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April 12-15, 2010 | Rosen Shingle Creek Resort | Orlando, Florida



Aligning IT and Business Objectives

Jeff Kubacki
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Company Overview & Technology Environment





Marsh & McLennan at a Glance

- MMC is a global professional services firm providing advice and solutions in the areas of risk, strategy and human capital

- Parent company of a number of the world's leading risk experts and specialty consultants, including
 - Marsh, the insurance broker and risk advisor
 - Guy Carpenter, the risk and reinsurance specialist
 - Mercer, the provider of HR and related financial advice and services
 - Oliver Wyman, the management consultancy
 - Kroll, the risk consulting firm

- Through our market leading brands, and over 50,000 colleagues in more than 100 countries, MMC helps clients identify, plan for and respond to critical business issues and risks



Kroll at a Glance

- **Kroll plays a vital role in protecting the reputation and assets of clients, by providing information and insight through our combination of investigative technologies and expertise.**

- **Kroll's unique combination of capabilities allow us to assist clients in a wide range of circumstances, these capabilities include:**
 - Technology (IP) for mining, aggregating, managing and presenting vast amounts of information in a meaningful context
 - Seasoned investigative professionals with backgrounds in criminal prosecution, intelligence and investigative journalism
 - A cadre of technical experts including computer forensic specialists, computer scientists and information security practitioners

- **Kroll is called upon most frequently to provide insights in the following situations:**
 - Disputes (investigation, litigation, arbitration, etc.)
 - People (management teams, vendors, partners, employees)
 - Enterprise data
 - Lending

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Kroll's Principal Services

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Investigations, Financial Advisory & Security

- Business Intelligence
- Due Diligence and Transaction Advisory
- Forensic Accounting
- Fraud Prevention and Detection
- Investigations
- Litigation Support and Dispute Advisory
- Security

Background Screening

- Employee Screening
- Right-to-Work Verification
- Identity Fraud Solutions
- Employment Physicals
- Substance Abuse Testing
- Vendor Screening

Legal Technologies & Data Recovery

- Data Recovery
- Paper and Electronic Discovery
- Computer Forensics
- Electronically Stored Information Consulting
- Jury Consulting and Trial Presentation Services

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Kroll's Technology Environment



- Data Centers
 - US - Twin Cities (3), Nashville
 - UK - Brighton & Bedford
- Over 13 petabytes of storage (EMC & HDS)
- 15,000 Microsoft SQL databases
- 2,200 physical Cisco, HP & Dell servers and 800 virtual servers using VMware
- 2,000 HP CCI Blades to support compute clusters
- AD, Exchange 2007, SharePoint 2007, Office 2007 & OCS
- Cisco IP Telephony, routers, switches, global MPLS network using Verizon
- 19 Data Recovery labs around the globe
- 400 IT colleagues globally

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Aligning IT & Business Objectives





Learning Objectives

1. Discuss an integrated approach to developing a business and IT strategic plan
2. Demonstrate how IT is delivering value to the business through the use of a reporting and communications framework
3. Measure and report – how to tackle an IT Balanced Scorecard





Learning Objectives

1. **Discuss an integrated approach to developing a business and IT strategic plan**
2. Demonstrate how IT is delivering value to the business through the use of a reporting and communications framework
3. Measure and report – how to tackle an IT Balanced Scorecard



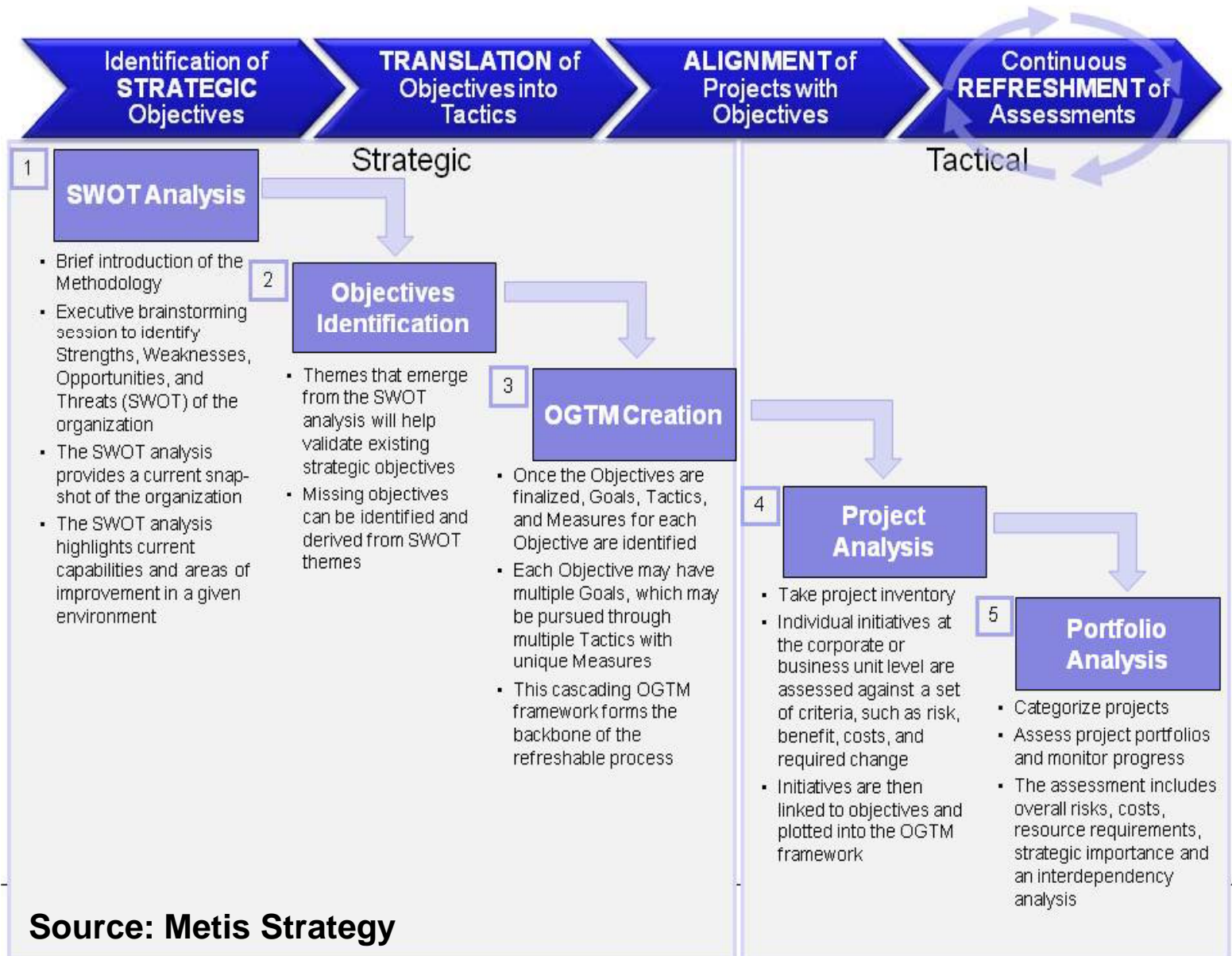
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Strategic Planning Framework



Source: Metis Strategy



SWOT Analysis

Strengths:

- A firm's strengths are its resources and capabilities that can be used as a basis for developing a competitive advantage.
- Areas where the company excels.
- These can be characteristics that provide a competitive advantage for the company.
- These are present characteristics and provide a snap-shot of the business today.

