

CHICAGO ORBIE AWARDS

The annual Chicago ORBIE® Awards program honors chief information officers and, for the first-time ever, chief information security officers who have demonstrated excellence in technology leadership. Winners in the Global, Large Enterprise, Enterprise, Large Corporate, Corporate, & CISO categories will be announced April 20 at Chicago Marriott Downtown Magnificent Mile.

INSIDE



DAVE HOAG
2023 ChicagoCIO Chair

Dave Hoag shares how the ORBIE Awards brings together leaders facing similar challenges and how every leader's perspective is valuable and can contribute to the conversation of technology.



JENNIFER SCANLON
President & CEO, UL Solutions Leadership/Keynote

Jennifer Scanlon discusses how to leverage technology to break down barriers across your organization and how it can help grow your business.



CHICAGO CIO OF THE YEAR
ORBIE
AWARDS

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2023 ChicagoCIO Chair ▶▶ Dave Hoag

Leadership makes the impossible possible

Technology is everywhere in our lives, and when it doesn't work, we notice. For nearly 25 years, the Inspire Leadership Network has helped CIOs succeed in today's most challenging C-suite executive role. ChicagoCIO members grow their leadership through year-round, member-led programs and interactions. Working together, CIOs across public and private business, government, education, healthcare and nonprofit organizations collaborate, share ideas and best practices, and create enormous leadership value.

The ORBIE Awards bring together leaders facing similar challenges, and this year the Inspire Leadership Network will grow to 30 chapters, including the first international chapter in Toronto, and three chapters exclusively for Chief Information Security Officers.

Security is top of mind for every leader and organization, and the same principles that have served CIOs can be applied to CISOs as well. There is no textbook for how to be a great CIO or CISO. But relationships with other leaders facing similar challenges sharpen leadership acumen. Every leader's perspective is valuable and contributes to the conversation – and everyone wins by joining a peer leadership network.

Member-led, non-commercial programs build meaningful professional relationships with colleagues facing similar challenges, solving problems and avoiding pitfalls. Successful leaders understand the 'superpower' of trusted relationships. In any gathering of technology leaders, the answer is in the room.

Together, we are transforming our economy using technology & security, and enriching our region and our world. On behalf of ChicagoCIO, congratulations to the nominees and finalists on their accomplishments and thank you to the sponsors, underwriters, and staff who make the ORBIE Awards possible.

Sincerely,
Dave Hoag
CIO, Options Clearing Corporation
2023 ChicagoCIO Chair



DAVE HOAG

"FOR NEARLY 25 YEARS, THE INSPIRE LEADERSHIP NETWORK HAS HELPED CIOs SUCCEED IN TODAY'S MOST CHALLENGING C-SUITE EXECUTIVE ROLE."

Chief Information Security Officer of the Year Nominee

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2023 ORBIE Award Finalist

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Leadership Award Recipient ▶▶ Jennifer Scanlon

UL Solutions' Jennifer Scanlon Leverages Technology to Grow Business



JENNIFER SCANLON | President & CEO, UL Solutions

Jennifer F. Scanlon's deep understanding of technology has been critical to her success as CEO of two historic companies. After starting her career at IBM, she served as CIO, head of Corporate Strategy and CEO of innovative building products manufacturer USG Corp. Now, as President and CEO of UL Solutions, Scanlon leads 15,000 employees in pursuit of the company's mission of working for a safer world and continues to expand its strategies and capabilities to ensure that it stays on the cutting edge of innovation.

Her best advice to CIOs: "Don't be afraid of tough jobs – take them because you will learn from them."

Q: How does your background inform your leadership today at UL Solutions?

Scanlon: The phrase "all companies are now tech companies" speaks to the importance of the proper utilization of technology in order to stay competitive.

I regard my technology background as critical to my career, but so is my business development experience in driving growth, as well as my attention to enhancing an inclusive and empowering company culture. That's what's so great about UL Solutions—we're committed to our mission of working for a safer world. I believe that leaders are successful when we help our employees to reach their full potential because they are motivated and inspired by the importance of their work.

Q: When did you think about becoming a CEO?

Was it always your goal?

Scanlon: I was 21 when I joined IBM, and I was identified as someone with high potential. They created additional learning opportunities for me, and they paired me with senior executives. At the time, IBM had 400,000 employees. They probably told at least 20,000 people exactly what they told me, which was I was someone worth investing in for training and development.

Still, that was important for me to hear, because it sparked an ambition in me. I decided I should seize the opportunity and learn as much as I could.

Q: What's the best advice you've ever received or given?

Scanlon: Here's my advice: take the jobs no one else wants. It may sound strange at first, but it's a serious answer. Each one of us is qualified to do a number of jobs. We are often more qualified than we may give ourselves credit for. There are tough jobs at every company, UL Solutions included. I urge you, if you have the skills and meet the requirements, don't be afraid of tough jobs—take them because you will learn from them.

Take the jobs no one else wants. That way you will always be learning and ready for what's next.

Q: How has your technology background contributed to your career in becoming a CEO?

Scanlon: My technology background has always been important but there have been critical skills I have added along the

way that deepened my leadership and prepared me for greater challenges.

I began my career at IBM, a company renowned for its technology and learning culture. When I joined USG, I learned the importance of building alignment as I implemented an ERP system for the company's North American operations. When I was CIO, I took on the added responsibility for corporate strategy for no extra pay. It was a demanding role, a truly expansive learning opportunity. Today, I regard strategy as one of my strengths. My operational roles helped me to develop my capacity to drive growth, the lifeblood of a company's success. Tech knowledge and understanding are critical in any leadership role today, but driving business growth and building an inclusive and welcoming culture is also important.

Q: Can you tell us about your strategy to transform the company, enabling its 80,000 customers to access the full portfolio of UL Solutions' products and services?

Scanlon: UL has been in business for 129 years because we have been able to adapt.

