*e*BUSINESS 2.0

what works, what didn't, and what's *next*

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CIO SYMPOSIUM
Alumni Club of Boston
Center for eBusiness
SIM Boston

MAY 18, 2005   *Boston Marriott Cambridge Hotel*

eBUSINESS 2.0
what works, what didn't, and what's *next*

Dear Colleagues,

On behalf of the MIT Center for eBusiness at the Sloan School of Management, I would like to welcome you to the 2005 MIT CIO Symposium. The Center is pleased to be your co-host for this event, along with the Sloan Alumni Club of Boston. This occasion allows us to showcase some of the research results produced over the last year. All of this research was performed in partnership with our corporate sponsors, so the work is "real world".

The spring of 2005 marks the Fifth Anniversary of the "dot com" crash. But ironically, in the past five years many of the crazy predictions of the dot com days have actually come true. For example, five years ago 80% of all travel was booked though travel agencies – today it is less than 15%. According to Comscore, total online consumer spending in 2004 grew by 26% to a record level of more than $117 billion. And believe it or not, people are even buying pet food online. "eBusiness" certainly has come a long way.

But we have to wonder what is in store for the next five years. What does "eBusiness 2.0" look like? A few questions are; how do we use Information Technology to revolutionize our business processes, and thereby our relationships with customers, suppliers and business partners? How can we protect ourselves from online threats like identity theft that cost companies and consumers tens of billion dollars a year?

Through our current research, we have some insights to lend. But we also have created a unique environment at the MIT Center for eBusiness through a successful balancing of real-world relevance with rigorous research. We bring together the combined talents and resources of the academic and business communities in search of new insights into how information technologies can enable organizations to invent new solutions to some of our greatest mutual challenges. Since our founding in 1999, we have worked with over 50 corporate sponsors on more than 60 research projects, involving nearly half the faculty at the Sloan School of Management. Through our continued collaborative effort, industry and academia will continue to uncover and shape the state-of-the-art for doing business in the era of the Internet.

Once again – as is the MIT Sloan way – we have gathered leading faculty from the MIT Center for eBusiness, as well as senior executives from industry, to provide a platform of discussion and understanding in the form of the 2005 MIT CIO Symposium. Please feel encouraged to contribute your thoughts, perspectives and experiences. We hope to be working with you more closely in the very near future. Thanks for you attendance, and welcome to MIT.

Sincerely,

DAVID VERRILL
Executive Director

MIT Center for eBusiness
MIT Sloan School of Management

Dear Symposium Attendees,

On behalf of the Sloan Alumni Club of Boston and the MIT Sloan School of Management, it is my great pleasure to welcome you to the 2005 MIT Sloan CIO Symposium.

The theme for this year's conference is "eBusiness 2.0: what works, what didn't and what's next". It's hard to imagine that it was only a decade ago that Netscape popularized the browser and the World Wide Web took off. eBusiness advances over the past 10 years have brought tremendous change in how companies organize, create value, market and transact business. We are fortunate to have with us today the inventor of the World Wide Web Tim Berners-Lee, and eBusiness pioneers such as Akamai, Amazon.com, and RSA Security. They will be joined by a stellar group of technologists and practitioners that will share their insights on next generation eBusiness.

What better place to explore these topics than MIT? We are privileged to bring this event to you in partnership with MIT's Center for eBusiness, the world's foremost center for research in eBusiness. In the great MIT tradition of "mens et manus", or mind and hand, we bring together a renowned group of academics, thought leaders and IT practitioners.

This event could not have been organized without the help of many talented people. We would like to thank Stephen Buckley, Erik Brynjolfsson and David Verrill from the MIT Center for eBusiness for their commitment and thought leadership. We owe particular thanks to the Society for Information Management (SIM) – specifically to Pat Randall, the SIM Boston Chapter President and Michael Brooks. Finally, this event would not have been possible without the generous support of our sponsors. Special thanks to our annual sponsors: Nutter McClennen & Fish LLP, and SAS; our gold sponsors Accenture, Akamai, BEA, and RSA Security; our silver sponsors AMR Research, EMC, Fast Search and Transfer, Novell, and Pegasystems; and our media sponsors Monderer Design and PapeBoston.

We look forward to hearing your feedback on the conference. Please complete the on-line feedback form at **www.mitcio.com**. If you would like further information on the Sloan Alumni Club of Boston or our "CXO" event series, contact our current president at **carlo_cadet@alum.mit.edu**.
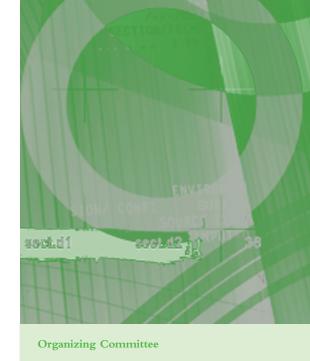
Welcome and enjoy the Symposium!

Sincerely,

JEFF LOEB, SM'89
*Chairman of 2005 MIT Sloan CIO Symposium,
Director of Market Development*

RSA Security
jloeb@rsasecurity.com

Organizing Committee

The success of this Symposium is a direct result of the tireless work and dedication of the following people:

Bennett Blau, SM '97
Michael Brooks, SIMBoston
Stephen Buckley, Center for eBusiness
Michael Griffin, MBA '95
Anne Johnson, MBA '06
Paulette Johnson, Sloan Alumni Club of Boston
Andrew Nelson, MBA '01
Jeremy Seidman, MBA '03
Tanis Teich, Sloan Alumni Office
Michael Veit, RSA Security

SCHEDULE

May 18, 2005

Time	Event
7:30-8:30 AM	**REGISTRATION AND CONTINENTAL BREAKFAST**
8:30-8:35 AM	**WELCOME** **RICHARD SCHMALENSEE,** *Dean,* MIT Sloan School of Management
8:35-9:15 AM	**MORNING KEYNOTE:** **Harnessing the Customer Power Revolution** **PROF. GLEN L. URBAN,** *Dean Emeritus,* MIT Sloan School of Management
9:15-10:30 AM	**PLENARY PANEL:** **Under Attack: Ensuring eBusiness Confidence in an Era of Identity Theft** **PAUL NICHOLAS,** *Assistant Director,* Government Accountability Office *(Moderator)* **RICHARD A. CLARKE,** *Chairman,* Good Harbor Consulting **ARTHUR W. COVIELLO, JR.,** *President and Chief Executive Officer,* RSA Security Inc. **DR. TOM LEIGHTON,** *Chief Scientist,* Akamai **DR. ALASTAIR MACWILLSON,** *Global Managing Partner of Security Practice,* Accenture
10:30-11:00 AM	**BREAK**
11:00 AM-12:15 PM	**TRACK I:** **The Future of Work** **PROF. THOMAS W. MALONE,** *The Patrick J. McGovern Professor,* MIT Sloan School of Management *(Moderator)* **CHARLIE BRENNER,** *Senior Vice President,* Fidelity Center for Applied Technology **ROBERT LAUBACHER,** *Research Associate,* MIT Sloan School of Management **DARYL MOREY,** *Senior Vice President of Operations and Information,* The Boston Celtics **JEREMY SELIGMAN,** *Director of IT Strategy and Competency,* Ford Motor Company **TRACK II:** **Applistructure: The Changing Roles of Application and Infrastructure Providers** **ERIC AUSTVOLD,** *Research Director,* AMR Research *(Moderator)* **DAVID BROWN,** *Vice President of IS – Supply Chain,* Staples Inc. **LUTZ HEUSER,** *Vice President of Corporate Research and Chief Development Architect,* SAP **ALAN TREFLER,** *Founder and Chief Executive Officer,* Pegasystems Inc. **CHRIS VOGEL,** *Senior Director,* BEA Systems
12:15-1:30 PM	**LUNCH**