Opportunities:

- Anticipated conditions (internal, market, competitive) that bode well for the company.
- These are future characteristics and provide a guide for the future.
- The snap-shot of the business today should inform the development of Opportunities.

Weaknesses:

- Areas where the company has traditionally not done well.
- These can be characteristics that provide a competitive disadvantage for the company.
- These are present characteristics and provide a snap-shot of the business today.

Threats:

- Anticipated conditions (internal, market, competitive) that do not bode well for the company.
- These are future characteristics and provide a guide for the future.
- The snap-shot of the business today should inform the development of Threats.
- Characteristics of the business environment that may be perilous to the company.



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OGTM Template

<u>Objective:</u>		
--the corporation's overarching pursuits for the next three to five years		
<u>Goals</u>	<u>Tactics</u>	<u>Measures</u>
-- the quantifiable metric that determines the degree to which an objective is being successfully reached	-- the various actions available to a company that will help the company reach the goal	-- the quantifiable metric that determines the degree to which a tactic is being successfully pursued.
	(...)	(...)
	(...)	(...)

- Once the Objectives have been identified and refined, Goals, Tactics, and Measures for each Objective are created
- This can be done through a brainstorming session with the senior executive team and further refined through one-on-one meetings with subject matter experts related to each Objective

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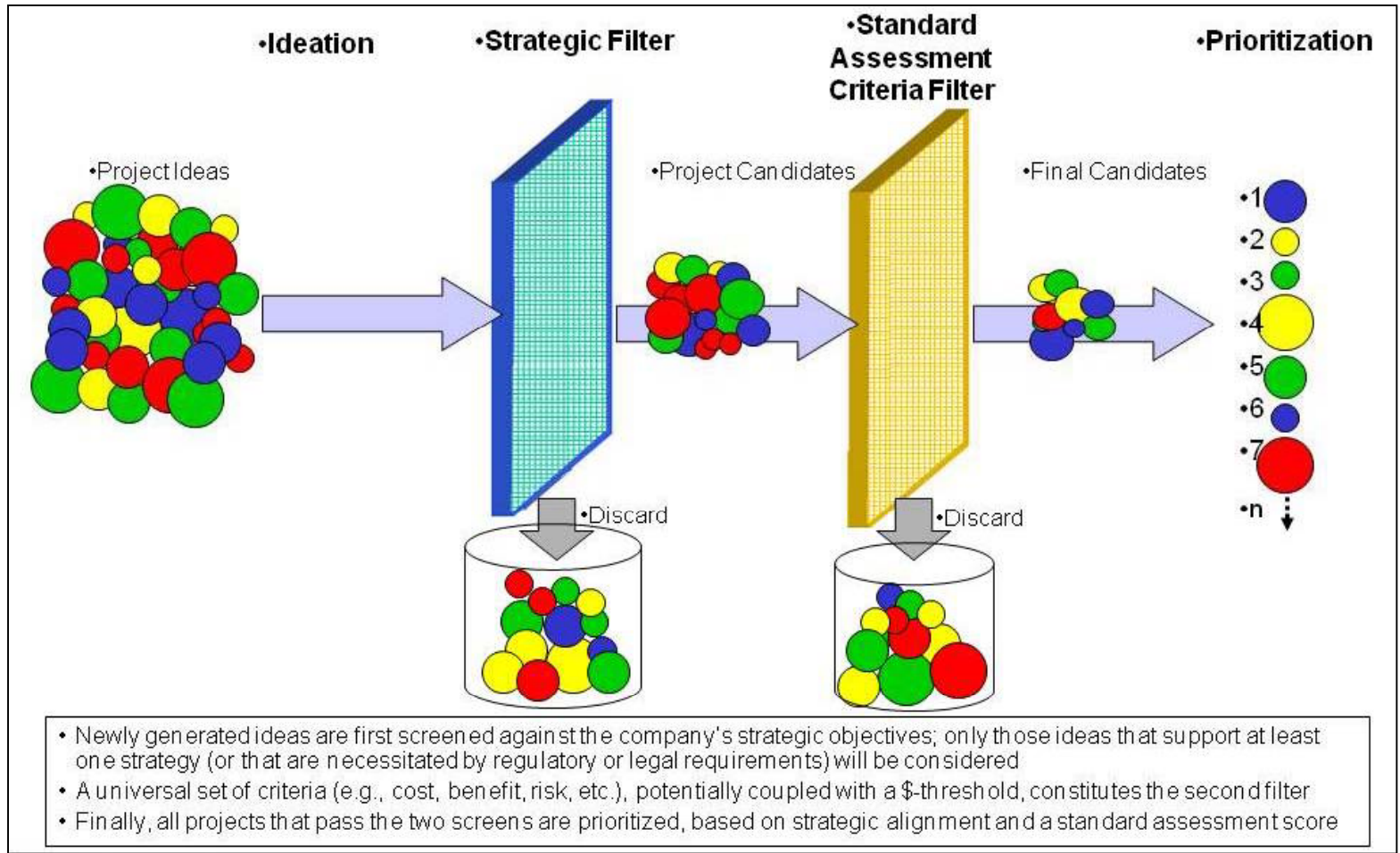


