

Capture Success

CSIA 2012



TALKING STICK RESORT, SCOTTSDALE

April 25 - 28

The 19th Annual Executive Conference of the Control System Integrators Association



What is your definition of SUCCESS? Earl Nightingale, the self-professed “Dean of Personal Development,” defined success as “the continuing realization of a worthy ideal.” Continually striving to improve company operations in the world of industrial automation — an industry that keeps our world advancing and makes products affordable, available and sustainable to societies in all corners of the world — is certainly a worthy ideal.

At the CSIA 2012 Executive Conference, it is our intention to help you capture that success and harness it for use in your own operations. A success in its own right, the three-day Executive Conference is packed with sessions that will enhance your business knowledge and give you tools you can apply to your company as soon as you get home. You'll also have ample time to network with executive and management peers from around the world. You'll share ideas, discuss what's going well (and not-so-well) and build relationships, both personal and professional.

Pack your business cards and sunscreen (cowboy boots optional) and get ready to round up some know-how and business connections that will help you capture success for your company.

— **Bob Lowe, CSIA Executive Director**



The Talking Stick Resort in Scottsdale, Arizona, is the headquarters for the 2012 CSIA Executive Conference. A block of rooms is being held at a special rate of \$180 until April 2, 2012. Space is limited.

Book your reservation by calling the Talking Stick directly at (866) 877-9897.

Talking Stick Resort
9800 East Indian Bend Rd
Scottsdale, AZ 85256

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Phoenix's Heard Museum is the foremost showcase of Native American art and culture in the United States. The Heard Museum reveals the cultures of tribes in the region through exhibits, demonstrations and live performances and displays the work of contemporary Native American artists.

WEDNESDAY, APRIL 25

10:00 am – 6:00 pm
Registration desk open

5:30 – 8:15 pm
Opening Reception sponsored by Anixter

Begin the conference by exploring Phoenix's abounding history on display at the city's Heard Museum. Substantial hors d'oeuvres and cocktails will be served as attendees are surrounded by a setting rich with the art and cultures of native people of the Southwest. Transportation provided. Open to registrants and guests.

THURSDAY, APRIL 26

6:30 – 8:30 am

CSIA Breakfast Briefing

Breakfast begins at 6:30 with briefing on CSIA news from 7:00 - 8:30 am.

8:45 – 10:15 am

The future is your decision



Alan Beaulieu, President, Institute for Trend Research, Boscawen, New Hampshire

We are all bombarded on a regular basis with conflicting economic news from any number of sources. Uncertainty in American businesses seems to be incredibly high. Beaulieu will be removing the uncertainty and laying out a tactical and strategic framework that will carry us through 2012 and into 2014. We will specifically discuss European debt, Greek default, U.S. interest rates, the potential for a double-dip recession, stock market volatility and raw material pricing pressures.

9:00 – 10:00 am

Spouse/Guest Breakfast

10:15 – 10:45 am

Break

10:45 – 11:15 am

Certification: Revisions and roadmap



Jeff Miller, Director of Automation Services, Interstates Control Systems, Sioux Center, Iowa

Jeff Miller, chair of CSIA's Best Practices and Benchmarking (BP&B) Committee, will

highlight rev. 4 of the BP&B manual, officially released



at this Conference. He will give details on how the new version will be phased into the certification process. Jeff will also introduce a new program that the committee is working on called Roadmap to Certification, the purpose of which is to provide direction to integrators seeking certification.

11:15 am – 12:00 pm

The legalities of maintenance and service contracts



Mark Voigtmann, Attorney, Faegre Baker Daniels, Indianapolis, Indiana

The system has been commissioned. Demobilization is underway. And yet . . . the end user is not quite ready to say good-bye. How should integrators “paper” the maintenance and service relationship? Is it best left to a handshake or is a long-term contract another profit center? Automation attorney Mark Voigtmann walks us through the risks and possibilities in his usual serious but interesting way.

12:00 to 1:30 pm

Lunch in Wandering Horse Buffet

Voucher required.

12:00 to 1:30 pm

New member lunch

1:30 – 3:00 pm

Getting Everyone Involved in Business Development



David Stone, President, Stone & Company, Charlotte, North Carolina

Every firm wants to involve as many people as possible in business development but the personality traits that tend to make a great engineer also tend to make a reluctant business developer. Since personality traits impact success in business development, this unique approach gives an active and meaningful role to everyone in the BD process. Using a totally outside-the-box approach you will learn to match the strengths of every individual in your firm to business development

tasks they will readily take on, enjoy and successfully accomplish. The strong relationships that result will reduce the high cost of competitive proposals and increase your negotiated and sole-source work.