Time	Event
1:30-2:45 PM	**TRACK I:** **Measuring and Maximizing the Productivity of Information Workers** **PROF. ERIK BRYNJOLFSSON,** *The George and Sandi Schussel Professor,* MIT Sloan School of Management *(Moderator)* **RICK BROUGHTON,** *Director of IT Strategy,* Dunkin' Brands, Inc. **STEPHEN C. HALL,** *Vice President of Corporate Technology,* The Thomson Corporation **BOB MESSIER,** *Senior Director of Performance Management,* SAS **RONALD E. STROUT,** *Senior Vice President of IT Strategy and Governance,* State Street Bank **TRACK II:** **Next Generation eBusiness Advances: What's Next?** **PROF. MICHAEL CUSUMANO,** *Management Review Distinguished Professor,* MIT Sloan School of Management *(Moderator)* **MARY FINLAY,** *Deputy Chief Information Officer,* Partners Healthcare System, Inc. **ERIC LUNDQUIST,** *Editor in Chief,* eWeek **ALI I. RIAZ,** *Chief Operating Officer and Chief Financial Officer,* Fast Search & Transfer Inc. **DR. WERNER VOGELS,** *Chief Technology Officer,* Amazon.com
2:45-3:00 PM	**BREAK**
3:00-4:15 PM	**TRACK I:** **What Does Open Source Mean to my IT Environment?** **PROF. ERIC VON HIPPEL,** *Head of the Technological Innovation and Entrepreneurship Group,* MIT Sloan School of Management *(Moderator)* **PAUL CORMIER,** *Executive Vice President Engineering,* Red Hat **KIRK M. KLASSON,** *Vice President of Strategy,* Novell **DAVID POWSNER,** *Partner,* Nutter McClennen & Fish LLP **PETER J. QUINN,** *Chief Information Officer,* The Commonwealth of Massachusetts **TRACK II:** **Implementing an Agile IT Infrastructure** **DR. PETER WEILL,** *Director of CISR,* MIT Sloan School of Management *(Moderator)* **JAMIE GYLDEN,** *Global Managing Partner of Networking Practice,* Accenture **BUD F. MATHAISEL,** *Senior Vice President and Chief Information Officer,* Solectron **NIRAJ B. PATEL,** *Executive Vice President and Chief Information Officer,* GMAC Commercial Holding Corp. **BALAJI YELAMANCHILI,** *Vice President and General Manager of Content Management Software Group,* EMC Corporation
4:15-4:30 PM	**BREAK**
4:30-5:30 PM	**AFTERNOON KEYNOTE:** **The Economic Importance of Standards** **TIM BERNERS-LEE,** *Director,* World Wide Web Consortium
5:30-7:30 PM	**COCKTAIL RECEPTION AND NETWORKING**

Harnessing the Customer Power
REVOLUTION

the *Economic*
IMPORTANCE of Standards

The firm's relationship with its customers has fundamentally changed by the increased power consumers have over information and the choice of products and services. This new power and the decrease in conventional marketing effectiveness calls into question the push/pull model of marketing used from 1950-2000. Now a new paradigm is emerging called "customer advocacy". Give customers open, honest, and complete information and help them make the best decision (even compare your products to competition). Companies are testing and implementing IT driven customer advocacy tools to harness customer power. I review programs at GM, Intel, and British Telecom and look at the role of IT in the coming era of customer advocacy.

From the early pyramids to 21st century skyscrapers, people engaged in architecting things have long recognized the importance of standards. Information technology is no exception. The development and wide adoption of technology standards continue to make an enormous economic impact. In this talk, we'll take a look at the many ways that the economic impact may be measured, using a number of recent industry examples. Some of the metrics we'll explore include: the cost of development and adoption of technologies with and without standards; the barriers to entry when there are no standards; the potential costs associated when duplicate or competing standards are offered; and the opportunity costs associated with standards.

Glen L. Urban is a leading educator, a prize-winning researcher specializing in marketing and new product development, an entrepreneur, and author. He has been a member of the MIT Sloan School of Management faculty since 1966, was deputy dean at the school from 1987 to 1992, and Dean from 1993 to 1998.

Urban's research focus is on management science models that improve the productivity of new product development and marketing. For example, in a methodology he devised called Information Acceleration, he uses multi-media computer technology to simulate future sales of products such as cars, computer systems, telecommunications, and drugs.

Urban's recent research is to develop a trust-based marketing system on the Internet. An extension of the Information Acceleration research, the system uses pickup trucks for a prototype Web site that integrates attribute screening, expert advice, collaborative filtering and community interaction. This is being extended to understanding how the click stream from such an advisor/customer dialogue can be used to discover unmet needs. Finally research is underway to find the determinants of trust on the Internet and design a real time adaptive experimentation system to increase the levels of trust on a Web site.

PROF. GLEN L. URBAN
Dean Emeritus

MIT Sloan School of Management

A graduate of Oxford University, England, **Tim Berners-Lee** now holds the 3Com Founders chair at the Laboratory for Computer Science and Artificial Intelligence Lab (CSAIL), at the Massachusetts Institute of Technology (MIT). He directs the World Wide Web Consortium, an open forum of companies and organizations with the mission to lead the Web to its full potential.

With a background of system design in real-time communications and text processing software development, in 1989 he invented the World Wide Web, an internet-based hypermedia initiative for global information sharing. while working at CERN, the European Particle Physics Laboratory. He wrote the first web client (browser-editor) and server in 1990.

Before coming to CERN, Tim worked with Image Computer Systems, of Ferndown, Dorset, England and before that as a principal engineer with Plessey Telecommunications, in Poole, England.

TIM BERNERS-LEE
Director

World Wide Web Consortium

Under Attack: *Ensuring*
BUSINESS CONFIDENCE
in an Era of Identity Theft

"eBusiness" has the power to extend market reach, reduce cycle times, optimize supply chains, and provide instantaneous global access to information. However, these advancements are threatened by fears of fraud, theft, surveillance, and even terrorism. The on-line banking community has lost tens of billions of dollars as a result of "phishing" and other scams. Consumers have become skeptical of product offerings. Businesses and governments have become so fearful of system compromise, that they block access to information from the people who need it the most. This panel of "C" level executives will explore how to tackle these issues and unleash the transformative power of eBusiness.

ARTHUR W. COVIELLO, JR.
President and Chief Executive Officer
RSA Security Inc.

As President and CEO of RSA Security Inc., **Arthur W. Coviello, Jr.** is responsible for the company's vision, strategy and day-to-day operations.

Since joining RSA Security in 1995, Coviello has been a driving force in the rapid growth of the Company, increasing revenue from $25 million in 1995 to more than $305 million in 2004. In 2003, Business 2.0 Magazine named RSA Security one of the top 10 fastest growing technology companies in its annual top 100 survey.

Coviello's contribution has helped establish RSA Security as a leader in e-security. The company is now recognized as the de facto standard for two-factor authentication and encryption, and as an emerging leader in identity and access management. Coviello has strengthened the company's position in the e-security market through the successful acquisitions of Xcert International, 3G International, TransIndigo, and Securant Technologies, and through strategic partnerships with Microsoft and Accenture.

Coviello's expertise and influence have made him a recognized leader in the industry, where he plays a key role in several national cyber-security initiatives and advises government agencies. Before joining RSA Security, Coviello served as Chief Operating Officer for CrossComm Corporation, an internetworking vendor. In addition, he has served on numerous outside boards of directors.

MODERATOR
PAUL NICHOLAS
Assistant Director
Government Accountability Office

Paul Nicholas is an Assistant Director at the Government Accountability Office where he focuses on cyberspace security and emerging technology and security challenges for the federal government. His current efforts include wireless security, IPv6, malware, and information sharing challenges.

