

Toolkit

The IT Peer Community. No Vendors. Ever.



IT GOVERNANCE & COMPLIANCE

These NOREX Member-contributed documents include topics such as confidentiality, data classification, plans, policies, charters, PCI, privacy, records management, risk assessment, and staffing. | TK015

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**TO REQUEST A DOCUMENT FROM THIS TOOLKIT,
NOTE THE TITLE / NUMBER AND ADD THEM TO THE
COMMENTS AREA ON THE REQUEST FORM [HERE](#).**

Confidentiality

DIGITAL INFORMATION TRANSMISSION This policy details the standard approach to sending either public, confidential, or sealed digital information. 5 Pages (20-605)

ENCRYPTION STANDARD This policy provides guidance and establishes a baseline for the use of encryption algorithms to protect information resources that contain, process, or transmit confidential and/or sensitive information (PII, PHI, PCI, etc.). 2 Pages (20-602)

PROVIDER CONFIDENTIALITY & SECURITY AGREEMENT This agreement applies to any provider party who is on site or who requires access to the company network. 2 Pages (20-539)

GOVERNING SYSTEMS ACCESS This policy provides a plan for the oversight of access to company information systems, media, hardware/software, Internet, and network systems. 3 Pages (20-288)

CONTRACTOR DATA INTEGRITY / CONFIDENTIALITY This is an agreement template between an organization and services contractor. 1 Page (20-087)

DATA SHARING AGREEMENT The following data sharing agreement template is HIPAA compliant. 3 Pages (20-086)

CONFIDENTIALITY AGREEMENT This agreement template outlines the intent of both parties in regard to the protection of information. 2 Pages (20-084)

ACCEPTABLE USE / CONFIDENTIALITY This agreement describes the standard policy of the use of company Information Technology resources and data contained therein. 5 Pages (20-043)

Data Classification

DATA STEWARDSHIP RACI MATRIX This matrix provides a layout for the Responsible, Accountable, Consulted, Informed method of outlining components of data stewardship duties. 1 Page (20-1265)

IDENTITY PROTECTION POLICY This document provides regulations about Personal Identifying Information (PII), including what may be shared and what must remain confidential. 7 Pages (20-647)

DATA CLASSIFICATION & PROTECTION STANDARDS This matrix lists several types of records, what they consist of, and how they must be handled, listing classifications of Sensitive, Confidential, Privileged, and Vital. 26 Pages (20-594)

INFORMATION CLASSIFICATION POLICY Here is a system for classifying information resources according to the risks associated with storage, processing, transmission, and destruction. 5 Pages (20-531)

DATA CLASSIFICATION WORKSHEET Information class, type, systems, availability, integrity, and confidentiality level are examples of these data classification tools. 4 Pages (20-530)

SECURITY CONTRACT LANGUAGE The following document describes language frequently used in the development of security contracts. Topics include encryption, authentication, compliance, auditing, personal data, and requirements. 4 Pages (20-508)

DATA CLASSIFICATION PROJECT This project ensures conformance with the information resources management program and that information resources are adequately protected. It also identifies the business owner responsible for the identification and classification of information. 13 Pages (20-454)

DATA CLASSIFICATION POLICY This state policy provides a data classification methodology to state agencies for understanding and managing the confidentiality & criticality level of data & information systems. 9 Pages (20-453)

INFORMATION SECURITY CLASSIFICATION. Information at the company will be appropriately protected based on its value, confidentiality, sensitivity, and the risk of loss or compromise. This document helps with information classification. 7 Pages (20-158)

GDPR

GDPR PLAN This plan details EU General Data Protection Regulation procedures including business cards, right of access, data retention, and data processing. 3 Pages (20-459)

GDPR OVERVIEW All the basic information describing the European General Data Protection Regulation (GDPR) is provided in this presentation. 12 Pages (50-277)

Governance Plans, Policies & Charters

GOVERNANCE, RISK MANAGEMENT, AND COMPLIANCE These slides demonstrate governance for executives and security, showing how the environment is controlled. 10 Pages (20-1224)

SHAREPOINT GOVERNANCE POLICY This policy defines requirements, processes, roles, and responsibilities for SharePoint environment development and administration. 5 Pages (20-1203)

IT GOVERNANCE POLICY This policy establishes the process for prioritization, requirements definition, user participation, and rollout for development and implementation of major and minor projects. 4 Pages (20-1067)

eGOVERNMENT STRATEGY This strategy template outlines the sustainable development of organizational capability and the implementation of technology. 11 Pages (20-987)

STRATEGIC PLAN OUTLINE These slides provide a template for creating a strategic plan of initiatives for 2021 and beyond. 8 Pages (20-982)

IT GOVERNANCE GROUP This presentation offers information on creating a governance framework promoting transparency, clarity, and consistency. 19 Pages (20-811)

DATA GOVERNANCE POLICY This policy applies to all data, processes, and/or standards used within business units such as Human Resources, Sales, Operations, Purchasing, etc. (See also 20-707 & 20-709). 11 Pages (20-708)

GOVERNANCE PROJECT SCORE SHEET A template for tracking and outlining the expected impact, performance results, compliance, and other aspects of a proposed project. 2 Pages (20-554)

GOVERNANCE INFORMATIONAL BRIEF This template provides a format for creating your own executive leadership team governance brief. 2 Pages (20-552)

ADA COMPLIANCE & ACCOMMODATIONS The Americans with Disabilities Act (ADA) provides equal access & protection for persons with disabilities. Policy detail for the workplace is provided here. 2 Pages (20-522)

INFORMATION GOVERNANCE CERTIFICATION REQUIREMENTS The intent of this questionnaire is to assist procurement with the solicitation of vendor responses to the information governance policy. Elements included are HIPAA privacy, security, and records management compliance. 14 Pages (20-363)

TECHNOLOGY STEERING TEAM CHARTER A partnership between Information Technology and business leadership, the Technology Steering Team (TST) represents a critical component of the overall technology governance process. 7 Pages (20-204)

SHAREPOINT GOVERNANCE GUIDE A comprehensive governance plan can benefit information systems and the organizations it services. 95 Pages (20-117)

SHAREPOINT GOVERNANCE MODEL The model is a comprehensive document identifying lines of ownership for business & technical teams, defining areas of responsibility and establishing appropriate usage of the SharePoint environments. 24 Pages (20-109)

SYSTEMS GOVERNANCE CHARTER The Systems Governance Committee serves two roles, IT Governance and Project Portfolio Oversight. 4 Pages (20-083)

DATA GOVERNANCE PROGRAM CHARTER This data governance structure provides requirements and guidelines for data management, processes, ownership, data types, classification and retention of data. 13 Pages (50-343)

