



# 2010 CSIA Executive Conference FINAL PROGRAM

# Aim Higher



The Westin Seattle  
April 29 - May 1, 2010

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# Aim Higher!



The theme of this 2010 CSIA Executive Conference accurately depicts what you and CSIA are doing: aiming for greater heights of performance and success! The Space Needle in Seattle points upward into the sky and that is where we want to take you — onward and upward!

Education and networking are the key benefits always cited by attendees and they will be available in abundance here in Seattle.

The presentation line-up is chock full of home-run hitters. To name a few, there's Alan Beaulieu on The Economic Recovery, Lean Manufacturing in the SI World, Risk Management by Mark Voigtmann and Chubb, Disaster Recovery – A Real Story, Smart Grid/Alternative Energy and How They Impact SIs, Marketing Secrets from four experts, Emerging Technology Trends, 10 Success Secrets from a successful SI, and insights into NASA.

Breaks, lunch and evening events are your opportunities to network. Give away a bit of information and you'll get ten ideas back. Seek partnering opportunities. If you manage a young, small company, spend time chatting with someone from a seasoned, successful one. Yes, members compete, but everyone wins when our industry becomes more professional.

Plan to attend some of the informal discussion groups scheduled during breakfast each morning.

We're glad you decided to attend! It has been a challenging time for many, but you obviously expect to find value while you're here. Hopefully you will find that value in the presentations and also in the conversations with your peers. It's also the perfect opportunity for Integrators and Partners to get to know one another. So take advantage of all the opportunities and have fun too!

  
— **Bob Lowe, CSIA Executive Director**

## CSIA Mission Statement

The mission of CSIA is to bring successful system integration to the marketplace by:

- Creating recognition and demand for CSIA certified members;
- Improving system integration best practices and performance; and
- Providing an industry forum and networking opportunities.

It is a mission that is continually being strengthened. It was reinforced in 1997 with the introduction of the Best Practices and Benchmarks process, and further extended in 2001 with the establishment of the respected Certified Member program.

## Executive Council

### Chairman

**Ed Diehl**

ediehl@conceptsinc.com  
(541) 791-8140

### Treasurer

**Steve Goldberg**

sngoldberg@matrixi.com  
(419) 897-7206

### Directors

**Brian Beaufaux**

bbeaufaux@iae-online.com  
(763) 450-3810

**John Justus**

jjustus@bay-tec.com  
(707) 252-6575

**Joseph Martin**

jmartin@martinci.com  
(614) 761-5600

**Jeff Miller**

jeff.miller@interstates.com  
(712) 722-1663

**PC Romano**

promano@avidolutionsinc.com  
(336) 970-4013

### CSIA Executive Director

**Bob Lowe**

execdir@controls.org  
(717) 371-0490

### CSIA President

**Lynda J. Patterson, CAE**

lpatterson@controls.org

### Staff

**Jeanne Rosen**

jrosen@controls.org

**Brittany Marsala**

bmarsala@controls.org

**Ann Nelson**

anelson@controls.org

**Kim Striebel**

kstriebe@controls.org

22 N Carroll St., Ste 300

Madison, WI 53703

(800) 661-4914

www.controls.org



## Wednesday, April 28

10:00 am – 7:00 pm **Registration Open** • Grand Registration Office

4:00 – 5:00 pm **Spouse/Guest Reception** • Suite 4641, North Tower

A Seattle historian will offer Guest registrants a video presentation on the history of Seattle and describe the tour and activities planned over the course of the Conference.