Our ambition summarizes our strategy to serve as our customers' most trusted, science-based safety security and sustainability partner. We test, inspect, and certify products to keep you safe from electromagnetic connectivity

"I REGARD MY TECHNOLOGY BACKGROUND AS CRITICAL TO MY CAREER, BUT SO IS MY BUSINESS DEVELOPMENT EXPERIENCE IN DRIVING GROWTH, AS WELL AS MY ATTENTION TO ENHANCING AN INCLUSIVE AND EMPOWERING COMPANY CULTURE."

to micromobility of e-bikes and e-scooters and new topics around environmental sustainability and governance.

We're focused on cybersecurity, battery safety and human factor safety, as well as those innovations that contribute to autonomous electrical vehicles.

The focus of our transformation was to reorganize around our customers, putting them in the center, and creating easier access to whatever safety science expertise they need. We have the privilege of working closely with them to bring their innovations to market safely and efficiently.

We continue to fulfill our mission of working for a safer world.

Q: How is UL Solutions preparing for the next generation of technologies? Electrification? 5G? New Mobility?

Scanlon: Our partnership with our customers is a big reason for our early engagement in coming trends and opportunities. We have the ability to pivot quickly to meet emerging customer needs. In 2020, for example, we suddenly needed to work with our customers and other partners to develop a certification approach for UV-C radiation equipment (which could kill the COVID virus). Within six months, we had the means to certify and help ensure the safe operation of both remote and stationary UV-C equipment.

By partnering with our customers, who are bringing their innovations to market, we stay on the cutting edge of developing the testing and certification strategies that help make innovations safe.

Q: You are an advocate for STEM education and increasing diversity in science, technology, engineering and math. Why are different perspectives important?

Scanlon: Diversity of opinion and perspective enlarges our thinking and improves decisions.

I speak regularly on the importance of greater participation of women and people of color in technology because I believe you cannot be a leading organization if you leave out any group and their thinking and life experiences.

We have to address the lack of diversity on two fronts—encouraging young girls to see the rich opportunities in STEM and helping to create experience through the many organizations that support girls and people of color.

Q: For those that know UL Solutions, they may think of you as an engineering organization. What would

technology professionals gain from working at UL Solutions?

Scanlon: We know tech talent is in high demand and can essentially work anywhere. What UL Solutions can offer is the chance for each individual to have a direct impact in helping to transform our organization to be more tech-forward whether that's building and expanding our commercial software offerings, through the cybersecurity work that is becoming more present across products and systems or reimagining how our core business is run utilizing AI and simulation.

Our mission is a differentiator. All 15,000 of our employees wake up every day with the mission to make the world a safer, more secure and sustainable place.

Having that north star creates a culture that champions diversity and the highest ethics and integrity. The UL Mark is on billions of products around the world, instilling confidence that the work has been done right and in the right way, reassuring both our customers and their consumers.

What we hear from our employees is that it's the people that makes UL Solutions such a great place to work. So, whether someone is looking to start their career or is a tenured subject matter expert, we value each individual's perspective and experience and have roles and needs across our organization

enabling our employees to contribute to a larger purpose as they grow their careers.

Q: What advice do you have for future CIO leaders?

Scanlon: Recognize that your technology skills are in demand but don't underestimate the importance of developing strong communication skills as well as a basic understanding of how your organization makes money.

Supporting the company's growth is important for every business leader. Even if you don't have P&L responsibilities, focus on contribution. Be a team player.



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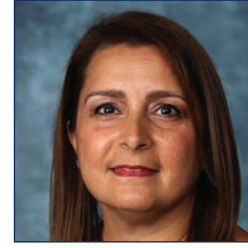
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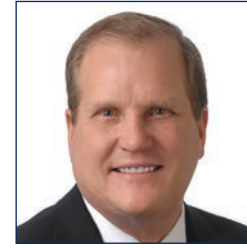
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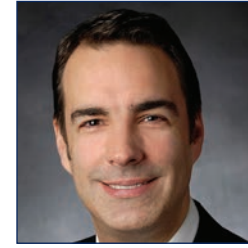
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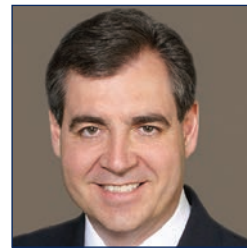
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We believe technology must work for everyone

The technology we work with every day is embedded in everything we do in our lives. We believe in being grounded in our pragmatic engineering background and to be truly transformative, technology must deliver tangible benefits to those who use it every day.

Building on belief



"Twilio is ranked #1 for market share in Customer Data Platforms."

- IDC, "Worldwide Customer Data Platform Market Shares, 2020"*

*IDC "Worldwide Customer Data Platform Market Shares, 2020: The Flight to First-Party Data is On, and CDPs Win Big," published July 2021 - ID #US48052920e

Global Finalists ▶▶ Over \$5 billion annual revenue & multi-national operations



MICHAEL ADAMS
VP & CIO
Brunswick

Michael (Mike) D. Adams was named Vice President – Chief Information Officer in October 2020. In this role, he is responsible for leading and overseeing the vision, strategy, execution, and operations of the information technology, information security, and digital product delivery organizations. Mike is a strategic leader that works in partnership with Brunswick Divisions and Enterprise Functions to deliver technology solutions to enable competitive advantage and business continuity across the company.



MANUEL DIETZ
VP, IT & Regional CIO
Bosch

Manuel Dietz is the CIO of Bosch in the Americas Region, responsible for Corporate IT and Digital across all Bosch Business Sectors in North and Latin America. Bosch in the Americas Region has annual sales of around USD 18 bn (2022) and employs more than 35,000 people. The Bosch Digital and IT teams in the region have around 1,000 associates and are in the Chicago, Detroit, and Charleston areas, Guadalajara (Mexico), and Campinas (Brazil).