From 2002-2004, Nicholas helped to coordinate critical infrastructure protection policy in the White House as a staff member of the President's Critical Infrastructure Protection Board and later as a Director on the Homeland Security Council. His key accomplishments at the White House included coordinating the President's National Strategy to Secure Cyberspace, developing presidential policy on infrastructure protection, and negotiating key information sharing provisions in the Homeland Security Act.

Prior to joining the executive branch, Nicholas spent three years in the United States Senate where he served as a senior advisor to Senator Robert F. Bennett on cyber security, information sharing, and Y2K. Additionally, he worked on the Senate Judiciary subcommittee on Technology and Terrorism.

Nicholas earned a Bachelor's degree in history from Indiana University, and a Master's in National Security Studies from Georgetown University.

DR. TOM LEIGHTON
Chief Scientist
Akamai

Dr. Tom Leighton is one of the world's preeminent authorities on algorithms for network applications. He co-founded Akamai Technologies in September 1998. Serving as Chief Scientist, he is Akamai's technology visionary. Dr. Leighton's work behind establishing Akamai was based on recognizing that a solution to freeing up Web congestion could be found in applied mathematics and algorithms. Akamai has demonstrated this through the creation of the world's largest distributed computing platform that dynamically routes content and applications for hundreds of organizations across a network of over 15,000 servers.

A Professor of Applied Mathematics at MIT, Dr. Leighton has served as the Head of the Algorithms Group in MIT's Laboratory for Computer Science since its inception in 1996. Dr. Leighton holds numerous patents involving cryptography, digital rights management, and algorithms for networks, and has published more than 100 research papers. He is a Fellow for the American Academy of Arts and Sciences, and is Chairman of the President's Information Technology Advisory Committee's subcommittee on Cyber Security. In 2004, he was elected into the National Academy of Engineering for contributions to the design of networks and circuits and for technology for Web content delivery.

RICHARD A. CLARKE
Chairman
Good Harbor Consulting

Richard A. Clarke is an internationally recognized expert on security, including homeland security, national security, cyber security, and counterterrorism. He is currently an on-air consultant for ABC News.

Clarke served the last three Presidents as a senior White House Advisor. Over the course of an unprecedented 11 consecutive years of White House service, he held the titles of Special Assistant to the President for Global Affairs, National Coordinator for Security and Counterterrorism, and Special Advisor to the President for Cyber Security.

Prior to his White House years, Clarke served for 19 years in the Pentagon, the Intelligence Community, and State Department. During the Reagan Administration, he was Deputy Assistant Secretary of State for Intelligence. During the Bush (41st) Administration, he was Assistant Secretary of State for Political-Military Affairs and coordinated diplomatic efforts to support the 1990-1991 Gulf War and the subsequent security arrangements.

As Chairman of Good Harbor Consulting, LLC, Clarke advises clients on a range of issues including corporate security risk management, information security technology, dealing with the federal government on security and IT issues, and counterterrorism.

DR. ALASTAIR MACWILLSON
Global Managing Partner of Security Practice
Accenture

Dr. Alastair MacWillson is the Partner in charge of Accenture's global Security Practice and works with business and government leaders around the world on critical issues such as security, trust, privacy and compliance. He also serves on the leadership team of Accenture's global Technology & Outsourcing Service Line.

Prior to joining Accenture, Alastair spent 16 years with the UK Foreign Service specializing in political and technical risk analysis on postings in the former Soviet Union, the Middle East and the USA. In 1990 he joined PriceWaterhouseCoopers, and in 1992, took on the role of global lead for the Technology Risk and e-Business Services a group of 2,500 security professionals. He also served as the interim global CEO for beTRUSTed, Price Waterhouse Cooper's managed identity services spin-off.

Alastair holds a PhD in Theoretical Physics, related to research in Applied Cryptography. He is based in London.

The Future of WORK

Imagine organizations where bosses give employees huge freedom to decide what to do and when to do it. Imagine electing your own bosses and voting directly on important company decisions. Imagine organizations where most workers aren't employees at all, but electronically connected freelancers living wherever they want to. And imagine that all this freedom in business lets people get more of whatever they really want in life—money, interesting work, helping other people, or time with their families. This panel will discuss some of the new organizational forms and ways of working and living together that may be enabled by information technology in the future.

ROBERT LAUBACHER
Research Associate

MIT Sloan School of Management

Robert Laubacher is a Research Associate at MIT's Sloan School of Management. His work has examined how information technology is transforming business practices and social patterns. He is currently a researcher for the Activity Based Performance Management project, which seeks to develop new tools for measuring the benefits of information technology.

Laubacher has published in academic venues and in Harvard Business Review, the Financial Times and Boston Globe. He recently co-edited *Inventing the Organizations of the 21st Century* (MIT Press, 2003), a collection of articles based on a multi-year MIT research initiative.

While at MIT, he has also served as executive producer of two independent feature films, *Home Before Dark* (1997) and *American Wake* (2004). Prior to coming to MIT, Laubacher worked as a strategy consultant at A.T. Kearney and was lead researcher for a Pulitzer-prize winning history of the oil industry. Laubacher has an undergraduate degree from Northwestern and a Master's Degree in modern history from Harvard, where he also completed doctoral coursework.

MODERATOR

PROF. THOMAS W. MALONE
The Patrick J. McGovern Professor

MIT Sloan School of Management

Prof. Thomas W. Malone is the Patrick J. McGovern Professor of Management at the MIT Sloan School of Management. He is also the founder and director of the MIT Center for Coordination Science and was one of the two founding co-directors of the MIT Initiative on "Inventing the Organizations of the 21st Century". Prof. Malone teaches classes on leadership and information technology, and his research focuses on how new organizations can be designed to take advantage of the possibilities provided by information technology. The past two decades of his research are summarized in his book, *The Future of Work: How the New Order of Business Will Shape Your Organization, Your Management Style, and Your Life* (Harvard Business School Press, 2004). Prof. Malone has also published over 75 articles, research papers, and book chapters; he is an inventor with 11 patents; and he is the co-editor of three books. Prof. Malone has been a cofounder of three software companies and has consulted and served as a board member for a number of other organizations. His background includes work as a research scientist at Xerox Palo Alto Research Center (PARC), a Ph.D. from Stanford University, and degrees in applied mathematics, engineering, and psychology.

DARYL MOREY
Senior Vice President of Operations and Information

The Boston Celtics

Daryl Morey assumed his role as Senior Vice President of Operations and Information of the Boston Celtics upon closing of the acquisition on December 31, 2002. He led the due diligence process for the new Celtics ownership group as a Principal consultant of The Parthenon Group, a strategy consulting firm.

At the Celtics, Daryl focuses on arena operations, risk management, basketball analytics, and the strategy, pricing, and technology infrastructure of the ticket sales process.

Key activities as Parthenon's CKO and sports consultant included the due diligence for the Joe O'Donnell/Steve Karp Boston Red Sox acquisition team and developing a new web hosting and design service offering to the legal market that grew to a $20 million business in 2 years. In addition to Parthenon, he has been a statistical consultant for STATS, Inc., and also a technology lead at The MITRE Corporation.

Daryl holds a bachelor's degree in Computer Science from Northwestern University and a MBA from the MIT Sloan School of Management. He has published over 10 technology strategy articles, in CIO and other publications.

CHARLIE BRENNER
Senior Vice President

Fidelity Center for Applied Technology

Charlie Brenner is Senior Vice President of the Fidelity Center for Applied Technology, a unit of Fidelity Investments, the nation's largest mutual fund company and one of the leading providers of financial services. In this position, Brenner heads the firm's focal point for R&D, emerging technology development, competitive analysis, re-use, university liaison, and technology education. FCAT is both an internal resource for Fidelity's businesses and a channel for communicating its technology story to customers.

