

Toolkit

The IT Peer Community. No Vendors. Ever.



CLOUD

These NOREX Member-contributed documents include Cloud strategy, discussions, evaluation, O365, policies, procedures, polls, RFP, and contracts. | TK013

Cloud Strategy	2
Evaluation & Selection.....	3
Job Descriptions.....	3
Office 365.....	4
Policies and Procedures.....	4
RFP & Contracts	5
Transcripts & Polls.....	6

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

Cloud Strategy

CLOUD VENDOR FRAMEWORK TEMPLATE This template provides summaries of Cloud-hosted products and the business goals to be achieved when reviewing products and vendors. 9 Pages (20-1093)

BUSINESS CAPABILITY ENVIRONMENT OVERVIEW This presentation describes a BCE steering committee structure and overall support model. 7 Pages (20-1057)

CLOUD OPTIMIZATION & MAXIMIZATION This presentation given at the 2020 NOREX International Roundtable highlights how Cloud optimization can help achieve business goals and drive profitability. 17 Pages (20-957)

IT CLOUD STRATEGY Cloud services include Software as a Service (SaaS), Infrastructure as a Service (IaaS), and Platform as a Service (PaaS), and this strategy focuses on productivity applications as well as data protection. 23 Pages (20-587)

CLOUD COMPUTING STRATEGY This presentation offers an overview of Cloud computing and what comprises a beneficial Cloud computing service. 15 Pages (20-586)

MICROSOFT CLOUD SECURITY These slides represent a company making a secure transition to the Cloud. 25 Pages (20-534)

WaaS READINESS STRATEGY With the Windows 10 Operating System, Microsoft is using what it calls "Windows-as-a-Service" for the release of new features and functionality. This document is intended to prepare the organization for the WaaS process, which promises enhanced reliability and security while simplifying the deployment of new features. 20 Pages (20-267)

CLOUD SERVICES EXECUTIVE SUMMARY A research group focused on what is needed by a vendor management role when creating a successful Customer Service Agreement with Cloud vendors. 7 Pages (20-183)

CLOUD STRATEGIC ASSESSMENT TOOL This questionnaire is a tool to be used by IT projects to assess whether Cloud computing services should be considered as a solution option. 6 Pages (20-168)

CLOUD STORAGE USE This guidance document is a brief overview of the file storage tool Cloud Storage, how it works, and the risks involved. 2 Pages (20-147)

BUILDING A CLOUD CENTER OF EXCELLENCE Goals, challenges, and lessons learned from building a Cloud Center of Excellence (CCoE) make up this presentation given at a NOREX event. 17 Pages (50-400)

CLOUD ENABLEMENT TEAM This team provides leadership, guidance, best practices, research, support and / or training in order to deliver Cloud services to the organization. 2 Pages (50-362)

CLOUD SECURITY FRAMEWORK This framework of steps procures a Cloud service that meets information security policies, standards, and baselines. 7 Pages (50-347)

CLOUD STRATEGY This PowerPoint describes internal and external drivers for a company Cloud strategy. 4 Pages (50-335)

CLOUD JOURNEY & COE DEVELOPMENT Cloud Center of Excellence (COE), strategy review, and Cloud structure foundation architecture are presented in this PowerPoint. 22 Pages (50-334)

AWS CLOUD SECURITY STANDARD This security standard provides the technical and operational security requirements for AWS hosted infrastructure and services. 21 Pages (50-308)

DEVELOPING AN ENTERPRISE CLOUD STRATEGY This presentation was given at a NOREX workshop and discusses the process of developing your company Cloud strategy. 22 Pages (50-272)

CLOUD VS. ON-PREMISE SOLUTIONS MATRIX Operating expenses, accessibility, requirements, classifications, and bandwidth are some important components to consider when choosing a Cloud host vs. an on-premise system. 1 Page (50-246)

CLOUD ENABLEMENT EXPERIENCES Reasons why Cloud matters, the Cloud First strategy and its execution, and lessons learned are parts of this presentation. 14 Pages (50-227)

CLOUD ENABLEMENT PROCESS An overview of the process that will identify and mitigate risks and help you make the purchase of software or SaaS that is not currently implemented. 7 Pages (50-223)

Evaluation & Selection

CLOUD SOLUTION ASSESSMENT TEMPLATE This assessment document guides a consistent and comprehensive evaluation of Cloud solutions in consideration. 4 Pages (20-1247)

