accessible to you through a number of highly acclaimed workshops.

**Share our experience, powerful**

# IN NEW YORK

## NEGOTIATIONS

Power • Process • Principles

This course is great for anyone involved in negotiating anything—from trade agreements, labor settlements and acquisitions to mergers, real estate transactions and corporate/government procurement. Close large sales or improve any deal in which you need to protect your interests. You'll discover how to increase your negotiating power and learn principles that are used by experienced negotiators. Most importantly, you'll understand a process that allows you to accomplish your objectives and ensures your success.

### *Benefits*

- Avoid risk
- Save money
- Resolve disputes
- Close that big deal
- Get what you pay for
- Gain and retain power
- Learn strategies and tactics
- Prevent future headaches
- Get a better agreement
- Obtain your objectives

## SLA Lab™

Results-Based Contracting

Early in the acquisition process, effective negotiating teams must agree upon the concept of which contractual approach they will use to drive the deal. ICN's advanced training course **SLA Lab: Results-Based Contracting** helps you understand the difference between contracting for resources and contracting for results and shows you how to implement a "results deal". This "results versus resources" decision establishes which side of the bargaining table will bear the responsibility for the results you're expecting from the deal. In a "results deal," the vendor is responsible, while in a "resource deal," it's the customer.

### *Benefits*

- Get Specific Results
- Change Promises into Contractual Rights
- Ensure Vendor Compliance
- Get Meaningful Remedies
- Reduce Your Risk of Project Failure
- Save Money, Time, Aggravation and Future Headaches

Complete Course Content Available at [DoBetterDeals.com](http://DoBetterDeals.com)

### Negotiations

2 Days • \$1,495

New York • Oct. 12-13, 2010

### SLA Lab

2 Days • \$1,695

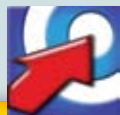
New York • Oct. 14-15, 2010

Phone 407-740-0700



E-mail [icn@dobetterdeals.com](mailto:icn@dobetterdeals.com)

Online [www.dobetterdeals.com](http://www.dobetterdeals.com)



At Your Site Seminars also available.

tools, and proven direction!

ICN™

# SEMINARS



## At Your Site

**Your Location**

**Your People**

**Your Needs**

### At Your Site Advantages

**Convenience**—You set the schedule for the training and location.

**Economy**—Travel budgets are not part of the picture. By bringing the training in-house, you save time, money and aggravation. No plane tickets, hotels or lost travel time.

**Productivity**—Employees who receive ongoing training are more productive and more loyal.

**Synergy**—On-site training provides a common ground for coworkers to stimulate ideas and discussions.

**Team building**—Teamwork is enhanced greatly through a shared learning experience.

**Customization**—The training provided can be tailored to your specific needs and environment.

**Uniformity**—Your personnel will get the same information at the same time, so they'll all be on the same page.



We'll train your people to do the best deals possible...and then manage those deals for maximum benefit. For over three decades, ICN's experience, powerful tools and proven methodology have helped clients Do Better Deals™.

We'll work with you to customize a training program that satisfies your organization's needs. You can select one or more of our seminars, or mix modules from any of our offerings. ICN's on-site training is tailored to your organization's distinct needs, timeframe and environment.

You can select information from any of ICN's seminars, products or methodologies...or we'll customize material to your requirements.

## The Association of Technology Acquisition Professionals

### Get

- Answers
- Insights
- Solutions

### Share

- Information
- Tools
- Experiences

### Discuss

- Vendors
- Deals
- Tactics



Caucus is the only association serving the specialized needs of technology acquisition professionals—the people responsible for negotiating and managing contracts with vendors of advanced technology products and services.

Members come from a variety of disciplines, including procurement, finance, legal, information technology and contract management. Membership gives them an invaluable professional edge—the Caucus Advantage.

As a member of Caucus, you have significant resources to enhance your capabilities, facilitate individual professional growth, gain industry knowledge, and advance the art and science of high tech procurement.

#### Membership allows you to:

- Do better and safer deals—impact the bottom line
- Expand your professional skills—increase your value
- Network with your peers
- Share information and experiences
- Discover vendor ploys and practices
- Learn who is doing the best and worst deals
- Keep up with pertinent legislative & regulatory issues
- Save time and money by accessing valuable documents—at no cost

## Become a member for only \$42 a month.

**Annual Membership Fees:** Individual \$495

Corporate \$2,195 {Includes five individual memberships.  
Each additional individual is only \$200.

**Join:** Phone 1.407.740.5600

E-mail [Info@CaucusNet.com](mailto:Info@CaucusNet.com)

Website [CaucusNet.com](http://CaucusNet.com)

Drawer 2970 Winter Park, FL 32790-2970

# IT Procurement Summit **CAUCUS**

## Chicago

Sept. 20–21, 2010

## SEMINARS

### Total Vendor Management

NYC • Oct. 5–6, 2010

### Software

NYC • Oct. 7–8, 2010

### Negotiations

NYC • Oct. 12–13, 2010

### SLA Lab

NYC • Oct. 14–15, 2010

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The Association of  
**CAUCUS**<sup>™</sup>  
Technology Acquisition Professionals

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Winter Park, FL 32790-2970  
USA

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## What People Are Saying

*In my role, this may be the best training opportunity I have come across.*

*This is the first conference I've been to that all sessions pertain to exactly what I do. Very pleased about content. I'll be back!*

*The networking opportunity is big!*

## Benefits

- Develop relationships with your peers
- Build professional confidence
- Get best practices
- Improve your negotiation techniques
- Gain leverage with your suppliers
- Reduce your risk
- Learn how to streamline processes
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- Earn continuing education credits