TALVIS LOVE
SVP & CIO
Baxter International

Love joined Baxter in 2020 from Cardinal Health's Pharmaceuticals Segment, where he was responsible for overall IT service delivery, including strategic planning, applications maintenance and support, and new project implementations. Previously, Talvis held the positions of senior vice president, eCommerce, Governance Execution, Enterprise Architecture & CISO of Cardinal Health. His career has included executive and management positions within TD Bank Group, Ford Motor Company, Oracle Corporation and Quaker Oats Company, a division of PepsiCo.



WHITNEY MCGINNIS
VP & US CIO
McDonald's Corporation

As US CIO, Whitney McGinnis is responsible for leading the US Technology organization in the development, integration, deployment and support of technology across 14,000 restaurants, including point of sale, kiosk, digital menu boards, mobile, back office, HR and training applications. In her role, Whitney partners closely with the McDonald's senior leadership team and McDonald's franchise owner/operators to bring McDonald's technology strategy to life, driving improved experiences for customers and restaurants.



ATUL VERMA
CIO
Bank of Montreal

Atul Verma joined BMO Financial Group in 2020 as Chief Information Officer, U.S. Personal and Business Banking. In this role, Atul leads a high-performing team responsible for delivering technology solutions for market-leading products and services for BMO's customers. Atul and his team help achieve the business's strategic objectives through a customer-centric approach driven by innovation and agility. Atul's teams have been recognized for execution excellence and collaborative partnerships with business and industry leaders.



SUCCESS STORY

In the wake of Hurricane Ian, the Brunswick IT organization worked tirelessly to ensure the safety of our employees, the continuity of our facilities, and the resilience of our systems. Although Brunswick assets sustained some damage, the IT organization ensured local systems remained available or were restored immediately following the impact. In addition to employee safety and business continuity, Brunswick IT quickly enabled digital channels to contribute to an employee relief fund. Our focus remained squarely on 2 priorities: (1) Employee Safety and (2) Business Continuity, in that order. The outcomes realized were a direct result of our digital business strategy in action.

SUCCESS STORY

Since becoming the Regional CIO for Bosch in the Americas in 2021, I have focused on bringing the digital and IT functions closer to the business and delivering more tangible business value. My team and I have transformed Corporate IT in the Americas into an agile organization and - with our new brand Bosch Digital - have become trusted partners for the business in the region. I have grown Bosch Digital in the region to over 1,000 associates and increased productivity substantially. We are shaping the digital future of Bosch in the Americas!

SUCCESS STORY

Baxter's modernized IT organization established critical foundational capabilities to accelerate the delivery of technology, including Modern Enterprise Architecture and Value-driven Portfolio Management. Leveraging a comprehensive IT strategy and roadmap which shifted the organization to Business-IT fusion teams that operate in a simplified environment that attracts talent, cultivates innovation, and increases the value delivered by our tech investments. Our team also builds upon and strengthens our data capabilities, by supporting an enterprise data architecture and consolidated data platform. The team also successfully delivered integration of Hillrom's core infrastructure, critical ERP and collaboration systems, enabling migrations and synergies of multiple business processes.

SUCCESS STORY

My team and I have the privilege of delivering and supporting technology for nearly 14,000 restaurants in the US. We use technology to drive growth for McDonald's, delight our customers and improve the experience for our restaurant teams. We worked hard to deploy more technology, faster than ever to stay one step ahead of business needs. Our relentless focus is driving positive guest count and sales growth. We are making a difference with our restaurant teams, improving crew and customer satisfaction. And we support our amazing marketing team's ideas, delighting and surprising our customers every day.

SUCCESS STORY

BMO's purpose of 'Growing the good in business and life' drives us to leverage technology as a key enabler to help over 5 million customers in the US make real financial progress. We are focused on technology innovation and modernization to fuel our growth. We are improving customer experience while supporting our employees with new ways of working in the post-pandemic world. We are rapidly deploying industry-leading digital platforms and have accelerated fintech partnerships to allow us to broaden our technology reach. My ambition is to build a technology organization where employees can thrive professionally and personally.

"THE ORBIE AWARDS BRINGS TOGETHER LEADERS FACING SIMILAR CHALLENGES – AND THIS YEAR – THE INSPIRE LEADERSHIP NETWORK WILL GROW TO 30 CHAPTERS, INCLUDING THE FIRST INTERNATIONAL CHAPTER IN TORONTO, AND 3 CHAPTERS EXCLUSIVELY FOR CHIEF INFORMATION SECURITY OFFICERS."