VENDOR SOLUTION ASSESSMENT FORM This form is used to assess a solution being considered for implementation and contains questions across seven categories. 3 Pages (20-1246)

SaaS BUYER RESPONSIBILITIES This document outlines product buyer responsibilities in a question-and-answer format. 3 Pages (50-366)

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

WEB HOSTING QUESTIONNAIRE The objective of this questionnaire is to gather detailed customer requirements for proposed web hosting projects. 6 Pages (20-735)

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)

PHONE SYSTEM POC This proof of concept discusses replacement of an aging phone system with Avaya PBX or hosted system. 12 Pages (20-074)

E-MAIL SERVICES / OFFICE SUITE EVALUATION Following is a comparison of the functional requirements and cost summary of Web-Based Office Suite (WBOS) such as Google Apps or Office 365. 16 Pages (20-061)

CLOUD VENDOR QUESTIONS This series of questions explores information helpful when making decisions related to Cloud hosting service adoption. 3 Pages (50-294)

Job Descriptions

CLOUD DEVOPS ENGINEER 1 Page (50-377)

CLOUD ENGINEER 3 Pages (20-816)

DATA ARCHITECT 3 Pages (20-745)

SENIOR SALESFORCE PROGRAMMER 2 Pages (20-744)

Office 365

O365 SHAREPOINT COLLABORATION The Office 365 SharePoint Collaboration Group develops, implements, refines, and publishes best practices for the use of O365 SharePoint and Teams. 2 Pages (20-668)

O365: WHAT TO USE WHEN The following diagrams provide insight on what Office 365 tools should be used for what functions. 2 Pages (20-598)

OFFICE 365 MIGRATION DIAGRAM This diagram shows the migration breakdown by groups, communication sites, and necessary features. 1 Page (20-597)

ONEDRIVE ADVANCED DOCUMENT LIBRARY SKILLS FOR SUCCESS The goal is to create an agenda to ensure that the communications / training plan introduces the user to key skills for managing document libraries. 2 Pages (20-262)

O365 DEPLOYMENT CHECKLIST Following is a basic checklist for when planning a deployment of Office 365. 1 Page (20-050)

COMMUNICATIONS USE CASE GUIDE This slide offers concise comparison of Yammer, Outlook, Microsoft Teams, Live Events, and SharePoint. 1 Page (50-297)

OFFICE PRODUCTIVITY REQUIREMENTS This spreadsheet provides a template for productivity evaluations, functionality & spam reporting, as well as calendar, directory, migration, meetings, and other topics. 8 Pages (50-283)

Policies and Procedures

SaaS SECURITY CHECKLIST Aspects of Software as a Service such as vendor policies, compliance requirements, security safeguards, and documentation are part of this checklist. 2 Pages (20-1095)

USING RINGCENTRAL Tips for using RingCentral, a solution for global enterprise Cloud communications and collaboration solutions. 4 Pages (20-902)

DATA STORAGE STANDARD This storage standard expands on the principles outlined in Data Governance Policy (20-708) as they relate to data management, and provides guidance on the implementation and practical application of data storage solutions. 6 Pages (20-707)

CLOUD COMPUTING POLICY This policy establishes the minimum requirements for securing company information that is processed, stored, or accessed through outsourced via the Internet. 3 Pages (20-484)

SHAREPOINT ONLINE EXTERNAL ACCESS PROCEDURE Follow this procedure to configure SharePoint Online access for external users. 5 Pages (20-426)

ONEDRIVE CLOUD STORAGE POLICY This policy establishes guidelines regarding support and usage of the authorized OneDrive Cloud Storage. 8 Pages (20-230)

CLOUD ADOPTION SECURITY MAPPING Included is a shared model with responsibilities for both the client and the Cloud provider. 8 Pages (20-198)

CLOUD STORAGE USE This guidance document is a brief overview of the file storage tool Cloud Storage, how it works, and the risks involved. 2 Pages (20-147)

CLOUD COMPUTING POLICY This policy outlines the cloud computing requirements and how they apply to the company and its subsidiaries. 4 Pages (20-049)

AWS CLOUD SECURITY STANDARD This security standard provides the technical and operational security requirements for AWS hosted infrastructure and services. 21 Pages (50-308)

COMMUNICATIONS USE CASE GUIDE This slide offers concise comparison of Yammer, Outlook, Microsoft Teams, Live Events, and SharePoint. 1 Page (50-297)