Brenner joined Fidelity in 1990. He created the firm's electronic messaging infrastructure, and directed its earliest forays into the Internet. He also led groups responsible for desktop architecture, security, disaster recovery, application development, speech recognition, and data engineering.

Prior to joining Fidelity, Brenner co-founded a financial services firm that pioneered the commercial use of distributed mini-computers, later selling the business to the Chase Manhattan Bank. He then served as CIO of several Chase and Dun & Bradstreet subsidiaries. His earliest work with computers began in 1969, as a principal designer of experimental teletype-based interactive systems for Shell Oil.

JEREMY SELIGMAN
Director of IT Strategy and Competency

Ford Motor Company

Jeremy Seligman is Director, IT Strategy and Competency, Ford Motor Company. Seligman is responsible for the integration of the overall Information Technology strategy as well as the design and implementation of a learning architecture for IT. He is committed to creating strategically linked learning environments that will be central to the effectiveness and sustainability of the IT organization.

Before joining Ford, Seligman was the CIO of Frontier Communications in Rochester, NY, and has also consulted to Fortune 500 companies on building sustainable learning environments. Seligman began his career at Xerox in Finance and later in Information Systems.

Seligman is a two-time graduate of the University of Rochester, with a degree in Education and an MBA in Finance and Economics, and is a lifelong student of organizational dynamics and change. He lives in Ann Arbor, Michigan.

Applistructure:
The CHANGING ROLES *of Application and Infrastructure Providers*

The combination of enterprise applications and infrastructure heralds the next generation of IT based on Service-Oriented Architectures (SOAs). SOA will turn out to be just another technology without game changing impact unless applistructure takes hold. SOAs current cost model and complexity will require new delivery models packaged to reduce costs of IT infrastructure while improving business agility. Who are the likely providers of applistructure and what impact will applistructure have on your IT strategy? This panel will discuss some of the best practices and successful delivery models for applistructure in organizations.

Lutz Heuser is Vice President of Corporate Research and Chief Development Architect at SAP AG. He is responsible for all strategic research programs and the global innovation transfer into the product portfolio of SAP. His main areas of expertise include eLearning, pervasive computing ("Ambient Intelligence"), Smart Items, Internet services, multi-modality, and business processes technology. Prior to joining SAP in 1999, Lutz was Managing Director of the European Research Organization of Digital Equipment Corporation and member of the extended board of the German subsidiary of Digital. Lutz started his career at Digital Equipment back in 1987 as member of the research staff. Lutz was co-founder of the renowned research center CEC Karlsruhe, Germany and was its manager from 1992 to 1995. He was also Founder and Director of the European Applied Research Center of Digital Equipment. Lutz received his doctoral degree in Computer Science from the University of Karlsruhe in 1991 and his diploma in Computer Science from the University of Darmstadt in 1987.

LUTZ HEUSER
Vice President of Corporate Research and Chief Development Architect

SAP AG

MODERATOR

As a Research Director focused on Enterprise Applications and Technology Strategies, **Eric Austvold** is responsible for leading AMR Research in the areas of enterprise software architecture, integration frameworks, business process management and B2B exchange platforms. Eric comes to AMR Research with a strong background in enterprise software applications and more than 15 years of high technology experience.

Prior to AMR Research, Eric was Vice President at Precipio Partners, a strategic consulting firm where he led successful client engagements for high technology firms looking to establish credible market positions and develop a brand identity for their product and service offerings.

Prior to Precipio Partners, Eric served as Director of Product Planning and Management at Infinium, leading the product marketing and product management teams and evaluating new business opportunities for the organization. Eric has also held senior sales and marketing positions at Dun & Bradstreet Software, and began his career as a Software Engineer working for IBM, NASA and TASC.

Eric graduated with honors from the University of Wisconsin – STOUT where he received a Bachelor of Science in Applied Mathematics and Software Engineering as well as a minor in Physics. Eric speaks frequently at local industry trade conferences, user group meetings, and executive conferences. He has also delivered a number of international presentations.

ERIC AUSTVOLD
Research Director

AMR Research

Alan Trefler is the Founder and Chief Executive Officer of Pegasystems. Trefler also serves as Chairman of the Pegasystems Board of Directors.

Trefler has consulted extensively in the use of advanced technologies, customer service processing, expert systems, and work automation. He has frequently presented to international audiences, and has written for major publications. He has been profiled in such publications as The Boston Globe, Forbes and Inc. Magazine, and was granted a U.S. Patent in 1998 for Pegasystems' distinctive Inherited Rule Base Architecture, which provides the framework for Pegasystems' rules-based Business Process Management (BPM) solutions.

His interest in computers and expert systems originates from collegiate involvement in tournament chess, during which time he achieved a Master rating and was co-champion of the 1975 World Open Chess Championship. Trefler holds a degree with distinction in Economics and Computer Science from Dartmouth College.

ALAN TREFLER
Founder and Chief Executive Officer

Pegasystems Inc.

David Brown works for Staples Inc. as the Vice President IS – Supply Chain. In his current role, David and his team provide leadership and oversight for all systems supporting supply chain activity at Staples. Prior to this, David worked as an independent IT Strategy Consultant. He has held senior IT positions with Stride Rite, Polaroid, Malden Mills and Konica and has extensive knowledge and experience in the supply chain, retail and manufacturing areas.

David has a B.A. from Unity College, an M.B.A. from the University of Massachusetts/Amherst and an M.S. in Computer Science from Rensselaer Polytechnic Institute. He is a member of the Council of Logistics Management and the American Production and Inventory Control Society (APICS) and has completed APICS certification. David has been an adjunct faculty member at Northeastern University and Babson College and serves on the Society for Information Management (SIM) Executive Board. He retired as a Major from the U.S. Army after almost 25 years of active and reserve service. David is also a board member for Brave River Solutions, a technology services company located in the Boston area.

DAVID BROWN
Vice President of IS – Supply Chain

Staples Inc.

Chris Vogel is Senior Director, IT Architecture and Advanced Solutions for BEA Systems. He oversees the IT roadmap and architecture required to support BEA's Worldwide Field Organization (Sales, Services and Marketing), including the next generation of BEA's service sriented architecture (SOA); role-based portals built on a standards based business and application aervices infrastructure. Since joining BEA, Chris has also led the IT Sales Organization and been responsible for the delivery of several major worldwide IT initiatives utilizing a shared-services model.

Chris has 15 years of Information Technology, software, consulting and customer support experience. Prior to joining BEA, Chris was responsible for a Western region consulting practice for BroadVision, a global provider of personalized self-service web applications. In that role, Chris oversaw the successful delivery of major customer Web initiatives, including enterprise portals, business-to-business and business-to-consumer implementations. Prior to BroadVision, Chris held several management positions at Oracle within application and solution support.

Chris holds a bachelor's degree in Applied Mathematics from Cal Poly, San Luis Obispo.

CHRIS VOGEL
Senior Director

BEA Systems

Measuring *and* Maximizing
THE PRODUCTIVITY
of Information Workers

A century ago, an exciting new technology called electricity was just being introduced. But by itself, electricity did nothing for productivity. It took decades for firms to figure out how to redesign their factories and processes to deliver a productivity payoff. But today, managers cannot afford to wait decades to harness the potential for greater productivity from much faster, exponential improvements in information technology. What must companies and their workers do to succeed in taking advantage of advances in information technology and be more productive? This panel will discuss some of the successful practices used by successful firms and individuals to improve this critical measurement.