3:00 – 3:30 pm

Break

3:30 – 5:00 pm

Questions that get results: How to motivate your team to build and sustain powerful customer relationships



Paul Cherry, Partner and Founder, Performance Based Results, Wilmington, Delaware

Do you have employees who thrive on being the go-to experts? When a customer's technical issue surfaces, they're on it immediately. But shifting from a reactive to a pro-active mindset, they're lost. With resources stretched, it's imperative to get your team to take more initiative in managing customer relationships. In this session, you'll learn innovative coaching strategies to give your team the skills to be more than a problem solver but a value-added solution to your customers.

5:30 to 8:00 pm

Partner Industry Expo and Reception

Exhibit 2012 showcases the most recent advances in control system integration and provides an unequalled opportunity for you to meet with over 50 companies representing industry suppliers, manufacturers and service providers. Appetizers and beverages will be served. *Included in Conference registration.*

FRIDAY, APRIL 27

6:30 – 8:00 am

Breakfast in Wandering Horse Buffet

Voucher required.

Concurrent Session

8:00 – 8:45 am

Engineering efficiency tools and practices



Matt McKinley, Head of COMOS Product Management, Siemens, Houston, Texas

The CSI community is continually challenged to enhance design processes while establishing advanced standards to differentiate them. Plant owners face numerous challenges, including stringent regulations that require increased transparency, an aging workforce that will impact company knowledge once they retire, and schedule compression. Automation system integrators can help clients address these issues with new tools and practices, enabling a competitive edge at system design, build and installation resulting in compressed schedules.

Concurrent Session

8:00 – 8:45 am

Collaboration with IT, engineers and operations: How to work together to deliver success



Ashtad Engineer, Global Vice President - Partner Ecosystem, Invenys Operations Management, Lake Forest, California

Invenys' Collaborative Services Delivery approach recognizes that project success is the result of collaboration between IT, engineering, operations, vendors, SI partners and other groups. How can we address

new opportunities and challenges associated with successfully delivering quality business solutions that address increasingly complex business requirements, on-time and on-budget, while ensuring customer satisfaction?

8:45 – 9:00 am

Break

Concurrent Session

9:00 – 9:45 am

Control integration opportunities in alternative energy markets



Del Boyle, General Manager-North America, Ausenco PSI, San Francisco, California
Craig Eidson, General Manager, Optimization Technology, Denver, Colorado

As alternative energy continues to gather momentum, are there control integration opportunities for a system integrator? This session will explore how other control system integrators have successfully engaged with wind and solar energy customers to leverage their experiences to help these customers enhance and/or maintain their company's assets during installation or once the installation is complete.

Concurrent Session

9:00 – 9:45 am

Control systems and cyber security in a post-Stuxnet world



Eric Byres, P.Eng., ISA Fellow, VP and CTO of Tofino Security, Belden Inc., Lantzville, B.C., Canada
The Stuxnet worm was a game changer for the SCADA and process industries.

Engineering and security professionals got to look into the workings of a worm designed to destroy industrial processes. As we will demonstrate with a live attack on a PLC, Stuxnet will not be the last worm of this type. The industry is now urgently looking for strategies, services and technologies to protect against the next "son-of-Stuxnet." There are new opportunities for security design and integration, but there are also new risks that must be considered.

9:45 – 10:30 am

Break

Concurrent Session

10:30 am – 12:00 pm

It's only worth what? Understanding business valuation and strategies for closing the gap



Cathy Durham, Accredited Senior Analyst and Principal, Capital Valuation Group, Madison, Wisconsin
Preparing for your exit from your business will establish your exit priorities, help you

grow the business value and maximize the opportunity for successful transition. This seminar will answer these questions: What do I need to be thinking about for my own succession plan? What do I need to understand about business valuation? How can I increase the value of my business? How can my business have more than one value? Who might be the buyer of my business?

Concurrent Session

10:30 – 11:15 am

Maximize your CSIA Certification with your clients



*Keith Martino, President, CMI,
Dallas/Fort Worth, Texas*

How do you help your clients recognize that your CSIA investment is of tangible benefit to them? Attend this highly-interactive presentation and your clients will see you as a valuable partner. Learn seven sales and marketing techniques your firm can leverage today. Increase your effectiveness in telling your CSIA Certification story. You've already done the heavy lifting. Now learn to maximize the rewards for your team and your customers for the superior company you've built.