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Project Assessment Filters



The Significance of the Strategic Filter – The Concept

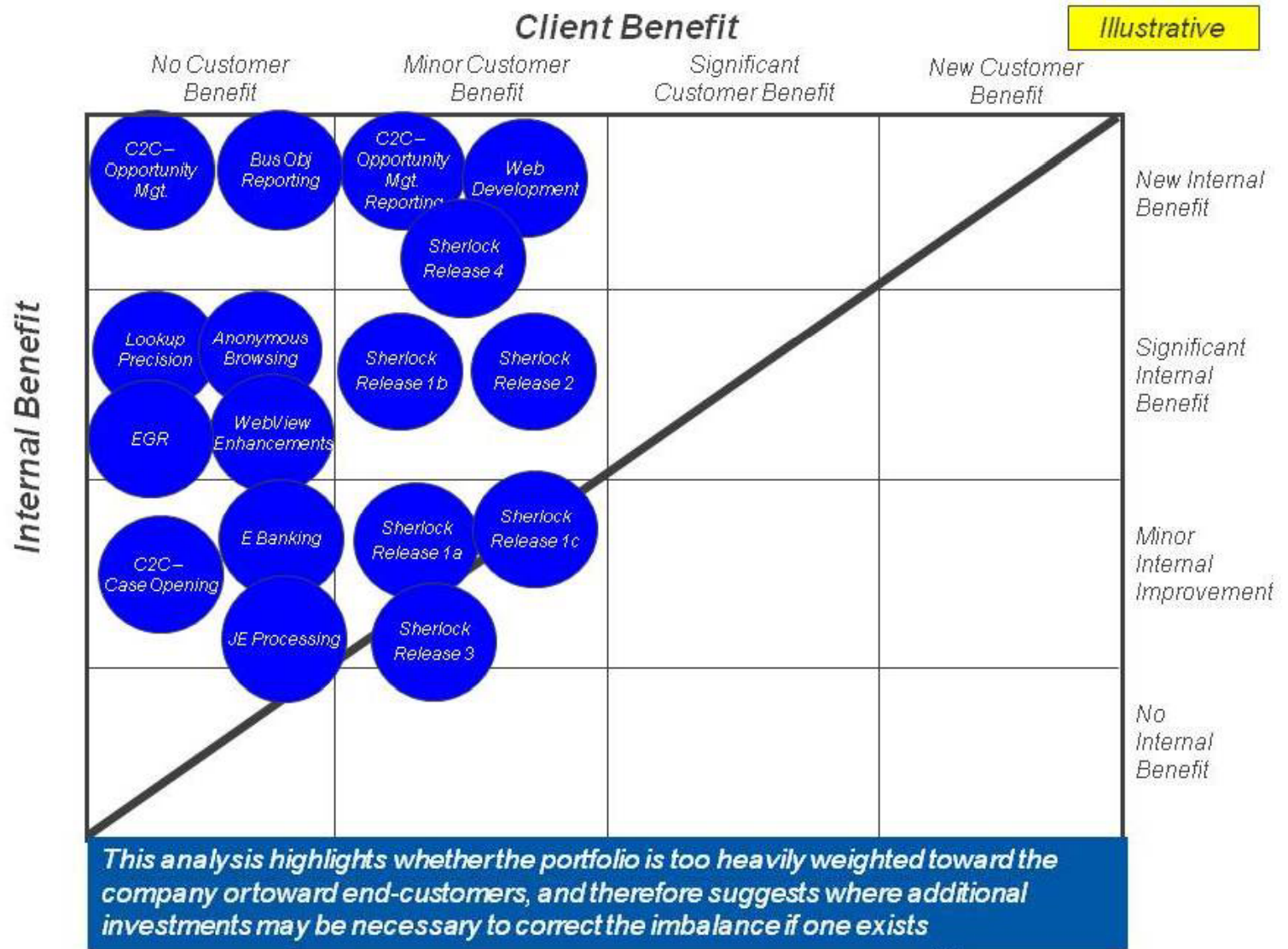
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Portfolio Benefit Matrix







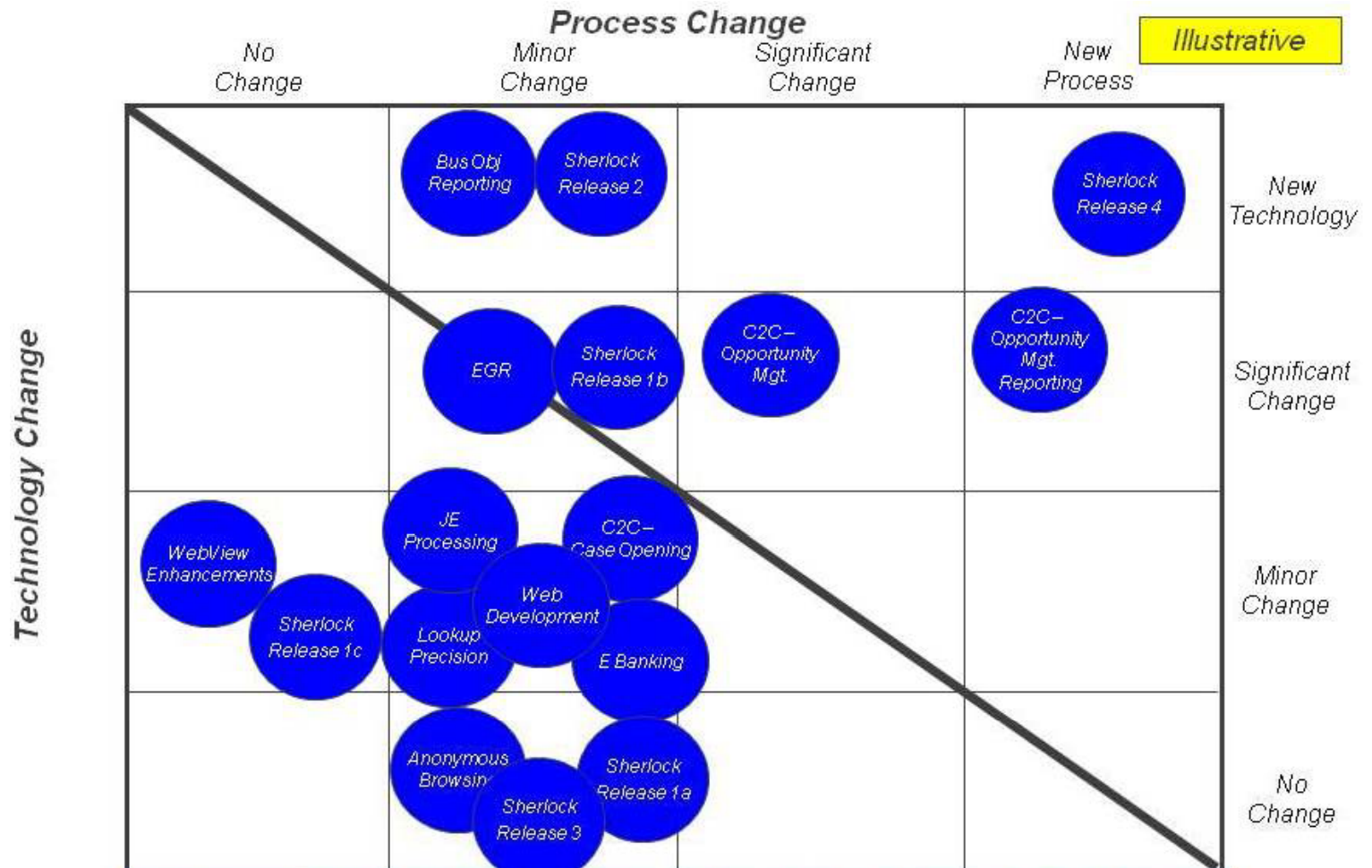
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Portfolio Process Change Matrix



This analysis highlights whether the company is innovating from a process and technology perspective. If more projects are below the line than above, the company is acting conservatively, and leveraging existing processes and technology. If more projects are above the line, then this is a risky portfolio, weighted more toward new processes and technology.



