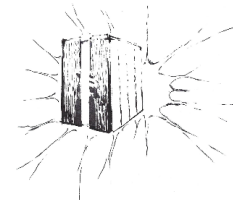


From Complaints to Security and Compliance: The IT Department and Marketing Department Alliance

Tony Perri CEO, Perri Marketing, IBM z/OS Champion

Reg Harbeck, MA, CEO, Mainframe Analytics, IBM z/OS Champion

perri marketing



Mainframe Analytics Ltd.

Who is Tony Perri?

- 1980 - started in college as Fortran programming student
Transferred to creative writing. Took off from school til 1988 to schlep food.
- Mid 1990s - started in the s/w biz after a long stint in foodservice
- 2008 - began working in mainframe space at Allen Systems Group
- 2011 - Founded PMI, a tech marketing company, in 2011

Have worked with: BMC, Cloud Compiling, CorreLog, DTS Software
Eccox Software, Insoft (Infotel), KoolSpan, SyncDog, Redwall
Technologies, SysperTec, Zetaly (zCost)

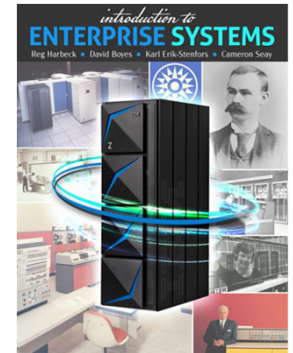
Here this week representing Infotel

- Over the years many research/writing projects in InfoSec space
- IBM Champion 2022+
- Co-founder and CEO of Santa Rosa Software, a mainframe software vendor specializing in mobile applications for next-gen mainframers



Who is Reg Harbeck?

- First IBM Z Champion in Canada
- Working in IT and mainframes for over three decades
- Global mainframe author, speaker, podcaster, consultant (see <https://techchannel.com/Authors/reg-harbeck>)
- Very involved in the mainframe culture and ecosystem, including SHARE (board member 2009-2011, projects, programs, committees, speaker); also CMG, GSE, NaSPA
- Mainframe Analytics Ltd. co-founder and Chief Strategist
- MA, Interdisciplinary Humanities, 2021
 - Focus on humanity of the IBM Mainframe
- Co-author of *Introduction to Enterprise Systems*



Agenda – Complaints to Compliance

- Cast of characters: Actors and Silos
- Broken scenario role play
 - Context
 - Regulations plus data: toxic gold
 - Compliance and IT, Marketing, HR, and the core business
- Relationships and Opportunities
 - Frenemies, internal customers, and perspectives
- What do we do about all this?
- Constructive scenario role play
- Discussion

The Actors

CEO and the Board

- They set the strategy and let others worry about the details
- Results today are more important than consequences tomorrow

*“It’s easier to apologize
than ask permission.”*

Rear Admiral Dr. Grace Hopper

CMO

- Messaging! Reputation! Revenue! Brand Strategy! Exclamation Marks!!!!
- Abstract role in organization – misunderstood, hard to measure, seen as a cost center

CTO and/or CIO

- Totally different people with totally different jobs, not at all interchangeable
- At least one of them reports to the CEO unless they report to the CFO
- Responsible for technology and business impact, maybe also vision
- Abstract roles in organization – misunderstood, hard to measure, seen as a cost center

CHRO

- “Human Resources” – squeezing the business value out of headcount
- Where political incorrectness goes to die

CISO

- When everyone else ignores the security and regulatory implications, the shouting sound comes from here

Silos Defined

Traditional physical concentration of value

Organizational silos:

- Horizontal silos
- Crypto vertical silos
- Concentrations of results and value – like good physical silos
But sometimes they sub-silo and become exclusive clubs – crystallizing granularization

It's all about data – the lifeblood and essential infrastructure that keeps silos valid

The Silos You Deal With

- **The line of business:** either a super silo, or the value other silos fail to “get”
- **IT:** shepherding the bits and bytes, keeping tech current, keeping dissatisfaction within SLA QoS
 - Even “insiders” often don’t have the whole picture of their own silo
- **Marketing:** the strategic face the organization shows the world
- **Human Resources:** keepers of the parameters for people
- **Internal customers:** they keep the boat afloat and rocking
 - Putting the “cuss” in customer
 - Forcing you to triage if there are conflicting demands
- **Audit and Computing Security:** the ultimate inside outsiders

So What?