DATA MANAGEMENT POLICY This policy provides requirements and guidelines for data management, outlining the protection protocol necessary to ensure data remains safe and protected. 4 Pages (50-342)

ACTIVE DIRECTORY GOVERNANCE POLICY This plan documents and governs the implementation of business rules & policies for the use of Active Directory, all interacting systems, roles, responsibilities, and methods of enforcement. 31 Pages (50-299)

DATA GOVERNANCE FRAMEWORK This document describes how a sound data governance program includes a governing committee, a defined set of procedures, and a plan to execute those procedures. 4 Pages (50-289)

ENTERPRISE DATA GOVERNANCE This journey into Enterprise Data Governance as seen by an experienced NOREX member gives insight into resources and directives. 9 Pages (50-249)

SOFTWARE GOVERNANCE BOARD This document helps record the duties and members of the board charged with governance of software maintenance. 1 Page (50-222)

Gramm-Leach-Bliley Act

GRAMM-LEACH-BLILEY ACT SECURITY PROGRAM This describes safeguards implemented to protect covered data and information in compliance with the FTC's Safeguards Rule of the Gramm-Leach-Bliley Act (GLBA). 4 Pages (20-764)

REPORT REQUIREMENTS SPECIFICATION TYPE 2 This template provides an overview of business needs, data sources, report filters, parameters, and formatting. 5 Pages (20-622)

PCI

MOBILE DEVICE MANAGEMENT POLICY This policy establishes the specific standards, guidelines, and procedures to manage the issuance, operation, and security of mobile devices and services (both company-issued and BYOD), to access company computing resources. 19 Pages (20-378)

HOSPITALITY LOSS PREVENTION This guide describes how the hospitality industry might handle loss prevention issues with hard keys, guest rooms, and guest property. 5 Pages (20-287)

AMENITY & SERVICES PAYMENT PROCEDURES The hotel industry is linked to several others, such as gift shops, spas, and athletic clubs. The following are procedures for accepting payment for these types of services. 14 Pages (20-286)

HOSPITALITY PAYMENT PROCEDURES In a hotel/motel industry, the following procedures are taken when accepting a credit card as payment. 6 Pages (20-285)

PCI SERVICE PROVIDERS The roles and responsibilities related to service providers are outlined in this PCI compliance document. 6 Pages (20-284)

PCI ROLES & RESPONSIBILITIES This document identifies and explains the roles and responsibilities for various Company positions in regard to PCI compliance. 10 Pages (20-283)

PCI REQUIREMENTS KEY Payment Card Industry (PCI) requirements regarding security, development, and firewall/router configurations are outlined in this key. 19 Pages (20-281)

INCIDENT RESPONSE POLICY This document outlines the credit card security incident response policy. 3 Pages (20-280)

CREDIT CARD SECURITY INCIDENT RESPONSE PLAN The Incident Response Team, comprised of the Controller, the IT Manager, the Facilities Director, the Loss Prevention Supervisor, and the Senior Systems Administrator have established specific guidelines for safeguarding cardholder information. 12 Pages (20-279)

Privacy

HIPAA AND SOCIAL MEDIA STANDARDS These standards provide a guideline for reducing the risk of privacy violations related to social media. 1 Page (20-1238)

PRIVACY POLICY The following website privacy policy explains what information is collected, how it is used, and with whom it is shared. 7 Pages (20-954)

INFORMATION PRIVACY AND SECURITY REQUIREMENTS Access to sensitive or regulated information is granted to third parties according to the following agreement. 7 Pages (20-739)

DATA PRIVACY POLICY This Privacy Statement describes protection of personally identifiable information in conjunction with data privacy legislation. 6 Pages (20-460)

HIPAA PROTECTION CHEAT SHEET This poster gives an at-a-glance reference for the protection and disposal of Protected Health Information (PHI). 1 Page (20-311)

Records Management

RECORDS RETENTION AND DISPOSITION This policy is to ensure that all records, regardless of media, are managed throughout their entire lifecycle including final disposition. 7 Pages (20-749)

RECORDS MANAGEMENT STANDARD This standard provides direction regarding the retention and destruction of records, as also explained in related documents 20-707 and 20-708. 27 Pages (20-709)

ELECTRONIC RECORDS RETENTION This policy advances the best practices in capturing, managing, and retaining electronic records. 6 Pages (20-642)

RECORDS MANAGEMENT POLICY This policy establishes the components and responsibilities of records management programs along with staff functions necessary to implement them. 2 Pages (20-640)

VITAL RECORDS PRICING This document is an example of how to record cost & pricing for various vital records systems and filing. 1 Page (20-607)

RFP: RECORDS MANAGEMENT SYSTEM This requests proposals for qualified contractors to provide a Records Management System to replace several existing systems. 217 Pages (20-164)

RFI: RECORDS MANAGEMENT SYSTEM A department is seeking information from vendors that can provide an operationally proven web-based Commercial Off-The-Shelf (COTS) software law enforcement application framework to replace, among other functions, internally developed Records Management System. 32 Pages (20-163)

RECORDS MANAGEMENT POLICY This document describes protection and preservation of records and security of confidential documents. 30 Pages (10-1697)

RECORD RETENTION This provides an example of a record protection and retention schedule by function, and assigns levels of confidentiality. 20 Pages (10-1696)

Risk Assessment

VENDOR SECURITY QUESTIONNAIRE Issues such as compliance, risk assessment, incident management, and requirements are itemized in this vendor survey. 3 Pages (20-887)

AUDIT CONTROLS POLICY This policy defines the audit controls of the security management process for health information technology resources. 2 Pages (20-591)

RFI: INFORMATION SECURITY RISK ASSESSMENT Requested here is a privacy and security risk assessment pursuant to the Health Insurance and Portability Accountability Act (HIPAA). 18 Pages (20-573)

VENDOR DATA & RISK ASSESSMENT This worksheet provides data on vendors as well as a risk assessment & security questionnaire. 19 Pages (20-225)

SECURITY AUDIT QUESTIONNAIRE Information Technology management, information security, and privacy are described in this questionnaire. 10 Pages (20-206)

SOFTWARE RISK ASSESSMENT SUMMARY Using data from service overviews and assessments, a summary of software risk assessment is made, determining acceptable risk, concern, and red flags. 8 Pages (50-326)

THIRD-PARTY TECHNICAL RISK ASSESSMENT This software service questionnaire for third-party providers covers technical assessment, IT governance & development, architecture, security, and support. 7 Pages (50-325)

SOFTWARE RISK ASSESSMENT INSTRUCTIONS These instructions are for completing the technical risk assessment required for third-party product or service providers that host or maintain systems on behalf of the organization and have access to data. 2 Pages (50-324)