6:00 – 10:00 pm **Anixter Exhibit and CSIA Welcome Reception** • Shuttle @ Westlake Entrance of Westin Hotel

Kick off the Conference with cocktails at the Seattle Aquarium. *See details below.*

*Sponsored by Anixter*

## Thursday, April 29

6:30 am – 6:00 pm **Registration Open** • Grand Registration Office

7:00 – 8:30 am **Continental Breakfast with optional networking tables** • Fifth Avenue

Topics: 1) New members/Mentors 2) International Members 3) Media Editors

*Sponsored by Invensys Wonderware*

8:30 – 10:00 am

### GENERAL SESSION



**The Recovery: How Long & How Fast** • Grand Ballroom I & 2

*Alan Beaulieu, President, Institute for Trend Research, Boscawen, NH*

Alan will present the economic outlook for our industry and the global economy with the clarity that business leaders have come to expect from ITR®. Beaulieu will take a look at what is happening in many key industries and address some of the questions common to all attendees. Registrants will gain confidence navigating the economic waters and walk away with a list of indicators that should be watched and those that can be safely ignored.

*Sponsored by GE Intelligent Platforms*

10:00 – 10:30 am

### Break

*Sponsored by Aspen Technology, Inc.*

10:30 – 11:15 am

### CONCURRENT SESSIONS



**Smart Grid - The Vital Role of Industry** • Grand Ballroom I & 2

*Raj Batra, President, Industry Automation Division, Siemens Industry, Inc.*

The “Clean Energy Economy” is driving economic recovery in the U.S. and around the world. Key components are using less energy, tapping into renewables, and above all, reinventing today’s power grid to handle a revolutionary new two-way conversation between supply and demand. As the largest consumer of power, industry’s role is vital. This session will discuss the value that control system integrators can deliver through assessments, process redesign, and business case analysis for industrial customers taking their first steps to join the Smart Grid.

# Anixter and CSIA Welcome Reception

Wednesday, April 28, 2010  
6:00 p.m. – 10:00 p.m.

The Seattle Aquarium  
1483 Alaskan Way  
Seattle, WA 98101  
206.386.4300

## Event Schedule

|                        |   |
|------------------------|---|
| 6:00 p.m. – 6:30 p.m.  | Buses depart from Westin for the Seattle Aquarium             |
| 6:00 p.m. – 7:00 p.m.  | Arrival and registration, cocktails and hors d'oeuvres served |
| 7:00 p.m. – 8:00 p.m.  | Dinner  |
| 7:30 p.m.              | The dive show   |
| 7:30 p.m. – 9:00 p.m.  | The “Puget Sound Scavenger Hunt”                              |
| 8:30 p.m. – 9:30 p.m.  | Dessert and coffee  |
| 9:15 p.m.              | Raffle prize drawing  |
| 9:30 p.m. – 10:00 p.m. | Buses depart for Westin                                       |



**Disaster Recovery – A Real Story About Surviving Hurricane Ike** • Fifth Avenue

*Russell Treat, President/CEO, EnerSys Corporation, Stafford, TX*

EnerSys Corporation, headquartered in Houston, Texas, sustained a direct hit by Hurricane Ike losing use of their facilities. The real challenge was not the hurricane but properly planning for how to run the business while at the same time recovering operations. This presentation is a step-by-step review of what was done well and what was missed or poorly planned as EnerSys implemented hurricane preparedness and recovery plans.

11:15 am – 12 noon **CONCURRENT SESSIONS**



**Applying Lean Manufacturing Principles to the System Integrator's World** • Grand Ballroom 1 & 2

*Jeff Miller, Director of Automation Services, Interstates Control Systems, Inc., Sioux Center, IA*

During tough economic times clients expect to see price cuts. So how does a systems integrator survive and remain poised for tremendous growth? One way is to apply lean manufacturing principals to our everyday work.



**The Time is Now to Incorporate Alternative Energy** • Fifth Avenue

*Ted Campbell, President and Chief Executive Officer, Xantrex, British Columbia, Canada.*

The search for alternative energy and energy efficiency is a must. The answers have to be cheaper, quicker, cleaner and with enhanced security. Each kwh saved avoids three times the generation production. Demand response programs cost about half of typical electricity costs. Technology is available today with short-term results. "Negawatts" or "clean power" produces no environmental footprint. Energy efficiency is homegrown, reducing dependence on imports.