RFP & Contracts

MASTER IT ACQUISITION PLAN This spreadsheet contains IT Purchase Plans and lists approved, hold, withdrawn, or denied status. 10 Pages (20-1004)

CLOUD PROVISIONS General and special provisions for Cloud computing are provided in this detailed contract. 22 Pages (20-1003)

CLOUD CONTRACT CHECKLIST The following checklist contains key points, when fully developed, the Statement of Work (SOW) can then be drafted. Definition of terms is located at the conclusion of this checklist. 9 Pages (20-1002)

CLOUD CONTRACT TEMPLATE This template provides a basis for contracting a Cloud computing service for SaaS, PaaS, or IaaS services. 4 Pages (20-1001)

DATA RECOVERY LANGUAGE This language is used for data recovery when an agreement is terminated with a vendor. 1 Page (20-1000)

RFP: CLOUD COMPUTING PROVISIONING SERVICES This document solicits proposals for a Cloud-based solution for optimal architecture, security, performance, and strategic vision. 17 Pages (20-881)

CLOUD COMPUTING FUNCTIONAL REQUIREMENTS This spreadsheet provides technical, security, solution, portability, and SLA requirements of Cloud computing, along with performance metrics. 13 Pages (20-880)

SAAS SUBSCRIPTION AGREEMENT This agreement sets forth the terms and conditions on which a vendor provides the functionality made available via Internet software. 8 Pages (20-629)

VENDOR AGREEMENT STANDARDS Following are basic vendor agreement standards concerning indemnity protection, limitations of liability, consequential damages exclusions, warranties, and more. 2 Pages (20-495)

MANAGED HOSTING SLA This Service Level Agreement describes the use and availability of network resources to those who have purchased Managed Hosting Services. 5 Pages (20-417)

HOSTED EXCHANGE SERVICES AGREEMENT The following is an agreement for hosting exchange services and spam filtering. 8 Pages (20-416)

RFQ: HOSTED CONTACT CENTER The Hosted Contact Center (HCC) contracts are multiple-award Master Services Agreements (MSA) with prequalified HCC contractors for hosted contact center services under fixed-priced, multi-year terms. 14 Pages (20-413)

RFP: MSSP For the purpose of engaging into a partnership with a professional Managed Security Service Provider (MSSP) for security monitoring and other network & computing asset security services, this informal RFP has been issued. 9 Pages (20-412)

SaaS CONTRACT REVIEWS A presentation delivered during a NOREX session shows SaaS volume, deal breakers, must-haves, and more. 6 Pages (20-259)

RFQ: COTS Quotations are requested for the non-exclusive supply of a Commercial Off-the-Shelf (COTS), Cloud-based, Constituency Management System. 71 Pages (20-239)

RFP: CLAIMS MANAGEMENT SOFTWARE SYSTEM A hosted and managed software system is solicited. 36 Pages (20-227)

CLOUD HOSTING AGREEMENT LANGUAGE This document provides sample Cloud hosting agreement early termination language. 1 Page (20-216)

RFP: CLOUD-BASED IP PBX A request for a provider of an IP PBX (Internet Protocol Private Branch Exchange), employing converged data and voice networks. 11 Pages (20-093)

MASTER SERVICES AGREEMENT: CLOUD-BASED SERVICES This template is for the request of services related to a Cloud-based environment. 23 Pages (20-088)

RFP: MANAGED HOSTING SERVICES This request is for a vendor to serve as the provider of the hosting of applications. 16 Pages (20-065)

RFP: CLOUD BASED CALL CENTER In order to create an integrated contact center solution, responses to this RFP will be used to evaluate the functional & technical fit of vendor packages based on requirements, the vendor's overall capabilities, and value. 58 Pages (50-251)

Transcripts & Polls

BANKING / FINANCIAL INDUSTRY IT ISSUES TRANSCRIPT NOREX Members discussed compliance issues; regulatory trends; onboarding / offboarding software; AI usage; AI / ML for enhanced customer service; Cloud usage; IT staffing trends; remote work trends; and the impact of AI on IT careers. 15 Pages (NV2503)

DATA ENCRYPTION TRANSCRIPT NOREX Members discussed data encryption pros and cons; implementations; encouraging the use of data encryption in the enterprise; standards; file sharing considerations; encryption in a hyperconverged environment; BitLocker recovery; tools; emerging technologies; encryption issues in China; and USB encryption. 14 Pages (NV2501)