Concurrent Session

11:15 am – 12:00 pm

Can automation vendors and system integrators be true partners?



*Greg Bodenhamer, Vice President, Industry Business
End User - Marketing, Solutions, and Execution,
Schneider Electric, Raleigh-Durham, North Carolina*

Control system integrators and automation manufacturers function in a codependent relationship that, at times, can be strained and fraught with potential pitfalls. But they can also be successful and profitable. These questions often arise: Who owns the end customer? Who drives the solution? Can we really trust one another? Join us as we explore these nuances and discuss how best to approach the relationship between the system integrator and the automation manufacturer while succeeding together.

12 pm - 1:30 pm

Lunch at Wandering Horse Buffet

Voucher required.

Concurrent Session

1:30 – 2:15 pm

The solution triangle: Customer, distributor and system integrator



*Neil Montgomery, President, Association for High
Technology Distribution (AHTD); President and CEO,
Davis Controls Ltd, Toronto, Ontario, Canada*

CSIA surveyed the U.S. members of AHTD to learn their views, opinions and pet peeves of our industry. The goal of the survey, and this presentation, is to better understand each other so that we can all best serve the customer and work more effectively with one another. To accomplish the goal, both industries must become better customers, suppliers and project partners. This presentation explores the survey results and offers insight into how to best create a collaborative business environment.

Concurrent Session

1:30 – 2:15 pm

Take control of your projects with SharePoint dashboards



*Rick Rietz, Director of Consulting Services,
DMC Inc., Chicago, Illinois*

Learn how you can use SharePoint Dashboards to put an end to your struggles with managing project budgets and critical milestones. With over 100 million users worldwide, Microsoft SharePoint® is the dominant business platform for collaboration and

document management. However, most businesses don't realize that SharePoint is also a project manager's weapon for configuration management and automatically aggregating and sharing information from multiple sources. Find out how SharePoint Dashboards motivate teams and deliver projects on time and on budget.

Concurrent Session

2:15 – 3:00 pm

Project success through project safety



*Mary Gurasich, Safety Program Manager,
Mangan Inc., Long Beach, California*

General engineering and construction industry safety practices have evolved well.

However, there is nothing general about the control system industry. The potential consequences of control system discipline work and project practices are extreme. Project and personal job safety analysis (JSA) programs address this heightened exposure. The suite of JSA practice provides specialized mitigation appropriate for the complexities of the control system industry.

Concurrent Session

2:15 – 3:00 pm

Speak the language of owners



*Tom Delaura, Vice President, Eramosa
International, Detroit, Michigan*

When control system integrators speak the "language" of owners and decision makers, they can have more meaningful discussions about the benefits of their services. Owners and managers don't often see that the metrics and dashboards they use to run their organizations are powered by the work of integra-

tors. Once they understand this direct impact, they will show their appreciation for an integrator's services.

3:00 – 3:30 pm

Break

Concurrent Session

3:30 – 5:00 pm

Selling has nothing to do with selling



Rick Farrell, President, Tangent Knowledge Systems, Chicago, Illinois

Debunk the time-honored beliefs and strategies that organizations hold so dearly and expose the obscene costs of sales that they blindly operate under. Content is non-traditional, contrarian and designed to be a wake-up call for all organizations on how to sell, strategize and position their companies to meet the harsh realities of the information economy and the challenging economic climate of today's marketplace.

Concurrent Session

3:30 – 4:15 pm

Does your hiring process engage or turn off prospective employees?



Evy Trost, Managing Director - Automation and Process Engineering, National Engineering Resources, Brooklyn Park, Minnesota

It's important to create a positive candidate experience during all stages of your hiring process. Despite high unemployment, are you finding it difficult to find the right technical talent? Have you found the right person, only to extend an offer that is turned down? This

presentation focuses on how organizations can leverage branding opportunities within their company to establish a positive candidate experience during the hiring process. Every candidate has a "brand experience" when they interact with you and that experience determines whether they're attracted to your company or not.

Concurrent Session

4:15 – 5:00 pm

Using the potential of new hires to your advantage



Ricardo Roman, Vice President of Strategic Alliances, CALIPER, Princeton, New Jersey

Most employee development programs fall short because they do not focus on the specific needs and potential of each individual. Nothing is more important than making sure you manage and develop your human capital, because, at the end of the day, your people are what distinguish your company. Everything else can be copied by any of your competitors – at lightning speed. Learn how you can help new hires achieve the goals you want...fast!

