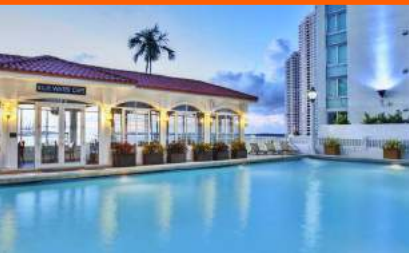




TDX 2018 Client Summit

MIAMI, FL / MAY 9-11, 2018



Agenda at a Glance

Welcome to the 2018 TeamDynamix Client Summit!

Each year, we look forward to the TDX Client Summit. Why? We love the opportunity to interact with our clients face to face. Collaborating with you is what makes TDX successful – simply said, our customers are the reason why TDX continues to grow.

The sessions for this year are intended to demonstrate how you can get the most out of your investment in TDX. They are from your peers, and by your peers, in the Higher Education space. To simplify the agenda, we have broken it out into three tracks: PPM, ITSM, and Special Topics. All sessions and evening events are open to all attendees, with the exception of Tuesday’s exclusive CIO track (by invitation only).

Don’t forget to meet our sponsors as well – they would love to partner with you to help your institution. If you need anything, ask any member of the TDX team. We hope that this Client Summit is your best one yet!

Sincerely,
The TDX Team

#TDXSummit18

Wednesday, May 9th

Registration	11:00 AM – 2:00 PM
Keynote Speaker	2:00 PM – 2:45 PM
TDX Strategic Vision: Information is Power	2:45 PM – 4:00 PM
Refreshment Break	4:00 PM – 4:30 PM
Working Smarter: CIO Lightning Talks	4:30 PM – 5:30 PM
Networking Reception	5:30 PM – 7:30 PM

Thursday, May 10th

Breakfast	7:30 AM – 8:30 AM
Breakout Sessions	8:30 AM – 9:30 AM
Breakout Sessions	9:30 AM – 10:30 AM
Refreshment Break	10:30 AM – 11:00 AM
TDX Solution Update	11:00 AM – 12:30 PM
Lunch	12:30 PM – 2:00 PM
Breakout Sessions	2:00 PM – 3:00 PM
Breakout Sessions	3:00 PM – 4:00 PM
Refreshment Break	4:00 PM – 4:15 PM
Breakout Sessions	4:15 PM – 5:15 PM
Location TBD	7:00 PM – 10:00 PM

Friday, May 11th

Breakfast	7:30 AM – 8:30 AM
Breakout Sessions	8:30 AM – 9:30 AM
Breakout Sessions	9:30 AM – 10:30 AM
Refreshment Break	10:30 AM – 11:00 AM
Breakout Sessions	11:00 AM – 12:00 PM
Lunch	12:00 PM – 2:00 PM
Breakout Sessions	2:00 PM – 3:00 PM
Conference Wrap-Up	3:00 PM – 3:30 PM



Agenda

WEDNESDAY MAY 9	<i>All Sessions at the Intercontinental Hotel</i>		
	Pre-Conference Workshops <i>Pre-Registration Required</i>		
10:30 - 12:30	Resource Management & Capacity Planning (ITSM/PPM)	Advanced Dashboards & Reporting	Out-Of-The-Box Integrations with 3rd Party Tools
12:00 - 12:30	Box Lunch for Workshops & Build a Bike Team Building (requires pre-registration)		
12:30 - 1:45	<div style="display: flex; align-items: center;">  <div style="text-align: center;"> <p>Don't Miss the Team Building Session <i>Build a Bike for Charity Event</i></p> <p>IMPACT4GOOD Connecting Corporations & Communities <i>*Requires pre-registration, includes boxed lunch</i></p> </div>  </div>		
2:00 - 5:30	General Session		
2:00 - 2:45	Key Note Speaker Keren Elazari, Cyber Security Expert		
2:45 - 4:00	TDX Strategic Vision Information is Power		
4:00 - 4:30	Networking Break		
4:30 - 5:30	Working Smarter - CIO Panel		
5:30 - 7:30	Welcome Reception - Intercontinental Hotel, 5th Floor Pool Deck		