GOVERNMENT IT ISSUES TRANSCRIPT NOREX Members discussed prioritization and budgeting; centralized, decentralized, or hybrid IT departments; out of state FTE positions; publishing the application catalog innovation and new capabilities; M365 governance and communication; managing AI; impact of emerging technologies; Cloud strategy; and disaster recovery and continuity of operations (COOP). 14 Pages (NV2500)

PROJECT MANAGEMENT TRANSCRIPT NOREX Members discussed software tools; Azure DevOps; tools for IT vs the enterprise; MS Project; project queue visualization; scoring models; use of AI; MS Copilot; automating with Power BI; workflow approval; Teams for projects; success measurements; decommissioning projects; and lessons learned. 20 Pages (NV2499)

MANAGING TECHNICAL DEBT TRANSCRIPT NOREX Members discussed the definition of technical debt; problems that occur; cleaning up a ServiceNow database; upper-level support; cyber attack risks; strategies to remediate technical debt; budget considerations; security risks; project delivery considerations; and Cloud vs on-prem technical debt. 18 Pages (NV2496)

EDUCATION INDUSTRY IT ISSUES TRANSCRIPT NOREX Members discussed departmental hardware challenges with disparate budgets; AI in education; implementing the Gramm-Leach Bliley Act; MFA for

students; students bypassing filters; using Google or MS with students; CRMs with Workday Student; and asset management for student devices. 13 Pages (NV2495)

CLOUD SECURITY IN A SaaS ENVIRONMENT TRANSCRIPT NOREX Members discussed strategies for SaaS vs on-prem vs Cloud; responsibilities for security in a SaaS model; data backup with vendors; SaaS sprawl; best practices for onboarding and offboarding users in a SaaS environment; using ISO 27017; security for integrations and data; IT staff protecting the applications they manage; and evaluating the exit strategy from a vendor. 16 Pages (NV2492)

RANSOMWARE TRANSCRIPT NOREX Members discussed lessons learned; paying or not paying the ransom; ethical and legal considerations regarding payment; engaging outside assistance; ransomware plan vs cybersecurity plan, immutable backup; early detection; reporting an attack; security and vulnerability assessments; and cybersecurity insurance considerations. 16 Pages (NV2488)

POWER BI TRANSCRIPT NOREX Members discussed creating a data-driven culture utilizing Power BI; third-party and free resources; Power BI as a replacement for Domo; the need for Microsoft Fabric; licensing considerations; auditing data sources; data loss prevention; and the positive impact of using Power BI. 17 Pages (NV2487)

TRANSPORTATION INDUSTRY IT ISSUES TRANSCRIPT NOREX Members discussed cybersecurity practices and tools; automating cybersecurity processes; user training videos; Azure Sentinel; securing personal messenger apps; WhatsApp security considerations; vendor flow; deploying MFA for all types of access; applying security certificates; black box device security; predictive ETA tools; and capturing real-time vehicle data. 14 Pages (NV2486)

SD-WAN TRANSCRIPT NOREX Members discussed SD-WAN pros and cons; deployment; the complexity of SD-WAN; public vs private internet connections; backup strategies; cost considerations; quality-of-service experiences; firewall positioning; P2P traffic performance; VPN connections; vendor selection; Fortinet usage; Cisco vs Meraki; utilizing multiple vendor solutions; Palo Alto; managed services options; SASE; WAN acceleration; and Always On VPN. 19 Pages (NV2483)

MANUFACTURING INDUSTRY IT ISSUES TRANSCRIPT NOREX Members discussed aligning IT with manufacturing processes; the “walkabout” model; implementing an enterprise-wide approach; network segmentation strategies; patching floor systems; Manufacturing Execution Systems (MES); ERP integration with manufacturing processes; authentication for frontline workers; Microsoft Dynamics; and dedicated operational technology. 18 Pages (NV2482)

MANAGING SHADOW IT TRANSCRIPT NOREX Members discussed the impact of shadow IT on an organization; who is most responsible for shadow IT; root causes; controls tied to the CMDB; innovation and control; tools to gain visibility to SaaS being used; the risk of shadow IT; and consumer-focused tools. 17 Pages (NV2481)

CLOUD-BASED ERP STRATEGIES TRANSCRIPT NOREX Members discussed factors that motivated the move from an on-prem solution to a Cloud-based ERP; utilizing a big bang or phased approach; cost prohibitive solutions; investments fundamental to a successful ERP move; centralizing integration platform technologies; vendor support; changing jobs and role responsibilities; integration challenges when interfacing to on-prem systems; MFA login to the Cloud ERP; Oracle vs Workday; Oracle Payroll / HCM; and migrating from Vista ERP on-prem to Cloud-based. 16 Pages (NV2477)