MODERATOR

PROF. ERIK BRYNJOLFSSON
The George and Sandi Schussel Professor

MIT Sloan School of Management

Erik Brynjolfsson is the Director of the Center for eBusiness at MIT, and the George and Sandi Schussel Professor of Management at the MIT Sloan School and Director or Advisor of several technology-intensive firms. Prof. Brynjolfsson was among the first researchers to measure the productivity contributions of information technologies, and his research has been recognized with six "Best Paper" awards by fellow academics. He lectures worldwide on business strategy, pricing models and intangible assets, including keynote addresses at the Business Week CEO Summit, the Business Week CIO Summit, the Economist eBusiness Summit, and the eBusiness Expo. He is Editor of the Ecommerce Research Forum and several books including *Understanding the Digital Economy* (MIT Press, 2000) and *Strategies for eBusiness Success* (Jossey-Bass, 2001). Prof. Brynjolfsson has served on the Editorial Boards of numerous academic journals as well as Time Magazine's Board of Economists.

At the MIT Sloan School of Management, Prof. Brynjolfsson teaches a popular MBA course on Digital Business and a PhD seminar on IT, Organizations and Markets. He is an associate member of the MIT Laboratory for Computer Science and the MIT Center for Coordination Science. Prof. Brynjolfsson previously taught at Stanford Business School and at Harvard University. He holds Bachelors and Masters degrees from Harvard University in Applied Mathematics and Decision Sciences and a PhD from MIT in Managerial Economics.

RICK BROUGHTON
Director of IT Strategy

Dunkin' Brands, Inc.

Rick Broughton is responsible for the strategic design, implementation and integration of the IT at Dunkin' Brands. There he is responsible for the strategic planning, deployment and use of technology and process change for this world-class franchisor. Dunkin' Brands is the parent company to Dunkin' Donuts, Baskin Robbins and Togo's Eateries with over 12,000 retail units worldwide.

Before joining Dunkin' Brands, Broughton was the CIO at Computerworld, Inc. and CXO Media, publishers of Computerworld, CIO Magazine, CSO Magazine and other publications both in print and online. As CIO, Rick was responsible for all IT infrastructure, initiatives and growth as well as having business responsibility for building out the various online properties. It was here that he grew properties such as Computerworld.com and CXO Online and developed secure "gated community" destination sites for CIOs such as Computerworld's Executive Suite.

Broughton serves on the board of the Boston chapter of the Society of Information Management (SIM) and facilitates the Boston SIM CIO Roundtable program. He has served on the advisory boards of several IT publishers.

Broughton received both his BSA and MSA from Bentley College and Bentley College Graduate School of Business.

STEPHEN C. HALL
Vice President of Corporate Technology

The Thomson Corporation

As head of the Corporate Technology Office, **Stephen C. Hall** is responsible for helping leverage technology across Thomson, managing, and supporting the CTO Council in its technology vision, strategies, programs, and projects: annual technology plan, architecture, standards, best practices, computer security, network infrastructure, web presence, business systems, and career development programs. Prior to Thomson, Hall was the CIO for Harvard University, a Managing Principal for the Nolan Norton IT management consulting firm, and led marketing and technical programs for IBM. He has served on the boards of NetPaper, IKIBI, BBN Planet Corp., IDC Services, Society for Information Management, and Trustee of the Manchester-Essex Conservation Trust.

Hall has a B.S. from Tufts University.

BOB MESSIER
Senior Director of Performance Management

SAS

Since joining SAS 8 years ago, **Bob Messier** has worked in numerous roles including Sales, Marketing, Business Development and Product Management. Bob is currently responsible for the SAS Americas Performance Management Business Unit. The team provides guidance and technical implementation services for clients that are looking to extend their financial reporting capabilities in the areas of Performance Management, Financial Reporting, Business Intelligence, Activity Based Management and Advanced Analytics.

Prior to joining SAS, Bob worked at Ernst & Young in Hartford, CT, supporting the following industries; manufacturing, healthcare, banking and insurance industries. He also has several years experience as a Systems Consultant at United Technologies (UTC). At UTC, Bob lead numerous international consulting projects including MRP Systems design, ERP implementations and financial reporting applications.

Bob is a Certified Public Accountant and has an MBA with a concentration in International Management.

RONALD E. STROUT
Senior Vice President of IT Strategy and Governance

State Street Bank

Ronald E. Strout joined State Street in March of 2003 and is the head of IT Strategy and Governance. He is responsible for managing the overall Information Technology governance function and overseeing the Offices of Architecture, Program Management Office, Corporate Management Information Services, IT Risk, and IT Finance as well as IT Transformation. His group is responsible for creating and managing the State Street offshore program. Ron is also part of a team that is developing a consolidated set of strategic IT and corporate metrics.

Before joining State Street, Ron was a Partner and Managing Director with BearingPoint, Inc. (formerly KPMG Consulting). At BearingPoint, he was part of the Financial Services practice and was also a leader in building the BearingPoint offshore strategy and was one of the key senior executives responsible for the transition management practice for the firm.

Prior to joining BearingPoint, Ron headed his own consulting company, Global Solutions. Global Solutions provided both strategy and implementation services to several international financial institutions and to financial services software companies.

Ron began his career in technology as a systems programmer and has an extensive technology background as a developer and product manager, both in the U.S. and overseas.

Ron received his Bachelor of Science degree in accounting from the University of Maine.

Next Generation
EBUSINESS ADVANCES:
What's Next?

Evaluating emerging technologies is a constant challenge for IT organizations. Identifying the emergence of new technologies, both those that have the power to transform industries and those that provide incremental business value, and developing adoption strategies has become a core element of business strategy. What are the critical success factors for evaluating and adopting new eBusiness technologies? What frameworks and tools are utilized? What are the lessons learned? This panel will evaluate best practices for evaluating emerging technologies, leveraging the experience of seasoned executives who have driven technology-enabled transformation.

Since 1996, **Eric Lundquist** has been Editor in Chief of eWEEK, which includes domestic, international and online editions. As eWEEKs EIC, Lundquist oversees a staff of nearly 40 editors, reporters and Labs analysts covering product, services and companies in the high-technology community. He is a frequent speaker at industry gatherings and user events and sits on numerous advisory boards. Eric writes the popular weekly column, Up Front, and he is a confidant of eWEEK's Spencer F. Katt gossip columnist.

ERIC LUNDQUIST
Editor in Chief

eWeek

MODERATOR

Michael A. Cusumano is the Sloan Management Review Distinguished Professor at the Massachusetts Institute of Technology's Sloan School of Management. He specializes in strategy, product development, and entrepreneurship in the computer software industry, as well as automobiles and consumer electronics. He teaches courses on Strategic Management, Innovation and Entrepreneurship, and The Software Business.

Prof. Cusumano received a B.A. degree from Princeton in 1976 and a Ph.D. from Harvard in 1984. Professor Cusumano has published eight books. *Microsoft Secrets* (1995, with Richard Selby) is a best-selling study of Microsoft's strategy, organization, and approach to software development, and has approximately 150,000 copies in print in 14 languages. *Platform Leadership: How Intel, Microsoft, and Cisco Drive Industry Innovation* (2002, with Annabelle Gawer) examines how industry leaders orchestrate complementary innovations that make their platforms more valuable. *Competing on Internet Time: Lessons from Netscape and its Battle with Microsoft* (1998, with David Yoffie), was named one of the top 10 business books of 1998 by Business Week and Amazon.com, and played a central role in the Microsoft anti-trust trial. His latest book, *The Business of Software: What Every Manager, Programmer, and Entrepreneur Must Know to Thrive and Survive in Good Times and Bad*, was published in March 2004.