THIRD-PARTY RISK ASSESSMENT This security questionnaire helps to diagnose possible risks with potential or current vendors. 2 Pages (50-314)

TECHNOLOGY RISK ASSESSMENT POLICY & PROCEDURE Following is an overview of the technology risk management process steps and the associated roles and responsibilities. 3 Pages (50-290)

Staffing

CLINICAL INFORMATICS SPECIALIST 4 Pages (20-394)

HIPAA BUSINESS ASSOCIATE AGREEMENT This agreement template is between an organization and a HIPAA compliant organization. 7 Pages (20-085)

RECORDS MANAGER FOLLOWUP INTERVIEW The following are appropriate questions for a second interview of a potential Records Manager. 5 Pages (20-021)

RECORDS & INFORMATION MANAGER SECOND INTERVIEW Questions for a second interview of a prospective Records and Information Manager are below. 2 Pages (20-020)

RECORDS & INFORMATION MANAGER QUESTIONS These questions are appropriate for the first interview of a potential Records and Information Manager. 6 Pages (20-019)

RECORDS SUPERVISOR 2ND INTERVIEW These questions are designed for the second interview of a potential Records Supervisor. 1 Page (20-018)

RECORDS SUPERVISOR 1ST INTERVIEW These questions are designed for the first interview of a potential Records Supervisor. 2 Pages (20-017)

GRC MANAGER 2 Pages (50-298)

Transcripts & Polls

PRIVACY LAWS TRANSCRIPT NOREX Members discussed privacy law compliance; departments best suited to manage privacy; sources consulted to measure compliance against; developing and keeping current a Record of Processing Activities (ROPA); Privacy Impact Assessments (PIA) tools; NIST CSF core functions; Chief Privacy Officer or Chief Compliance Officer; audit frequency of IT tools to ensure privacy law compliance; leveraging internal audits to evaluate privacy programs; and US federal legislation on privacy laws. 13 Pages (NV2471)

ARTIFICIAL INTELLIGENCE / MACHINE LEARNING / ChatGPT TRANSCRIPT NOREX Members discussed how AI is used for critical thinking; use cases; training internal models – LLM; tracking the validity of AI info and privacy concerns; real world use cases; training users; policies for use; limiting personal logins to ChatGPT; deciding when to use; tracking users' usage of AI / ChatGPT; chatbots and OpenChatKit; and copyright protections in AI. 20 Pages (NV2470)

MFA & IDENTITY ACCESS MANAGEMENT FOR ADMINISTRATORS TRANSCRIPT NOREX Members discussed the definitions of MFA, IAM, and PAM; cyber insurance requirements; MFA tools; MFA usage trends; enforcing MFA with M365; MFA for non-admins; MFA for non-service accounts; threat detection and response; automated detection tools; passwordless authentication; phishing resistant MFA; and password vault usage. 21 Pages (NV2468)

CONFERENCE ROOM TECHNOLOGY SOLUTIONS TRANSCRIPT NOREX Members discussed conference room monitoring and management strategies; staff dedicated to conference room management and troubleshooting; training capable users; tool experiences and recommendations; cost of conference room technology solutions; projectors vs TVs; moving away from complex-type rooms to Microsoft Teams rooms; Microsoft licensing; camera options; using Teams with non-Teams meetings; hybrid solutions; accommodating classroom meetings; microphone considerations; and large occupancy rooms. 25 Pages (NV2464)

GOVERNMENT: CYBERSECURITY TRANSCRIPT NOREX Members discussed significant changes to the cybersecurity program considering the current threat landscape; optimizing the organizational structure; cybersecurity priorities for leadership; AI considerations; accommodating business needs while maintaining

effective security; recommended cybersecurity tools; Microsoft tools utilized; G3 M365 licensing experiences; and security frameworks. 14 Pages (NV2463)

IT STAFF DEVELOPMENT / TRAINING TRANSCRIPT NOREX Members discussed the percentage of IT budget planned for training and development; hours / certifications required per year; measuring success of training completed; vendors or online services utilized for training; soft skill training; encouraging employees who do not want to develop; on-the-job development plans; successfully planning and allocating time for professional development; and Knowledge Skill Tree or Knowledge Map for application development or system infrastructure teams. 18 Pages (NV2461)

CLOUD PHONE SYSTEMS TRANSCRIPT NOREX Members discussed initial cost per user for a Cloud phone system vs VoIP system; Cloud phone providers and moving from a Cisco Unified Communication Manager (CUCM) VoIP system; Teams integration (8x8 vs RingCentral vs others); direct routing vs Cloud-hosted / managed; replacing an older on-prem Mitel system; Dialpad usage; issues with Teams; Operator Connect or direct routing integration with Teams; Vonage Premier unified communications with mobility; all-in-one VoIP / chat / video / mobile solutions for call routing workflows and SMS user requirements; devices on desktop vs softphones; Kari's Law and RAY BAUM'S Act compliance with regard to Cloud Phone Systems; and data ownership and PCI considerations. 23 Pages (NV2460)

DATA GOVERNANCE TRANSCRIPT NOREX Members discussed how data governance is defined and does it include data quality and master data; the scope of data governance (creation to deletion); who drives data governance; critical departments included in data governance; best practices and framework to launch data governance; balancing data governance with self-service reporting; tips to get the business to see the value in data governance; tactics to push business units to take ownership of data; tools used in tracking and starting a data governance committee; handling compliance and security questionnaires asking assets to be classified with a data label; social media apps on corporate cell phones; stakeholders for data-only Change Advisory Board; and integrating disparate software solutions / single product that delivers 80% for governance. 14 Pages (NV2459)

IT GOVERNANCE TRANSCRIPT NOREX Members discussed defining and initiating IT Governance; lessons learned; data governance; pain points when starting IT governance; ensuring effective governance; where IT governance sits in the organization; authority to accept or reject proposed governance policies; promoting governance as a value-add; producing policies and guidelines; governing "citizen development"; governance tools; and securing vulnerable legacy systems. 18 Pages (NV2457)

DATA ANALYTICS / BUSINESS INTELLIGENCE TRANSCRIPT NOREX Members discussed challenges with Data Analytics and Business Intelligence; dedicated teams to manage DA / BI; tooling in use; Azure Analysis and Synapse analytics; third-party connectors; Cloud vs on-prem vs hybrid environments; leveraging Cloud computing resources to improve data modeling and processing times; implementing a Master Data Management solution; Machine Learning deployments; enabling self-service capabilities; data quality; and measuring the effectiveness of DA / BI systems. 20 Pages (NV2456)

