

# Session Outline

SBSmigration.com IT Pro Conference 2007

**Small Business  
IT Disaster Planning  
for  
Risks and Crisis Recovery**

**2-day Conference  
French Quarter Weekend  
May 26-27, 2007**

**Astor Crowne Plaza Hotel  
New Orleans  
Bourbon and Canal St.**



## Event Presentation Team at a Glance

Recognition	Name	State/Country
Microsoft Dev Team	Microsoft Windows Server (SBS) Senior Dev Managers Including Dean Paron and Paul Fitzgerald	Seattle, WA, US
SBS Group Leader	Chris Rue	AL, US
SBS-MVP	Frank McCallister	AL, US
SBS-MVP	Dean Calvert	Australia
SBS-MVP	Wayne Small	Australia
Managed Services	Erick Simpson	CA, US
IT Services Tuning	Karl Palachuk	CA, US
SBS-MVP	Roger Otterson	CA, US
SBS-MVP	Steve Lai	CA, US
SBS-MVP	Susan Bradley	CA, US
SBS-MVP	Cal McLennan	Canada
Windows MVP	Charlie Russel	Canada
Security MVP	Dana Epp	Canada
SBS-MVP	Les Connor	Canada
Exchange MVP	Vlad Mazek	FL, US
SBS Group Leader	Bob Hood	IL, US
SBS Group Leader	Cindy Slade	IL, US
SBS-MVP	Jeff Middleton	LA, US
ISA MVP	Amy Babinchak	MI, US
SBS-MVP	Cris Hanna	MO, US
SBS-MVP	Andy Goodman	NC, US
SBS-MVP	Grey Lancaster	NC, US
SBS Group Leader	Mark Crall	NC, US
Managed Services	Amy Luby	NE, US
SBS-MVP	Chad Gross	NE, US
SBS-MVP	Marina Roos	Netherlands
SBS-MVP	Dave Nickason	NY, US
SBS-MVP	Kevin Royalty	OH, US
SBS-MVP	Fred Johnson	OH, US
SBS-MVP	Eriq Neale	TX, US
SBS-MVP	Steve Foster	United Kingdom
CRM MVP	Anne Stanton	VT, US
SBS-MVP	Steven Banks	WA, US

Session Summary at a Glance			
Session Title	Speakers	Format	Discussion Issues
Vision	Jeff Middleton	<b>Keynote Welcome</b>	Crisis Management Roles & Relationships
Crisis	Jeff Middleton Dr. Mark Cousins, DVM	<b>Keynote Interview Case Study</b>	The 9-Lives of Cat Practice Veterinary Hospital <ul style="list-style-type: none"> <li>• <i>Special Guest Interview with owner Dr. Mark Cousins, DVM</i></li> </ul>
Strategy	Chris Rue Cindy Slade Cris Hanna Bob Hood	<b>Leadership Panel</b>	How Your Career/Business Model Positions You to a Crisis
Outsource	Eriq Neale Marina Roos Les Connor Roger Otterson	<b>Case Study Snapshots</b>	Augmented Services & Resource Leveling <ul style="list-style-type: none"> <li>• <i>Four Elements: 10-minute topic briefs with panel debate/Q&amp;A</i></li> </ul>
Obligations	Amy Luby Erick Simpson Karl Palachuk	<b>Leadership Panel</b>	Is a Managed Services Model Boundless Risk?
Friction	Susan Bradley Eriq Neale Anne Stanton	<b>Leadership Panel</b>	The Opposite of Streamlining Productivity <ul style="list-style-type: none"> <li>• <i>Draining Productivity with Process Burdens</i></li> </ul>
Leverage	Kevin Royalty Dean Calvert Wayne Small Vlad Mazek	<b>Case Study Snapshots</b>	Design and Deploy of Recoverable Environments <ul style="list-style-type: none"> <li>• <i>Four Elements: 10-minute topic briefs with panel debate/Q&amp;A</i></li> </ul>
Perimeters	MS Dev Team	<b>Demo &amp; Discussion</b>	Windows Home Server – Data Protection Technology
Foundation	MS Dev Team	<b>Demo &amp; Discussion</b>	Infrastructure Server Platforms for Small-Medium Sized Businesses <ul style="list-style-type: none"> <li>• <i>Presentation by MS Server Dev Team</i></li> </ul>
Environment	Dana Epp Dave Nickason Dean Calvert Mark Crall	<b>Leadership Panel</b>	A Place to Work
Continuity	Fred Johnson Steven Banks Amy Babinchak	<b>Leadership Panel</b>	Strategic Assets & Value Decisions for Choosing Recovery vs. Uptime
Fundamentals	Open - All Experts	<b>Ask the Experts Group Q&amp;A:</b>	The Usual Suspects in Crisis: Open Q&A
Workshops	Workshop Session presenters will be announce soon.	<b>Demo &amp; Discussion</b>	<ul style="list-style-type: none"> <li>• Server Imaging Based Recovery</li> <li>• SBS AD/Domain Controller</li> <li>• Exchange</li> <li>• SQL/CRM</li> <li>• SharePoint</li> <li>• Client and Mobile Data</li> </ul>