— Dave Hoag, ChicagoCIO Chapter Chair

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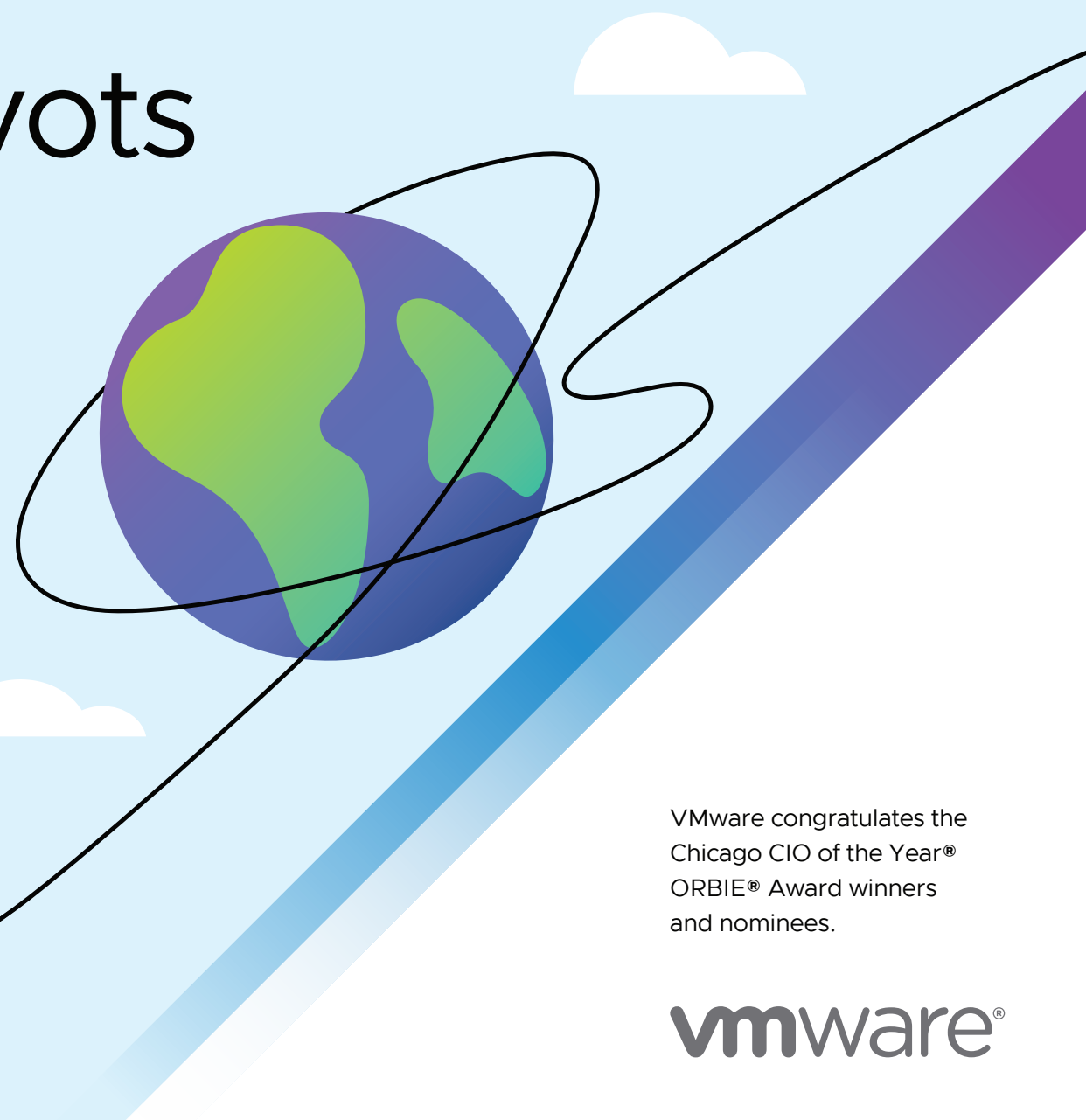
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Large Enterprise Finalists ▶▶ Over \$2.5 billion annual revenue



MARK BROWNING
SVP, IT & CIO
Exelon

Mark Browning is an information technology executive with over 25 years of experience leading IT teams in the energy and utility industry. Mark serves as Vice President and Chief Information

Officer for Exelon Utilities with overall responsibility for IT at Exelon's family of utility companies. He has held roles including Enterprise Architecture Lead, IT Director of Utility Projects, IT Director of Utility Operations, and VP of IT for ComEd.



MARYANN BYRDAK
CIO
Feeding America

As Chief Information Officer, Maryann Byrdak serves as senior technology strategist and is responsible for guiding the organization's vision for the emerging technologies, digital

trends and infrastructure advances that will help Feeding America fulfill its mission. Her passion to serve and experience leading technology transformations influence the optimization efforts for a more connected Feeding America network.



ALOK MEHTA
CIO
Kemper Corporation

Alok Mehta is an experienced global information technology corporate officer with a proven track record in all aspects of information technology. Over the years, he has led several business and

IT-driven transformational efforts delivering business values by redesigning business processes, establishing strategies and successfully executing projects. Alok is highly effective in leading global and culturally diverse teams with experience in establishing multi-year business-technology roadmaps across multiple lines of business.



MIKE POWELL
CTO
SEKO Logistics

Mike previously spent four years with SEKO as Vice President, Information Technology and as a member of its leadership team before leaving in 2010 to become co-founder of a cloud-

based logistics software company used by global and domestic third-party logistics companies, trucking companies, and brokers. In 2014, he joined RIM Logistics as Vice President, Technology Solutions, where he was responsible for crafting and executing corporate technology strategy and streamlining its operations to increase productivity.



SAMIR SHAH
SVP & CIO
Fortune Brands Innovations

Samir Shah is the Senior Vice President and Chief Information Officer at Fortune Brands Home & Security, a leading U.S. consumer goods and manufacturing company on the S&P 500. He has a 25-year

track record of driving the execution of IT strategy and business partnerships. As a technology leader, Samir is focused on business transformation holding additional responsibility as a digital leader and Chief Information Security Officer (CISO).



SWATI SHAH
CIO
TransUnion

Swati Shah leads a product engineering organization enabling TransUnion's business strategy through the development of products and solutions via cloud technology while prioritizing

business value and customer experience. Swati formerly held positions leading digital transformation and acceleration. In 2021, she was named one of the National Diversity Council's Top 50 Most Powerful Women in Technology and is the executive sponsor of Women of Global Technology at TransUnion.



SUCCESS STORY

2022 was a historical and transformational year for Exelon's IT organization as we achieved the spin-off of Constellation Energy. Exelon IT accomplished this while running IT systems for two Fortune 200 companies with the same level of service and delivery on complex transformations of our digital field operations, customer-facing systems, real-time control, and financial systems. These projects enable Exelon to power a cleaner and brighter future for our customers and communities. True to our core value, IT established a talent strategy focused on evolving our talent and ongoing commitment to creating a more equitable, diverse, and inclusive workforce.

SUCCESS STORY

38 million neighbors in this country experience food insecurity including 12 million children. Why should they? My greatest accomplishment is seeing the promise of our multi-year technology and analytics transformation come to life. During my tenure, we've built solutions at scale so we can better understand neighbors; source more nutritional products; innovate food delivery methods; improve customer relationship management; and fundraising. We work hard to ensure solutions are free for Food Banks! And, to have maintained momentum through unprecedented demand and disruptions in the charitable food system is a true testament to the resolve and talent of my technology team.

