



Executive Training & Events for Risk Management Professionals

# PROFESSIONAL WORKSHOPS

## VIRTUAL ERM ROUNDTABLE SUMMIT

DECEMBER 3, 2021  
12:00 - 3:30 PM EDT

EARN  
**4.0** CPE

# VIRTUAL ERM ROUNDTABLE SUMMIT

**NC STATE** Poole College of Management  
Enterprise Risk Management Initiative

**DECEMBER 3, 2021**  
**12:00 - 3:30 PM EST**

**4.0**  
Recommended  
CPE Credits

Join us for our *virtual* ERM Roundtable Summit on December 3, 2021 from 12:00-3:30 PM eastern standard time. Hear insights from ERM experts from Lockheed Martin, Compassion International, Crowe, LLP, NC State University's College of Design and Bonneville Power Administration. The Summit will also include breakout sessions for in depth discussions with other participants and interactive Q&A with presenters.

## WHO SHOULD ATTEND?

Individuals serving in risk oversight roles, including chief risk officers, CFOs, CEOs, COOs, general counsels, internal and external auditors, treasurers, members of boards of directors, and other risk management professionals who can benefit from the presentations and dialogue.

## LEARNING OBJECTIVES

- Identify opportunities to integrate ERM and sustainability processes.
- Pinpoint techniques for managing risks within organizations that have teams and staff in numerous geographic regions and cultures.
- Recognize risks that may be triggered by increasing use of cloud computing capabilities and apply ERM principles to manage those risks.
- Evaluate how design principles and thinking can stimulate innovations in ERM processes.
- Identify opportunities for embedding decision frameworks to help business leaders proactively identify and navigate risks tied to key strategic decisions.
- Evaluate what changes are needed to enhance ERM processes in your organization.
- Exchange best practices and effective ERM techniques with other risk management professionals.

## ERM FELLOW DESIGNATION

The virtual ERM Roundtable Summit qualify as credit that can be applied towards earning your NC State ERM Fellows Designation.

## DATE

DECEMBER 3, 2021 | 12:00-3:30 PM

The SUMMIT will be held virtually Eastern Standard Time (EST).

**COST | \$250**

**CPE | 4.0 CPE**

In order to receive the full 4.0 CPE credit, participants will be required to respond to at least 3 polling questions per CPE credit hour and participate in break-out discussions.

**FIELD OF STUDY | MANAGEMENT SERVICES: ENTERPRISE RISK MANAGEMENT**

**PREREQUISITES & ADVANCED PREPARATION | NONE**

**PROGRAM LEVEL | BASIC**

**DELIVERY METHOD | GROUP**

## Reserve Your Seat >

Visit <http://erm.ncsu.edu/executive-education/event/ERMRTGIBDEC2021> for more information.

Login details will be provided to registered participants.

To view our detailed refund, cancellation, and complaint policy, visit <https://erm.ncsu.edu/az/erm/i/chan/library/EventPolicy.pdf> or email [erm\\_initiative@ncsu.edu](mailto:erm_initiative@ncsu.edu) or call 919-513-0901.

The NC State Executive Education LLC ERM Initiative is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.nasbaregistry.org](http://www.nasbaregistry.org).