**Activity Hours Overview & Unique Events**

	<b>Friday Night</b>	
Registration	4:00 – 8:00 PM	Astor Crowne Plaza Hotel – Main Lobby
Jazz Reception	6 - 9 PM	Astor Crowne Plaza Hotel – St. Charles Room (1 <sup>st</sup> floor)

**Saturday & Sunday Daytime**

Breakfast	7 – 9 AM	Astor Ballroom <i>(Attendee, Sponsor, or Speaker badge required)</i>	
Registration	7:30 – 8:30 AM	Grand Gallery Registration Desk	
Coffeehouse	7 AM – 5 PM	Complimentary snacks, gumbo, CC's coffee and a place for attendees and guests to mingle outside the conference session. <i>(Conference badge required, Guest Badges welcomed)</i>	
Morning Break	10:00 – 10:15 AM	Coffeehouse and Gallery	
Lunch Break	Saturday 12:15 – 1:30 PM	Sunday 12:15 – 1:15 PM	Astor Ballroom <i>(Attendee, Sponsor, or Speaker badge required)</i>
Afternoon Break	Saturday 3:30 – 3:45 PM	Sunday 2:45 – 3:00 PM 4:30 – 4:45 PM	Coffeehouse and Gallery

**Saturday Evening Special Events**

Sponsors Hour Mixer	6:00 - 7:00 PM	Coffeehouse & Gallery – We can help plan your dinner. We'll have wine & a beer bucket hour to plan your night out and chat with our sponsors.
Dinner on the Town	Find your own restaurant on the town...we can help. Come to the mixer at 6 pm for suggestions!	
Late-Nite Cabaret	9:00 – 12 PM	Wrap the evening with our Cabaret, including piano and vocals by Aileen Paron, one of our friends from the Redmond area...hmm. Who could that be?

**Sunday Evening Special Events**

SBS Riverboat Dinner Cruise	7 – 10 PM	<p>SBS Bash Riverboat Cruise on the Creole Queen, sponsored by the Microsoft SBS Team!</p> <p>We'll be taking a short walk just down Canal St. to the river to hop on the boat. It's dinner, drinks, sights and sounds. We will be entertained by the Anthony AB Brown Band all night long! Gather in the Coffeehouse area at 6:45pm to join the group!</p>
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Saturday Morning		
<b>Taking A Crisis Perspective on Normal Events</b>		
<b>1</b>	<b>Keynote Welcome</b>	<b>Crisis Management Roles &amp; Relationships</b>
8:30 - 9:00	<b>Jeff Middleton</b>	<ul style="list-style-type: none"> <li>• Optimism – Owner &amp; IT Pro: Partnership or Open-Ended Delegation</li> <li>• Over-commitment – The Biggest Mistake You Could Control</li> </ul>
<b>2</b>	<b>Keynote Interview Case Study</b>	<b>Crisis – The 9-Lives of Cat Practice Veterinary Hospital</b>
9:00 – 10:00	<b>Jeff Middleton</b> <b>Dr. Mark Cousins</b>	<b>Special Guest Interview with owner Dr. Mark Cousins, VMD</b> <ul style="list-style-type: none"> <li>• Building a Business with Many Technical Needs</li> <li>• Growth Planning</li> <li>• The Fire</li> <li>• Katrina</li> <li>• The Long Road Home</li> </ul>
<b>15 Minute break</b>	<b>Coffeehouse Refreshments</b>	
<b>Reality Check</b>		
<b>3</b>	<b>Leadership Panel</b>	<b>Strategy – How Your Career/Business Model Positions You to a Crisis</b>
10:15 – 11:15		<ul style="list-style-type: none"> <li>• Your Responsibility and Career Choices</li> <li>• Panel Discussion on “What is my Job/Business Model”</li> </ul>
	<b>Bob Hood</b>	A Consultant Serving Non-Profits now nearing retirement
	<b>Chris Rue</b>	10 yrs corporate IT Pro Staff, now entrepreneur consultant as startup
	<b>Cris Hanna</b>	Full-time IT Pro corporate staffer, Part-Time freelance Consultant
	<b>Cindy Slade</b>	Consultant perspectives on unexpected health crisis that takes priority
<b>4</b>	<b>Case Study Snapshots</b>	<b>Outsource – Augmented Services &amp; Resource Leveling</b> 10-minute topic briefs with panel debate/Q&A
11:15 – 12:15	<b>Les Connor</b>	Outsourcing Helpdesk Coverage or Emergency Partners
	<b>Roger Otterson</b>	Remote Hosting Environments & Services
	<b>Eriq Neale</b>	2 <sup>nd</sup> Level Support: Maze or Resolution Path?
	<b>Marina Roos</b>	Providing Support & Management from Offsite
<b>12:15 – 1:30</b>	<b>Lunch (1hr 15m) - Astor Ballroom</b>	