EMPLOYEE ONBOARDING / OFFBOARDING TRANSCRIPT NOREX Members discussed the four Cs of onboarding – Compliance, Clarification, Culture, and Connection; day-one training; credentials to access corporate systems on start day or earlier; SLA for creating starters; ITSM Salesforce ticket system; process to determine access to applications / systems; initiating sub-processes that include other groups / departments; tracking assets manually or with an automation tool; best practices for deploying and retrieving IT equipment; cached credentials; tools used for a centralized employee repository; and tracking setup. 22 Pages (NV2455)

PRIVILEGED ACCESS MANAGEMENT TRANSCRIPT NOREX Members discussed responsibility for managing and maintaining privileged accounts; consolidating PAM responsibilities into a centralized program or federating them amongst different teams; implementing PAM into an IAM program; process to identify roles and entitlement taxonomy to be used by PAM; how often to review PAM in a given year; frequency of auditing role-based access management; Information Governance Administration (IGA) as an alternative or augmentation to traditional PAM systems; ensuring compliance with access policies; products and tools used

to manage privileged access; PAM solutions for small organizations; password vaults; and KPI and KRI reporting. 20 Pages (NV2454)

BACKUP / RECOVERY TRANSCRIPT NOREX Members discussed tools used for backup / recovery; issues getting Veeam backups on tape; backing up to the Cloud; cost savings backing up to the Cloud; backup strategies; software / hardware for Linux Ubuntu servers; securing backups from ransomware attacks; testing recovery environments after daily backup; people responsible for overseeing backup / recovery; use of an MSP to perform backups; Recovery Point Objective (RPO) and Recovery Time Objective (RTO); cyber recovery / vault to protect against ransomware; and exercising / updating the cyberattack incident playbook. 17 Pages (NV2453)

PROJECT MANAGEMENT TRANSCRIPT NOREX Members discussed leadership buy-in to form an infrastructure PM team; applications in use to track project deliverables and progress; tools utilized for project management; scheduling time for projects daily and across a calendar year; pros and cons of using Microsoft Project Online; combining traditional project management methods (Waterfall) with the Agile methodology (Scrum); working with Agile Development Teams when the business is Waterfall process; platform to work with multiple IT stakeholders who use Jira and ServiceNow; and allocating time for the unexpected work driven by business needs. 18 Pages (NV2451)

SD-WAN TRANSCRIPT NOREX Members discussed SD-WAN vs traditional WAN; pitfalls and costs of deploying SD-WAN; best SD-WAN solutions; replacing virtual SonicWall appliances at locations with Fortinet devices; performance SLAs in use; managing your own SD-WAN equipment vs using a managed services approach; pros / cons of using single vendor for all networks vs using a standalone SD-WAN next to the big-name network solutions; using SD-WAN to connect to Cloud service providers; using IPsec tunnels; managing multiple carriers; and using SD-WAN to provide communications for SCADA systems. 20 Pages (NV2448)

HEALTHCARE INDUSTRY IT SECURITY TRANSCRIPT NOREX Members discussed when risk outweighs an operational mandate; managing comprehensive security; successful tool and processes for centralized or almost-centralized security management; state of cybersecurity infrastructure; routine tests to measure cybersecurity readiness; managing outside access requests such as VPN connections, vendor contract workers, etc.; Cloud-hosted EMRs; responding to natural disasters or other emergencies; and best practices for recruiting and retaining talent. 14 Pages (NV2447)

RISK MANAGEMENT TRANSCRIPT NOREX Members discussed conducting a formal risk / vulnerability assessment either in-house or by a third party; prioritizing what aspects of risk / vulnerability management are managed in-house vs outsourced; risk management programs for small businesses; different levels of risk maintained within enterprise-risk registrars; KPIs around vulnerability management; frameworks used to ensure benchmarks to measure against; balancing risk against value delivery in an Agile Minimal Viable Product (MVP); reporting for executives, application owners, and auditors; and policy to patch zero-day, critical, high, medium, or low vulnerabilities. 16 Pages (NV2446)

PATCH MANAGEMENT TRANSCRIPT NOREX Members discussed the best tools other than WSUS for patching servers and the time to report after the patch is installed; the level of automation when patching servers; automation tools for patching 3rd-party software besides SCCM; process for manually patching servers / software; enforcing or forcing workstation reboots to ensure updates and patches are applied; efficient patching and vulnerability scan frequency; VDI patching; Linux patching; Ivanti with Intune; and updating hardware drivers. 13 Pages (NV2444)

ERP STRATEGIES TRANSCRIPT NOREX Members discussed managing ERP workload across the organization's teams; running ERP globally; on-prem vs Cloud-hosted, single vs multi-instance, regional support vs central support teams; running multiple unique ERPs and financial considerations; implementing Electronic Data Interchange (EDI); the value of implementing an EDI solution and ERP solution; Dynamics 365 ERP accessing ERP data through the Dataverse; Asset Management features of Dynamics F&O; implementing a WMS; migrating from EBS to another ERP system; SAP ECC to SAP S/4; and keeping inventory in sync between 3PLs and the ERP. 17 Pages (NV2435)

PASSWORD MANAGEMENT TRANSCRIPT NOREX Members discussed NIST password guidelines; verifying users for password reset without using the last four of SSN or employee ID number; critical steps to be taken before rolling out a Password Management solution; enterprise, end-user password solutions (LastPass, 1Password, Keeper, and Dashlane); user adoption of an Enterprise Password Manager; Windows Hello for Business and Beyond Identity for passwordless authentication; utilizing an MFA security thumb key; requiring two-factor or multi-factor authentication; and secure backup strategy. 21 Pages (NV2434)

DOCUMENT MANAGEMENT TRANSCRIPT NOREX Members discussed Records Management vs Document Management; the use of DocuWare, GlobalSearch, and Azure for Document Management; migrating from OnBase to DocuWare; converting captured forms from one platform to a new platform; guidelines for applications to use for what types of documents; Document Management for small businesses; using a consultant to audit enterprise-wide documents; setting up an overarching content structure that allows information to be used in multiple areas; transitioning from paper forms to digital forms / self-service; and creating structured content from digitized forms. 17 Pages (NV2433)

MULTI-FACTOR AUTHENTICATION / SINGLE SIGN-ON TRANSCRIPT NOREX Members discussed preventing MFA fatigue; minimizing the impact to registration of the users before enabling MFA; passwordless MFA configured through Microsoft Azure by conditional access; applying MFA for service accounts; handling MFA for admins; utilizing PAM solutions and if this will be a requirement for cyber insurance; white glove configuration of new laptops; startup difficulties to retrofit SSO into the existing environment; and adopting SSO for third-party accounts that employees frequently access. 19 Pages (NV2432)