Time	Topic / Speaker
12:00-12:10pm	<b>Welcome and Overview of the Importance of ERM</b>
12:10 - 12:40pm	<p><b>Integrating ERM and Sustainability: Navigating Horizon Risks</b></p> <p><b>Christopher Geiger</b> <i>Director of Internal Audit and Risks</i> <i>Lockheed Martin</i></p> <p><b>Heather Daniels</b> <i>Director of ERM and Sustainability</i> <i>Lockheed Martin</i></p> <p>The importance of considering challenges related to the environment, social issues, and governance (ESG) is increasing exponentially as global leaders and key stakeholders are placing greater demands on organizations to consider their impact on society. While many organizations are investing in ERM and in managing sustainability related issues, those efforts are often not integrated. Lockheed Martin has purposefully connected their ERM and sustainability efforts given both are focused on managing risks that may impact the strategic success of the organization. Christopher Geiger and Heather Daniels will share insights about what led to that integration decision and how they are realizing synergies in those efforts.</p>
12:40 - 1:10pm	<p><b>Overview of ERM at a Global Non-Profit Serving the Most Vulnerable</b></p> <p><b>Travis Will</b> <i>Director of Global Risk Management</i> <i>Compassion International</i></p> <p>Compassion International is a global non-profit organization whose mission is serving the poorest of the poor – over 1.9 million children in need in over 25 countries around the world. Given the global locations and individuals they serve, Compassion International faces a number of risks that have been especially challenging to manage during a global pandemic. Travis Will helps lead the ERM process for Compassion International, and he will share insights about how their ERM processes have been helpful in navigating a number of complex issues and how they are using technology to help support their communication of risk information to key decision makers in their organization.</p>
1:10 - 1:30pm	<p><b>Breakout Room Discussion &amp; Debrief: Engaging Management in Robust Risk Discussion?</b></p> <p>C-suite executives often think management is already aware of key risks on the horizon and therefore they fail to appreciate the need to engage more explicitly in risk conversations. During this breakout session, participants will engage in small group conversations about approaches they have used to engage management in robust conversations about risks on the horizon, highlighting what has worked well (or not).</p>
1:30 - 1:35pm	Short Stretch Break
1:35 - 2:05pm	<p><b>Overview of COSO's Guidance on Managing Risks Related to Cloud-Computing</b></p> <p><b>Vicky Cheng</b> <i>Managing Director</i> <i>Crowe, LLP</i></p> <p><b>Mike Grob</b> <i>Principal</i> <i>Crowe, LLP</i></p> <p>Organizations of all types and sizes are increasingly embracing cloud-based computing technologies to help support key business processes. While cloud-based solutions provide a number of amazing benefits, they also come with risks that need to be considered. COSO recently issued new thought-leadership guidance, <i>Enterprise Risk Management for Cloud Computing</i>, to provide insights to help strengthen an organization's governance over cloud computing. Vicky Cheng and Mike Grob, who served as authors of that guidance, will share insights about this new COSO thought leadership, in addition to highlighting important considerations surrounding risks related to cloud computing and how ERM principles can be helpful in facilitating the management of those risks.</p>

Time	Topic / Speaker
2:05 - 2:35pm	<p><b>How Design Thinking Principles Can Stimulate Innovation in ERM</b> <b>JMark Searce</b> <b>Professor of Art + Design, Music</b> <b>College of Design, NC State University</b></p> <p>JMark Searce is one of North Carolina's most recognized and performed music composers, who builds upon his expertise in music composition as Professor of Art + Design in the College of Design at NC State to teach design-thinking principles as techniques helpful when approaching a complex project with a holistic, full-spectrum view. In many ways, ERM leaders serve as composers of the entity's ERM process as they orchestrate an enterprise-wide process that involves a number of moving parts that must eventually work together. JMark will illustrate a number of design-thinking principles that might prove helpful to ERM leaders as they orchestrate a variety of ERM tasks that lead to a top-down view of the entity's most important risks.</p>
2:35 - 2:40pm	Short Stretch Break
2:40 - 3:10pm	<p><b>Building Risk Insights into Strategic Decision Making</b> <b>Nigel Williams</b> <b>Manager-ERM</b> <b>Bonneville Power Administration (Department of Energy)</b></p> <p>A critical objective of any ERM process is to generate insights about risks that may be on the horizon that business leaders can use to make key business decisions. Finding tools and techniques to help facilitate that kind of risk information that can be challenging. Nigel Williams will share insights about some of the tools and techniques used in his organization to help guide key leaders through the decision making process at Bonneville Power Administration.</p>
3:10-3:25pm	<p><b>Breakout Room Discussion &amp; Debrief: Where Should ERM Go From Here?</b></p> <p>The pace of change and complexities of a global business environment are triggering a wide range of ever-evolving uncertainties that will lead to a whole host of risk challenges for all types of organizations. Said differently, the world of risk will not become more simplistic over time, with risks a constant reality for everyone. The challenge is whether organizations recognize this reality by investing in enhancements to the organization's risk management infrastructure. During this breakout session, participants will join in small group discussions about how they envision risk management processes changing in the near term to address these challenges. Participants will share how they envision the evolution of their organization's ERM approach over the next few years.</p>
3:25 - 3:30pm	<b>Insights from the Day</b>