

## This series is based on the critically acclaimed book “The Valuation of Information Technology” by Christopher Gardner.

“... does an admirable job of outlining techniques for creating shareholder value in an area that is too often subject to luck and hapless guesswork.”

– Harvard Business School, Working Knowledge April 2000

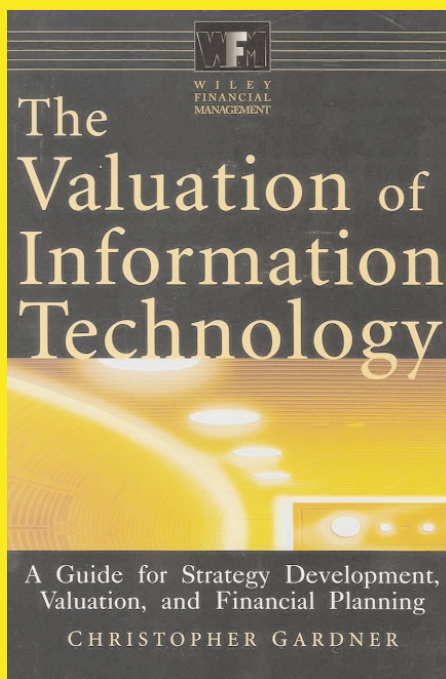


“This is the first book which I have seen that places corporate decision-making on a logical and quantitative basis. Decisions which have traditionally been done by the ‘seat of the pants’ are subjected to the same rigorous analysis as is routine in the hard sciences. I think this book strikes off in a completely new direction....”

– Mel Schwartz, Nobel Laureate in Physics 1988 and Professor Emeritus, Stanford and Columbia Universities

“Finally a clear set of tools for those of us who are trying to find a path through a jungle of complexity. Chris Gardner has clearly and crisply provided a roadmap of rationality to help direct our path through a chaotic world of accelerating change.”

– Peter Sprague, Founder, Chairman and CEO Wave Systems and Former Chairman of National Semiconductor



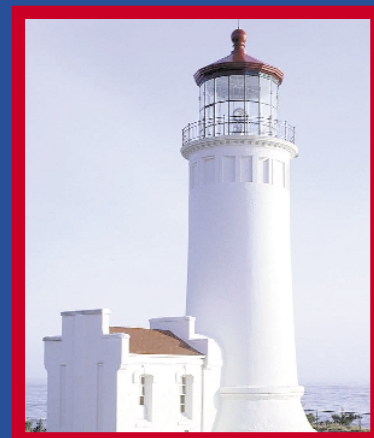
## Course Leaders

**Christopher Gardner** is a management consultant and author of “The Valuation of Information Technology: A Guide for Strategy Development, Valuation, and Financial Planning” (John Wiley). He is a partner at PricewaterhouseCoopers LLP, where he leads the Information Technology Strategy Group. Mr. Gardner was a management consultant and IT specialist for McKinsey & Company.

**Ray Trotta** is the cofounder of *iValue*, a technology valuation firm. He has taught and written courses on IT valuation nationally. Before launching *iValue*, he was a member of the Financial Services Consulting Practice of KPMG Peat Marwick. Mr. Trotta is the Chairman of the Advisory Board to the business school and a faculty member of the Walter E. Heller College of Business Administration at Roosevelt University. He regularly leads courses for the American Management Association.

## Who Should Attend

- Anyone that needs to understand the contribution of IT investments to shareholder value
- Executives responsible for corporate and IT strategy as well as the financial performance of an enterprise
- CEO's, CFO's, CIO's, Vice Presidents, Directors of Finance and Technology, MIS Management, Financial Analysts, Investment Bankers, Turn-around Specialists, Consultants, Project Managers, Technology Professionals, Engineering Managers, System Architects
- Staff members leading or participating in the conception, development, and operation of an IT system



# The *i*Value Approach



## Enjoy a Relaxing Experience in an Exclusive Environment

This isn't your ordinary executive conference. Expect to have fun while exploring the cutting edge. Meeting sites include the University of Chicago's Midway Club, the MIT Endicott House, Château Élan Winery & Resort, and the Monterey Bay Inn.