IT ASSET MANGEMENT TRANSCRIPT NOREX Members discussed core investments for IT assets in 2023; successes in building an asset management program; resource levels dedicated to ITAM practices; key measures to tracking assets; foundational pieces needed before IT asset management is useful; successful ITAM tools; tracking software assets vs hardware assets; lessons learned implementing a software asset management solution; factors considered for on-prem vs Cloud-based software asset management solutions; experience with doing a formal software asset management process maturity assessment; managing endpoints for a 100% remote workforce; managing assets that do not have an agent installed; and pros / cons to a Managed Security Service. 24 Pages (NV2430)

SERVICENOW TRANSCRIPT NOREX Members discussed the reasons to select ServiceNow and moving from other toolsets; pros / cons with implementing ServiceNow; utilizing customizations within ServiceNow and experiences with customizations during system upgrades; time to implement ServiceNow; staffing model for management; end user experience via mobile usage; Configuration Management Database; Teams integration and deploying the catalog / portal to the Teams client; Employee Center; integrating ServiceNow with work-tracking systems like Azure DevOps; Software Asset Management module; ServiceNow Discovery tools; metrics to measure customer experience; and Project Management module. 28 Pages (NV2429)

DATA MANAGEMENT TRANSCRIPT NOREX Members discussed tools utilized for data management; implementing an Azure Data Warehouse; moving to SQL Enterprise; strategy to connect an SQL Data Warehouse to Dynamics 365; prerequisites required before using Power BI to create visualizations; Power BI standards; migrating from on-prem unstructured data to Microsoft SharePoint / OneDrive; SaaS applications; platforms to manage internal data analytics; starting a data governance program; key elements of data strategy; and practical ways to measure and report on data quality. 18 Pages (NV2428)

EDUCATION IT ISSUES TRANSCRIPT NOREX Members discussed lessons learned while managing a school population that suddenly went remote; remote management tools used to patch and support checked-out equipment; changes in IT staffing needs when changing from on-prem to remote; downsizing Zoom licensing with the move back to mostly in-person classes; implementing Class for Zoom; applications used to manage phones and tablets coming onto campus; applications used to manage and push data to students' tablets; helpful and / or required security certificates; Moodle LMS and other vendors such as Canvas and D2L; airSlate / signNow over DocuSign and PandaDoc; and partnering with Coursera. 12 Pages (NV2426)

VENDOR MANAGEMENT TRANSCRIPT NOREX Members discussed software to manage the gamut of Vendor Management; primary requisites for selecting a vendor; how often to meet with vendors; negotiating

price based on vendor performance; KPIs tracked for strategic vendor relationships; formalized plans for vendor selection; practices to deal with lack of communication; questions asked of vendors prior to or as part of onboarding; inclusion of SLAs and SOWs for technology residency / DR for vendor selection; and qualities of Managed Service Partners (MSPs) that do a great job and deliver. 21 Pages (NV2425)

SQL SERVER TRANSCRIPT NOREX Members discussed current version of SQL Server in use; percentage of SQL workload in the public Cloud; drivers to move SQL workload to the Cloud; advantages / disadvantages of going fully virtual with SQL Server, one instance with many different databases and applications vs one virtual machine with different instances for each application; migrating from an iSeries to SQL Server; changing the default SQL port and / or encrypting all traffic; protecting SQL injections through websites; best practices around MS licensing compliance; and solutions for long-term, database growth reporting / trending. 16 Pages (NV2423)

RISK & VULNERABILITY MANAGEMENT TRANSCRIPT NOREX Members discussed conducting a formal vulnerability assessment; prioritizing which aspects of Risk / Vulnerability Management to be managed internally vs contracted out to a MSS vendor; mitigating human resources risk; reporting to executives / application owners; communicating risk to decision makers; policy to patch zero-day, critical, high, medium, or low vulnerabilities; dynamic Asset Management tools; processes used to discover and track vulnerabilities in IT systems; and measuring progress on remediating vulnerabilities. 21 Pages (NV2422)

MANUFACTURING INDUSTRY IT ISSUES TRANSCRIPT NOREX Members discussed the top three business-facing projects initiated this year, metrics used to measure the performance of IT, improving IT vs the manufacturing lifecycle, the work environment for IT workers, Microsoft Compliance Manager for O365, introducing user profiles, dealing with passwords, determining support group when issues could be IT or OT, segmenting BT / IT and OT Networks, barcode scanners in a HighJump environment, solutions to track employees and visitors in facilities for emergencies, and CMMS / EAM solutions. 21 Pages (NV2421)

DISASTER RECOVERY / BUSINESS CONTINUITY TRANSCRIPT NOREX Members discussed organizational roles, responsibilities, and accountability for DR / BC; defined standards; having DR and BC sites on-prem, Cloud, or colocation; DRaaS vendors; backup solutions such as VEEAM, Acronis, and MS Azure; strategies for having both a DR and a BC site; replication software; Oracle; established reusable patterns; incorporating DR / BC plans in architecture reviews; app tiers / categories corresponding to implementation; meeting business requirements for resiliency and performance; and testing disaster recovery plans. 24 Pages (NV2418)

ENERGY / UTILITY INDUSTRY IT ISSUES TRANSCRIPT NOREX Members discussed IT budget trends, applications used to track compliance requirements, tools to analyze historical meter and weather data to determine the performance of behind-the-meter load control programs, leveraging collaboration tools (MS Teams / Slack) to work with 3rd parties, vendor partners, or stakeholders, use of MS Sentinel as both a SIEM and a SOAR, network tap monitoring tools like CyberX and Darktrace, Identity and Access Management initiatives, maintaining utility-owned communications equipment, partnering with outside Incident Response Services, and capabilities in the area of RPA / Automation. 22 Pages (NV2412)

TALENT RECRUITMENT / MANAGEMENT / RETENTION TRANSCRIPT NOREX Members discussed top-shelf benefits today's IT candidates expect, strategies implemented to retain current talent, challenges with pushing IT employees to return to the office, available hybrid / work-from-home / in-office options, creating bonus programs, targeting and hiring talent that is a cultural fit and has the required skill set, measuring technical knowledge vs what is listed on a resume, questions candidates ask about the hiring organization, promoting employee engagement, and creating a team atmosphere when many employees continue to work remotely. 18 Pages (NV2411)

RUSSIA-UKRAINE IMPACT ON CYBERSECURITY TRANSCRIPT NOREX Members discussed trusting the resiliency of government and infrastructure security, increase in security metrics due to the war, measuring the risk impact of this event, determining dependencies and risks with overseas vendors, important steps of system hardening, email security vendors, utilizing threat intelligence effectively, preparing executives for

worst-case scenarios, Honeypot as a security measure, supply chain attacks, securing Operational Technology environments, and the evaluation and address of risks from ransomware. 22 Pages (NV2410)