THURSDAY MAY 10	Brickel	Sevilla	Trade	Junior	Isle
	PPM	Core ITSM	ESM/Special Topics	ESM/Special Topics	CIO Track - Invitation Only
7:30	Breakfast - Bayfront Ballroom				
8:30 - 9:30	PPM Across Enterprise Northern Essex Community College	From Chaos to Control: How Effective Asset Management Transformed SUNY New Paltz SUNY New Paltz	Shared Services & Consolidation: Getting Your Departments on the Same Page University of New Hampshire		Enterprise Analytics and Dashboards CIO Panel
9:30 - 10:30	Tell Your Story: How Time Tracking in Your PMO Can Demonstrate Your Value Colorado State University	Technician-less Service Requests University of Nevada - Reno	Expanding Marketing Support Capabilities with TDX Johnson County Community College	Continuous Improvement from Implementation to Methodologies Central Michigan University	Supporting ESM Across the Organization: How to Consolidate & Drive Adoption
10:30 - 11:00	Break				
11:00 - 12:30	TDX Solution Update				
12:30 - 2:00	Lunch				
2:00 - 3:00	How Project Intake and Governance Expand Functionality Bowling Green State University	The Advantages of Student Run Service Desks Manhattan College & University of North Carolina, Wilmington	Tying Requests into Creative Services Michigan State University	ITSM Outside of the Toolbox Boston College	Looking Ahead to 2020 TDX Strategy Session
3:00 - 3:15	Break				
3:15 - 4:15	Service Management Open Forum TDX Product Strategy Team		Keeping TDX Fresh & Fully Utilized Wichita State University		Creating a PMO Discussion
4:15 - 5:30	PPM Methodology & Best Practices Panel TDX, Boston College, University of Toronto	Effective Roll-Outs Make All the Difference - Panel Palm Beach State College, Bellevue College, University of Oregon	Leveraging Process Improvement Analysis Across the Enterprise Austin Peay State University		Governance & Culture: How to Keep Up the Momentum
7:00 - 10:00	Customer Appreciation Networking Dinner (location to be announced)				

*Note: additional sessions will be added into the blank spots.



Agenda

FRIDAY MAY 11	Brickel	Sevilla	Trade	Junior
	PPM	Core ITSM	ESM/Special Topics	ESM/Special Topics
8:00 - 9:00 AM	Breakfast - Bayfront Ballroom			
9:00 - 10:00	PPM Open Forum		Student Affairs to Marketing: How TDX Works Across Campus Tallahassee Community College	
10:00 - 11:00	The Impacts of Time Tracking on Resource Capacity North Carolina Central University	Technology Governance with a Purpose Johnson County Community College		Service Management and Knowledge Management Best Practices University of Cincinnati
11:00 - 11:30	Break			
11:30 - 12:45	PPM Best Practices TDX		Advanced Knowledge Management and Knowledge Centered Support Western Kentucky University	
12:45 - 2:00	Lunch			
2:00 - 3:00	Service Acceptance Criteria in PPM Miami University	Taking Your Service Catalog to the Next Level – Panel University of North Carolina – Wilmington, Dominican University	Building Local User Groups The Ohio State University	
3:00 - 3:30	Summit Wrap-Up			

Key Note Speaker Introduction

Keren Elazari

CYBER SECURITY EXPERT, PUBLIC SPEAKER AND
INDUSTRY ANALYST WITH GIGAOM RESEARCH

Keren Elazari is a security researcher, author and strategic analyst. Her independent research work, analysis and writing about emerging security issues has been featured by TED, Scientific American, WIRED, VICE and more. Keren holds an MA in Security Studies from Tel Aviv University where she is a senior researcher at the Balvatnik Interdisciplinary Cyber Research Center, focusing on the complex relationships between hackers, industry and government. In 2014, Keren became the first Israeli woman to speak at the annual TED conference. Keren's TED talk about the role of hackers has been viewed by millions, translated to 27 languages and selected for TED's list of 'Most Powerful Ideas'. She recently co-authored a book called "Women in Tech", published by Penguin USA in March 2016.



BIO

Keren Elazari is an internationally acclaimed security researcher, author and strategic analyst, with years of experience in the international cyber security industry. Since 2000, Keren has worked with leading Israeli security firms, government organizations, Big 4 firms, advised Fortune 500 and groundbreaking startup companies, helping global organizations navigate complex cyber security issues. Elazari's independent research work and writing about emerging security issues has been featured by Scientific American, WIRED, and she is a frequent speaker and commentator in international events and in the media. Ms. Elazari holds an MA in Security Studies from the prestigious Security & Technology workshop at Tel Aviv University – where she is a senior researcher with the Balvatnik Interdisciplinary Cyber Research Center, focusing on the complex relationships between hackers, industry and government. Elazari is also a Security Fellow with Singularity University, a private future-oriented think tank.