SUCCESS STORY

A CIO's success depends on understanding the corporate mission, relentlessly supporting business objectives, effectively communicating at all levels, managing relationships, building high-performing teams, and delivering innovative solutions with flawless execution that provides tangible business value. At Kemper, my team and I strive to meet these success criteria by being trusted and reliable advisors to our business partners and having fun along the way. I am excited and grateful to be part of the ORBIE award journey. I am thankful to have met some very impressive leaders through this process that has allowed me to reflect on my leadership style.

SUCCESS STORY

One of the team's most significant accomplishments over the past few years was launching our global cross-border eCommerce platform for our fastest-growing business segments. From initial concept to successful deployment, including a complex integration with U.S. Customs and Border Protection, we launched in under six months with a small team of technologists. This new platform allowed our business unit to migrate away from a costly compilation of off-the-shelf solutions while offering enhanced capabilities and a simplified user experience for internal and external clients. Our ROI was approximately 18 business days, saving the enterprise millions of dollars since inception.

SUCCESS STORY

In 2022, the focus was on digital transformation to deliver value, utilizing technology to grow the business, fuel growth, and execute across the front, middle, and back offices. The "Grow" initiative involved developing digital and analytics tools using Agile to deliver connected products and an immersive e-Commerce experience. "Fuel" was focused on accelerating new product introduction and transforming middle-office capabilities, while "Execute" was aimed at delivering technology foundations for growth and scale. The team accomplished separating one company into two publicly traded companies while delivering strategic initiatives. This comprehensive digital transformation has set the company up to be strong and nimble in 2023.

SUCCESS STORY

I lead USMT, a product engineering organization responsible for enhancing experiences via technology by reducing complexity, global efficiency and collaboration, and speed to market. Our 2022 development strategy offered cloud certification that enabled over 25% of my organization to immediately make active contributions to our cloud transformation. As result, we exceeded our goal and doubled our targeted number of applications moving to the cloud. We also established a robust communications framework to foster transparency and partnership with our customers throughout this transition. I also lead our Global Technology Engineering and Optimization effort, distilling complexities for enhanced product focus and delivery.

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JOHN ARMBRECHT
SVP, CTO & CIO
The True Value Company

As Sr. Vice President, CIO/CTO, John Armbrecht is responsible for all technology and platforms supporting True Value's wholesale distribution business and the company's technology strategies to support business functional needs. Armbrecht began his work with True Value in October 2016 as the Senior Director of Enterprise Technology. He joined True Value after serving more than 15 years in technology leadership for multiple retail and wholesale companies including Kohl's, Belk Stores, OfficeMax, and Sears.



MURALI BALAKUMAR
CIO
Oak Street Health

Murali Balakumar is the Chief Information Officer at Oak Street Health, with overall leadership responsibility for all of the organization's technology, data, and information services efforts. Before joining Oak Street Health, Murali served as Chief Information Officer for the Card Services business at Fiserv Inc, a leading global financial services technology provider, owning all technology functions for its debit and credit card issuing business.



RAHUL GHAI
VP, CDO & CTO
AAR Corp

Rahul S. Ghai is Vice President, and Chief Digital and Technology Officer for AAR, a leading provider of aviation services for commercial and government customers in more than 100 countries. Rahul joined AAR in 2019 to lead the Digital Technology & Analytics organization and spearhead the digital transformation of AAR through technology initiatives that combine the digital enablement of AAR's businesses while driving an enterprise-wide IT transformation.



LAURA KOHL
CIO
Morningstar, Inc.

Laura Kohl is a recognized technology leader with extensive global business experience across multiple industries, including financial services, travel and transportation, retail, supply chain, and quick service restaurants. She is the Chief Information Officer for Morningstar, a global financial services firm providing an array of investment research and investment management including software and data platforms for investment professionals. At Morningstar, she leads technology efforts by transforming employee experience and tools to be growth ready.



KRIS RAO
CIO & CDO
HNI Corporation

As a technology and business transformation executive, Kris Rao brings repeated success in defining enterprise technology vision, strategy, and roadmaps to bolster top and bottom-line growth at global high-tech, healthcare/pharmaceutical, and manufacturing corporations. With more than 20 years of management and leadership experience in driving profitable transformation initiatives for various companies including HNI Corporation, Ricoh USA, Hospira, Motorola, and Oracle, Kris has managed more than \$160 million in budgets and 900+ globally dispersed staff.



LISA TOMA
CIO
SunCoke Energy

Lisa Toma was appointed as Chief Information Officer of SunCoke Energy in 2018. Lisa joined SunCoke Energy in 2011 as the Manager of Accounting & Operations and quickly took on roles of increasing responsibility within both financial and IT leadership roles. She started her career as a CPA and held various Accounting and Finance roles before eventually transitioning into the IT organization to ultimately the CIO role that she has today.



SunCoke Energy

SUCCESS STORY

In the last 30 months, we have replaced our core ERP (Oracle Fusion Cloud) and Primary Ordering Portal, modernized and mechanized dozens of applications and hundreds of servers, upgraded our Integration Framework, retired our mainframe, and cloud migrated all 3 of our colo/data centers. All while increasing project throughput by over 300%, implementing agile tenets, taking release success from 68% to 99.8%, and lowering key costs.

SUCCESS STORY

Oak Street Health is a pioneer and leader in the delivery of "value-based" healthcare services and is highly dependent on technology and data analytics to deliver the best possible outcomes for our patients. 2022 was a transformative year. We built out and upgraded our infrastructure and delivered key data and operational product software. We migrated significant infrastructure capabilities to the public cloud, ensuring better resiliency and scalability across the board. And we delivered major features to our cloud/microservice-based, Provider Workflow tool called Canopy winning it the Best Overall MedTech Software award from the MedTech Breakthrough Awards program.