12 noon - 1:30 pm **Lunch** • Elliot Bay, Lobby Level

12 noon - 1:30 pm **New Member & First Time Attendee Lunch** • Grand Crescent

*Read more below.*

*Sponsored by Graybar*

1:30 – 3:00 pm **BUSINESS SESSION**

**Annual CSIA Business Meeting** • Grand Ballroom 1 & 2

The Annual Business Meeting is a forum-based session, set aside for CSIA leaders to report to the membership on the events of the last year and plans for the year to come. Stick around for an overview of the CSIA Connected Community.

3:00 – 3:30 pm **Break**

*Sponsored by ILS Technology*

3:30 – 5:00 pm **INSURANCE SESSION**

**How to Bring Down Your Company in a Few Easy Steps** • Grand Ballroom 1 & 2

*Mark Voigtmann, Attorney, Baker & Daniels, Indianapolis, IN*

*Suzanne Nasipak, Regional President, First Niagara Risk Management, Rochester, NY*

*Richard Reed, Vice President, Worldwide Commercial Errors and Omissions Product Manager, Chubb Specialty Insurance*

*Moderator: Paul Barnard, CSIA Insurance Program Manager, Paul Barnard Insurance, Schwenksville, PA*

In our first-ever "interactive workshop," the CSIA's top risk advisers, Baker & Daniels LLP, First Niagara Risk Management and Chubb Insurance, join forces to outline the risk management policies that every CSI should adopt, while highlighting ways that some companies, against their own self-interest, seem to do exactly the opposite.

6:00 – 6:30 pm **Sponsor/Exhibitor Reception** • Grand Crescent

Conference sponsors and exhibitors are invited to this special recognition event.

6:30 to 10:00 pm **Partner Industry Expo and Reception** • Grand Ballroom 3

Exhibit 2010 showcases the most recent advances in control system integration and provides an unequalled opportunity for you to meet with over 40 companies representing industry suppliers, manufacturers and service providers. Heavy appetizers will be served.

*Sponsored by Rockwell Automation and Schneider Electric*

**CSIA New Member & First Time Attendee Lunch** 12 noon - 1:30 pm • Grand Crescent

All 2009 and 2010 new members (integrators and partners) are invited to join the Membership Committee and new member mentors for an informal networking lunch to learn about practical ways to tap into your membership and get to know others in the organization.

7:00 – 8:30 am **Continental Breakfast with optional networking tables** ● Fifth Avenue  
Topics: 1) Certification 2) Social Networking 3) Collaborative Project Management Tools  
Sponsored by Opto 22

8:30 – 10:00 am **GENERAL SESSION**



**Intelligent Control Systems: Shaping the Future of Aeronautics and Space Exploration** ● Grand Ballroom 1 & 2

*Dr. Kalmanje KrishnaKumar, Scientist and Principal Investigator, Intelligent Systems Division, NASA Ames Research Center*  
Intelligent Control Systems are nature-inspired, computationally intensive problem-solving tools and methodologies that have become important for future innovations in aeronautics and space exploration. In this talk, Dr. KrishnaKumar will present aerospace applications of intelligent control that NASA is pursuing and highlight the benefits in such applications to enabling safe and mission-effective approaches to aircraft and spacecraft design and control, spacecraft autonomy, and robotic and human space exploration.

10:00 am – 3:30 pm **Guest Tour: Wine Country** ● Shuttle begins loading at 9:45 am @ Westlake Entrance of Westin Hotel  
See details on page 8.

10:00 – 10:30 am **Break**

10:30 – 11:15 am **CONCURRENT SESSIONS**



**Top Trends and Technologies for 2010: Emerging Trends and Their Impact on CSIs** ● Grand Ballroom 1 & 2

*Russ Novak, Director of Consulting, ARC Advisory Group, Boston, MA*  
This presentation will be an executive level review of selected top trends and technologies that the SI market will encounter in the 2010 recovery. Examples include carbon accounting and monitoring, enhanced cyber security issues, energy alternatives, and smart grid perspectives.