DISASTER RECOVERY / BUSINESS CONTINUITY TRANSCRIPT NOREX Members discussed where to start with DR / BC; engaging the business and getting business continuity out of IT; raising awareness and participation from the business; mitigating risk for SaaS solutions; multiple backup solutions on prem and in the Cloud; mass communication options; frequency to review and test a plan; COVID’s impact on DR / BC planning; and tools to back up network devices. 14 Pages (NV2475)

MERGERS & ACQUISITIONS TRANSCRIPT NOREX Members discussed merger and acquisition experiences and recommendations; acquiring executive consideration for technical issues; M&A planning; managing due diligence; identity federation; migrating Active Directory and Microsoft Forms; platform and cross-platform migration tools; ERP migration; domain access; management software / discovery tools to inventory IT asset inventories; and enterprise reporting platforms. 16 Pages (NV2473)

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)

ENERGY / UTILITY INDUSTRY IT ISSUES TRANSCRIPT NOREX Members discussed budget trends; technology and innovation challenges; effective collaboration and communication between IT and OT; Cloud solutions for CIP data / workloads and auditing concerns; SaaS and Cloud options for major applications; and ServiceNow on-prem and other tools. 15 Pages (NV2465)

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)

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)

CONSTRUCTION INDUSTRY IT ISSUES TRANSCRIPT NOREX Members discussed percentage of annual revenue spent on IT; percentage of budget allocated to IT and cybersecurity; staffing ratios; pros / cons with outsourcing support to a third party; dealing with consistent communication for “undesked” workers; internet access solutions for jobsites and remote locations; paperless onboarding with users not wanting an email address; fleet management software / services in use; Oculus VR headset and local administrator rights; asset label printers for barcodes / QR codes; structure and function of a Project Management Office for IT; and iPad programs. 19 Pages (NV2436)

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)

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)

VDI / DESKTOP AS A SERVICE (DaaS) TRANSCRIPT NOREX Members discussed differences between Virtual Desktop Infrastructure (VDI) and Desktop as a Service (DaaS); which is better for virtualization needs; justifying the investment in DaaS because of its agility; best use cases for DaaS; moving from Windows 10 desktops to remote work and VDI; successful deployment of Azure Virtual Desktop (AVD); utilization of VMware Horizon platform on-prem and in Azure as a hybrid configuration; utilizing Workspot DaaS; and cost analysis of DaaS vs traditional, user-device replacement schedules. 19 Pages (NV2424)

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)

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)

GOVERNMENT IT ISSUES TRANSCRIPT NOREX Members discussed recruiting and building an adequate candidate pool, changes in compensation / benefits to support the hybrid workforce, hybrid accommodations, COVID mitigations to ensure safety, dealing with employee turnover, preparing for the digital worker, analytics and cross-functional information gathering, Microsoft Tenant, geoprocessing in the Cloud, and moving server infrastructure to the Cloud. 18 Pages (NV2420)

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)

HEALTHCARE INDUSTRY IT ISSUES TRANSCRIPT NOREX Members discussed driving system utilization to improve operational efficiencies, effect of technology deployment on staff and workflows, leveraging Cloud technology, Cloud-hosted for EMRs, separate EMRs for hospitals and clinics, single-patient portals for health information in one app, leveraging APIs, recommended healthcare apps, PMO / SDLC strategies, dedicated project managers, data analytics programs, and managing comprehensive security. 24 Pages (NV2415)

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)

NETWORK MANAGEMENT / MONITORING / REFRESHES TRANSCRIPT NOREX Members discussed network management trends for 2022, the frequency to push out configuration changes, improvements to network monitoring to increase cybersecurity, partnering to monitor and manage infrastructure monitoring, network performance and diagnostic products in use, toolsets used to assess and monitor network capacity, network monitoring solutions for remote access, open source network management solutions, KRI / KPI metrics, and migrating business applications and data to a hybrid Cloud environment. 21 Pages (NV2404)

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)

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

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)

ENTERPRISE ARCHITECTURE TRANSCRIPT NOREX Members discussed key areas of opportunity for EA, how EA addresses internal vs external business capabilities, EA's role to contribute to current and future business financial performance, tracking metrics and measuring performance, citizen development, and advertising EA specific services across the organization. 24 Pages (NV2387)

