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**INFORMATION MANAGEMENT SOLUTIONS:
THE BUSINESS SIDE OF STORAGE
IN THE FINANCIAL SERVICES SECTOR**
EXECUTIVE SUMMIT

ALIGN IT AND CORPORATE BUSINESS STRATEGIES TO INCREASE REVENUES, IMPROVE PRODUCTIVITY AND REDUCE IT COSTS.

Storage Information Management: **February 19-20, 2003**
The Business side of Storage Crowne Plaza Times Square
 Storage Infrastructure Management: **New York, NY**
The Technology side of Storage
Regulatory Compliance Issues

LAST UPDATED 2/18/03

DAY ONE, WEDNESDAY, FEBRUARY 19, 2003

IN ASSOCIATION WITH

 **ROBERT FRANCES GROUP**
Business Advisors to IT Executives

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[Bookmark This Event](#)[Email This Page](#)**8:00 Registration and Continental Breakfast Sponsored By****8:45 CHAIRPERSON'S OPENING ADDRESS...WELCOMING REMARKS FROM INFORMATION MANAGEMENT NETWORK**Adrian J. Bowles, *Principal Research Fellow*, **ROBERT FRANCES GROUP****9:00 KEYNOTE ADDRESS: THE SNIA VISION OF STORAGE MANAGEMENT**

A brief introduction of the role of the Storage Networking Industry Association followed by detailed discussions of SNIA IT customer feedback, management standards and efforts, and the vision of Storage Management going forward. Mr. Krantz will introduce new and emerging Storage Management technologies, coupled with business applications and the vision of future applications.

KEYNOTE SPEAKER

Larry Krantz, *Chairman Emeritus*, **SNIA** and *Chairman*, *New Storage Management Forum*, *Senior Technologist*, **EMC**

Lawrence (Larry) Krantz has enjoyed several key roles within the Storage Networking Industry Association where he has been a contributing member since 1997. Mr. Krantz currently holds position of Chairman of the newly formed SNIA Storage Management Forum, leading the executive team on the highest priority and profile SNIA initiative.

In his last two years serving as Chairman of the Board of Directors, Mr. Krantz was responsible for the worldwide expansion of the SNIA, establishing Regional Forums in Europe and Japan. Mr. Krantz continues his international role establishing regional affiliates in China, Australia, and throughout the Pacific Rim. Mr. Krantz is currently an active member of the SNIA Board of Directors while enjoying his new role as Chairman Emeritus.

Mr. Krantz is also a Senior Technologist for EMC2 Corporation based in Hopkinton Massachusetts. As part of the EMC2 Corporate Technology Organization, Mr. Krantz is responsible for development of the company's long-term storage strategy, focusing on the development and advancement of Enterprise Storage Networks.

9:30 STRATEGIES FOR THE REGULATORY IMPACT OF STORAGE COMPLIANCE

Regulatory agencies are demanding more data be captured, reported and retained. More changes are in the works, as agencies such as the SEC, NASD, Bank of International Settlements and The Office of Homeland Security continue to draft compliance legislation and rules. Discussion topics will include: Basel II, USA Patriot ACT, HIPAA and other regulations that will create increasing demands for online and offline storage subsystems.

Moderator:Dr. Adrian Bowles, *Principal Research Fellow*, **ROBERT FRANCES GROUP** and *President of FI*SHARE***Panelists:**Christopher Diamond, *Managing Director*, **SECTOR, INC.**Mary Kirwan, *Senior Director, Business Development*, **SECURE NETWORK STORAGE (SNS), Division of KASTEN CHASE**John B. Butler, Jr., *Co-Founder*, **LIVEVAULT CORPORATION****10:30 Refreshment Break****11:00 DRIVING COST CONTAINMENT IN YOUR STORAGE ENVIRONMENT**

Costs are out of control around storage – multiple copies, backups, offsite and people. Much of the cost is driven

from inefficiency in process. With nothing definite except data growth, how are you going to drive down and contain costs in your storage environment going forward? This panel will examine current thoughts, trends and emerging technologies in the area of cost containment.