PROF. MICHAEL A. CUSUMANO
Management Review Distinguished Professor

MIT Sloan School of Management

Ali I. Riaz serves as the Chief Operating Officer and Chief Financial Officer with the dual role of managing the financial and corporate function strategies. Riaz previously served as the Vice-President, Strategy and Corporate Development. Prior to joining FAST, Riaz held executive positions with Computer Sciences Corporation (CSC), including Vice President for Finance and Administration for Europe, Middle East and Africa. Riaz has also held several management positions at Novartis Pharmaceuticals, including Head of Planning, Information and Control and Head of Global Marketing Controlling.

Riaz holds an MBA degree from Loyola Marymount University in Los Angeles, California.

ALI I. RIAZ
Chief Operating Officer and Chief Financial Officer

Fast Search & Transfer Inc.

Mary Finlay is the Deputy Chief Information Officer, Partners HealthCare System, Inc. In this role, she is responsible for the daily management of an organization of 1,100 information systems and telecommunications staff. Previously, Finlay was the Chief Information Officer of Brigham and Women's Hospital. Prior to Brigham and Women's, Finlay was a senior systems consultant with Automatic Data Processing (ADP).

Finlay serves on the board of the Boston chapter of the Society of Information Management (SIM) and is on the technical advisory council for YearUp. She is a member of Healthcare Information and Management Systems Society, the College of Healthcare Information Executives (CHIME) and a past member of CIO magazine's advisory council on executive programs.

Finlay received her MBA from the Simmons School of Management and her BA in psychology from Allegheny College.

MARY FINLAY
Deputy Chief Information Officer

Partners Healthcare System, Inc.

Dr. Werner Vogels is Chief Technology Officer at Amazon.com where he is responsible for driving the technology vision to continuously enhance the innovation on behalf of Amazon's customers at a global scale.

Prior to joining Amazon, he worked as a research scientist at Cornell University where he was a principal investigator in several research projects that target the scalability and robustness of mission-critical enterprise computing systems. He has held positions of VP of Technology and CTO in companies that handled the transition of academic technology into industry.

Vogels holds a Ph.D. from the Vrije Universiteit in Amsterdam and has authored close to 80 articles for journals and conferences, most of them on distributed systems technologies for enterprise computing.

DR. WERNER VOGELS
Chief Technology Officer

Amazon.com

What Does Open Source
Mean to my IT ENVIRONMENT?

Open source software is perhaps the most innovative trend currently impacting IT environments. Developed by a community of programmers, open source software is changing the way that software is sold and supported. With open source software, CIOs can now influence the software roadmap as much as the vendors do. But not every application is a good fit for open source. If CIOs choose open source software, then they must decide whether to buy support from a third-party vendor or support it using in-house staff. This panel will examine the open source development process, establish criteria for evaluating open source versus proprietary software, and explore various open source support models.

Kirk Klasson is the Vice President of Strategy for Novell and is responsible for the identification of new business and technology-based opportunities. He joined Novell from Cambridge Technology Partners where he was Vice President of Marketing and Business Development. In this capacity he was focused on the articulation and development of advanced business and digital strategies for clients on a world-wide basis.

Prior to joining Cambridge, Klasson was the vice president of strategy for Xerox New Enterprises, a technology-based business development group of Xerox Corporation, where he was responsible for the formation and implementation of business strategy for a portfolio of young, high-growth businesses encompassing software, display, data encryption, collaborative and internet/intranet technologies.

Klasson has also held a number of executive positions in consulting, engineering, marketing, finance, and operations with several computer and high technology companies, including Yankee Group, Prime Computer, Ionics, Adage and GRI Computer Corporation.

Klasson holds a BA from Goddard College and a certificate in Management and Administration from Harvard University.

KIRK M. KLASSON
Vice President of Strategy

Novell

MODERATOR

Eric Von Hippel is Head of the Technological Innovation and Entrepreneurship Group at the MIT Sloan School of Management. His research is focused on the sources of and economics of innovation. Eric Von Hippel has developed methods that enable firms to rapidly and efficiently create breakthrough new products and services by building on information gained from innovating lead users. These Lead User methods have been found valuable by many leading-edge companies worldwide. In a new book, *Democratizing Innovation* (MIT Press, April 2005), Von Hippel will provide a detailed new view of the latest work in this field.

PROF. ERIC VON HIPPEL
*Head of the Technological Innovation
and Entrepreneurship Group*

MIT Sloan School of Management

David Powsner is an MIT graduate (S.B., Physics, 1981) and a partner in Nutter McClennen & Fish's intellectual property law group. He is a registered patent lawyer with over twenty years of experience counseling high-tech clients in the Boston area. Powsner has a broad base of technical and legal knowledge, with a particular focus on protecting companies working in computer, software and communications technologies.

He handles patent prosecution and clearance studies, infringement and validity opinions, trademark prosecution, trade secrets and copyright counseling, licensing, and litigation.

He is admitted to practice before the Supreme Judicial Court of Massachusetts, the U.S. District Court for the District of Massachusetts, the U.S. Court of Appeals for the Federal Circuit, and the U.S. Patent and Trademark Office.

A leader in the field, he has served as editor of the Newsletter of the National Council of Intellectual Property Law Associations. He was recently named a Massachusetts Super Lawyer in the November 2004 issue of Boston magazine.

DAVID POWSNER
Partner

Nutter McClennen & Fish LLP

Since joining Red Hat in May 2001 as Executive Vice President of Engineering, **Paul Cormier**'s leadership and experience in enterprise technology has led to the introduction of Red Hat's acclaimed line of enterprise products, including Red Hat Enterprise Linux. Cormier has been instrumental in forging tight partnerships with many leading technology companies.

Prior to coming to Red Hat, he served as Senior Vice President of Research and Development at BindView, helping the company achieve market leadership in 2000.

Cormier holds a Master of Science in Software Development and Management from Rochester Institute of Technology.

PAUL CORMIER
Executive Vice President of Engineering

Red Hat

Peter J. Quinn is Chief Information Officer (CIO) for the Commonwealth of Massachusetts and Director of the Commonwealth's Information Technology Division (ITD), and Founding Chair of the Government Open Code Collaborative (GOCC). As ITD Director and CIO, under the Executive Office for Administration and Finance, Quinn is responsible for setting information technology standards in the Commonwealth. Quinn came to public service following a successful career in private sector IT, most recently as the CIO for Boston Financial Data Services.

PETER J. QUINN
Chief Information Officer

The Commonwealth of Massachusetts

Implementing an Agile
IT INFRASTRUCTURE

In many enterprises, IT infrastructure accounts for 50% or more of the total IT budget. Ebusiness and other business needs are requiring increasingly agile IT infrastructures. On-demand computing, outsourcing, service oriented architectures all promise to help deliver more flexible IT services to improve the scale, flexibility and productivity of business operations. To achieve this goal, IT will need to manage itself like a service but also be more agile than ever before. Manageability and scalability will need to be built into IT services as an inherent attribute, rather than after the fact. This panel will discuss the opportunities and challenges around implementing agile infrastructures seeking to uncover best practices for implementation and governance.

MODERATOR

DR. PETER WEILL
Director of CISR

MIT Sloan School of Management

MIT Sloan's Center for Information Systems Research (established in 1974) is funded by corporate sponsors and patrons, and undertakes practical research on how firms generate business value from IT. CISR disseminates its findings through briefings, papers, workshops and executive education. **Dr. Peter Weill** joined the Sloan faculty in 2000 to become director of CISR. Peter's research and advisory work centers on the role, value and governance of IT in enterprises.