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)

DISASTER RECOVERY / BUSINESS CONTINUITY TRANSCRIPT NOREX Members discussed best practices conducting Business Impact Analysis, addressing cyber-resilience for DR and BC, determining appropriate recovery time objectives and recovery point objectives, testing and training users, testing disaster recovery plans, and the use of vendors for DR. 16 Pages (NV2379)

DATA WAREHOUSE FOR BI TRANSCRIPT NOREX Members discussed developing and building a data warehouse from zero, data architecture, mastering and curation, 3rd-party consultants, integrating lakes and hubs, requirements gathering with stakeholders, ETL tools, and implementing a data API layer. 17 Pages (NV2377)

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)

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 session. 16 Pages (NV2365)

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)

ENTERPRISE STORAGE SOLUTIONS TRANSCRIPT Member organizations discuss a variety of enterprise storage technology, trends, vendor solutions, and more during this March 2021 session. Several polls are included. 24 Pages (NV2362)

TELECOM / VOIP / TEAMS PHONE SYSTEMS TRANSCRIPT A great March, 2021 discussion on telecom trends. Strategies and experiences moving to Teams (and others) for voice; softphones comparison; VoIP enhancements; and more. This transcript includes several polls and a lively chat session. 32 Pages (NV2361)

VDI AND DESKTOP AS A SERVICE (DaaS) TRANSCRIPT Members discuss their adoption to both VDI and DaaS environments during this February, 2021 session. This discussion includes a detailed look at one members journey, several polls, and a lively chat. 18 Pages (NV2360)

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)

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)

AZURE / AWS / GOOGLE ENTERPRISE CLOUD USAGE TRANSCRIPT Companies of all sizes see advantages to using Cloud services. NOREX members cover strategies and challenges in continuing to add Cloud services to their environments, with an extensive discussion around the hidden costs surrounding the Cloud. 18 Pages (NV2350)

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

HYBRID AND MULTI-CLOUD ENVIRONMENTS TRANSCRIPT Members compare notes and experiences with both Multi-Cloud and Hybrid Cloud environments during this August, 2020 session. Use cases for different Cloud providers, tools, and strategies are discussed. 17 Pages (NV2338)

BI / DATA ANALYTICS TRANSCRIPT NOREX Members discuss Business Intelligence and Analytics processes and tools during this August 2020 session. 19 Pages (NV2337)

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

REPLACING SKYPE FOR TEAMS / TEAMS TELEPHONY ISSUES TRANSCRIPT NOREX Member organizations weigh in on the status of a move to Teams telephony from either an on-prem or Cloud Skype for Business solution and / or other vendor systems during this July 2020 session. 22 Pages (NV2330)

AZURE / AWS / GOOGLE ENTERPRISE CLOUD USAGE TRANSCRIPT NOREX Members discuss the usage of Microsoft, Amazon and Google Cloud services during this June 2020 session. 20 Pages (NV2325)

ASSET MANAGEMENT / PROCUREMENT FOLLOWING COVID-19 TRANSCRIPT NOREX Members discuss ITAM strategies and tools in light of the COVID-19 Pandemic during this May 2020 session. 20 Pages (NV2323)

MICROSOFT TEAMS GOVERNANCE TRANSCRIPT NOREX Members and guests share their experience, questions, and ideas on Microsoft Teams. This session explored issues including best practices, migration, retention, managing groups, naming conventions, guest access, add-ins, and creation and archiving of teams. 49 Pages (NV2322)

COVID-19: BRINGING WORKFORCE BACK TRANSCRIPT Organizations are currently working on how and when to move staff back to the office after the COVID-19 pandemic shutdown. Among the decisions to be made are whether to return the full or partial staff to the office. During this session, NOREX Members and guests discussed options, resources, and lessons learned regarding equipment returns, social distancing in the office, government requirements and guidelines, stipends for employees, work prioritization, remote work tools, sanitizing, restrictions, and temperature scanning in the workplace. This transcript includes discussion about keeping the workforce safe after returning to the office, as well as a robust chat log conversation. 53 Pages (NV2321)

VENDOR MANAGEMENT OFFICE (VMO) TRANSCRIPT NOREX Members and guests share their experience, questions, and ideas on Vendor Management Office (VMO). This session explored issues including vendor risk assessment, pricing flexibility, hardware & maintenance, performance review, security compliance, and creating a sense of urgency with vendors. 19 Page (NV2320)