**Are You Selecting Your Customers or Are They Selecting You?** ● Fifth Avenue

*Dean Streck, CEO, VI Engineering, Farmington Hills, MI*  
Not all customers are equal. This talk examines the importance of selecting your customers wisely and the far reaching impacts on your future. Dean will review various customer selection techniques and measurement methods including project margin, account margin, total lifetime value and the impact on your culture. Actual examples include the impacts of both wise and poor choices in changing industries.

11:15 am – 12 noon **CONCURRENT SESSIONS**



**10 Things System Integrators Need to Know About Marketing to Grow Their Business** ● Grand Ballroom 1 & 2

*Bob Patterson, President, MKTX Inc., Beaverton, OR*  
Many system integrators, being engineer-trained and engineer-oriented, don't fully understand the role that marketing plays in an organization and the marketing techniques that can be employed to help them grow their business. This seminar will expose some misconceptions and provide examples of best practices that CSIA member firms can employ to out-market their competitors and win more business.



**The Three Essentials to Compensation Plans that Drive Performance and Profitability** ● Fifth Avenue

*Robert Rainey, Senior Vice President, The VisionLink Advisory Group, Irvine, CA*  
This presentation will help business owners and CEOs understand clearly how the company's compensation programs impact fulfillment of the strategic plan. How can an organization utilize its incentive structure to produce a positive return on the investment in employee productivity? What are the "best practice" concepts that are essential to spur growth in today's economy?

12 noon - 1:30 pm **Networking Lunch** ● Grand Ballroom 3  
Sponsored by Siemens

**Continue the Conversation**  
Visit with the 2010 Executive Conference eGroup to connect with others attending this year's conference . . . before, during and after.  
Go to <http://csia.connectedcommunity.org>



1:30 – 2:15 pm

**CONCURRENT SESSIONS**



**Marketing/PR on a Shoestring: Build Your Brand and Bring in Business**

● Grand Ballroom 1 & 2

*Walt Boyes, Editor in Chief, Control Magazine, Itasca, IL*  
*Marty Michael, Marketing Manager, Avanceon, Exton, PA*



This program discusses how control system integrators can use public relations and social media to build business and do it on a shoestring budget. Most people think of advertising when they think of marketing, but there is much to be gained from an active public relations program that uses both traditional and social media contact methods. Anybody can do it — it isn't rocket science.



**Financial Analysis and Industry Benchmarking** ● Fifth Avenue

*PC Romano, President, Avid Solutions, Winston-Salem, NC*

After last year's conference, the CSIA Statistics Committee set out to evaluate a complete overhaul of the annual financial survey. Over the last 12 months, the committee identified and selected a cutting edge technology platform and implemented a completely redesigned survey. The new tool will be unveiled during this presentation.

2:15 – 3:00 pm

**CONCURRENT SESSIONS**



**Every H-Rep Needs an E-Rep** ● Grand Ballroom 1 & 2

*Todd Youngblood, Sales Consultant, YPS Group, Acworth, GA*

That's "H" as in "human" and "E" as in "electronic sales rep." As a CSI member you have a wealth of specialized knowledge and expertise that, when well applied, can save and/or make money for a wide variety of customers. Find out how an e-rep can help you develop a strategic plan and craft compelling value propositions and proposals.



**Selling Your Company: A Buyer's Perspective** ● Fifth Avenue

*Scott Shawyer, President & CEO, JMP Engineering Inc., Burlington, ON*  
*Brian Mullen, Consultant, Exotek, Waterloo, Ontario, Canada*



Selling an integration company can be fraught with many unknowns and complex issues. Scott and Brian share their specific and industry-level insights regarding key areas that are critical for business owners who, one day, are planning to sell their businesses.