Peter has taught executive education and MBA programs on the business value of IT and has published award-winning books, journal articles, and case studies. These include his recent co-authored book, *IT Governance: How Top Performers Manage IT Decision Rights for Superior Results* (Harvard Business School Press 2004). He is co-author of the 'best-seller', *Leveraging the New Infrastructure: How market leaders capitalize on information technology* (HBS Press 1998) and *Place to Space: Migrating to eBusiness Models*, (HBS Press 2001) which won one of the Library Journal of America's best business book of the year awards. Peter is currently working on a new book on Enterprise Architecture and researching effective business models. Peter has advised corporations and governments in the USA, Europe and Australia.

JAMIE GYLDEN
Global Managing Partner of Networking Practice

Accenture

Jamie Gylden is a Partner with Accenture's technology organization and is the head of the Network Technologies Practice. Gylden has been with Accenture for 14 years and has focused on infrastructure and networks for the entirety of that time. The Accenture Network Technology Practice counts 150 full time professionals aligned directly to the practice and a total interest group of over 1000.

Gylden is based in Accenture's European Technology Park in Sophia Antipolis and has spent a majority of his career on clients in the Europe, Middle East, and Africa (EMEA) region. His most recent engagements include Sainsburys, QinetiQ, Thames Water and Barclays Bank.

In his free time, Gylden enjoys spending time with his family and golfing.

BUD F. MATHAISEL
Senior Vice President and Chief Information Officer

Solectron

Bud F. Mathaisel is Senior Vice President and Chief Information Officer for Solectron, with global responsibility for information technology and business process reengineering worldwide. Scope includes plant floor and manufacturing technologies, computer aided design, computer aided engineering, computer aided manufacturing and product information systems, marketing and sales systems, computer and network operations and all business applications. Previously, he was the CIO for the Ford Motor Company, and CIO of the Walt Disney Company. Earlier, Bud was the founding Director of Ernst & Youngs Center for Business Innovation (CBI) in Boston, a group dedicated to the conception and development of leading-edge ideas and management approaches about business innovation.

Bud is on the Editorial Advisory Board of CIO Magazine and McKinsey reviewer for the Harvard Business Review. He is a member of several CIO benchmarking groups. He received both Bachelor of Science and Master of Science degrees from the Engineering School at MIT, Cambridge Massachusetts. He is a native of Boston, Massachusetts.

NIRAJ B. PATEL
Executive Vice President and Chief Information Officer

GMAC Commercial Holding Corp.

The Information Technology department at GMAC Commercial Holding Corp. is considered one of the best in the family of General Motors subsidiaries. **Niraj B. Patel**, Executive Vice President and Chief Information Officer, has built the company's technology from the ground up and was praised as the Best of Breed in web technologies for all of General Motors. In his present role, Patel guides the corporation's worldwide activities in application development, infrastructure, telecommunications and business unit support.

Patel is widely regarded as an industry expert and is frequently featured in technology and mortgage publications including Network World, Information Week, Banking Strategies, Computerworld, American Banker, Wall Street Journal, Mortgage Technology Magazine, Silicon India, Philadelphia Inquirer, National Mortgage News, Financial Times, Philadelphia Business Journal, Financial Executive Magazine, Business Communications Review, New York Times, Network World Fusion, RealComm Advisory, and PC Week.

Patel's achievements have been recognized by CIO Magazine, The Yankee Group and various financial services industry groups. Excellence awards include the 2004 CIO 100 Award (Agile 100), Realcomm Top 25 People to Watch in Commercial Real Estate for 2004 and 2005, and CIO Forum Top Financial IT Executive of 2001–2002, and 2004.

BALAJI YELAMANCHILI
Vice President and General Manager of Content Management Software Group

EMC Corporation

Balaji Yelamanchili is the Vice President and General Manager of Content Management Software Group at EMC Corporation. Together with Frank Chao, Balaji leads world-wide product operations for EMCs Enterprise Content Management and Collaboration offerings, with functional responsibilities for product strategy, product development (engineering, QA, and program management), and product marketing.
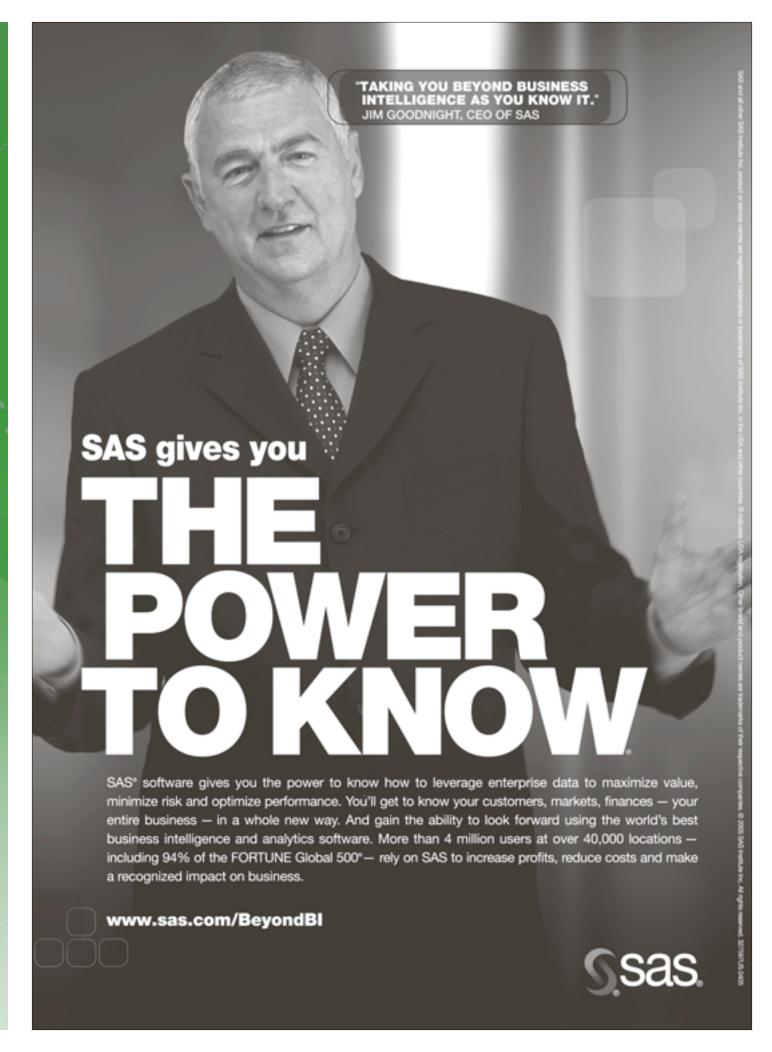
Balaji was previously the Vice President and General Manager of Collaboration product business unit at Documentum where he was responsible for the product strategy, development, and marketing efforts of the companys best-in-class collaboration products. Earlier, Balaji served as the Vice President of Products for Documentum with responsibility for product management, technical marketing, and product business development for all of companys product lines.

Prior to joining Documentum, Balaji served in senior product management and market development roles at Rational Software Corporation, managing Rational's industry-leading software configuration and change management product lines.

Balaji Yelamanchili holds an MS in engineering from the Louisiana State University at Baton Rouge and an MBA from the University of Michigan at Ann Arbor.

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Information Technology

Nutter knows what it takes for IT companies to reach their potential—both as technology providers and as thriving businesses. We understand that IT firms must move quickly to develop, protect and deploy their innovations.

Our patent attorneys help IT providers secure invaluable protection of proprietary assets. When necessary, our IP litigators are there to enforce that protection.

Our business attorneys help IT companies get started, secure financing, make acquisitions and assemble strategic alliance and licensing deals.

Nutter is one of Boston's premier law firms, offering strategic counsel, regulatory advice and expertise. We help technology companies transform opportunities and innovations into success.

Join Nutter partner David Powsner for his Track I panel: What Does Open Source Mean to My IT Environment? at 1:30 p.m.