HELP DESK / SERVICE DESK TRANSCRIPT NOREX Members discussed outsourcing vs insourcing the Service Desk function, IT Service Providers, tracking and reporting key metrics / KPIs, response and resolution targets for Incident Ticket severity levels, the role of the individual answering incoming calls to the Help Desk, the structure of the Help Desk team, best practices for SLAs on Level 2 & Level 3 service requests, dealing with inappropriate escalations, Tier 1 staff engagement, training and professional development, VDI, and Self-Service. 32 Pages (NV2407)

CLOUD PHONE SYSTEMS TRANSCRIPT NOREX Members discussed when it makes most sense to invest in a Cloud-based phone system, caveats to Cloud phones, implementing a Cloud phone system in the workplace, call center performance in the Cloud, handling contact center outages, using Microsoft Teams as a Cloud phone system, 8x8 offerings, combining Zoom telephony with Teams, call recording capabilities, moving Cisco Call Manager to the Cloud, and Vonage Mobility for desk phones and call forwarding. 28 Pages (NV2406)

IAM: MANAGING IDENTITIES & PROVISIONING TRANSCRIPT NOREX Members discussed lessons learned from implementing an IAM solution, the source of truth for employee information and identity, tools used on MFA privileged accounts, tools for account provisioning for Active Directory / Hybrid 365, IAM tools in use to manage user accounts, staff resources devoted to IAM, and Access Reviews / Certifications. 16 Pages (NV2405)

TRANSPORTATION INDUSTRY IT ISSUES TRANSCRIPT NOREX Members discussed the shortage of drivers, issues with finding and retaining IT workers, addressing cybersecurity risk, types of digital investments being made, managing the 3G February / March sunset dates and asset tracking, implementing Snowflake for a data warehouse solution using Azure Data Factory for ELT / ETL, solutions for source control, data dictionary, glossary of terms while following DevOps best practices, and increased infrastructure and maintenance costs. 16 Pages (NV2403)

SECURITY INITIATIVES FOR 2022 TRANSCRIPT NOREX Members discussed the percentage of the IT budget directed to InfoSec, cyber insurance, top 3 security initiatives, implementing a governance framework for accepting risk, GRC tools, best practices to apply security patches on Windows OS, automating / outsourcing cybersecurity processes, MDR services and pen testing, successful tools to protect from malicious web links and sites, VPN requirements, EDR / AI scanners, security strategies, and providing security dashboards to company officers. 28 Pages (NV2401)

IAM: AUTHENTICATION & SECURITY TRANSCRIPT NOREX Members discussed how best to start an IAM implementation, timeframe of implementation, major issues encountered / lessons learned, products commonly assessed and selected, Data Loss Prevention (DLP) and Information Rights Management (IRM) tools in Office 365, desktop / Windows-installed solutions for MFA, implementing MFA for on-prem AD, MFA products recommended for remote access to network, adopting a zero trust model, and staffing to manage the IAM solution implemented. 23 Pages (NV2400)

HOSTED ERP SOLUTIONS TRANSCRIPT NOREX Members discussed whether shifting to the Cloud is the right move when an organization is primarily on-prem, integrating Cloud applications with an ERP, utilizing Boomi as an integration Platform as a Service (iPaaS), value-add with an external PM to help push ERP implementation, security concerns with sensitive data on someone else's Cloud, using Microsoft Dynamics Business Central, Oracle R12.2.5 on-prem and moving to Oracle Cloud, and utilizing a Cloud-based ERP for operations in China / South Korea. 17 Pages (NV2398)

MULTI-FACTOR AUTHENTICATION / SINGLE SIGN-ON TRANSCRIPT NOREX Members discussed struggles setting up users with MFA, conditional access policies, minimizing the impact to registration of the users before enabling 2FA / MFA, experiences implementing Duo 2FA, passwordless MFA configured through Microsoft Azure, integrating with Remote Desktop Connection to servers and / or Terminal Server, MFA products for remote access to network (VPN / RDP) and local login, adopting Single Sign-On for 3rd-party

accounts, and pain points with implementing OKTA for MFA and SSO. 19 Pages (NV2396)

HEALTHCARE INDUSTRY IT ISSUES TRANSCRIPT NOREX Members discussed selling IT as business value, techniques to assure IT is part of Clinical Operations future planning, IT as the unofficial project management department, IT salary comparisons, leveraging Cures Act Interoperability and planning for the Transparency and No Surprises Act, cybersecurity metrics for board presentation, HIPPA compliance, and data retention policies. 17 Pages (NV2395)

PATCH MANAGEMENT TRANSCRIPT NOREX Members discussed efficient patching and vulnerability scan frequency, maintenance window downtime, patch management for servers needed for production environments that have zero downtime, patch management on company desktops / laptops for remote users, time to delay patching before forcing the user, Linux patch automation, software tools to manage patching process, open source patch management for Windows, logging changes for monthly workstation patching, and processes used to evaluate patches from vendors. 27 Pages (NV2394)

DOCUMENT MANAGEMENT TRANSCRIPT NOREX Members discussed the number of document repositories in an organization and experienced issues, Document Management platforms in use and recommendations, transitioning from free-for-all document repositories to a central approach, historical document and retention policies and governance, procuring a new Document Management system and converting old documents, lessons learned in implementation, 3rd-party vendor data collection, and SharePoint Cloud from Office 365 enterprise license and pursuing a 3rd-party DMS. 15 Pages (NV2393)

CYBERSECURITY TRANSCRIPT NOREX Members discussed how best to prepare for a ransomware attack, steps to take when hit, security teams reporting risk, incident response plans, managing vulnerabilities, best ways to combat phishing and malware attacks, KnowBe4 for cybersecurity and phishing awareness platform, training, Cybersecurity Awareness Month to raise awareness, Microsoft Defender vs Symantec / Norton, endpoint protection, evolution of threats in work-from-home models, and security threats in the Cloud. 31 Pages (NV2392)

PROJECT MANAGEMENT / PMO TRANSCRIPT NOREX Members discussed the value a PMO returns to the business, the value of a PMO in a functional environment, introducing a PMO to an organization that is historically managed in silos, measuring success of a PMO for Agile Projects, the pros and cons of Waterfall vs. Agile, assigning projects, work intake process for smaller projects, tools to keep track of the lifecycle, documentation requirements for SDLC, the number of teams for Scrum Masters, and practicing Kanban. 23 Pages (NV2391)

VENDOR MANAGEMENT TRANSCRIPT NOREX Members discussed flexible pricing strategies, holding vendors accountable for service delivery, strategies for maintenance / support agreements, handling vendors and items to document, implementing an IT VMO, tools for vendor management and vendor scoring, and assessing the maturity of your VMO and strategic vendor relationships. 17 Pages (NV2390)