Moderator:

Richard Scannell, *Vice President of Strategy*, **GLASSHOUSE TECHNOLOGIES, INC.**

Panelists:

Chris A. Johnson, *Vice President, Storage Systems*, **DYNAMIC SOLUTIONS INTERNATIONAL**

Robert D'Amelio, *Vice President, Technology & Infrastructure*, **AURUM TECHNOLOGY**

Chris Hyrne, *Vice President of Marketing*, **INVIO SOFTWARE, INC.**

Mark Reid, *President and CTO*, **PROVISIONSOFT**

12:00 Luncheon Think Tank

1:30 DISASTER RECOVERY AND BUSINESS CONTINUITY PLANNING

Fiduciary responsibilities and regulatory constraints make it essential for financial institutions to be able to restore operations with maximum immediacy. In light of this, IT executives should position themselves and their enterprises to comply with these regulations as non-disruptively and inexpensively as possible. This discussion will look at business continuance and disaster recovery, with a focus on backup methodologies, data risk management issues, the technology costs of business continuity, and plans and implementation strategies.

Moderator:

Ronald E. R. Lovell, *Storage Practice Leader*, **GREENWICH TECHNOLOGY PARTNERS**

Panelists:

David Hudanish, *Partner*, **BROBECK, PHLEGER & HARRISON, LLP**

Chris Bernhardt, *Practice Manager for Business Continuance*, **EMC CORPORATION**

Andy Salo, *Director of Product Marketing*, **DECRU, INC.**

Yoram Novick, *CEO and Founder*, **TOPIO, INC.**

SW Worth, *Technical Marketing Manager*, **CROSSROADS SYSTEMS, INC.**

2:30 CONVERSATION BETWEEN PRACTITIONER AND INDUSTRY ANALYST: WHAT'S DRIVING THE STORAGE MARKET?

Business drivers from an investment perspective. Where is the market going? What's needed to move forward? Is it a 'real' business?

Panelists:

Andrew McCullough, *Research Analyst*, **CREDIT SUISSE FIRST BOSTON**

Evan Bauer, *Principal Research Fellow*, **ROBERT FRANCES GROUP**

3:30 Refreshment Break

CONCURRENT SESSIONS: CHOOSE "A" OR "B"

3:50 TRACK A: BUSINESS SOLUTIONS: DEFINING A STORAGE MANAGEMENT STRATEGY THAT REDUCES COSTS THROUGH STORAGE CONSOLIDATION

Requirements for data storage are growing at an unprecedented rate with uptime demands approaching 100%. In addition, IT budgets are squeezed, utilization of existing storage is poor, and the human resources and skill sets to do the job are not keeping pace with the demand. This session will examine, through consolidation, how you can achieve both cost savings and significant performance improvements throughout your storage infrastructure. Customer examples and best practices will be presented.

Introduction:

- Short background on why enterprises are looking at Storage Consolidation as a key solution for reducing costs and improving performance of storage
- Brief overview of key elements of Storage Consolidation
 - Architecture
 - Storage policy
 - Storage Management

Key Questions Panelists' Will Address:

- What are the biggest technology challenges?
 - Integrating different technologies
 - WAN-based consolidation
- What are the IT/storage management policy issues that need addressed?
- What are the key management issues in storage consolidation?
- What new products can address these issues and challenges?

Moderator:

Deborah Johnson, *President and CEO*, **INFINITY I/O**

Panelist:

Jeff Helthall, *Vice President, Sales and Marketing*, **TACIT NETWORKS, INC.**

Mark Reid, *President and CTO*, **PROVISIONSOFT**
Hermant Kurande, *CTO*, **STORABILITY SOFTWARE**

3:50 TRACK B: TECHNOLOGY SOLUTIONS: INTELLIGENT STORAGE MANAGEMENT: LUXURY OR NECESSITY?

This panel will discuss Intelligent Storage Management and the various architectures with which it is being implemented. Do we need ISM? Must it be implemented? Or is it just today's buzzword? Panelists will answer these questions and discuss the pros and cons of the various techniques being employed by the IT vendors and users to get the biggest bang out of their storage management buck.

Moderator:

Edward M. Broderick, *Principal Analyst*, **ROBERT FRANCES GROUP**

Panelists:

Ash Ashutosh, *Executive Vice President and CTO*, **APPIQ**
Mark Jedraszek, *Solutions Architect*, **STORAGE NETWORKING TECHNOLOGIES INC.**
Mike Koclanes, *Co-Founder and CTO*, **CREEKPATH SYSTEMS**
David Scott, *CEO*, **3PAR**

4:40 TRACK A: BUSINESS SOLUTIONS: WHERE THE INDUSTRY IS HEADING: MOVING INTELLIGENCE ONTO THE NETWORK

Demand for online financial information and transactions is growing rapidly. The unpredictable nature of e-business applications in the financial services sector demands new and strong functionality. Prepare for a paradigm shift. A network is no longer a simple message-carrying service. It is a generalized platform that interconnects computing and storage resources, embedding processing power and host software intelligence in order to do the job.