SUCCESS STORY

It's a privilege to be part of AAR's digital transformation. We're reimagining technology at AAR, shifting from providing IT "keep the lights on" support to putting innovation and technology at the core of each service and solution. Digitizing an arduous paper-intensive process to streamline the aircraft maintenance experience for our 2500 technicians and enhance safety has been a significant success. Numerous other initiatives are on the horizon, including using drones to enhance the aircraft inspection process, implementing AR/VR and Computer Vision, and leveraging AI/ML to drive insights. Combining our industry-leading business expertise with technology is advancing AAR and the industry.

SUCCESS STORY

Using my large-scale global business and technology experience, I have built a technology strategy for Morningstar to be growth ready, anchored on people, process, technology, and foundation. In technology, we have leveraged strategic vendor partners to make the right investments in world-class tooling for infrastructure, employee experience, and corporate systems. This year is about taking our investments to the next level to build scalable, growth-ready operations and realize process efficiencies so our colleagues can focus on delivering Morningstar's mission of empowering investor success.

SUCCESS STORY

Moving business from traditional manufacturing to digital business. What that means is, transforming business using digital technologies to scale and address the market, without adding resources. Leap-frogging competition and morphing to digital workplace services, IT and digital organization is driving innovation from 'Art of possible' workshops, to disrupting the industry, all driven by digital solutions, and in partnership with business stakeholders. Our IT and digital organization has morphed into a collaborative, results-driven, experimenting, and innovative organization. We have moved from 'knowledge is power' to 'collaboration is power' and have sunset all siloed behavior.

SUCCESS STORY

I led the organization through multiple large-scale initiatives including modernizing the organization's systems, establishing a comprehensive cybersecurity program, improving the resiliency of the organization's IT infrastructure, improving the overall operations of the IT department, and improving the overall service quality and user experience. Built strong relationships with business stakeholders, and trusted IT third-party providers along with an exceptional IT team.

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RICK COOK
SVP, Technology
Portillo's

In 2020, Rick Cook accepted the role of Senior Vice President of Technology for Portillo's, an American fast casual restaurant chain specializing in Chicago-style cuisine. In this capacity, Rick is responsible for all corporate and restaurant technology. In 2018 he joined Coates Inc., a digital content and signage company, serving as Senior Director of Technology Delivery, responsible for four technology solutions teams directly supporting all Coates' US strategic initiatives.



MICHELLE KASSON
VP & CIO
The AZEK Company

Michelle Kasson joined The AZEK Company as the Chief Information Officer in December 2019 and is based at the Chicago headquarters. Her primary responsibility is information technology strategy, services and operations across the entire AZEK portfolio of companies and brands. She will lead the development of IT solutions to further drive efficiencies, accelerate innovation and promote operational excellence. Michelle has more than 25 years of corporate IT experience, spanning the CPG, food and pharmaceutical industries.



GREG MICHELINI
CIO
Athletico Physical Therapy

Greg Michelini joined Athletico as the Chief Information Officer in September 2020. Greg is responsible for driving transformational change to Athletico's technology platforms which will enable operational excellence and best-in-class patient care and experience. Greg joined the team after a 16-year career with Walgreens Boots Alliance, including an international assignment as CIO of Boots UK and the Republic of Ireland which operates a 2500+ store business as well as a nationwide opticians practice.



JOHN MOHR
CIO
MacArthur Foundation

John Mohr oversees Foundation-wide technology services and planning. He is responsible for developing a strong and sustainable information technology infrastructure. As a leader of the department (and within the Foundation management team), the CIO provides oversight, vision, planning, development, and strategy for the Foundation. Prior to joining the MacArthur Foundation in 2012, John was the Director of Academic Systems at the University of Chicago. The 20 enterprise applications he supported serve student, academic, and campus activities.



JUSTIN STAHL
VP, IT
Chicago Bears

Justin Stahl has been with the Chicago Bears for 7 seasons. In his role, he is responsible for the Bears' technology strategy in alignment with the club's business and football objectives. Justin oversees the club's IT operations, networking, infrastructure, and application development in addition to serving as the club's Information Security Officer. Prior to the Bears, Justin was a Senior Manager within Accenture's IT Strategy practice, focusing on retail, CPG, and entertainment industry clients.



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SUCCESS STORY

I believe my greatest success as Portillo's senior technology leader has been inculcating a deeper appreciation across the team for how our work impacts our guests, our team members, and our restaurants. Restaurant IT organizations can often look at their roles myopically, overlooking their true mission: Enabling the organization's operations team to function as frictionlessly as possible so they can drive meaningful business results for the organization and the organization's shareholders. I believe a meaningful appreciation of that perspective has increased over the course of my opportunity to lead Portillo's technology team, and it's something I'm very proud of.

SUCCESS STORY

AZEK's former CLO mentioned IT was constantly discussed as a roadblock to progress. The turnaround from "in the way" to "anything's possible" is an enabler to our thriving business. We've also earned the right to manage more as the trust level has increased. We've assumed the responsibility for architecting new manufacturing technology formerly in Engineering and driving standardization across the sites. We're recognized for strong process orientation in our portfolio and called upon to lend that structure to corporate initiatives such as the retail line review expected to add incremental sales this year. My lean, scrappy team is delivering strong.

SUCCESS STORY

Over the past 30 years, Athletico has grown from a single clinic to a multisite healthcare operation with over 900 clinics. To support this expansion, our digital transformation strategy is focused on building the foundation for continued growth, improving access to healthcare, and delivering differentiated patient and clinician experiences. We started by building the digital foundation required to drive efficiencies, and deliver scaled services and products across our footprint. From there, we've introduced new digital tools, including a patient portal, to simplify the onboarding experience and improve the patient journey, enabling clinicians to spend more time on direct patient care.

SUCCESS STORY

In my decade-plus years at MacArthur, we have made more than 7,000 grants totaling more than \$3.5 billion. I am co-leading a transformational effort to create a common grant application and Philanthropy Data Commons (PDC). This effort has the promise of changing the status quo in the sector and saving prospective grantees 30-50% of time spent on applications by reusing data for each application. It can truly shift how philanthropy engages with changemakers and how the entire sector operates. My biggest success is the people I have worked with. Mentoring, leading, and helping others to grow is my true legacy.