In 2014, Keren became the first Israeli woman to speak at the annual TED conference. Keren's TED talk has been viewed by millions online, translated to 27 languages and selected for TED's list of 'Most Powerful Ideas in 2014' and Inc.com's list of 'Top TED Talks of 2014'. Her collaborative book with 8 leading women, Women in Tech, was published by Penguin USA in March 2016 and became an Amazon bestseller.

Breakout Sessions

8:30 AM

PPM Across Enterprise

SPEAKER: Theresa Mullins – Northern Essex Community College

At Northern Essex Community College we have TDX-PPM, and as the College's only dedicated project manager Theresa has been working with other departments across the College to promote the Project Management Mindset; working with folks who may not be project managers to adopt project management practices to help them better achieve their goals.

From Chaos to Control: How Effective Asset Management Transformed SUNY New Paltz

SPEAKER: Sam Fischer - SUNY New Paltz

Take an asset management journey with SUNY New Paltz! Learn how five departments worked together to iron out policies and manage over 1700 active assets deployed all over campus, and another 300 inventory assets. Reporting is widely used and extremely useful in tracking the parts of a project that can easily fall through the cracks.

Shared Services & Consolidation: Getting Your Departments on the Same Page

SPEAKER: University of New Hampshire

9:30

Tell Your Story: How Time Tracking in Your PMO Can Demonstrate Your Value

SPEAKERS: Josh Clark and Rami Jalal – Colorado State University

Colorado State University uses time tracking to improve resource and project management. CSU aims for better planning to develop a story for management and C level stakeholders. This session will cover: Adoption of time tracking, Resource Management, workspaces to compare operational work to project work, and lesson's learned.

Technician-Less Service Requests

SPEAKER: Ben Gallagher – University of Nevada Reno

Find out how University of Nevada Reno utilizes workflow, web services, and automation to produce "technician-less" service requests. Software purchases from the point of purchase to installation on the client's computer never touch a human. This is beneficial for those understaffed organizations that feel under pressure to field every single service request that comes in.

Expanding Marketing Support Capabilities with TDX

SPEAKER: Deanna Belshe – Johnson County Community College

Listen in as Deanna Belshe shares how Johnson County Community College fully embraced TeamDynamix to support requests from the campus community for marketing and promotion of programs and events. Discussion will include how they prepared and planned for implementation, adoption, rollout and what they learned to support additional use across campus.

Continuous Improvement from Implementation to Methodologies

SPEAKERS: Eric Whitmore and Darcie Wilson – Central Michigan University

Learn how Central Michigan University implemented TeamDynamix with Time Tracking alongside their implementation of a Project Management Office for the University. Find out how they approached the overall implementation, portfolio planning & prioritization (using scorecard), review & approval processes, and project management processes, including resource planning, waterfall and agile methodologies, and continuous improvement.

11:00PM

TDX Solution Update

2:00PM

How Project Intake and Governance Expand Functionality

SPEAKERS: Adam Petrea and Phylis Short - Bowling Green State University

At BGSU, the Analyst team has created a series of dashboards and analytics for different levels within the organization to monitor and track progress against projects. Learn about their processes while viewing dashboards, reporting, and analytics. They have expanded on the portfolio/project functionality to give 4 layers of depth.

The Advantages of Student Run Service Desks - Panel

SPEAKERS: Richard Musal and Greg Quaglieni – Manhattan College

Jonathan Graves – University of North Carolina - Wilmington

Find out how the Manhattan College developed a Student Employee Hierarchy to achieve their goal of a 90% student run service desk. The University of North Carolina – Wilmington will share best practices for engagement opportunities with student interns and how students can be involved at every step of the service development process.

Tying Requests into Creative Services

SPEAKERS: Lee Gullett and Larry Farmer – Michigan State University

Michigan State University shares how they are tracking tech tickets, project and marketing requests. Learn best practices on work flows, automated reports for specific data, automated tasks, integrating a creative brief of required questions at the point of request, allowing specific customers to view certain types of requests, and recording labor time and printing costs.

ITSM Outside of the Toolbox

SPEAKER: Jeri Schefts – Boston College

ITSM begins outside the tool, with identifying where you are (Maturity Assessment). Join Boston College to learn how they have built a successful ITSM strategy including: How to define what ITSM means at your university, incorporating ITIL – focused on request, problem & change, your ITSM Roadmap, and bringing in the other non-ITS departments.