Moderator:

Dan Tanner, *Director, Storage Research*, **ABERDEEN GROUP**

Panelists:

Yoram Novick, *CEO and Founder*, **TOPIO, INC.**
Victor Walker, *President*, **CREEKPATH SYSTEMS**
Ash Ashutosh, *Executive Vice President and CTO*, **AppIQ**

4:40 TRACK B: TECHNOLOGY SOLUTIONS: PROTECTING DISTRIBUTED AND NETWORKED STORAGE INFRASTRUCTURES

In order to embrace new storage technologies and strategies to satisfy demand for greater storage capacity, application availability and business continuity, so too must security evolve. Explore how a storage-centric, defense in-depth strategy can extend, enable and secure distributed / networked primary and secondary storage infrastructures. This panel will discuss the exposures, threats, liabilities, current and emerging standards, vendor offerings, best practices and alternatives.

Moderator:

Scott Gordon, *Vice President, Marketing*, **NEOSCALE SYSTEMS, INC.**

Panelists:

Robert Galletta, *Director, Information Technology*, **FEDERAL RESERVE BANK OF NEW YORK**
Steve Licata, *Practice Manager, Storage Solutions*, **SATURN BUSINESS SYSTEMS**
Barry Cohen, *CTO*, **PROGRESSIVE STRATEGIES**

5:30 Cocktail Reception

DAY TWO, THURSDAY, FEBRUARY 20, 2003

8:00 Continental Breakfast

8:30 CHAIRPERSON'S OPENING REMARKS

Edward M. Broderick, *Principal Analyst*, **ROBERT FRANCES GROUP**

8:45 KEYNOTE ADDRESS: MEETING THE CHALLENGES OF CORPORATE POLICY AND REGULATORY REQUIREMENTS FOR INFORMATION RETENTION AND USE

In Financial organizations across the globe ensuring information's retention, authenticity and quick retrieval are requirements that are at odds with each other. Assure content authenticity and you give up speed of information access. Have speed of access and you lose assured retention & content authenticity. This session will discuss a new category of information technology, Content Addressed Storage, that is helping Financial organizations simultaneously meet all three user demands. Two case studies will be presented, one in a regulated environment and one meeting internal business policy requirements. The discussion will focus on how these organizations are using Content

Addressed Storage to provide:

- higher levels of customer service to both their internal and external customers
- using online access to craft new service offerings for incremental revenue gain

KEYNOTE SPEAKER



Sean Lanagan, *Director of Emerging Technologies*, **EMC CORPORATION**

Sean holds an undergraduate degree from Princeton University and an MBA from Harvard Business School. Prior to joining EMC, Sean was with Morgan Stanley's Technology Group and a Senior Product Marketing Manager at Documentum, which is a leader in Enterprise Content Management solutions.

9:15 ELECTRONIC RECORDS RETENTION POLICY: A STORAGE CHALLENGE

Failure to comply with SEC rulings has already cost the Financial community over 1.4 billion dollars in fines. The rules governing the retention of electronic records are so "fuzzy" that Financial companies are struggling to determine the extent to which they need to capture, index and retain these inter and intra-company communications. Discussion topics will include, regulatory rulings, email, IM, XML documents, media options and solutions.

Moderator:

Cal Braunstein, *CEO and Executive Director of Research*, **THE ROBERT FRANCES GROUP**

Panelists:

Laurence J. Wolf, *Senior Manager, Enterprise Risk Services*, **DELOITTE & TOUCHE**

D. Scott Robertson, *Managing Director*, **SECTOR, INC.**

Scott Kursman, *Lawyer*, **SIA**

Lisa Cash, *President and CEO*, **PRINCETON SOFTECH**

Luciana Duranti, *Chair and Professor, Master of Archival Studies School of Library, Archival and Information Studies*, **UNIVERSITY OF BRITISH COLUMBIA**

10:15 Refreshment Break

10:30 LOOKING AHEAD: SOUND PRACTICES THAT WILL STRENGTHEN THE RESILIENCY OF THE U.S. FINANCIAL SYSTEM

Panelists:

Brian Ignomirello, *Global Director of Storage Engineering*, **GIANTLOOP**

Peter J. Chepucavage, *Attorney Fellow*, **SECURITIES AND EXCHANGE COMMISSION**

11:30 Summit Concludes

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