Learning Objectives

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Why Focus on IT Reporting?

The goal of IT reporting is to address stakeholder needs for information based on audience, content, and frequency





IT Reporting & Communications Framework

- Weekly
 - IT updates by business unit; summarized at business staff meetings
 - Global IT leadership team meeting
- Bi-weekly
 - Executive Committee report – review global projects and discuss key decisions that need to be made
 - Global Technology Council – cross OpCo coordination
- Monthly
 - IT Monthly Update
 - IT project review meeting
- Quarterly
 - IT All Staff Meeting – project status, celebrate success, HR update
 - IT Executive Committee meeting – decision making body
- Adhoc
 - Annual budget review
 - Mid-year business review



Example - Monthly IT Reporting

- Title:** IT Monthly Update
- Audience:** Global Senior Management
- Purpose:** To provide a monthly high level view of IT performance in a targeted communication for BU / Function leads
- Content:** Update from the CIO
Financial performance against budget
BU and function-specific updates
Summary of key strategic initiatives
Operational metrics
- Delivery:** PDF via email
- Cycle:** 13th business day

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IT Monthly Update

December 2009

CIO Corner
IT Project Management. Run the Business. Change the Business

The goal of the Kroll IT project management process is to meet or exceed project delivery commitments to the business while improving project portfolio and resource management maturity levels across the global IT organization. IT's supporting objectives to achieve this overall goal have been to: centralize project information into a single system; measure projects at a deliverable level with standardized commitments; and implement consistent, repeatable processes in resource and financial management.

In 2007 Planview was selected as the standard project and portfolio management tool for IT globally and throughout 2008 work was going on to implement project management standards and best practices. This year IT has focused on standardizing resource management processes including time reporting. A major benefit resulting from these multi-year efforts coming together has been to provide robust data and reporting on how IT spends its time.

At the beginning of 2009, IT had anticipated working on a wide array of projects that would "change the business" (e.g. implementing new technologies that help change how Kroll operates); however as the focus moved to cost controlling costs, IT's efforts were refocused on projects and standard activities which support "Running the Business" more efficiently and effectively. Based on the data in Planview we know that during the 2nd half of 2009, IT spent 95% of its resource effort on projects and activities which "Run the Business."

In 2010 as IT continues to move forward with Planview, resource reporting will be coupled with standard milestone reporting which will enable IT - working closely with business sponsors - to gain a forward looking view of the status and progress of projects which both run and change the business.

The progress made with Planview to date has been successful in no small part to the hard work of the global IT team. The effort spent is not only recording their time in a project management tool, but their input and dedication to ensure that information is categorized accurately has provided a valuable baseline to move forward IT's project and portfolio management maturity.

Best regards,
Jeff Kubacki
Chief Information Officer

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IT Monthly Update – CIO Corner

Sample Topics

- Upgrading organizational capabilities
- Key decisions
- Topics impacting global organization
- Educational topics
- Go forward strategies

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IT Monthly Update

December 2009

Fast Facts:

- November in-bound emails for Kroll: 88,353,840 total attempted messages. 97.7% were blocked by our email scanning solution, IronPort
- All data center raw storage capacity is – 11.05 Petabytes.
- During November, IT achieved an overall incident satisfaction rating of 4.7
- 2,917,009 threats were detected and blocked by McAfee Antivirus

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CIO Corner

IT Project Management: Run the Business. Change the Business

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Run the Business Versus Change the Business
July 1, 2009 - December 31, 2009

Run the Business	95%	1,867,200 hrs
Change the Business	5%	100,800 hrs

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Largest Effort Put Towards Change the Business Projects	
Project Name	Hours Reported
Data Center III	1522 hours
Argon	788 hours
LI Disaster Recovery	775 hours

Largest Effort Put Towards Run the Business Projects <i>(not including support projects)</i>	
Project Name	Hours Reported
ISP Environment Rebuild	1361.5 hours
MPLS Implementation	869 hours
Production Isolated 1.0	454 hours

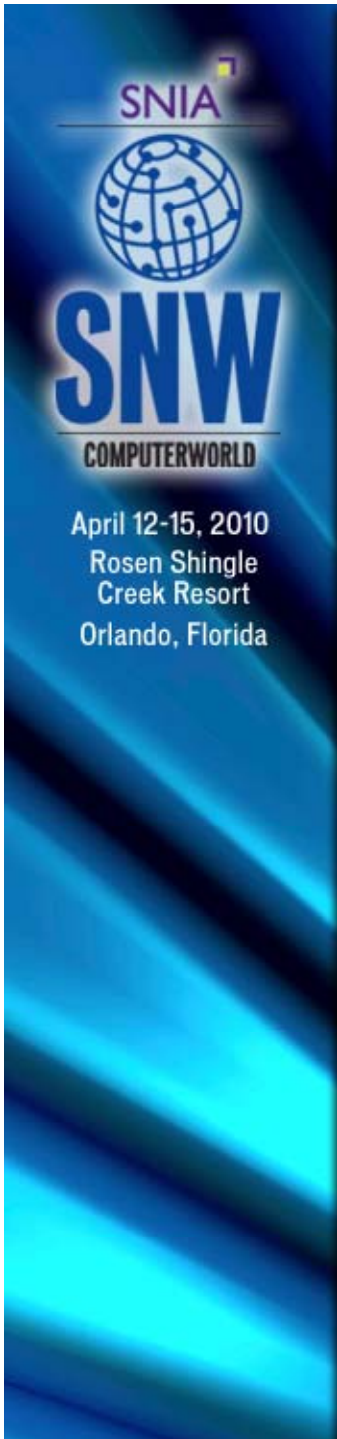
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The progress made with Planview to date has been successful in no small part to the hard work of the global IT team. The effort spent in not only recording their time in a project management tool, but their input and dedication to ensure that information is categorized accurately has provided a valuable baseline to move forward IT's project and portfolio management maturity.

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Chief Information Officer

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IT Monthly Update – Financials

Sample Topics

- Review expense, capital, headcount & depreciation
- YTD actuals versus budget and prior year
- Explain major variances
- Include BU and corporate IT financials

Representative Numbers Only!

