



2019 MasterMind Lunches: CIOs Share What Tools They're Using to Increase Efficiency in their Organizations

CIO, 4000 Employees, Construction Industry

Thanks Bill. This is an awesome list!! My contributions to the community are as follows:

1. **Talend:** This is a drag and drop (like ETL) tool that can connect to OnPrem or Cloud solutions very similar to Dell Boomi (*which charges by the connector and data flows*) but Talend has a yearly cost of \$25k.
2. **ThoughtSpot:** This is a self-service Google-like data visualization tool. Our team helps setup a schema, relationships and creates a keyword dictionary then trains the business how to use their own data and share their "pin boards".
3. **Glip:** This is a social collaboration tool that comes with Ring Central, similar to MS-Teams/Slack/GroupMe/Chatter except it is integrated into the total UC platform. From a Glip Group you can launch an immediate video conference with the entire team and they all get a single click "alert" on their iPhone, Android, or Windows PC. This is similar to a document share you don't have to bounce out to WebEx and create a meeting.

VP of IT, 300 Employees, Real Estate/Property Management Industry

Bill, Thanks for hosting such a great event and inviting me to join!

1. **Microsoft Flow:** This is an easy, intuitive workflow/integration tool that's included in our Office365 plan. We use it for a variety of tasks - simple workflow notifications, approval processes, automating SharePoint file tagging and cataloging, streaming real-time data and even some ETL tasks. There are plenty of prebuilt connectors for major SaaS platforms and Social Media (Salesforce, JIRA, Service Now, Workday, Twitter, Facebook, Drop Box, etc.) and major database platforms (SQL Server, Oracle, PostgreSQL etc.). It's very easy to configure and use.
2. **Microsoft Power Apps:** These are usually used together with Flow, another intuitive tool from Microsoft that allows my team to create simple apps that can interact with our other systems and platforms. It's great for creating complex forms, managing data/information that doesn't reside in existing systems, managing metadata and building random internal tools. It also works great with Microsoft Flow, Power BI, SQL Server and SharePoint.
3. **Skype for Business:** Unified communication. We made the switch from an old Mitel PBX system last year and couldn't be happier. We leverage Polycom Trios in our conference rooms and they integrate seamlessly with Skype. Scheduled meetings appear on the Polycom interface, users click on their meeting and voice/video is joined. The Skype for Business mobile app is leveraged by our heavy travelers. They have access to the entire company directory and can easily call or message anyone, and can one-tap into scheduled meetings for voice and video (no more fumbling around for conference numbers or IDs). We know that we will have to transition to Teams shortly and we have started to test the project and collaboration side of the platform (minus calling/rooms) which has been very useful so far.
4. **Microsoft SSAS Tabular:** We load all our GL and operational data into a single tabular (columnar) database daily. We developed business metrics and KPI's on top of the data and serve it to our users in a couple of different ways - Power BI Dashboards, SSRS reports, Excel reports that my team builds; and the most impactful, self-service through Excel and Power BI. This gives the company a "one version of the truth" architecture, allows my team to focus more on data engineering and less on report writing and empowers our users by taking "data wrangling" tasks off their plate allowing them to focus on what the data is telling them and more value-add tasks. The tabular database is extremely responsive and scaled very well as our data volumes have increased. We still have other departments to roll this out to but have had tremendous successes with our finance and accounting teams.

Senior VP | CIO, 215 Employees, Insurance Industry

Thanks Bill – Here are my top 3 to add to the list. Thanks!

1. **Atlassian products (Jira, Confluence):** While the main use case for these tools is agile software development, we also use them across other teams for task tracking and project management. They are flexible enough to adapt to project needs (i.e., some projects require fixed increments while others have a list of interdependent tasks). We have used them successfully to tackle projects such as phone system migration from analogue to SIP and SQL server migrations. There are lots of connectors to other systems for easy integration
2. **MS Teams:** We are using this as a unified communication platform across our teams and offices. It's easy to use and included in O365. We are in the process of integrating it with our PBX.
3. **Carbon Black:** Our next generation end-point security solution. We switched to it from Symantec and we are pleased with the performance and extra capabilities that it offers.