SUCCESS STORY

Our digital transformation has enabled significant improvements within our technology stack, operating model, expertise, and most importantly, team culture. Through this work, we have positioned ourselves at the forefront of the NFL regarding the adoption of cloud technologies. We have experienced the benefits of this transformation in our abilities to scale with organizational growth, and we've built a collaborative approach to innovation with our end users. These foundations were critical to keeping our organization operational throughout the pandemic when we seamlessly supported the fully remote 2020 NFL Draft and a decentralized ticket sales call center.

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MARK CAMPBELL
Sr Director, IT
Chicago White Sox

Mark Campbell joined the Chicago White Sox as Senior Director of Information Technology in January 2020. His focus since joining the organization has been positioning information technology as a valued business partner. He has worked to upgrade existing infrastructure, leverage cloud offerings to increase functionality to end-users, and innovate where possible. He believes implementing technology for the sake of technology without a clear purpose and outcomes creates limitations in the mind of end-users complicating adoption.



FRANCISCO DIAZLUNA
CIO
Producers National Corp.

Francisco Diazluna is a strategist technologist with 20+ years of experience in the insurance industry who has helped multiple insurance organizations with multi-year business transformations, bringing transparency and accountability to technology initiatives. He has successfully implemented policy, billing, and claims systems and helped insurance companies correctly execute and position them for growth by guiding them while bringing clarity to their current state and a road map to reach their intended future state.



DUSTIN ESSELMAN
CIO
Scrip Companies

Currently the CIO of Scrip Companies, Dustin Esselman brings with him an extensive background involving (but not limited to) strategic web and business development, standardization, cross-functional management, and forming healthy workplace cultures via leading by example. Even more, he enjoys leveraging that dynamicity to not just instill positive, innovative progressions here in the present, but do so all while positioning the healthcare industry for excellence as it navigates deeper into the ever-transient future.



KADER SAKKARIA
CDO & CTO
Ruffalo Noel Levitz

Prior to joining RNL, Kader Sakkaria led all of the Technology Build and Delivery organization across Cartus. He joined Realogy to oversee Cartus Technology Digital Transformation Strategic Initiatives. Prior to joining Realogy, Kader was the Head of Business, Technology and Portfolio Management at BMO Harris Bank. Previously, he has led large-scale technology transformation initiatives for fortune 500 companies like Deloitte and Accenture. He was the country head for TransUnion in South Asia.



RAJ SAMPOORNAM
CIO & SVP
Byline Bank

Raj Sampooram is Senior Vice President & Chief Information Officer at Byline Bank in Chicago. He has more than 26+ years of progressive leadership experience in information technology, starting as a software developer. Raj's expertise spans multiple industries including financial services, manufacturing, market research, and legal. His professional passion stems from applying technology and data solutions to improve business efficiency, solve enterprise issues, enhance competitive differentiation, improve team collaboration, and increase overall revenues.



JASON SCHWEITZER
Head of IT
ECOS

Jason Schweitzer currently serves as the Head of IT for ECOS. He oversees all IT functional areas including infrastructure, applications, and cybersecurity for each of the company's manufacturing and office facilities. Before his current position, he led diverse IT and security teams at Fortune 100 enterprises. While Jason still enjoys being hands-on with technology, his present focus is digital strategy development, business alignment, and providing IT solutions that empower and delight.



SUCCESS STORY

Our technology team successfully transformed our organization's infrastructure, enabling us to leverage data-driven insights for better decision-making. We implemented a comprehensive data analytics platform to collect real-time data and have established ourselves as strategic business partners by building relationships throughout the organization.

SUCCESS STORY

During 2022, we tripled our team and reorganized it into four areas: IT Operations, Application Delivery, Data and Analytics, and Operational Excellence. We want to be at the forefront of an overdue transformation of the non-standard auto insurance industry. Our main initiative comprises a superior insurance product, customer experience, and technology. I'm passionate about this because there is a story behind every non-standard policy. I had to obtain a non-standard auto policy when I migrated from Mexico 20 years ago. This is an opportunity to support those stories and provide a better experience than what is available in the market.

SUCCESS STORY

I am so humbled and honored to be a finalist for this award. I wouldn't be where I'm at today without the mentors I've had over the years and the teams that I've had under me. Over the last year at Scrip, we've been able to transform the business to be more cutting-edge by enhancing the way we do our B2b business with a platform we designed and built called e-purch and building out new reporting and shipping platforms to serve our customers even better.

SUCCESS STORY

I lead digital transformation at RNL, enabling the company and the higher education institutions it serves to be more agile, efficient, and effective. I have moved RNL from a project- to a product-centered organization following a Plan-Build-Run technology model. This change has fostered new ideas, brought innovation to market faster, and instilled a fail-fast mindset in staff. I've implemented an Agile Transformation Office to coach and manage SCRUM-based delivery and measure IT productivity. I've implemented changes in design thinking, vendor consolidation, and cloud migration to Azure that have had positive impacts on product strategy, ROI, and next-generation analytics.

SUCCESS STORY

My greatest success was establishing a bold technology & digital strategy and getting support from our executive management team for that, which laid the foundation for Byline's digital transformation. I am incredibly proud of my exceptionally talented team for achieving the aggressive goals to modernize the technology landscape and enhancing cybersecurity posture, which protected the business from productivity and security risks and enabled the bank to swiftly complete the M&A integrations. In addition, our bank achieved impressive business value and a higher customer satisfaction rate, especially with the implementation of digital account opening and loan origination solutions.

SUCCESS STORY

I joined ECOS in 2020 to design and launch the IT department and lead every facet of IT and cyber. With the trust and engagement of the executive team, a multi-year digital transformation plan was conceived to modernize and secure the business, reduce the operating budget, and align technology with the company's sustainability mission. My greatest sense of accomplishment comes from being able to showcase the current IT program as an example of how mid-market businesses can implement best-in-class systems that rival larger enterprises through inventiveness, entrepreneurial spirit, and tenacity.