**Receive personalized attention** – We limit the session sizes to 15 executives in order to give you the best service, instruction, and comfort. The course leaders are dedicated to your success. It is our pleasure to give you individual attention and discuss your needs.

**Get hands on experience** – Collaborate on actual cases, designed to give you experience with key concepts and methods as well as arriving at the best solution.

**Network with senior executives** – You will have the opportunity to spend time with colleagues outside the learning sessions. Join us for cocktail receptions in the evening.

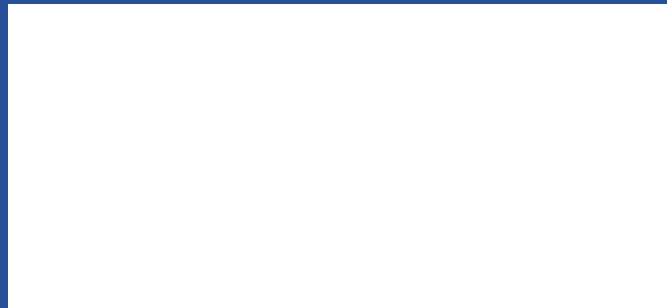
## About *i*Value

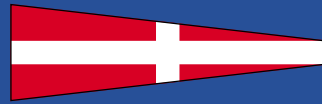
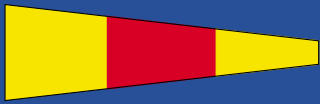
We are an organization dedicated to the best thinking on technology valuation. Your seminar fees fund future research in the field. The firm does not have alliances with vendors or consulting companies. *i*Value is committed to finding the most economically attractive solution to your technology problems. We maintain the highest service standards in our industry. For more information visit our website at [www.iValueInstitute.com](http://www.iValueInstitute.com).

***i*Value – the source of the best thinking on the valuation of technology**

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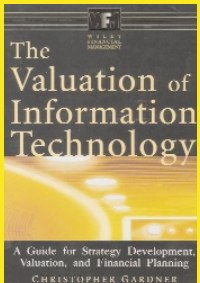


# Are you on the right course to create shareholder value from information technology?

- Are your technology investments creating value, rather than destroying it?
- Can you tell your shareholders how much value IT has created?
- Do you know how to construct an IT system to create value?
- Do you have the right tools to measure IT value?



*iValue* can help you answer YES to all these questions.



**The *iValue* Series is based on a book endorsed by Harvard Business School.** *iValue* seminars are designed for executives. You will learn

to use tools that can help you determine the effect of your technology initiatives and portfolio of technology assets, on shareholder value. These tools have been developed through extensive research and testing in real-world environments. The course leaders are specialists in the field, who have developed and deployed these tools in companies that range from the Fortune 500 to mid-sized firms.

Choose these offerings to get on course:

**How to Value Information Technology** – You will learn to use VITA™, a powerful method to evaluate technology initiatives.

**The Portfolio Strategy Approach to IT Investment** – You will develop critical skills to get the most value from your portfolio of technology assets.



## How to Value Information Technology



Information technology has many success stories. However, there have also been far too many failures. The effect of information technology on a company's shareholder value has been unpredictable. Lacking a method to analyze the value of IT, executives are forced to make decisions based on fragmented data and guesswork. Now, *iValue* makes it possible to get a clear picture of the impact IT is having on shareholder value.

How to Value Information Technology, a three day executive seminar, can help you answer these questions:

- What contribution will a system make to a company's shareholder value?
- How can an IT system be constructed to create value?
- How do you value infrastructure, portals, Internet initiatives, CRM, and legacy systems?
- How to get the most from your technology spend?
- What will be the likely reaction from Wall Street?

### Course Takeaways:



#### Develop a critical skill.

You will learn how to use VITA™, a structured process to estimate the shareholder value generated from IT systems.