Director of IT, 170 Employees, Architecture & Engineering Industry

Thanks Bill! I really enjoyed the lunch and connecting with everyone. *Here a few tools I rely on:*

1. **PowerBI:** I have connected it to the general ledger of our finance system and built dashboards and reports to monitor budget-to-actuals for my IT Budget and I'm working on doing this for our other business unit budgets as well. The most valuable piece of it is the threshold alerts. I set thresholds on each of the accounts (Software, Hardware, Internet, etc.) and when a threshold is reached (say 75% of the budgeted amount) I get an email alert. This has come in handy to always know where I am with my budget and has also been valuable in a couple instances where our accounting team coded something unplanned or incorrectly to one of my accounts.
2. **Connectwise Automate (formerly LabTech):** This is a remote monitoring and management platform I use for all of our laptops and servers for systems automation, patch management and proactive health monitoring. One feature I like is we've setup helpdesk alerts; if someone's computer is maxing out RAM or processor, it allows us to proactively reach out to see if there is an issue. It also alerts us to full hard drives and automates a laptop lockdown in the event of suspicious activity like file encryption activity.
3. **Microsoft Teams:** We have invested in this for the threaded conversations and quick chat to reduce the amount of emails we have to manage. We also use this for screen sharing and online meetings. We are currently testing a transition from the Skype client to Teams for calling (we're on Microsoft's phone system).
4. **Lastly, a favorite YouTube channel is CXO Talk.** They host a large variety of innovators at the C-level from companies of all sizes. It also includes innovators and thought leaders that discuss strategy, communication and marketing.

Senior IT Manager, 150 Employees, Construction Industry

Bill, thanks again for putting on such a thoughtful event. I just wanted to document what I brought up and what I heard down at my end of the table:

1. **Microsoft Flow:** To put a copy of all my inbound email attachments into my OneDrive for later review was not only handy because we have a 90-day email retention policy, but also because attachments can come in on emails that aren't necessarily associated with them via the subject line. While it is rare for me to have fewer than 100 items in my flow folder, at least I know that if I got an email attachment, it is either in that folder or is filed properly.
2. **Microsoft Teams:** I use this for organizing my internal communications and files.
3. **The IT department has been using Microsoft Planner** for about 8 months now; it is a lot like Wrike, but not quite like a ticket system. It is more for project or program management tasks that don't necessarily fall anywhere else – like a to-do list that you can assign AND it will keep your Outlook calendar updated with your tasks.
4. **Ring Central:** This is being used and/or considered; and comparisons with Skype/Teams calling were brought up.

I also wanted to mention (but didn't get a chance) that **O365 has a great website called Secure Score** that I've been using for two years now and I'm still surprised how many people don't know about it. While it isn't setup to evaluate on-prem systems, it is great at evaluating your risk and suggesting paths to mitigate it for your web-hosted stuff.

Information Security Officer, 250+ employees, Financial Industry

Thank you for a great lunch and discussion. These events (discussion groups, peer meetings, etc.) are a great way to share current and relevant information and support awareness of solutions that address similar challenges. Your CIO Innovation Forum series hits both. Excellent job! Thanks for the invitation.

Here are my Top 3 tools:

1. **SilverCloud Knowledge Access and Sharing.** We realized our employees were spending a large amount of time looking for information to support work tasks and/or answer questions from colleagues and/or members. We implemented the SilverCloud solution to assist in finding the right answers. SilverCloud took a large amount of our institutional knowledge and processes and consolidated them on one platform so employees can find immediate answers to their questions through a simple-to-accomplish process. This has increased employee productivity and satisfaction.
2. **SolarWinds WebHelpDesk.** We use this tool as our IT Help Desk & Remote Support. This software package has simplified our help desk ticketing and IT asset management processes while directly improving our end-user support. We use it for service request management, IT asset management, knowledge base (central repository), project management, audit control, vendor/3rd party engagement, and employee/system remote support. WHD has easy interface and is customizable to support changing requirements. This has provided greater resource awareness and allocation.
3. **Cisco Jabber.** It provides instant message and direct/group communication. The benefits have been improved productivity through the use of real-time information and data to address and support colleague and member concerns and queries. This tool also supports real-time collaboration between team members and is integrated in our MS Office suite. Desktop interface is a simple click to initiate chat, voice calls, or multiparty conferences. Although not used by all employees, the ones that do utilize it have commented on its benefit to their job performance and member support.