October 2009 Financial Summary Page 2

Kroll	Prior Year Actual	YTD 2009		% Fav / (Unfav)		Total Year 2009		% Fav / (Unfav)		
		Actual	Budget	Prior	Budget	Actual	Outlook	Budget	Prior	Budget
KO - GBA	5,972	5,972	6,580	0%	0%	8,094	7,540	8,367	2%	10%
KO - COGS	17,884	17,414	21,208	(7%)	19%	20,705	20,300	27,848	2%	10%
KO - DC II / LT Disaster Recovery	-	83	1,168	(100%)	93%	-	674	4,817	(900%)	80%
KBS	3,200	3,424	4,624	(7%)	29%	4,261	6,064	8,148	(29%)	1%
KLS	481	487	583	(1%)	27%	553	898	918	(11%)	0%
CSG	2,783	2,863	5,438	(4%)	87%	3,816	7,880	7,368	(90%)	0%
Kroll IT	8,580	5,574	5,807	17%	4%	8,903	7,111	7,837	25%	3%
Subtotal	38,930	38,787	48,823	1%	22%	48,284	53,185	63,906	(7%)	18%
Product Development										
KBS	2,894	2,753	3,585	(4%)	22%	2,904	4,700	4,758	(38%)	2%
KO - IBM	753	541	385	39%	45%	1,753	774	1,289	120%	40%
KRCL - HONE	13,437	13,638	15,818	(1%)	13%	18,968	17,873	20,823	(10%)	12%
Subtotal	16,984	16,932	20,188	(0%)	18%	20,625	23,347	26,770	(17%)	13%
Expense Total	62,289	62,687	86,032	(1%)	20%	89,925	76,618	92,684	(8%)	18%

Kroll	Prior Year Actual	YTD 2009		% Fav / (Unfav)		Total Year 2009		% Fav / (Unfav)		
		Actual	Budget	Prior	Budget	Actual	Outlook	Budget	Prior	Budget
KO - GBA	1,155	670	2,281	72%	71%	1,824	2,430	2,430	(25%)	0%
KO - COGS	10,337	8,026	16,114	72%	63%	10,916	7,689	19,745	50%	60%
KO - DC II / LT Disaster Recovery	-	17,394	38,464	n/a	93%	-	28,898	38,464	n/a	24%
KBS	189	235	1,158	(54%)	83%	2,107	752	1,280	160%	40%
KLS	35	10	87	254%	90%	47	138	130	(64%)	0%
CSG	836	480	384	24%	(22%)	715	1,387	1,387	(49%)	0%
Kroll IT	4,540	158	2,089	2788%	82%	5,419	578	2,355	942%	70%
Subtotal	16,832	24,988	61,422	(37%)	88%	21,028	28,181	68,722	(18%)	40%
Product Development										
KBS	123	264	1,382	(54%)	80%	2,277	848	1,421	160%	40%
KO - GBA	-	-	364	-	100%	567	-	369	-	100%
KRCL - HONE	890	2,772	1,168	89%	(100%)	1,536	2,860	1,158	(47%)	(101%)
Subtotal	1,013	3,036	3,784	(67%)	(10%)	4,479	3,748	3,948	18%	(37%)
Capital Total	17,845	28,017	64,188	(38%)	96%	25,507	41,929	88,888	(28%)	40%

Kroll	Prior Year Actual	YTD 2009		% Fav / (Unfav)		Total Year 2009		% Fav / (Unfav)		
		Actual	Budget	Prior	Budget	Actual	Outlook	Budget	Prior	Budget
KO - GBA	20	24	23	(17%)	4%	23	20	20	0%	0%
KO - COGS	51	54	64	(6%)	19%	56	58	64	(5%)	3%
KO - DC II / LT Disaster Recovery	-	-	11	n/a	100%	-	-	11	n/a	100%
KBS	9	9	9	0%	0%	9	9	9	0%	0%
KLS	4	4	4	0%	0%	4	5	5	(25%)	0%
CSG	8	11	13	(40%)	12%	8	13	13	(64%)	0%
Kroll IT	44	20	37	52%	22%	43	29	37	48%	22%
Subtotal	124	121	162	2%	20%	140	129	164	1%	19%
Product Development										
KBS	19	44	58	(57%)	12%	25	58	50	(60%)	(1%)
KO - IBM	0	0	0	20%	17%	0	0	0	20%	38%
KRCL - HONE	127	188	188	(10%)	2%	178	189	189	(8%)	0%
Subtotal	182	236	246	(32%)	4%	203	244	247	(14%)	1%
Headcount Total	216	246	468	(14%)	10%	348	283	411	(8%)	7%

- KO-COGs total year expense outlook has increased slightly and now includes recurring expenses for November and December
- Kroll IT total year expense is outlooked to be 9% favorable (excluding severance costs)
- Capital outlook for all groups continues favorable due to projects being either delayed or cancelled

† KO-GBA headcount does not include Europe


Depreciation is included in respective Expense line item reporting



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IT Monthly Update – Strategic Projects

Sample Topics

- Review timelines, schedule, status, key accomplishments, risks and issues
- Focus on projects that have enterprise appeal

October 2009
Data Center III
Page 5

Executive Summary			Project Management			Schedule Status	Q1 2009	Q2 2009	Q3 2009	Q4 2009	Q1 2010	Q2 2010
Ben Allen, Rob Wiegner & Greg Olson	ID: Ben Akelah	KA: Mark Miller	Budget	Cost	Variance							
Data Center III			\$M	Exp. 2.8	8.7	2.1						
				Cap. 21.3	21.6	1.7						
<ul style="list-style-type: none"> Concept Design and Systems Validation Data Center Construction Data Center Commissioning Core Infrastructure Implementation Data Center "Go Live" 												
KD Disaster Recovery			\$M	Exp. 3.5	6.1	2.6						
				Cap. 21.8	21.8	0.0						
<ul style="list-style-type: none"> Project Charter Approved Initiation, Risk & Vulnerability Assessment Analysis & Requirements Definition Design, Build & Test Acceptance Testing DR "Go Live" 												
Committed Schedule Comments:												
<ol style="list-style-type: none"> 11/5/2009 - target date to have a fully commissioned data center 12/1/2009 - DCIII available to process LT production 5/1/2010 - DCIII available as disaster recovery site for LT Disaster recovery budget reflect 2009 budget only. Majority of the capital expenditure has been moved to Q1 2010 												
<ul style="list-style-type: none"> Completed Completed Late Target Committed Storage Committed 												

Key Achievements Last Month


DCIII


- Held DCIII employee open house and tour
- Completed chiller enhanced design changes
- Began data center integrated testing
- Began building automation system training

DR


- Completed disaster recovery requirements document
- Began reviewing disaster recovery release strategies

Picture:
Raised floor area with racks for core infrastructure.