3:15

Keeping TDX Fresh & Fully Utilized

Moderated by TeamDynamix

SPEAKERS: Warren Glore and Anita Barrett – Wichita State University

Wichita State has talked to several other institutions who have shared that they have left some aspects of TDX unused. After a couple of years, they had to go back and re-deploy that aspect of TDX. WSU would like to explore ways to keep TDX fresh and best practices to avoid re-deployment.

4:15

PPM Methodology & Best Practices Panel

SPEAKERS: Denis Walsh – Boston College

Rajiv Kaushik – University of Toronto

Join University of Toronto to learn about their portfolio planning blueprints and future growth plans for ITS PMO and what role TDX will play in these developments. Boston College will share their portfolio planning best practices around submission, prioritization, approval process, resource allocation and portfolio reporting.

Effective Roll-Outs Make All the Difference – Panel

SPEAKERS: Kenneth Libutti and Edith Robinson-Johnson – Palm Beach State College

Jamie Osbourne and Dustin Thomas – Bellevue College

Kelsey Lunsman, Michelle Brown and Ryan Stasel – University of Oregon

Join Palm Beach State, Bellevue College and University Oregon in this group panel discussion. Each institution will be sharing their unique roll-out stories and how they are implementing TeamDynamix across their campuses today. Some topics include: ESM, SLA's, organizational change management, enterprise resources, email, processes and strategies.

Leveraging Process Improvement Analysis Across the Enterprise

SPEAKERS: Austin Siders and Jerad Sneed - Austin Peay State University

Join Austin Peay State University as they share strategies around "PIA" - Process Improvement Analysis. The team will share best practices for leveraging TDX to facilitate "PIA" through the service catalog, manage the life-cycle in the Project Management module, as well as discuss workflow creation used by departments outside of OIT such as Human Resources.



FRIDAY

9:00

PPM Open Forum

Student Affairs to Marketing: How TDX Works Across Campus

Speaker: Tallahassee Community College

Learn how TDX can be used across the campus. From IT to HR to Student Affairs, TDX is being implemented to help drive efficiencies and improve processes.

10:00

The Impacts of Time Tracking on Resource Capacity

SPEAKERS: Jennifer Jones and Tamisha Waden – North Carolina Central University

Walk on a time tracking journey with the NCCU Web Services team where they are using resource management, time types and capacity planning for tickets and projects. Realizing that not all things are a ticket or a project, a workspace was also created for other task that may arise.

Technology Governance with a Purpose

SPEAKERS: Tom Pagano and Sandra Warner - Johnson County Community College

While technology governance can many times focus in on project governance, we believe by the time the project request has been submitted, it's too late. We will share our journey about taking a technology governance structure from invisible to easily understood by weaving it through existing processes and aligning it with the strategic plan.

Service Management and Knowledge Management Best Practices

SPEAKERS: James Saunders – University of Cincinnati

The University of Cincinnati will share their case study around IT Service Management and Knowledge Management. The journey and best practices will further be shared around the adoption of TeamDynamix as our IT Service Management tool set.

11:30

TDX – PPM Best Practices

Advanced Knowledge Management and Knowledge Centered Support

SPEAKERS: Kaliegh Belda – Western Kentucky University

Patrick Lisk – Bowling Green State University

After countless articles, meetings, style guide revisions, sweat, and tears you have a Knowledge Base. You may be asking yourself, “now what?”. “Why stop now”? It can be leveraged to improve customer experience, house information outside your core service areas, empower your employees, and most importantly, make your IT life easier.

2:00

Service Acceptance Criteria in PPM

SPEAKERS: Jeffrey Toaddy – Miami University

Learn how Miami University is implementing the ITIL concept of Service Acceptance Criteria; a list of the things that need to occur for a new or heavily-changed service to be considered “live” and for the project to close. These include technical items, communications objectives, training outcomes, documentation, schedules, data migration, and many other areas.

Taking Your Service Catalog to the Next Level – Panel

SPEAKERS: Kara Farmer and Danielle Ferrell – University of North Carolina - Wilmington

Adam Smeets – Dominican University

Are you interested in taking your service catalog to the next level? UNC -Wilmington and Dominican University are prepared to share their innovative techniques and best practices to help other universities embrace and deliver IT Service Management concepts through user interface design, reviewing current trends and higher education practices that you can implement for success!

Creating a Local User Group

SPEAKER: Caitlin Baer – The Ohio State University

Join Caitlin as she shares how the Ohio User Group was created. Shared best practices will include: How to get in touch with the right people, coming up with a good structure, delivering quality content, picking your discussion leaders, ensuring participation in discussion, and getting feedback and figuring out how to improve future sessions.



We Look Forward to
Seeing You in Miami!