PATCH MANAGEMENT TRANSCRIPT During this session, NOREX Members and guests discussed patch management automation, delays, tools, scheduling, solutions, and patch frequency. 16 Pages (NV2317)

CLOUD FIRST APPROACH / STRATEGY TRANSCRIPT From key factors that drive usage to the Cloud, adoption, moving existing applications, security measures, agnostic vs. native, the Cloud Center of Excellence, and more are covered in this April, 2020 discussion. Polls and member chats are included. 28 Pages (NV2316)

COVID-19 PANDEMIC: RESPONSE, LESSONS LEARNED, WHAT'S NEXT? TRANSCRIPT Members discuss how the organization has responded to the impact to the pandemic crisis. Lessons learned on supporting WFH from a technical, hardware, security and team engagement / collaboration, and what is next perspective are shared. Polls, links, and a lively chat section are included in this April, 2020 transcript. 28 Pages (NV2315)

PREPARATION FOR A REMOTE WORKFORCE TRANSCRIPT With the onset of COVID-19 and the need for distancing, aggressive remote workforce processes are in place for most NOREX Member organizations. NOREX hosted this discussion on March 17, 2020 with over 200 participants. This transcript includes a very active chat log conversation, results from polls taken, and the takeaways we received from those who completed an evaluation. 48 Pages (NV2313)

MICROSOFT TEAMS AND ALTERNATIVE SOLUTIONS TRANSCRIPT Microsoft Teams and alternative solutions is a strong, growing area of interest for many NOREX Members. This discussion covers adoption and implementation, benefits and shortfalls, use of chat and collaboration, developing MS Teams governance, and more. Polls, links and an in-depth chat section is included in this February 2020 transcript. 32 Pages (NV2308)

VDI TRANSCRIPT NOREX Members discuss the selection, implementation and operation of various Virtual Desktop Infrastructure platforms during this February 2020 session. 16 Pages (NV2306)

SD-WAN TRANSCRIPT NOREX Members discuss the reasons they have moved forward or are considering the benefits of SD-WAN technologies during this January 2020 session. 14 Pages (NV2304)

2020 IT SECURITY INITIATIVES TRANSCRIPT What are member organizations top IT security initiatives for 2020? This January 2020 discussion is packed with security plans, strategies, polls, links to solutions / tools, a lively chat section, and much more. 27 Pages (NV2303)

ANTIVIRUS FILTERS AND FIREWALLS TRANSCRIPT In October 2019, participants inquire and share their experiences and research on anti-virus filtering and firewall tools. Several polls identify trends, opinions and strategies to combat spam and virus infection. 21 Pages (NV2291)

MICROSOFT AZURE CLOUD SERVICES TRANSCRIPT With Cloud-based solutions and services continuing to increase, members share their experiences with Microsoft Azure Cloud Services. In this October 2019 discussion, pros and cons, lessons learned; future plans; and more are shared. 12 Pages (NV2290)

ENTERPRISE STORAGE SOLUTIONS TRANSCRIPT NOREX members discuss current storage trends including usage of flash, Cloud options, modern data protection, automation and artificial intelligence during this September 2019 session. 10 Pages (NV2289)

MICROSOFT TEAMS TRANSCRIPT Microsoft Teams is gaining momentum for several NOREX organizations. While many are in the beginning stages, addressing Teams governance, retention concerns, managing access, general engagement, and more are discussed during this September, 2019 session. 22 Pages (NV2287)

TELECOM / MOBILE / VOIP ISSUES TRANSCRIPT NOREX members discuss Mobile Device Management, VoIP solutions and telecom issues during this August 2019 session. 15 Pages (NV2284)

O365 NEW FEATURES/ INITIATIVES TRANSCRIPT Members share experiences with the implementation of various Microsoft Office 365 services and features including Power BI, SharePoint, Skype for Business and Teams during this June 2019 session. 32 Pages (NV2275)

BACKUP/RECOVERY TRANSCRIPT Members share experiences with the leading backup and recovery tools during this May 2019 session. 12 Pages (NV2270)

ENTERPRISE CLOUD USAGE TRANSCRIPT NOREX members discuss experiences with Enterprise Cloud Usage during this April 2019 session. 16 Pages (NV2267)