SD-WAN TRANSCRIPT NOREX Members discussed drivers to SD-WAN, reliability of their solution, negative experiences when implementing SD-WAN, recommendations for design and deployment, solutions evaluated for SD-WAN, utilizing providers with their own backbone vs. providers like CATO and Velo, access to all internet / Cloud services routed through NGFWaaS, and use of a managed service provider for SD-WAN. 22 Pages (NV2389)

FOOD & BEVERAGE MANUFACTURING: IT SECURITY TRANSCRIPT NOREX Members discussed recommended IT Security initiatives, cybersecurity insurance and renewals, segregation of the IT network, communication to the outside world from the OT network, solutions used for 2FA on VPN connections, Artic Wolf, Red Canary, and documented recovery and response plans. 15 Pages (NV2386)

POST-COVID HYBRID WORK STRATEGIES TRANSCRIPT NOREX Members discussed how best to manage a hybrid work environment, provisions for home offices, hardware support and budget, internet connectivity issues, cash allowances and potential legal concerns, achieving equity amongst in-office and at-home staff, best tools for building out conference rooms, and security. 30 Pages (NV2385)

POWER BI TRANSCRIPT NOREX Members discussed getting started with Power BI, experiences with

building and executing, visualization services, mining capabilities, dashboard viewing, licensing agreements, backup and recovery strategies, deliverables, and alternative products. 15 Pages (NV2383)

RANSOMWARE TRANSCRIPT NOREX Members discussed Ransomware attacks and what to do once infected, restoring LAN shares and rebuilding workstations, warnings against paying ransom, counter measures and mitigation, backups and patching, cybercriminal activity detection, MDR vs. MSSP, endpoint protection, and the use of an MDM application. 30 Pages (NV2381)

CONSTRUCTION INDUSTRY: IT PROJECT MANAGEMENT TRANSCRIPT NOREX Members discussed how best to elevate the presence of IT project management in the Construction Industry, community of practice standardization, master service integrators, Construction Management software, credential harvesting, and security. 14 Pages (NV2375)

SECURITY FRAMEWORKS TRANSCRIPT NOREX Members discussed the hierarchy of security frameworks; most commonly used frameworks; categorization of control, platform, and risk frameworks; and active threat hunting. 14 Pages (NV2374)

GLOBAL IT ISSUES TRANSCRIPT NOREX Members discussed the biggest issues they and their organizations are facing with a global footprint in today's business climate. The expectations with employees able to return to the office, IT talent recruiting and hiring internationally, standardization of processes, cybersecurity, procuring equipment globally, keyboard sourcing, and in-country IT support were challenges shared by all Member participants. 17 Pages (NV2371)

MICROSOFT TEAMS BEST PRACTICES TRANSCRIPT NOREX Members discussed the implementation of Microsoft Teams within an organization, Teams' members as part of the infrastructure or collaboration teams, the use of the exploratory license program, promoting adoption and usage of the platform, and VoIP integrations. 49 Pages (NV2369)

CLOUD-BASED STORAGE TRANSCRIPT NOREX Members discussed the lessons learned, and difficulties experienced, when transitioning from on-prem storage to Cloud. The discussion covered the pros and cons of various Cloud platforms, security, policy and practices, and the dangers of accessibility. 17 Pages (NV2368)

IT SERVICE MANAGEMENT TRANSCRIPT NOREX Members shared strategies and solutions in designing, creating, delivering, supporting, and managing IT Services within an organization. 22 Pages (NV2367)

DATA LOSS PREVENTION TRANSCRIPT NOREX Members shared strategies, policies, and solutions to prevent sensitive or critical information from leaving the corporate network. 21 Pages (NV2366)

HYPERCONVERGED INFRASTRUCTURE TRANSCRIPT NOREX members share experiences adopting a Hyperconverged Infrastructure including performance expectations, vendor options, and back-up strategies during this April 2021 WebForum. 16 Pages (NV2365)

INCIDENT & PROBLEM MANAGEMENT TRANSCRIPT Member organizations discuss both incident and problem management best practices, tools, lessons learned, and more during this April, 2021 WebForum. Chat comments and polls are included. 24 Pages (NV2364)

IT CHANGE MANAGEMENT TRANSCRIPT NOREX members discuss IT Change Management processes including recommended tools, governance approaches and communication protocols during this April 2021 session. 25 Pages (NV2363)

RISK MANAGEMENT TRANSCRIPT NOREX members share strategies for identifying, managing and reporting risks during this February 2021 session. 21 Pages (NV2358)

SECURITY INITIATIVES FOR 2021 TRANSCRIPT NOREX members share 2021 IT security plans including budgets, initiatives and tools during this January 2021 session. 34 Pages (NV2354)

IT GOVERNANCE TRANSCRIPT Aligning IT with the business can be challenging work. In this discussion, | 14

members tackle strategies for implementing and getting buy in, working with the business to align goals, and the structures that have made Governance a more successful venture. 17 Pages (NV2353)

PLANNING FOR 2021 TRANSCRIPT NOREX members share their expectations for IT budgets, staffing levels, security initiatives, user support trends and other 2021 issues during this December 2020 session. 19 Pages (NV2351)

MANAGING AND MONITORING REMOTE TEAMS TRANSCRIPT NOREX Members share policies, procedures and tools for managing and monitoring remote workers during this August 2020 WebForum. 20 Pages (NV2339)

CYBERSECURITY TRANSCRIPT NOREX Members share cybersecurity best practices and tool recommendations during this July 2020 WebForum. 19 Pages (NV2331)

PCI TRANSCRIPT Members take a fresh look at all regulation, protection, and processes required to meet PCI data security standards (DSS) during this March, 2020 WebForum. 13 Pages (NV2314)

ISO 27001 AND SOC COMPLIANCE TRANSCRIPT Small group discussion among 6 member companies to exchange information, solutions, and best practice around ISO 27001, SOC2, and other security-related compliance / certification. 18 Pages (NV2293)

VULNERABILITY MANAGEMENT TRANSCRIPT NOREX members share recommendations on processes and tools to manage IT vulnerabilities and risks during this September 2019 WebForum. 20 Pages (NV2288)

DATA GOVERNANCE / GDPR / US PRIVACY LAWS TRANSCRIPT NOREX members share recommendations on achieving compliance with various privacy regulations during this August 2019 WebForum. 25 Pages (NV2283)

MANAGING PRIVACY REGULATIONS TRANSCRIPT NOREX members share strategies for complying with various privacy regulations such as GDPR and CCPA during this March 2019 WebForum. 15 Pages (NV2261)

IT GOVERNANCE TRANSCRIPT NOREX members share recommendations for the establishment and management of an effective IT Governance practice during this January 2019 session. 11 Pages (NV2256)