Nutter is pleased to be an Annual Sponsor of the MIT Sloan Alumni Club of Boston.

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GEORGE A. XIXIS
Partner

Nutter McClennen & Fish LLP
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Companies are always looking for a "leg-up" in the marketplace. Successful techniques for achieving that competitive advantage can often be elusive, especially in fast moving, technology-driven businesses.

The importance of synchronizing an organization's business and legal goals cannot be overstated. An in house legal department, and in particular an in house intellectual property group, can be an effective tool in advancing the business and helping management set up a systematic plan for addressing the competitive environment.

Barriers to entry generally come in three flavors: regulatory, contractual and intellectual property. Intellectual property (I.P.) barriers can be extremely flexible and valuable tools. They are a result of a company's own hard work and innovation and are therefore the only barriers fully within the company's control.

The term intellectual property generally applies to four kinds of rights: patents, which protect new and useful ideas; copyrights, which protect tangible expressions of ideas; trademarks, which are used to protect the association of a particular name or type of packaging with your product; and trade secrets, which protect confidential company information that may give you a competitive advantage.

But how do you create an effective IP portfolio that really gives the business an advantage in the market place? The answer: One step at a time.

A "tiered" approach can be both very simple to implement and effective in getting an organization where it needs to go.

Step 1: Protect Your Current Products
Nothing is as frustrating (or as damaging) as having a competitor knock-off your product – whether copying your software, mimicking your product packaging or reverse engineering your invention.

The first thing you must do when creating an IP portfolio, is make sure that you have adequate intellectual property protection for the product or service that you sell. Basically, create an intellectual property "umbrella" for your business.

The critical steps are often very straightforward. Register the copyrights of any written materials and computer software. Register any unique product or service names or distinctive packaging. File patent applications that claim the products or processes that are key to your business.

Such simple steps create basic barriers to entry by preventing "copy-cat competitors" from entering the marketplace unopposed.

Step 2: Protect the Products Being Developed
Merely building an IP enclosure around your current product offerings is probably not enough. What you really want to protect is your business model. This entails thinking more strategically about your current and future products and services, as well as creating an IP portfolio in anticipation of where the business is going.

File trademark applications based on your "intent to use" a mark. Register your software copyrights as you develop the code and prior to general release. File patent applications on products that are currently in development with claims that cover different potential aspects of

your product. Such an approach provides disincentives for competitors getting too close to your business model.

Step 3: Protect the Company's 'Core' Mission
In a rapidly changing environment, the real goal is to create barriers to entry that are sufficiently broad and prospective to protect both the business that you are in as well as the business that you might be in.

To accomplish this, the focus must shift from the products or services that the business markets, to those things that are truly "core" to the organization's existence and which makes it unique. In technology-driven companies, this is generally a technology platform.

Counsel should reorient the organization's thinking to address the entire universe of things that can be done using its "core" technology, whether such activities are in the organization's current business space or not.

For example, one can build an appropriately strong patent portfolio that covers such things as: the technology that the company is currently using; products that will be and can be made using the technology by either competitors, suppliers or customers; processes that may implement (in whole or in part) that technology; and potential uses of that technology in industries that are both similar and radically different from the one the company is currently in.

In this way an organization can truly stake out its territory and provide itself a buffer zone of protection around its business. Such flexibility allows for future changes in strategic direction while supporting the current business.

Step 4: Addressing Third Party Activities
The mere presence of a trademark or copyright registration, or of an issued patent, may serve to hold competitors at bay or it may not. The reality is that IP portfolios are only truly valuable if they are put to work. Sometimes this entails actively licensing trademarks or key patents to parties that are in complementary businesses.

Other times, an organization makes a strategic decision to get out of a particular line of business, yet it still holds key intellectual property in that area. An active licensing program is often helpful in those situations as well.

Often, however, the only way to see a return on your investment and keep competitors at bay is to actively assert your intellectual property rights. This can take many forms including: trademark oppositions and litigations; patent infringement suits, interferences, reexaminations, and foreign oppositions; or copyright infringement and trade secret misappropriation lawsuits. Smart timing and the right assertion strategy can often make the difference between being an industry leader or an industry laggard.
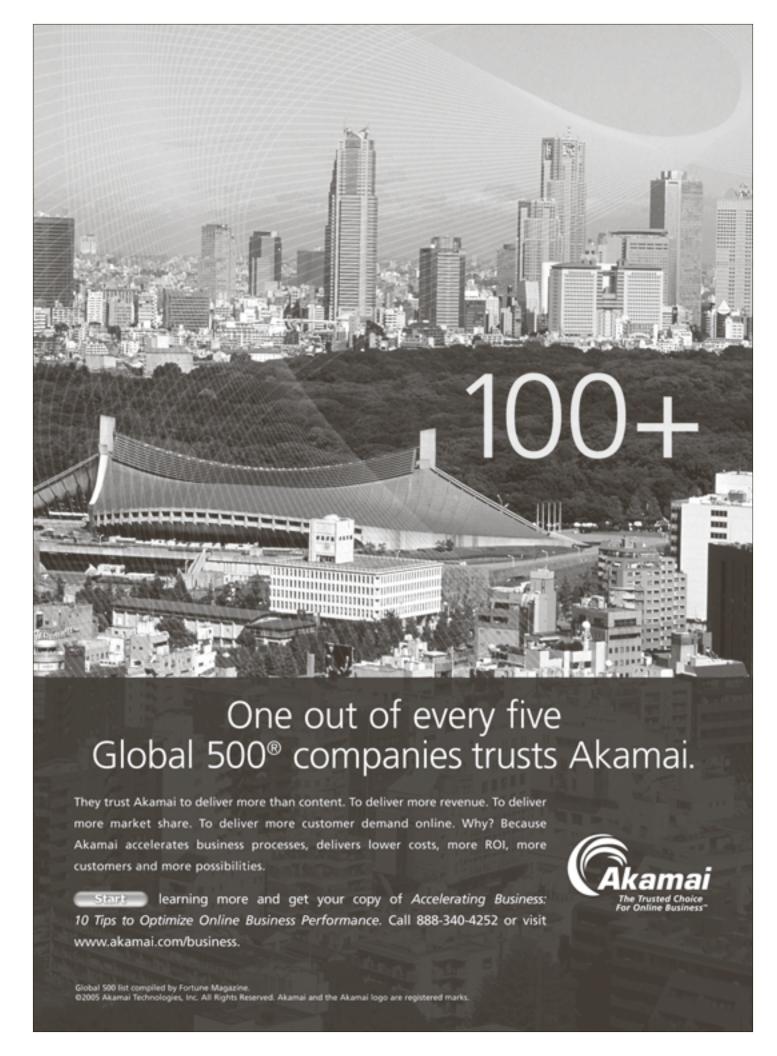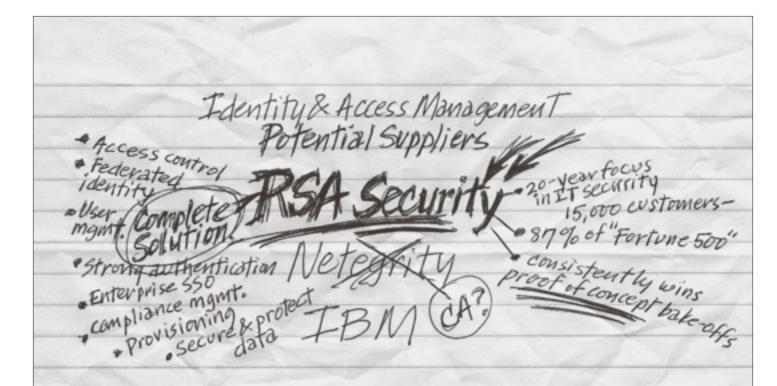
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