3:00 – 3:30 pm

**Break**

3:30 – 5:00 pm

**AFTERNOON SESSION**



**Customer-Centric Culture** ● Grand Ballroom 1 & 2

*Dave Blair, Director of Customer Experience, Rockwell Automation, Milwaukee, WI*  
*Bill Barnes, Senior Vice President, Burke Inc., Cincinnati, OH*



Your company makes huge efforts and investments in communicating your value proposition, which is the brand promise that shapes customer expectations. A corresponding investment makes sense for ensuring the brand promise is indeed delivered. Dave and Bill will explore best practices for measuring and monitoring customer loyalty and maximizing profitability.

6:30 – 9:30 pm

**Friday Evening Cocktail Reception and Dinner** ● Space Needle

Your evening begins with a 90-second trip aboard the Seattle Monorail to the base of the Space Needle. Enjoy cocktails and dinner 582' feet up at the Observation Deck with 360° views of Seattle and the Puget Sound. The monorail will return you to the core of downtown and steps from the hotel. Included in Executive Conference registration.

Meet in Westin Lobby beginning at 6:15 pm for escort to Monorail

Sponsored by Anixter and First Niagara Risk Management



**Your insurance advisers don't understand your business?  
Inaccurate classifications? Servicing problems?  
Have questions about your existing coverage?**

CSIA Insurance specialists will be on-hand throughout the Conference to evaluate your needs. Contact CSIA Insurance Program Manager Paul Barnard to schedule a personalized consultation: paulbarnard@csia-insurance.com or (610) 507-6595.

9:00 am – 5:00 pm Thur - Fri ● Stuart Room, Mezzanine Level 9:00 – 11:30 am Sat ● Baker Room, Mezzanine Level

Saturday, May 1

7:00 – 8:15 am

**Continental breakfast with optional networking tables** • Fifth Avenue

Topic: 1) Peer Groups 2) Best Practices User Group 3) Deltek Vision User Group

8:15 – 9:00 am

**CONCURRENT SESSIONS**



**Surviving and Thriving as an SI: The Top Ten Concrete Business Tips Learned Over 25 Years as a Systems Integrator** • Grand Ballroom I & 2

*Rick Pierro, President, Superior Controls, Seabrook, NH*

Rick will share valuable, easy to implement, and proven ideas which will produce more profit and add more value to your business. From marketing, hiring, contracts, structure and additional services, this talk will leave you with practical ideas to improve both your customer satisfaction and your bottom line.



**Selling CSIA Certification to our Clients** • Fifth Avenue

*Bob Zeigenfuss, President, Avanceon, Exton, PA*

Bob will explain why it's important to help clients identify the success factors of any project. By doing so, CSIA certified members can help clients understand how CSIA Best Practices and Certification nearly ensures a successful outcome.

9:00 – 9:15 am

**Break**

9:15 – 11:45 am

**FINAL SESSION**



**Accountability Into exeCution I and II** • Grand Ballroom I & 2

*Ted Garnett, CEO, Performance Resources Consulting, Cedar Rapids, IA*

Ted's presentation explains how to build accountability into exeCution within your company. He'll connect the difficult issues in organizational performance today to the current accountability crisis and provide a tangible approach for improving performance outcomes in any organization.

10:15 – 10:45 am

**Break**

11:30 am – 4:30 pm

**Golf Outing at Harbour Pointe** • Shuttle @ Westlake Entrance of Westin Hotel

*See details on page 8.*

1:00 – 4:15 pm

**Boeing Tour** • Shuttle @ Westlake Entrance of Westin Hotel

*See details on page 8.*

6:00 – 7:00 pm

**Cocktail Reception** • Grand Foyer

7:00 – 9:00 pm

**Banquet & Awards Presentation** • Grand Ballroom I & 2

This special event is set aside to recognize the 2010 award recipients.