LICENSING / CONTRACT NEGOTIATIONS TRANSCRIPT NOREX members discuss the strategies for managing contracts and negotiating licenses during this April 2019 session. 17 Pages (NV2266)

DISASTER RECOVERY TRANSCRIPT Topics of this March 2019 session include recovery approaches such as on- prem vs. DR-as-a-Service, backup and recovery tools, testing strategies and Business Continuity considerations. 20 Pages (NV2264)

DATA LOSS PREVENTION (DLP) TRANSCRIPT Getting started with DLP, DLP attributes, solutions used, Cloud impact, data classification, and more are discussed during this March 2019 session. 17 Pages (NV2263)

WINDOWS 10 TRANSCRIPT Member organizations strategize and share the decisions they made when rolling out, supporting and managing the upgrades to Windows 10 during this January 2019 session. Several products are shared and polls taken. 17 Pages (NV2255)

CLOUD-BASED STORAGE TRANSCRIPT NOREX members discuss the pros and cons of moving from on-prem to Cloud-based storage during this January 2019 session. 16 Pages (NV2254)

SELECT: GENERATIVE AI TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed integrating AI / LLMs into IT strategies; use cases and governance; justifying cost of internal models; intellectual property issues; securing AI; validating vendor-generated AI results; training teams; hosting internal instances of AI; and switching AI workloads to on-prem data centers. 14 Pages (NS254)

SELECT: RISK & VULNERABILITY MANAGEMENT NOREX Select Members from Fortune / Forbes 1000 organizations discussed including SLAs in a strategic approach; prioritizing vulnerabilities; tracking tools; identifying shadow IT; measuring program effectiveness; internal communication; emerging threats; and communicating risk to senior management. 12 Pages (NS250)

SELECT: DATA ANALYTICS TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed Cloud-based analytics tools; implementing Microsoft tools; centralized vs federated analytics; self-service analytics; impact of AI; dedicated data engineers; data governance; executive support; and visualization tools. 15 Pages (NS248)

SELECT: MANAGING TECHNICAL DEBT TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed the definition, management, and communication of technical debt; how to identify, surface, and prioritize TD; risk as an assessment; using employee retention as leverage; management in the Cloud vs on-prem; IT in the enterprise hierarchy; and balancing TD and product development. 15 Pages (NS247)

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: 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: SERVICENOW CMDB TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed CMDB licenses and application recognition; how detailed a CMDB can get; challenges navigated on CMDB practices and implemented capabilities that rely on CMDB data cleanliness; tips to set up Multisource CMDB; experiences with interfacing / integrating external CMDBs or external discovery tools; automatic import capabilities from other sources like Microsoft Active Directory or Microsoft System Center Configuration Manager; successfully implementing a true CMDB with relationships between CIs; master data strategy for end-to-end integration across CMDB, Incident Response Management, EA tools, and PMO tools; assigning capabilities to applications or services; and how deep in the CSDM model you define information. 18 Pages (NS235)

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)

SELECT: SERVICENOW TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed achieving primary value drivers for a ServiceNow implementation, organization structure, implementation timelines, SAM Pro module, managing services in SNOW, ServiceNow enabling other IT capabilities and systems such as CMDB, and CAB workbench to run a CAB meeting. 18 Pages (NS213)

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

IT TRENDS 2023 Q4 IT Trends is a collection of the NOREX Member input captured in the fourth 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. 25 Pages (DT2023-4)

IT TRENDS 2023 Q3 IT Trends is a collection of the NOREX Member input captured in the third 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. 22 Pages (DT2023-3)

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 STAFF DEVELOPMENT & PERFORMANCE TRANSCRIPT NOREX Members discussed Knowledge Skill Trees / Maps for application development and system infrastructure teams, reskilling / upskilling staff utilizing internal custom content or 3rd-party providers, preparing for Cloud / digital transformation, options for learning better human interactions and collaboration, IT Certification training and exams, motivating and retaining staff, and data to support that staff is productive and performing at a high level when working remotely. 20 Pages (CV079)

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 session. Topics include Cloud computing, staffing, project prioritization and Business Intelligence tool recommendations. 20 Pages (CV075)

CIO: NAVIGATING INTERNATIONAL / GLOBAL IT ISSUES DURING A PANDEMIC TRANSCRIPT During this CIO call, NOREX Members and guests shared experience and ideas on global office management, particularly in Asia. They discussed differences in products, regulations, firewalls, long distance connectivity, and collaboration tools. 21 Pages (CV074)

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)