#### Get hands on experience.

Work on real-world cases where our proven method has been applied.

### How to Value Information Technology

Date	Location
Please visit	Atlanta
<a href="http://iValueInstitute.com">iValueInstitute.com</a>	Boston
for the latest	Chicago
schedule.	New York
	San Francisco



### Course Outline



#### Day 1 – The VITA™ Framework

Get an introduction to the *iValue* analytical tools and techniques.

##### Understanding the Opportunity

- Discovering the real need
- Assessing the amount of demand

*Refreshment Break*

##### Creating the Technology Solution

- Determining the flow of information
- Scaling the system
- Designing the information system architecture

*Luncheon*

##### Estimating Economic Value

- Evaluating system cost
- Making cost comparisons

*Refreshment Break*

- Understanding baselines
- Developing valuation models
- Interpreting the results

*Reception*

#### Day 2 – Case Study

Learn how TCI, a large capitalization public company, made the decision to invest in the distribution and installation of cable modems. Examine this case using proven financial models.

##### Breakout Session 1 – Strategic Analysis

*Refreshment Break*

##### Breakout Session 2 – Pre-Initiative Valuation

*Luncheon*

##### Breakout Session 3 – Model Preparation and Analysis

*Refreshment Break*

##### Breakout Session 4 – IT System Valuation

#### Day 3 – The Lab!

Join the group and course leaders to develop a high-level valuation approach to your IT initiatives. Apply the course learning and experience to get your own work done.

##### Getting Started

- Review and explore each opportunity
- Strategize on real opportunities with the group

##### What Will it Take?

- Develop the information flows
- Work through the technology architecture
- Understand what it will cost to launch your program

##### Will You Create Value?

- Create the inputs necessary for analysis
- Run a financial model

##### Go, No-Go, or Wait?

- Make a strategic decision

# Venues & Registration



**The University of Chicago Midway Club** is a private establishment that is next to Chicago's famous

Miracle Mile. Treat yourself to luscious Wolfgang Puck catered breakfasts, lunches, and refreshments while enjoying spectacular views of Lake Michigan and the city.

**MIT ENDICOTT HOUSE**

**The MIT Endicott House**

is an elegant pre-war era mansion, which is surrounded by 25 acres of breathtaking gardens. It is conveniently located near Boston. The Endicott House is known for its cuisine. The grounds inspire creative and constructive thought. Breakthrough solutions will come easily to you in these settings.



**Château Élan Winery & Resort** is just 40 minutes north of Atlanta. Here on 3,500 acres, French provincial and Southern

hospitality combine to produce a superb leisure resort and conference destination. The centerpiece of the resort is a 16th century French Château and Winery designed in the style of a royal retreat. Framed by 200 acres of lush vineyards, the Winery is the largest producer of premium and varietal wines in Georgia. Château Élan is truly one of a kind.



Sleek and modern, the **Monterey Bay Inn**

meets the tides from its magnificent site along historic Cannery Row. A short stroll down Cannery Row finds you at the Monterey Bay Aquarium, lively restaurants, and nightclubs. Adjoining boutiques are set into historic storefronts.



**Set Sail and Register Today!**



**4 Ways To Register Immediately**

- Go to our Website at [iValueInstitute.com](http://iValueInstitute.com)
- Mail or fax this form to:  
Ms. Sherry Hill  
Director of Customer Advocacy  
92 Old Mill Court  
Barrington, IL 60010  
Fax 847-713-2451
- Call 847-713-2974 M-F 9AM-5PM CST
- E-mail to [shill@ivalueinstitute.com](mailto:shill@ivalueinstitute.com)

**Accommodations**

See our website [www.iValueInstitute.com](http://www.iValueInstitute.com) for suggested hotels.

**Included with Registraton**

The registration fee includes a free copy of **The Valuation of Information Technology**, continental breakfast, lunch, coffee, reception, and complete program materials. It does not include hotel accommodations. Confirmation of receipt will be by mail.