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IT Monthly Update – Business Units

Sample Topics

- Business unit updates written by IT leaders from the BU
- Global IT Services update written by IT leader
- Brief narrative providing an update on key projects

October 2009
Page 2

Business Unit Updates

Technology Services Group

Kroll Ontrack

Beryllium Phase 1 Release. During October, a new version of Ontrack Inview (Ontrack Inview 6.1) was released for customer use. Ontrack Inview 6.1 provides enhanced reporting features allowing customers to better understand their data; provides tracking and reporting on the actions taken during the review of the data; and provides reporting on keywords such as how many times a keyword has shown up in a particular data set. During the release window, IT upgraded over 120 databases from Ontrack Inview 6.0 to Ontrack Inview 6.1. This effort provided existing customers with immediate access to the desired functionality. This was the first time Kroll Ontrack undertook Ontrack Inview mass upgrades.

KBS

BCP/DR Project. This project kicked off the week at the beginning of October, and was followed by a meeting with EMC to discuss replication options. The KBS Infrastructure team has been working closely with the Kroll Infrastructure team regarding Business Continuity Planning and Disaster Recovery as well as replication with a goal to finding one solution that works for both groups.

Salesforce.com. An Outlook add-in from Salesforce.com was deployed with the intention of making data entry easier. Options are being considered to incorporate a BlackBerry client and another client that will integrate the Cisco phones with Salesforce.com. Timelines are pending moving phones to AT&T and getting a new telecom staff member in place in Eden Prairie.

Patch management. An agreement between IT and the Engineering teams resulted in the implementation of a formal patching process in which patches tested by QA are implemented production three weeks after their initial release. A project is also in place to bring the Test and Production environments to the same patch level. This process will help ensure consistency between the two environments and improve release management.

WiFi. WiFi is now available in Nashville, a communication and instructions were sent in October.

KLS

KLSapp Version 2. Beta testing of version 2 is now in progress. The Greina team has completed the first two phases of beta testing for this version, and two more phases of testing will be performed to validate various complicated scenarios. In addition a project to develop new version, 2.5, has finalized its scope and development is scheduled to begin in December.

Krolldatalink.com. IBM performed another penetration test on the KLS web reporting system Krolldatalink.com and KLS received very positive feedback from IBM.

Collection Site Management. KLS is upgrading the "Zip Radius search" module system of collection site management. This upgrade will enable the client services department and clients to find the actual driving distance between the client locations and collection site locations. Go-live for the internal application is scheduled for October and will be extended for web application in November.

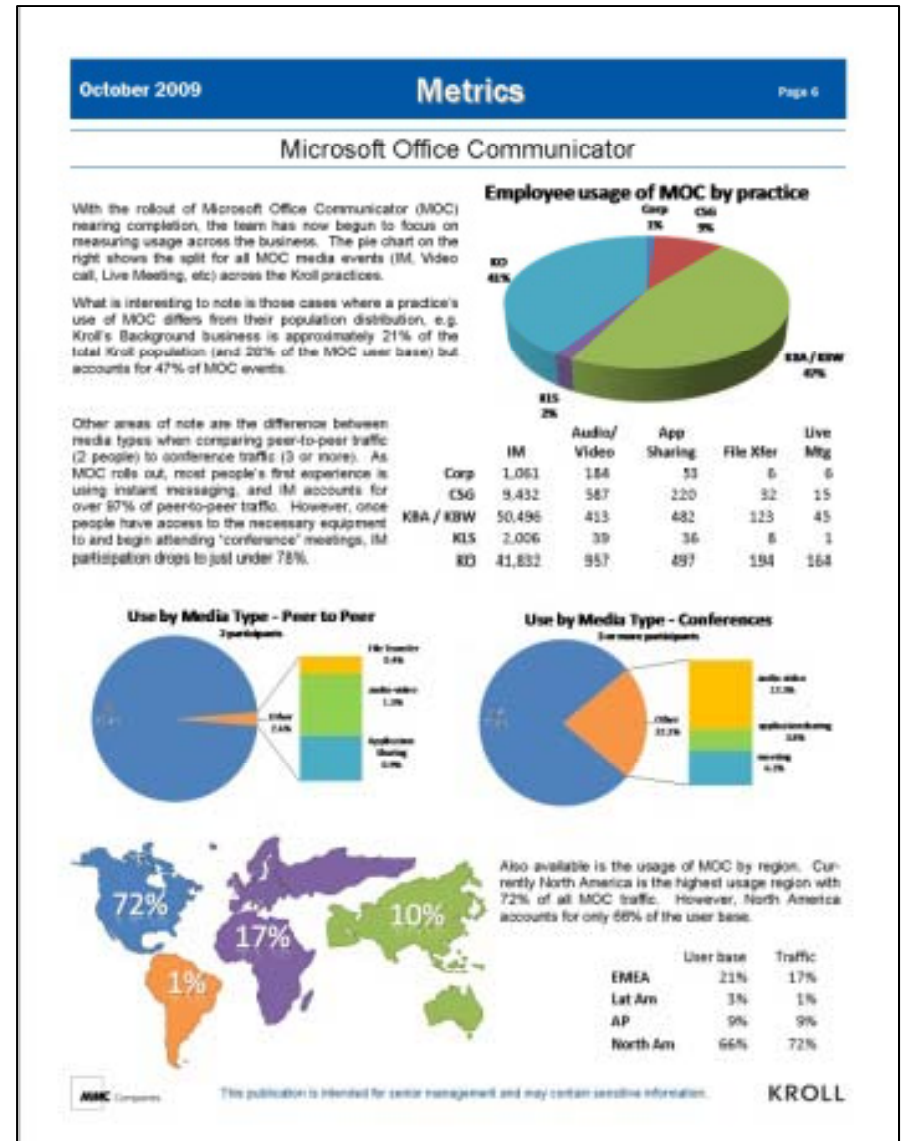
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IT Monthly Update – Metrics

Sample Topics

- Global usage summary of a key enterprise tool
- Service Desk performance
- Critical application availability index
- Customer satisfaction
- IT Balanced Scorecard





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Scorecard Questions to Address

- Has the audience for the scorecard been determined?
- Can you clearly describe what issue the metric will address?
- Is the issue of relevance to the audience?
- Can you describe how the metric will help support decision making around the issue?