6:30 – 7:00 pm

Cocktail Reception

7:00 – 9:00 pm

Banquet & Awards Presentation

The Awards Banquet is a special event set aside to recognize the outgoing officers and honor the 2012 award recipients. *Included in registration.*

SATURDAY, APRIL 28

7:00 – 8:00 am

Continental breakfast

Concurrent Session

8:00 – 8:45 am

Navigating 22 years of organic growth



John Robertson, President, RoviSys, Aurora, Ohio
RoviSys, one of the earliest members of CSIA, has grown from a single motivated founder to over 250 engineers. Growth

is challenging to manage and impacts organizational dynamics and company culture. RoviSys President John Robertson will share his experience driving his company through stages of growth and provide insights on success factors and impediments. This session will be valuable to leaders seeking out new levels of company performance.

Concurrent Session

8:00 – 8:45 am

Business process documentation and optimization



Don Roberts, Principal, Exotek LLC, Waterloo, Ontario, Canada

As a company grows from a few people to a few dozen, to a few hundred, it is critical that routine tasks be performed consistently and efficiently. Don will share his observations on how to document, communicate and provide configuration management of these processes in a way that doesn't create a lot of red tape or negatively impact the utilization of billable people.

Concurrent Session

8:45 – 9:30 am

Maximizing success in selling your company



Rick Pierro, President, Superior Controls, Seabrook, New Hampshire

Learn how the big guys do it. Get an inside perspective from a board member of several technical companies now being sold. Discussion will include an overview of the buyer identification process, strategic versus equity buyer interests, due diligence, possible structure, and options for continued employment. We'll also cover a summary of the current state of the merger and acquisitions market.

Concurrent Session

8:45 – 9:30 am

Ensuring client success with technology transfer



Brent Stromwall, PE, PMP, Vice President of Business Development, Polytron, Inc., Duluth, Georgia

You get the call: "OEE is dropping like a rock!" What happened? You know your business. This installation was close to perfect – the design and programs are solid, and execution was flawless. How do you avoid telling the client it's their problem, not yours? What's the solution? Join Polytron for a discussion on aligning system integration and technology transfer. Discover what technology transfer is all about and what role it plays in startup performance.

9:30 – 10:00 am

Break

General Session

10:00 am – 12:00 pm

You on your best day



Michael Allosso, Communications Specialist, Wayland, Massachusetts

In a dynamic and fast-paced presentation, award winning professional director, actor and executive coach Michael Allosso compares the preparation, performance and role of an actor with that of the business leader. Participants will reach a more vital and dynamic awareness of the excellence needed for presentations as well as day-to-day communications. Allosso offers concrete suggestions and exercises designed to modify behavior and help the participant always be "you on your best day."

Tee time to be confirmed

Golf at the Talking Stick Golf Club

Contact Sam Hoff to register: shoff@pattiang.com.

1:30 - 5:30 pm

Saturday Desert Hike

Explore the Sonoran Desert on foot.
Separate registration required.

8:00 – 10:00 pm

Poolside Dessert Reception

Talking Stick Resort



Explore the Sonoran Desert on Foot

Saturday afternoon, April 28

1:30 - 5:30 pm

Discover the magnificent landscape of Arizona's Sonoran Desert on foot and enjoy an intimate look at the unique elements that distinguishes this picturesque setting from that of any other in the world. The hike is designed to accommodate individuals of all fitness levels. *Separate registration required. Fee: \$85.*



Poolside Dessert Reception

Saturday, April 28

8:00 - 10:00 pm

Grab a bite at your favorite Talking Stick restaurant then join us for a tasty celebration on the North Patio as we conclude the 2012 Executive Conference with specialty treats and signature drinks. *Included in registration.*



Desert Botanical Garden Tour – Spouse/Guest Tour

Friday, April 27

9:30 am - 2:30 pm

Bask in the natural beauty and all there is to learn at the Desert Botanical Garden. The spectacular trails that showcase the splendor, history and culture of the southwest are sure to please! Next up, it's lunch at Cowboy Ciao featuring modern American food with global influences and a selection of over 3,000 wines. *Included in guest registration. Additional fee for children.*



Industry Expo and Reception

Thursday, April 26

5:30 - 8:00 pm

Exhibit 2012 showcases the most recent advances in control system integration and provides an unequalled opportunity for you to meet with over 50 companies representing industry suppliers, manufacturers and service providers. Appetizers and beverages will be served. *Included in registration.*



Golf at the Talking Stick Golf Club

Saturday afternoon, April 28

Tee time to be confirmed

Located-on and owned by the Salt River Pima-Maricopa Indian Community, the North and South golf courses blend with their tranquil desert surroundings to provide a serene yet challenging day of Scottsdale, Arizona, golf. Contact Sam Hoff, CSIA's own golf enthusiast, to register: shoff@pattiang.com.