Saturday Afternoon		
	<b>Reality Check</b>	
<b>5</b>	<b>Leadership Panel</b>	<b>Obligations – Is a Managed Services Model Boundless Risk?</b>
1:30 – 2:30	<p><b>Erick Simpson</b></p> <p><b>Amy Luby</b></p> <p><b>Karl Palachuk</b></p>	<ul style="list-style-type: none"> <li>• Service Level Agreements Taking Responsibility for Anything?</li> <li>• How Deep is a Full Recovery Plan?</li> <li>• Risk Boundaries and Expectations</li> </ul>
<b>6</b>	<b>Leadership Panel</b>	<b>Friction – The Opposite of Streamlining Productivity</b>
2:30 – 3:30	<p><b>Susan Bradley</b></p> <p><b>Anne Stanton</b></p> <p><b>Eriq Neale</b></p>	<p><b>Draining Productivity with Process Burdens</b></p> <ul style="list-style-type: none"> <li>• Addressing Needs in the face of Improbable Budgeting</li> <li>• Managing Human Factor vs. Technology Collapses</li> <li>• Compliance, Auditing, and Security</li> </ul>
15 Minute break	Coffeehouse Refreshments	

Change the Rules – Evolve with the Technology		
<b>7</b>	<b>Case Study Snapshots</b>	<b>Leverage – Design and Deploy of Recoverable Environments</b> 10-minute topic briefs with panel debate/Q&A
3:45 – 4:45	<b>Dean Calvert</b>	Desktop Consolidation via Terminal Services
	<b>Vlad Mazek</b>	Production Server Virtualization
	<b>Wayne Small</b>	Running a User Desktop Lock Down and Managed Business
	<b>Kevin Royalty</b>	Offsite Storage/Backup Automation
<b>8</b>	<b>Demo &amp; Discussion</b>	<b>Windows Home Server – The Future in Data Protection Technology</b>
4:45 – 5:30	<p>Windows Home Server Team</p> <p><b>Grey Lancaster</b></p>	<p><b>Emerging Technology</b></p> <ul style="list-style-type: none"> <li>• Data Protection: A glimpse into the future</li> </ul>
	<b>Announcements</b>	<b>Closing the Sessions for the Day</b>
5:30 – 5:45	<b>Jeff Middleton</b>	

Sunday Evening Special Events		
<b>Sponsors Hour Mixer</b>	<b>6:00 - 7:00 PM</b>	<b>Coffeehouse &amp; Gallery</b> – We can help plan your dinner. We'll have wine & a beer bucket hour to plan your night out and chat with our sponsors.
<b>Dinner on the Town</b>	Find your own restaurant on the town...we can help. <b>Come to the mixer at 6 pm for suggestions!</b>	
<b>Late-Nite Cabaret</b>	<b>9:00 – 12 PM</b>	<b>Wrap the evening with our Cabaret-</b> This includes piano and vocals by Aileen Paron, one of our friends from the Redmond area...hmm. Who could that be?