- The focus of all organizations with mainframes (revenue in \$billions) is to stay out front and on top, shareholder value
- Must do it within constraints of regulations, compliance, data security, insurability, liability
- How do you maintain your organization's viability when it takes an army to be successful, but the silos mean each constituent may be at cross-purposes with the rest?

Broken Scenario Role Play

- CEO mandates a new marketing message about the organization ASAP, completely unplanned and out of left field
- CMO needs to get the message out to everyone who has a product. NOW!
- CTO is gatekeeping the resources based on security and regulatory concerns
- No strategy = tragedy?

Context, Issues, Opportunities

- IT is focused on delivery of functional, quality technical results
 - Always on the lookout for “gotchas” like regulations, laws, liability, capacity limits
- Marketing wants to create quality, compelling messaging that connects and drives opportunities for sales or direct purchase
 - “Know thy customer” is essential to avoid wasted effort
- Like two ships that crash in the night
 - IT and marketing don’t automatically perceive common ground
 - When their requirements suddenly conflict, resolution is unclear
- Unique opportunity for communication and partnership
 - Establishing a clear mutual understanding of needs and boundaries
 - Designating relationship connectors
 - Brainstorming emergent opportunities from available data and functionality
 - Both of us work within the “abstract,” not easily understood.

Regulations + Data: Toxic Gold

CMO opportunities:

- Data is the “new gold”
- Using it well, including mining, entails unlimited opportunities

CTO Terrors:

- Using it, well that can run afoul of regulations, rules, laws, liability, and CISOs
- Data breaches are today’s endless nightmare
- Controlling data access while making it available is... daunting

Data Usage Compliance and IT, Marketing, HR, and the core business

- **IT:** Stewardship of the data *for the business*
- **Marketing:** Using the data *to generate business*
- **HR:** That data had better not be used for monkey business
- **Core business:** That data is a key aspect of our *business success*
- **Compliance:** Rules, regulations, laws: personally identifiable information

These things fill silos...

Frenemies, internal customers, cost-benefits, and the bottom line

- Healthy tension is like triceps/biceps rowing the boat
- Internal customer demands interweave with CEO/Board mandates
- Costs of systems vs benefits rarely calculated fully, often marketecture
- Loggerheads often result from focusing on different versions of “success”
- BOUNDARIES! Mapping “stand firm” boundaries to business bottom line value brings insight
 - Use the tools of evidentiary value (CRM, Project Management, SLA goals) to communicate up the chain.
- Negotiating mutual value and compatible standards can result

The view through their glasses: IT, Marketing, Shareholders

- IT: everything is about technical configuration, currency, functionality, availability
- Marketing: everything is about connecting with customers
- Shareholders: everything is about the bottom line

What do we do about all this?

- Install Java (i.e. have coffee)
- Identify common sources of mandate, demand, difficulty
- Find places of conflict, trace roots to business reasons and values
- Meta-silo communication and relationship

Constructive Scenario Role Play!

- In-depth external audit of accounts, resource access, and usage:
 - Marketing people have a lot of access that doesn't appear relevant to their roles
 - Some accounts appear to be in use by multiple people, possibly not all employees
 - Some systems they shouldn't have access to are being actively used by them
- CTO gives CMO a list of the accounts and accesses that are “going away.”
- CMO storms into CTO's office and threatens to escalate.
- Let's see how they work things out.

So What Does This All Mean?

1. Lack of communication creates unknowns; unknowns are devastating for breach response
 - Communicate up and down the chain of command.
 - Data breach is mostly enabled by human error from resources being overtaxed and over-mandated.
2. Silos of workflows and information is evidence of lack of communication.
 - When breach forensics starts it's less effective when you have to flip the switch and start communicating
3. Comms about cyberthreat start with CHROs and employee onboarding!
4. Breaches are career killers and impact the bottom line:
 - *"In 2023, the average cost of a data breach globally reached an all-time high of \$4.45 million. This figure represents a 2.3% increase from the previous year and a 15.3% rise from 2020."**

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Q&A Forum

Tony Perri | [LinkedIn](#)

Perri Marketing, Inc.

(423) 212-3127, ext. 1

tony@perrimarketing.com

Reg Harbeck | [LinkedIn](#)

Mainframe Analytics, Ltd.

(403) 605-7986

Reg@Harbeck.ca

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