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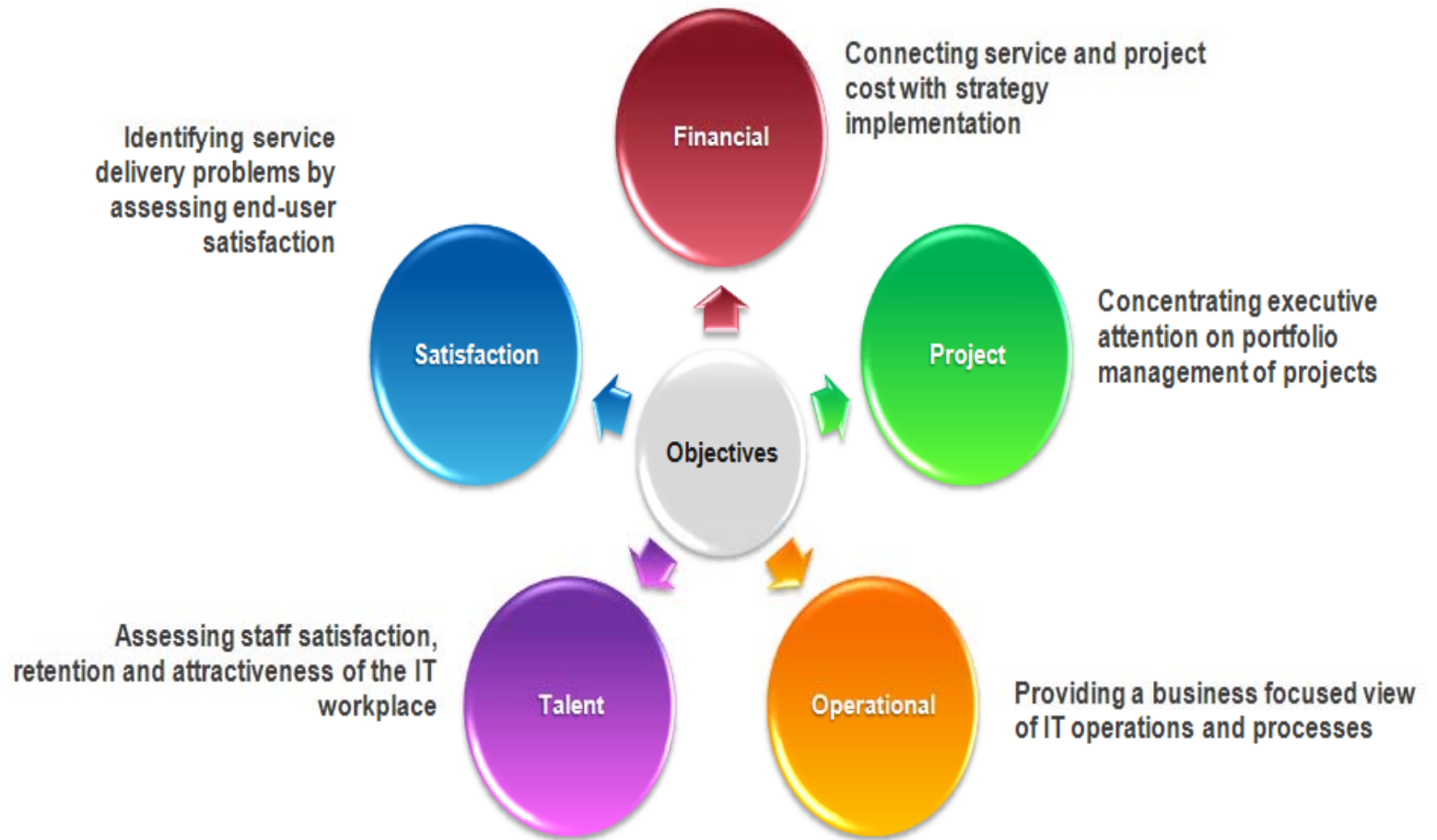


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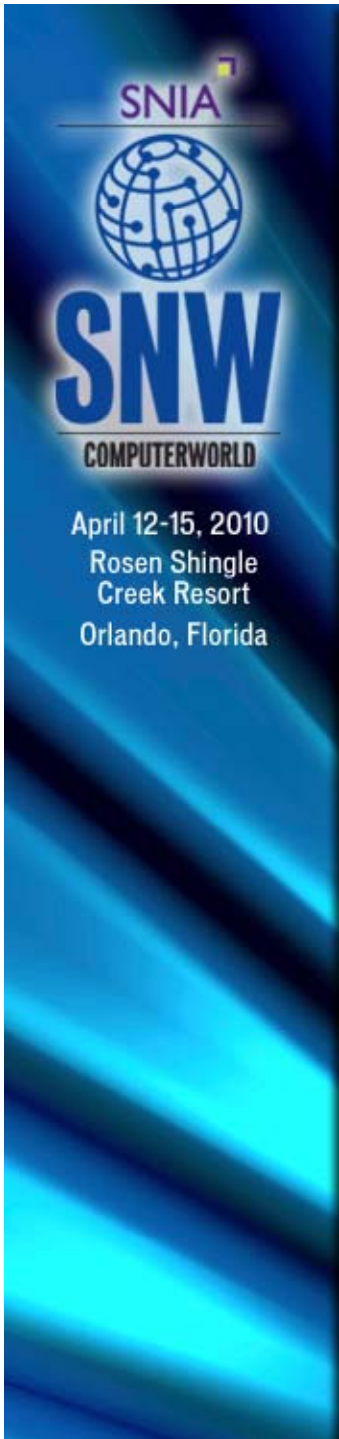
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IT Balanced Scorecard Framework



A "balanced" scorecard for IT is adjusted to five categories which are aligned to and support IT strategic objectives



Sample Balanced Scorecard

IT Balanced Scorecard					last updated 28-Mar-10
Talent - TM01	Finance - FM01	Operations - OP01	Projects - PM01	Satisfaction - BS01	
<u>Staff with an IDP</u>	<u>IT Spend per Employee [\$US]</u>	<u>SOC Avg Speed to Answer [secs]</u>	<u>Milestone Tracking</u>	<u>Service Desk Transactions</u>	
Q4 2009	Q4 2009	Feb-10	Feb-10	Feb-10	
● 97% ↓	● \$ 22,304 ↓	● 15 ↓	● 100% ↑	● 4.5 ↓	
Talent - TM03	Finance - FM02	Operations - OP02	Projects - PM02		
<u>IT Staffing Levels</u>	<u>IT Spend % of Revenue</u>	<u>SOC Call Abandon Rate</u>	<u>Resource Activity by Type</u>		
Q4 2009	Q4 2009	Feb-10	Feb-10		
● 2.6% ↓	● 10.4% ↑	● 3.1% ↓	▲ 7% ↑		

Representative Numbers Only!



Sample Framework

Talent Development

IT Staff with an IDP and Action Steps Completed
as of: 1/21/2010

IDPs Required	IT Function	% with IDP	Total IDPS Completed	Q4 2009		
				Steps Created	Steps Completed	Completion Rate
4	OCIO	● 100%	4	0	0	
58	GBL SVCS	● 95%	55	65	29	● 44.6%
9	BOO	● 100%	9	13	8	● 61.5%
48	KO IT	● 98%	47	53	20	● 37.7%
2	SEC	● 100%	2	13	3	● 23.1%
121	Total IT	● 97%	117	144	60	● 42%

97% of IT staff have an IDP (down from 98% in Q3 this is driven by new hires)

42% of Action Steps targeted for Q4 were completed (down from 53% in Q3)

The target is to have 100% of IT Staff with an actionable IDP on file (metric TM01). IDPs are supported by Action Steps which have target completion dates for any given quarter. The target percentage of action steps to be achieved in any given quarter (metric TM02) is still under review as the IDP process is refined.