*Sponsored by Anixter*

*Join CSIA in recognizing this year's award winners at Saturday night's*

# *Banquet and Awards Presentation*

**2010 Charlie Bergman Award**

**Bill Pollock**

*President, Optimization*

**2010 Partner of the Year**

**Invensys/Wonderware**

*represented by Scott Kiser*

**2010 Rising Star**

**Michael Bachelor**

*Principal, Bachelor Controls*

## Exhibit Lineup

### Partner Industry Expo Thursday night

ABB, Inc.  
Allied Moulded Products  
Anixter  
Aspen Technology, Inc.  
Automationtechies.com/  
Automation.com  
Control See Software  
Solutions, LTD.  
CSE-Semaphore  
DATA-LINC GROUP  
GE Intelligent Platforms  
Grace Engineered Products, Inc  
Graybar Electric, Co.  
Haewa Corporation  
Hermery Opto Electronics Inc.  
Hollsys (Beijing Hollsys Co.,  
Ltd.)  
Honeywell International  
ILS Technology  
Invensys  
Kepware Technologies  
MatrikonOPC  
First Niagara  
Omron Electronics, Inc.  
Online Development, Inc.  
OPTO 22  
Phoenix Contact  
ProComSol, Ltd.  
ProSoft Technology  
QSI Corporation  
RFID Inc.  
Rockwell Automation  
Sarla Technologies  
Schneider Electric  
Siemens Industry, Inc.  
Software Toolbox Inc.  
STEGO, Inc.  
Yaskawa Electric America, Inc.

## Optional Tours and Excursions

### Friday

#### Guest Tour - Wine Country — Friday ■ 10:00 am - 3:30 pm

Chateau Ste Michelle and Novelty Hill Januik are two of Washington's most renowned wineries. A visit at each venue will provide tours and tastings of the highest rated wine in the country. Deluxe Motorcoach transportation, lunch and a local expert to guide you through the area are provided. Pre-registration required. Shuttle begins loading at 9:45 am from the Westlake entrance of the Westin Hotel.



### Saturday

#### The Future of Flight Aviation Center & Boeing Tour — Saturday ■ 1:15 - 4:15 pm

The Future of Flight Aviation Center & Boeing Tour features popular learning zones equipped with touch-screen computers that let you design your own aircraft. As part of the tour, you will visit the largest building in the world by volume (472,000,000 cubic feet). On the Boeing flight line, visitors will see airplanes in various stages of flight test and manufacture for airline customers around the world. Deluxe motorcoach transportation and local tour guide is included in this activity. Pre-registration required. Shuttle begins loading at 1:00 pm from the Westlake entrance of the Westin Hotel.



#### Golf at Harbour Pointe — Saturday ■ 12:45 - 4:30 pm

In 1996 Golf Digest rated Harbour Pointe as the second best golf facility in the Northwest. Lunch at 12:45 pm; Shotgun start at 1:30 pm. Motorized carts, beverages and catered lunch included. Private transportation to and from the event. Pre-registration required. Shuttle begins loading at 11:30 am from the Westlake entrance of the Westin Hotel.

## Additional Information

- **Networking breakfasts**  
Join other members for an informal discussion on specific topics of interest noted each morning at breakfast. No registration is required.
- **Handouts online**  
Preliminary speaker handouts and slides are available at <http://tiny.cc/CSIA2010presentations>. Download or print the presentations that interest you most.
- **Please wear your name badge at all times**  
Your CSIA Executive Conference badge is required for all sessions and functions.
- **Internet access**  
Complimentary wireless Internet is available in the guest rooms and lobby of the Westin Seattle.
- **Spouses, guests and children**  
Spouses and guests must purchase a Guest registration to attend any Conference function. Children under 18 may attend Conference events at no additional charge (Additional fee required for children to participate in the Friday Guest tour). Additional fees are required for the Saturday Boeing tour and the Golf Outing.