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CISO Chief Information Security Officer



ROBERT ALLEN
Corp VP & Global CISO
Gallagher

Since 2020, Robert Allen has served as the Global CISO at Gallagher where he has led a transformation of the cyber security organization. Robert redefined the global structure and risk scenario focus and partnered with business leaders on key mitigation priorities to drive a \$150M+ aggregate risk reduction. Previously, Robert was the SVP, CISO at Brighthouse Financial joining as a founding executive, prior to the start-up company's spin-off from MetLife.



BRUCE COFFING
CISO
City of Chicago

Bruce Coffing is an information security professional with over twenty-five years of industry experience in information technology and cyber security. He is currently the Chief Information Security Officer for the City of Chicago. Prior to joining the City of Chicago, he held information security positions at Bank of America and at consulting firm Accenture. Bruce holds the Certified Information Systems Security Professional (CISSP) certification.



DENEEN DEFIORE
VP & CISO
United Airlines

Deneen DeFiore currently serves as Vice President and Chief Information Security Officer at United Airlines. She is responsible for leading the cybersecurity and digital risk organization to ensure the company is prepared to prevent, detect, and respond to evolving cyber threats. She leads initiatives on commercial aviation cyber safety risk, improving cyber resilience, and represents United in working with international partners to reduce cyber safety risk worldwide across the aviation ecosystem.



JOHN SANDER
VP & CISO
Wesco

John Sander is a highly respected leader possessing 25+ years of experience developing technology solutions on a global scale to resolve significant business challenges. John currently serves as VP and Chief Information Security Officer of Wesco. He has proven experience developing global IT strategy and governance, evaluating emerging technologies, transforming organizations, managing large-scale global programs, negotiating large contracts, fostering strategic relationships with external partners, and providing budget management and oversight.



SUCCESS STORY

As Gallagher's Global CISO, I am responsible for a growing company of more than 43,000 employees across 60 countries. Since joining Gallagher, we've unified our approach to security around a set of global services while relentlessly focusing on top risks to prioritize what matters most to our cyber posture. While I love the challenges and mission - protecting our customers, and employees and working with peers across the community, my true passion is being a leader and seeing others succeed. I'm proud of the team we've built at Gallagher, in line with our culture and the Gallagher Way.

SUCCESS STORY

One of the things of which I am most proud is the growth of the Information Security Office (ISO) team. This growth isn't in terms of numbers, rather it is in the growth of the individuals. This individual growth is reflected in the expanded cybersecurity services the ISO team members provide through tools and capabilities delivered. Combined, these services, tools and capabilities secure the City of Chicago's computing environment helping departments deliver services to the over 2.7 million constituents of the City of Chicago every day.

SUCCESS STORY

Keeping the United network safe and secure from cybercriminals means being the industry leader. By implementing a zero-trust platform, including multi-factor authentication, employees have seamless and secure access to applications and systems, and customers are confident their information remains safe. We've increased cybersecurity drills and exercises across all United teams to understand the threat landscape and how to react immediately - reducing operational impacts. We stay current by partnering with regulatory and industry associations to share and receive information. Our award-winning momentum means we are on the right path in protecting our employees and customers strategically and innovatively.

SUCCESS STORY

I led the cybersecurity integration of two Fortune 500 companies to become a unified team that was able to turn our number one enterprise risk into a differentiating benefit for our customers. This huge accomplishment was done through a pandemic, unifying completely different tools and processes, team uncertainty, and with an organization that was looking to completely transform the industry. I was able to build the right organization, prioritize our biggest risks, develop a winning strategy, and get the support of the entire organization. We can now say that Wesco truly has an industry-leading cybersecurity risk posture.



Kemper Congratulates

Alok Mehta

2023 Chicago CIO of the Year ORBIE Award Finalist




WILLIAM SHIELDS
CISO
TransUnion

Bill Shields leads global security efforts across TransUnion to protect systems, data and associates through the balance of security and user experience. He believes in empowering people to drive ongoing success. Shields has built critical security functions and programs using intelligence to defend technology ecosystems. He earned a bachelor's degree in computer information systems from Bentley University, a master's degree in telecommunications from Boston University, and he holds an MBA from Duke University.



SUCCESS STORY

Information Security is significant in enabling consumer trust, and as such, my team established the mindset that security is a foundational element of our products and services. We've embraced our role as engineering partners to aid the development of TransUnion solutions and support business growth. We've built a strong partnership between information security and the business by embedding our security engineers into development teams, giving them direct ownership and accountability for our overall security posture. This partnership allows everyone to see themselves as an integral part of information security while creating an environment that views security as an essential service.



SARA SCHMIDT
SVP & CISO
US Foods

In her nearly 20-year career in information security, Sara Schmidt has established her reputation as an inclusive, proactive leader focused on delivering the highest-value security outcomes for business partners. In her current role, Schmidt serves as the Senior Vice President and Chief Information Security Officer (CISO) at US Foods where she leads the organization's cyber defense strategy, responsible for ensuring the information and cyber security of the organization's systems, processes and people.



SUCCESS STORY

One of my greatest satisfactions comes through developing cybersecurity team structures that empower the organization and professionals alike, delivering optimum results in tactical security measures as well as for individual career advancement. One of the ways I do this is by collaborating with my team leads to develop a strategy that leverages their expertise, while also allowing them a leadership development opportunity in defining structures. From identifying weaknesses to defining success, they drive the process. The partnership and trust built through this collaborative process not only empowers the individual but also strengthens our team.




Congratulations Greg Michelini

Chicago CIO of the Year® ORBIE® Awards Finalist



Your leadership and commitment to excellence in information technology are transformative for Athletico's clinicians and patients. We thank you and your team for your work in helping deliver exceptional patient care and outcomes.



CONGRATULATIONS DR. MARK CAMPBELL

The Chicago White Sox congratulate Dr. Mark Campbell on being named a Chicago CIO of the Year® ORBIE® Awards Finalist.

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