Chief Technology Officer, 160 employees, Broadcast Television Industry

Thanks Bill, a very good lunchtime discussion was had by all.

1. **ATSC 3.0** – The Next Generation Television broadcast standard, developed by the Advanced Television Systems Committee, has been launched in an experimental fashion with full deployment coming in the next few years. The new standard, utilizing an IP backbone, will integrate the best of broadcast television and broadband technologies in a user friendly environment to deliver content to viewers. But, it will also deliver non-consumer based content data for a one-to-many delivery over a large geographical space, often where broadband and cellular are not present. Applications could include Public Safety, Education, Transportation and others.
2. We migrated to the **O365** suite of products two years ago after using a collection of non-compatible tools. We continue to unwrap and utilize the features including Teams, SharePoint, and others.
3. **We have implemented several cloud-based, off-prem solutions for content delivery, data archive and other services.** By reducing on-site hardware and the never ending battle to find resources for hardware refresh we have found the continued move to the cloud to be cost effective as well as improving uptime of critical systems.

VP of Operations + IT, Security Solutions, 50 employees, Renewable Energy Technology

Bill, I enjoyed meeting the group and exchanging some information. Overall it was a good experience for me. Like many others, we use the same or similar tools to maintain efficiency. These are our best used tools.

1. Since we migrated to **O365** in 2014, **Skype for Business** is, by far, the best used tool by everyone in operations.
2. Compared to the old Messenger, multi-purpose SFB is more powerful and is used effectively with many teams.
3. **We use Lynda.com (now LinkedIn Learning)** to promote self-learning and help every employee to think better. We can monitor and see who can be productive with this tool.
4. We haven't rolled out a BI tool yet but I want to mention that we are actively looking at **grow.com, Power BI and Tableau** to see if we can harness information we accumulate.
5. **VoIP is another tool we utilize** to save cost while increasing productivity. We have been using RingCentral since we stopped maintaining our PBX. It provides us calls routing to any end points (branches, SOHO, foreign countries), voicemail-email integration, faxes, video and audio conference calls, and an extension on cell phones.

Director of IT, 100+ employees, Education Industry

My top three tools are:

1. **Working Sm@rt with Outlook:** I completed this course over 10 years ago and still find the approach taught extremely helpful in managing the influx of emails I receive, turning emails into meetings and tasks, using Outlook Tasks as a way to manage my daily/weekly work priorities and track tasks I've assigned to other people.
(http://www.prioritymanagement.com/training_programs/time_management/working_smart_using_microsoft_outlook.php)
2. **The Corporate Athlete approach:** After training professional athletes for decades, Jim Loehr turned his sights on business executives after realizing that the careers for business executives span many more years than professional athletes and could benefit from his approach to energy management across all aspects of a person's life. I have found these concepts to resonate and assist me with keeping my body, mind and spirit in a place where I can perform at a high-level year after year. I have only read his books/articles, but I did send my husband to his Human Performance Institute for a week – he said it was amazing.
(<https://hbr.org/2001/01/the-making-of-a-corporate-athlete>) and associated book: The Power of Full Engagement: Managing Energy, Not Time, Is the Key to High Performance and Personal Renewal
(https://www.amazon.com/dp/0743226755/ref=cm_sw_em_r_mt_dp_U_QDsKCbS3C1SWJ)
3. **My team and I have been using Microsoft Teams very effectively.** We leverage a Team channel for each active project we have and include links to key files located in Box (our cloud storage provider), contain key conversations in Teams and leverage the Task Planning tab for determining and sequencing tasks.

VP | CIO, 440 employees, Real Estate Property Management Industry

Thanks Bill! Here's my list – my top 3.

1. **Power BI** – We continue to connect more and more of our business data to Microsoft Power BI and this has great potential. Microsoft continues to invest in the BI space. We are working on some really interesting use cases with our finance group for real time analysis of our building portfolio.
2. **Citrix ShareFile** – Our goal this year is to have zero file shares and move everything to ShareFile in the cloud.
3. **Parking Automation** – Highwoods continues to convert our paid garages to self-managed ones. The parking space is being disrupted with some very interesting advancements in the technology. We are currently evaluating these solutions and they look very promising.