What you get . . .

Executive Conference registration includes continental breakfast, lunch on Thursday and Friday, all meeting sessions, educational programs, Opening Reception, Industry Expo and Reception, Friday night's Banquet and Awards Presentation and Saturday night's dessert reception. Additional fees are required for the Saturday hiking tour and golf.

Spouses, guests and children

Spouses and guests must purchase a Guest registration to attend any Conference function. Guest registration includes the Opening Reception, Industry Expo and Reception, Friday night's Banquet and Awards Presentation and Saturday night's dessert reception only. Registration also includes the guest tour of Scottsdale. Additional fees are required for the Saturday hiking tour and golf.

Children under 18 may attend Conference events at no charge. Additional fees required for children to participate in the Friday guest tour and Saturday hiking tour.

Transportation

ExecuCar is the preferred vendor transportation service to the Talking Stick Resort. Please call (800) 410-4444 or visit www.execucar.com to place your reservation. The approximate cost is \$45.

Taxi service is also available for an approximate fare of \$38-42 each way. The Talking Stick's concierge team will happily assist you in arranging a cab to transfer you to the airport at the conclusion of the Conference.

Handouts online

Speaker handouts and slides will be available at www.controlsyst.org one week before the conference. Download or print the presentations that interest you most and bring them with you.

Internet access

Complimentary high-speed wireless internet access resort-wide. Attendees will receive a password upon check-in.

Onsite registration hours

Wednesday, April 25 10:00 am - 6:00 pm
Thursday, April 26 6:30 am - 6:00 pm

How to register

Click on the conference logo on the CSIA website (www.controlsyst.org) to register online. Or call the CSIA office at (800) 661-4914.

Register online @ www.controlsyst.org



	Before April 2		After April 2	
	1st Registrant	Addl Registrant	1st Registrant	Addl Registrant
Associate	\$675	\$575	\$725	\$625
Certified Member	\$675	\$575	\$725	\$625
Partner	\$725	\$625	\$775	\$675
Spouse/Guest	\$350		\$375	
Non-Member	\$875		\$925	

Registration fees

A \$100 discount will be offered to all registrants after the first registrant from the same member company. Register before April 2 and save \$50!

Live streaming and view-on-demand



Can't make it to Scottsdale, but still want to participate? CSIA will be streaming a majority of the sessions live, online. These sessions will also be available post-conference for viewing online. Registration for viewing the live stream will be available in February. *Separate registration required. Fee: \$100. Full registrants will have access to the recorded sessions post-conference.*

Partners are encouraged to invite their non-member integrators

Attention all Partners! Once again we will be asking you to encourage your top integrators who are not currently CSIA members to participate in our annual conference. We want you to host potential members of CSIA so that they learn more about the organization and understand the benefits of being a member. For this exclusive program, CSIA is offering special invitation-only rates for the 2012 conference — half price for up to 10 non-members to attend the full conference. The bill must be paid by you, the industry partner and registration made directly through the CSIA office. *No onsite registrations accepted through this program.* Please contact the CSIA office for more information.

Dress casually

Leave your ties and business suits at home! Business casual is the recommended attire for the 2012 CSIA Executive Conference. However, dress for the Friday evening Banquet and Awards Presentation is semi-formal.

If you must cancel . . .

Confirmed registrations must be cancelled by Friday, April 13, to receive a refund of the amount paid less a \$50 cancellation charge. No refunds shall be made for cancellations after April 13.

Conference sponsors

Please take the time to thank the Conference sponsors when you see them for their generous support of the CSIA Executive Conference. Their contributions make it all possible.



Reserve your booth today!

Industry Expo and Reception

Thursday, April 26, 5:30 - 8:00 pm

Attention Partners! Industry Expo 2012 provides an unequalled opportunity for you to meet with business leaders from all aspects of control system integration in an exhibit reception format. Exhibit tabletops are available exclusively to CSIA Partner members.

To register or see a complete exhibit prospectus go to www.controlsys.org or contact Brittany Marsala Olson at bolson@controlsys.org.

Note, all booth representatives must register for the Conference.

Enhance your exhibit experience

Sponsor a CSIA event

A variety of sponsorship levels are available to all our Partner members. To discuss sponsorship and reserve a level and event for your company, please contact Brittany Marsala Olson at bolson@controlsys.org.



Thank you to our Conference sponsors

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