Talent - TM01

Staff with an IDP

Q4 2009

● 97% ↓

Talent - TM02


IDP Steps Completed

Q4 2009

◆ 42% ↓

Representative Numbers Only!

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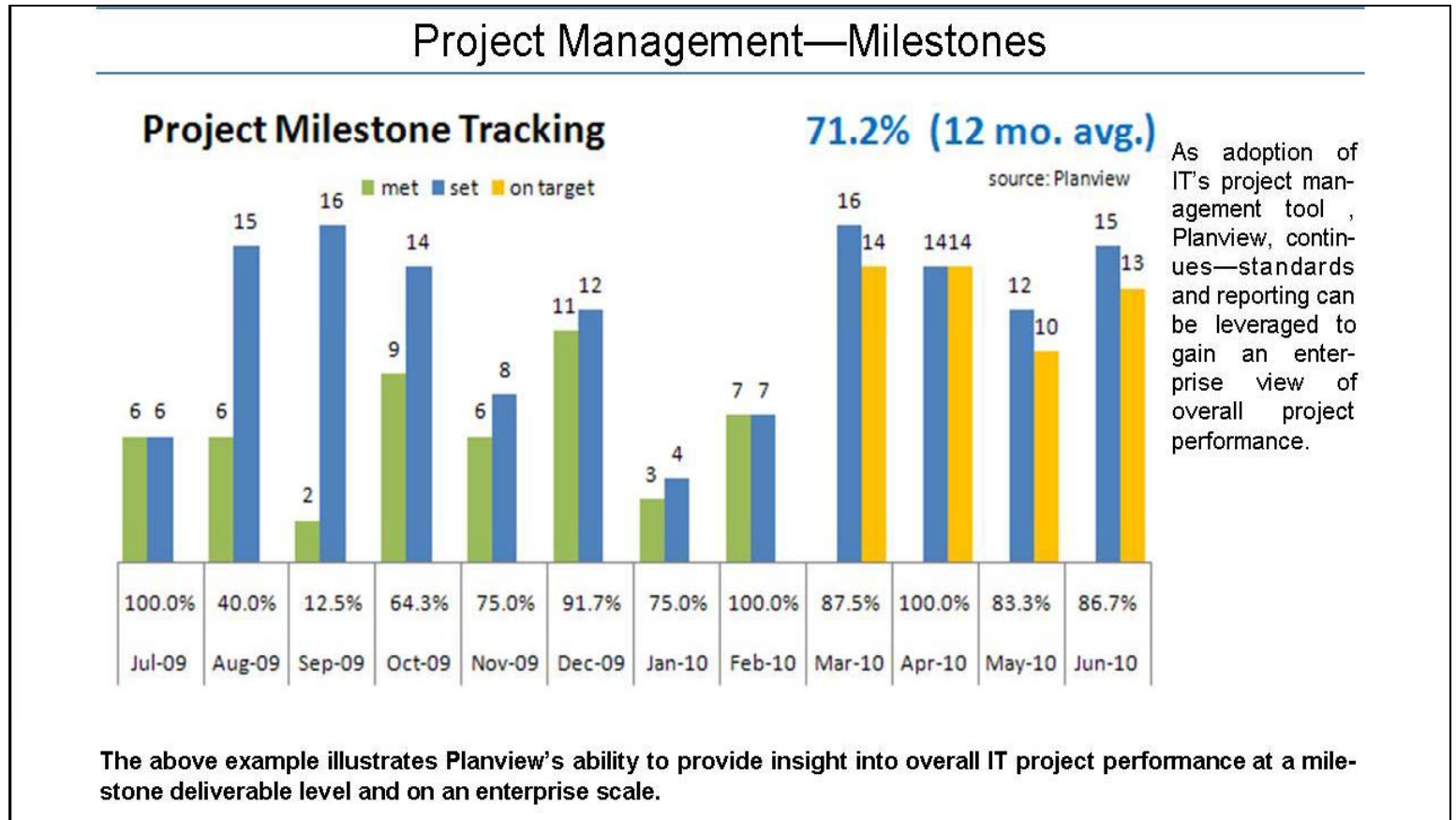


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COMPUTERWORLD

April 12-15, 2010
Rosen Shingle Creek Resort
Orlando, Florida

Sample Framework –



Representative Numbers Only!



Sample Metric Definition

Perspective: Project Performance	Measure Number/Name: PM 01 – Project Milestone Performance	Owner: Sr. Manager - PMO	Provider: Planview Administrator
Corporate Strategy:		Objective:	
Description: Percentage of IT project milestones met versus all IT project milestones due for the reporting month. Milestones are defined in "Appendix A" of this document.			
Lag/Lead: Leading	Frequency: Monthly	Unit Type: Percentage	Drill down parameters: Phase, portfolio, time, IT function, project mgr
Formula: Count of milestones delivered divided by count of milestones due for the reporting month times 100			
Data Source: Planview PPM WBS field "milestone" where flag is set to "yes". Tasks flagged in PPM project plans as a milestone are extracted via a query and reported based on baseline finish vs. actual finish. Milestone estimated finish is also reported for purposes of forward tracking.			
Data Quality: <ul style="list-style-type: none"> - Includes all active projects that are not classified as admin or support - Only milestones with a baseline finish date for the specified reporting month will be counted - Changes to baseline finish dates are allowed only by approved processes - Project milestones are defined and tracked based on Appendix A in this document - Processes for managing milestones in PPM are defined in Appendix B, "Procedures for Milestone Reporting", in this document 		Data Collection: PMO will provide data on a monthly basis from Planview PPM. Project Managers are responsible for honestly and accurately setting milestones in individual projects as defined in Appendix B of this document (Procedures for Milestone Tracking). Project Managers are responsible for accurately and honestly updating milestone task dates as completed.	
Baseline: Not yet available		Target: TBD	
Target Rationale: suggest measuring performance for x months to set baseline and then agreeing target			
Improvement Approaches:		Work with the PMC to enhance project management capabilities and processes (e.g. forecasting, estimating, demand mgmt).	
		Provide PMs the ability to select from a standard list the reason for missed milestones.	
		Perform root cause analysis on missed milestones.	



Learning Objectives – Summary

1. Discuss an integrated approach to developing a business and IT strategic plan
2. Demonstrate how IT is delivering value to the business through the use of a reporting and communications framework
3. Measure and report – how to tackle an IT Balanced Scorecard





Thank You!

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