**Certificates**

Certificates of Participation will be awarded to all those attending the program.

Name \_\_\_\_\_ Title \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Company \_\_\_\_\_  
 Phone \_\_\_\_\_ Fax \_\_\_\_\_  
 E-mail \_\_\_\_\_

Circle Programs You Wish To Attend

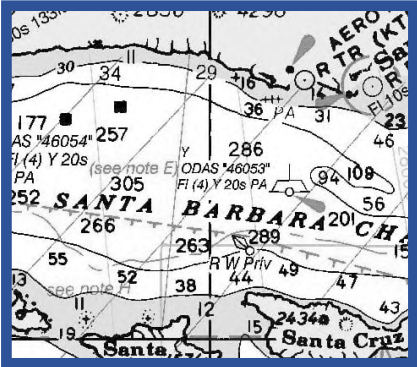
Course 1 - All Three Days (\$2,895)	Course 2 - All Three Days (\$2,995)
Course 1 - Day 1 and Day 2: (\$2,100)	Course 2 - Day 1 and Day 2: (\$2,300)
Course 1 - Day 1: (\$1,300)	Course 2 - Day 1: (N/A)

Form of Payment (Circle One): Check (payable to iValue) MasterCard VISA Account # \_\_\_\_\_

Exp. Date \_\_\_\_\_ Signature \_\_\_\_\_

Attendance at this program will be reserved on a first-come, first-served basis. If the session is cancelled, liability is limited to the registration fee. You will have the opportunity to attend a seminar on another date.

# The Portfolio Strategy Approach to IT Investment



**N**early half of corporate capital expenditures are invested in information technology. Yet, many executives struggle with managing the value delivered from their IT investments. They lack a comprehensive method to understand the value generated from IT investments as a whole,

that deals with the wide variation of risk/reward. Now, *iValue* makes it possible to manage the value of your portfolio of IT assets.

The Portfolio Strategy Approach to IT Investment, a three-day executive level seminar, can help you answer these questions.

- Do you have a process to evaluate your total investment in IT?
- Can you identify the stars from the dogs in your IT portfolio?
- Have you developed a buy, hold, and sell strategy for your IT investments?
- Do you know what your IT options are and when to act on them?
- Do you know how to hedge your bets?



## Course Outline



### Day 1 – IT Portfolio Framework

#### Establish a Strategy

- Understand your risk profile
- Establish your value target
- Link IT investments to your overall investment strategy

*Refreshment Break*

#### Assess Your IT holdings

- Use a structured method to categorize your IT assets
- Develop a risk profile for each investment

*Luncheon*

- Sort out the true value contribution/drain
- Analyze difficult IT investments such as legacy systems
- Assess your hold periods and exit strategies for your IT investments

*Refreshment Break*

- Examine alliances and outsourcing to modify risk
- Decide whether to continue to invest, run, or retire systems
- Discuss IT asset recovery techniques

*Reception*

### Day 2 – Managing IT Assets

#### Get to the Right Investment Mix

- Balance your portfolio
- Identify your buy and sell strategies
- Create an option strategy for possible changes in the market
- Optimize your return

#### Case Work

- Prepare a case study in a team environment using IT Portfolio Strategy techniques
- Review your recommendations in an investment committee setting

## Course Takeaways:



**Stay ahead of your competition.** Be able to apply state of the art techniques to your IT portfolio to keep your company ahead of the curve.



**Learn a process that can enhance the value derived from your IT portfolio.** The Portfolio Strategy process provides you with a step-by-step method to assure that you are maximizing value from IT.



**Apply what you have learned to case studies.** Work through cases that give you exposure to IT portfolio modeling.

### The Portfolio Strategy Approach to IT Investment

Date	Location
Please visit	Atlanta
<a href="http://iValueInstitute.com">iValueInstitute.com</a>	Boston
for the latest	Chicago
schedule.	New York
	San Francisco