SELECT: SECURITY INCIDENT RESPONSE TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed developing an incident response plan; incident communication tips; tabletop exercise recommendations; usage of an incident response service provider; business continuity tool recommendations; post-breach activity; third-party security monitoring; and incident response playbooks. 13 Pages (NS243)

SELECT: APPLICATION MANAGEMENT TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed developing a business application catalog; the use of ServiceNow; application tracking and data synchronization; automating processes; user education on the latest apps, tools, and features available for use; identifying a source of truth; asset management; and outsourcing asset management. 11 Pages (NS242)

SELECT: BUSINESS RESILIENCY TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed business continuity vs business resiliency; business resiliency framework; escalating incident response to crisis management; value of business continuity to organization in post-COVID world; guiding principles regarding manufacturing autonomy and resiliency; hybrid / remote work affecting alternate site strategy; and storing DR documented processes / runbooks so they are easily accessed during an event. 15 Pages (NS240)

SELECT: CHANGE MANAGEMENT TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed Change Management best practices and initiatives; who in IT can submit standard changes; implementing a continuous-release or release-on-demand process; documenting UAT and PIT test

completion with evidence using ServiceNow; incorporating Cloud into Change Management policies and procedures; system-based approvals; Change Manager or coordinator closing change requests; risk calculation scoring; combining infrastructure and application teams; and security review of changes. 19 Pages (NS239)

SELECT: IT GOVERNANCE TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed initiating a governance process; the scope of IT Governance; defining IT Governance; decision makers and how decisions are made; establishing governance standards; IT Governance tools; Change Management considerations; maintaining process; and dealing with a less-rigid planning cycle. 13 Pages (NS238)

SELECT: VENDOR RISK MANAGEMENT TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed driving security improvements and measuring results among vendors and suppliers; how Vendor Risk Assessment activities are performed and what results from that activity; what portions of the vendor survey add the most value; what departments in an organization should be included to assess the Vendor Risk Assessment; the process for creating on-site or remote assessment in addition to vendor assessment; proper responses to poor performance, vendor-caused incidents, business disruptions, and negative financial impact; third-party training before onboarding; fourth-party compliance; process for vendor to submit notification of system maintenance or changes; and management of lifecycle from initiation to off-boarding vendors. 19 Pages (NS232)

SELECT: EVERYTHING AS A SERVICE (XaaS) TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed drivers leading to the decision to move to an “as a service” model, key benefits realized from XaaS, XaaS governance, and who has the authority to purchase XaaS, ISP, or WLAN cost increases. They also discussed the impact on network and connectivity vs traditional DCs when moving workload to the Cloud. 15 Pages (NS228)

GOVERNMENT: MS365 ADOPTION TRANSCRIPT NOREX Members from Government agencies share strategies on the adoption of Microsoft’s M365 licensing program during this October 2020 WebForum 19 Pages (GSP100)

GOVERNMENT: REGULATORY COMPLIANCE TRANSCRIPT NOREX Government members share their experiences with regulatory compliance during this June 2019 session. 10 Pages (GSP099)

IT TRENDS 2023 Q2 IT Trends is a collection of the NOREX Member input captured in the second quarter of 2023 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 36 Pages (DT2023-2)

IT TRENDS 2023 Q1 IT Trends is a collection of the NOREX Member input captured in the first quarter of 2023 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 45 Pages (DT2023-1)

IT TRENDS 2022 Q4 IT Trends is a collection of the NOREX Member input captured in the fourth quarter of 2022 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 37 Pages (DT2022-4)

IT TRENDS 2022 Q3 IT Trends is a collection of the NOREX Member input captured in the third quarter of 2022 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 44 Pages (DT2022-3)

IT TRENDS 2022 Q2 IT Trends is a collection of the NOREX Member input captured in the second quarter of 2022 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 43 Pages (DT2022-2)

IT TRENDS: 2022 Q1 IT Trends is a collection of the NOREX Member input captured in the first quarter of 2022 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 57 Pages (DT2022-1)

IT TRENDS: 2021 Q4 IT Trends is a collection of the NOREX Member input captured in the fourth quarter of 2021 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 44 Pages (DT2021-4)

IT TRENDS: 2021 Q3 IT Trends is a collection of the NOREX Member input captured in the third quarter of 2021 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 59 Pages (DT2021-3)

IT TRENDS: 2021 Q2 IT Trends is a collection of the NOREX Member input captured in the second quarter of 2021 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 56 Pages (DT2021-2)

IT TRENDS: 2021 Q1 IT Trends is a collection of the NOREX Member input captured in the first quarter of 2021 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 57 Pages (DT2021-1)

IT TRENDS: 2020 Q3 & Q4 IT Trends is a collection of the NOREX Member input captured in the third and fourth quarters of 2020 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 74 Pages (DT2020-2)

IT TRENDS: 2020 Q1 & Q2 IT Trends is a collection of the NOREX Member input captured in the first and second quarters of 2020 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 62 Pages (DT2020-1)

CIO: ALIGNING BUSINESS & TECHNOLOGY PLANNING TRANSCRIPT NOREX Members discussed stakeholder involvement in planning; usage of a steering committee; technology roadmap tools; capability mapping; consultant involvement; organizational considerations; business-led ERP implementation; steps to achieve IT objectives; digital transformation and ChatGPT usage; cyber training for leadership; retaining staff; and transferring IT leadership. 17 Pages (CV083)

CIO: IT BUDGETING & PLANNING FOR 2022 TRANSCRIPT NOREX Members discussed projecting vendor price increases, cybersecurity goals aligning with legal and cyber insurance needs, percentage of IT budget to overall budget, success stories to acquire more funding and staff, the cost to move to the Cloud, software, infrastructure, and platforms when moving to the Cloud, leveraging ARPA funding in 2022, mid-year reviews to analyze spending, determining the optimal size for an IT organization, critical-success criteria, and measuring productivity of software developers in an Agile Scrum environment. 24 Pages (CV078)

CIO: ROLE / JOB DESCRIPTION OF THE CIO TRANSCRIPT Senior IT leaders discuss the evolution of the Chief Information Officer role during this October 2020 session. 17 Pages (CV076)

CIO: IT'S ROLE IN BUSINESS SUCCESS TRANSCRIPT Senior IT leaders share strategies for aligning IT with business objectives during this July 2020 WebForum. Topics include cloud computing, staffing, project prioritization and Business Intelligence tool recommendations. 20 Pages (CV075)

CIO: IT TRANSFORMATION TRANSCRIPT This March 2019 session featured strategic-level discussion on starting the transformation process, gaining executive support, involving business units and developing roadmaps for cloud usage and mobile device management. 19 Pages (CV071)