Sunday Morning		
	<b>Microsoft Future Platforms</b>	
<b>9</b>	<b>Demo &amp; Discussion</b>	<b>Foundation – Infrastructure Platforms</b>
8:30 – 10:00	<p><b>Dean Paron</b></p> <p><b>Paul Fitzgerald</b></p> <p><b>Bodhi Deb</b></p> <p><b>Chris Almida</b></p>	<p><b>Future Platforms</b></p> <ul style="list-style-type: none"> <li>• Longhorn</li> <li>• Cougar</li> <li>• Centro</li> <li>• Home Server</li> </ul>
<b>15 Minute break</b>	<b>Coffeehouse Refreshments</b>	
	<b>Delivering Productivity During Crisis</b>	
<b>10</b>	<b>Leadership Panel</b>	<b>Environment – A Place to Work</b>
10:15 – 11:15	<p><b>Mark Crall</b></p> <p><b>Dean Calvert</b></p> <p><b>Dave Nickason</b></p> <p><b>Dana Epp</b></p>	<ul style="list-style-type: none"> <li>• Primary Site, Facility Operations</li> <li>• Domain and Remote Site Dependencies</li> <li>• Communications System Protection</li> </ul> <p><b>The answers are not obvious or universal. Where to work in a crisis?</b></p> <ul style="list-style-type: none"> <li>• Branch office, hot site, cold site, hotel, business partner, virtual operation?</li> <li>• Earthquake, Sunami, Tornado...what if you will have no warning?</li> <li>• Hurricane, wild fire, blizzard ...what do you grab as you evacuate?</li> <li>• Resource requirements at your destination, acquisition time?</li> </ul>
<b>11</b>	<b>Leadership Panel</b>	<b>Continuity – Strategic Assets &amp; Value Decisions for Choosing Recovery vs. Uptime</b>
11:15 – 12:15	<p><b>Amy Babinchak</b></p> <p><b>Charlie Russel</b></p> <p><b>Steven Banks</b></p> <p><b>Fred Johnson</b></p>	<p><b>Assuming you have a facility available, now you need the production assets:</b></p> <ul style="list-style-type: none"> <li>• Crisis Management Staffing, Planning, and Expectations</li> <li>• Real Time, Real Fast vs. Really Important Data and Operations</li> <li>• Conundrum for Optimized Redundancy as More Daily Overhead</li> <li>• Emergency Hardware Replacement Service Agreements</li> </ul>
12:15 – 1:15	<b>Lunch (1hr) - Astor Ballroom</b>	

Sunday Afternoon		
<b>Workshops: Best 30 Minutes Disaster Recovery Dives</b>		
1:15 – 4:30	<b>1 Track</b>	<b>6 sessions (30 min. each)</b>
12	<b>Mark Crall</b> <b>Andy Goodman</b>	Virtual and Imaging Based Server Recovery
13	<b>Jeff Middleton</b>	SBS AD/Domain Controller
14	<b>Vlad Mazek</b>	Exchange
<b>15 Minute break</b>	<b>Coffeehouse Refreshments</b>	
15	<b>Anne Stanton</b> <b>Steve Foster</b>	SQL/CRM
16	<b>Chad Gross</b> <b>Amy Babinchak</b>	SharePoint
17	<b>Chris Rue</b> <b>Steve Banks</b>	Client and Mobile Data
<b>15 Minute break</b>	<b>Coffeehouse Refreshments</b>	
<b>Conference Summary Q&amp;A</b>		
18	<b>Ask the Experts Group Q&amp;A:</b>	<b>Fundamentals – The Usual Suspects in Crisis: Open Q&amp;A</b>
4:45 – 5:45	<b>Stump the Band</b>	Open Topic Q&A: <ul style="list-style-type: none"> <li>• Server and Operations Protection</li> <li>• Applications – Exchange, LOB &amp; CRM</li> <li>• Central Data Protection</li> <li>• Peripheral, Client and Portable Data</li> </ul>
	<b>Closing Comments</b>	<b>Close of Conference Sessions</b>
5:45 – 6:00	<b>Jeff Middleton</b>	
<b>Sunday Evening Special Events</b>		
<b>SBS Riverboat Dinner Cruise</b>	<b>7 – 10 PM</b>	<b>SBS Bash Riverboat Cruise on the Creole Queen, sponsored by the Microsoft SBS Team!</b>  We'll be taking a short walk just down Canal St. to the river to hop on the boat. It's dinner, drinks, sights and sounds. We will be entertained by the Anthony AB Brown Band all night long! Gather in the Coffeehouse area at 6:45pm to join the group!

