



# The TechVision Research Conference 2019

11-14 November  
Manchester Grand Hyatt, San Diego

Enabling the

## DIGITAL ENTERPRISE

4 immersive days of  
discussion and learning  
with world leaders in  
the practices of  
Identity Management,  
Security, Privacy,  
Innovation,  
Architecture,  
and Data

SESSION LEVEL  
DETAILS



TECHVISION  
CHRYSALIS

# TechVision Research Chrysalis Conference – Enabling the Digital Enterprise

Solving the hard problems that face IT professionals requires a place where all stakeholders can discuss these problems candidly, without other agendas steering the conversation. The TechVision Research Chrysalis Conference has been uniquely developed to provide a place for such candid and user-centric conversations. The goal of the conference is to improve the state of how the industry responds to the real needs of the enterprise; this is achieved by an honest discussion about the problems, future enterprise needs and designing (and influencing) the right path forward. When there is a disconnect between the desired path and current reality we'll look to respond to the needs of the enterprise, highlight the gaps and move the industry in the desired, customer-focused direction. To achieve these goals, we've brought together some of the greatest independent enterprise-focused industry, technology and business experts on the planet.

TechVision's Chrysalis Conference has an attendee-driven agenda, high-profile expert speakers, in-depth content and a fiercely independent point of view. TechVision's Chrysalis Conference is not your typical event focused on highlighting vendor offerings. The event has two days of comprehensive workshops bookending two days of lively, focused general sessions. Evenings include hospitality suites where attendees can enjoy networking with peers while learning more about emerging technologies. If you attend only one event this year, the TechVision Research Chrysalis Conference is the best event to provide the education and insight needed to help you prepare for the future of your enterprise.

## TechVision Research – Advocates for the Enterprise

Sometimes you already have the experience and guidance you need to get the job done. For those times when you don't, there's TechVision Research.

TechVision provides product-neutral, independent, outside expertise at the level necessary to help you make strategic decisions. TechVision advisors have the knowledge and stature required to anticipate and settle internal disputes, and deep business/technical expertise necessary to support your success. TechVision offers a range of research, consulting, and advisory services to support you in the disciplines of:

- Identity and Access Management
- Cybersecurity
- Architecture and Innovation
- Information Asset Management
- Privacy and Consent



## Introduction, Conference Keynote. “Managing New Challenges and Opportunities”

The challenges businesses face today are increasing exponentially as are the rewards for properly aligning business goals with technology and innovation...and the technology is changing and disrupting at an unprecedented pace. Expectations and consequences can make or break businesses swiftly and decisively. Technology advances and innovations from the movement to the cloud, AI, Blockchain, IoT, DevOps and unprecedented attacks on our increasingly connected ecosystems require new ways of thinking about business and being prepared to act decisively with the right, secure and available technology infrastructure. The keynote presentation and the focus of this conference will describe how enterprises can best take advantage of and be prepared for the tremendous opportunities while managing risk.

Speaker: Gary Rowe, CEO and Principal Consulting Analyst, TechVision Research

## The Digital Enterprise - An Integrated Ecosystem of Capabilities and Information that Defines a Responsive Business

All enterprises are transforming, to varying degrees, into Digital Enterprises. The transformation to this new state is the chrysalis, the metamorphosis from the traditional enterprise into a Digital Enterprise. But the transformation part needs to be ongoing and the foundation needs to support rapid shifts in strategy, technology/market disruption, and change...and to do it securely.

Digital Transformation is one of the most hyped topics and we will look to provide our definition using our Digital Enterprise reference architecture as a framework for the topic and as a roadmap for this conference. We'll define key considerations for preparing for and maintaining a secure, successful digital enterprise.

Speaker: Karen Hobert, Principal Consulting Analyst, TechVision Research

## Innovation – Introducing Experimentation and Disruption into the Digital Enterprise

In the digital enterprise, innovation isn't a one-time program; it is a continuous process that becomes a source of competitive advantage in a rapidly changing market. The ability for an enterprise to innovate is, perhaps, the most important factor in the long-term success or failure of an organization and we believe enterprises should treat innovation like they do other core business functions.

TechVision will describe an approach to systematize innovation using reference architecture to help enterprises organize their innovation efforts into continuous, sustainable processes, and provide lessons learned from implementing innovation centers of excellence in large enterprises.

Speakers: Wil Koenig, Principal Consulting Analyst, TechVision Research, co-founder of the Deutsche Bank Silicon Valley Innovation Lab

Gary Zimmerman, Principal Consulting Analyst, TechVision Research, author of TechVision's Innovation Reference Architecture

### DevOps/Microservices and the Cloud; Architecting and Delivering the Digital Enterprise

The emergence of the capabilities and practices of Cloud, SaaS, DevOps, and microservices are enabling the transformation of IT from a back-office cost center into a data-rich, connected and responsive source of competitive advantage.

TechVision will describe current and future state technology, core principles, and design patterns that help an enterprise achieve responsive and scalable business function delivery. We'll also share a reference architecture to help enterprises envision the elements of and path towards a DevOps approach. We will also highlight the tactical, strategic, and cultural impacts that these changes imply.

Speakers: Chris Haddad, Principal Consulting Analyst, TechVision Research  
Patrick McClory, Principal Consulting Analyst, TechVision Research

### Preparing for the Digital Enterprise: It Starts with Your Business Data

Data is the foundation of a digital enterprise. Every touch point, every click, every transaction, even digital exhaust provides relevant insight as well as risk. As such, data and analytics will become the centerpiece of enterprise business/IT strategy, focus and investment. But how can you make such decisions if you are unsure of the veracity, validity, and volatility of the data?

We'll describe a systematic approach to understanding business data needs and mapping data to the appropriate sources. Business data is the foundation for virtually every topic we're covering in this conference and is core to how modern businesses operate. It is also an area that is often overlooked and inadequately invested in as organizations often drop data in a data lake and expect AI/ML to clean up this mess. We'll also examine how data both supports and can challenge enterprise security, privacy and governance.

Speaker: Noreen Kendle, Principal Consulting Analyst, TechVision Research

### Day 1, Part 2: Diving Deeper into the Relationship Between Identity and the Digital Enterprise

In the earlier sessions we defined the digital enterprise as an integrated ecosystem. Identity and access management plays a key role as an enabler of this ecosystem.

The rest of the Day 1 is focused on Identity Management, the security discipline that enables the right individuals (and increasingly things) to access the right resources at the right times for the right reasons. IAM is changing and scaling to ensure appropriate access



to resources across increasingly heterogeneous technology environments, and to meet increasingly rigorous compliance requirements. This security and engagement practice is a crucial undertaking for any enterprise. It is increasingly business-aligned, and it requires business skills, not just technical expertise.

### Identity Management; A New Approach is Needed to Address the Digital Enterprise

A core theme TechVision Analysts will describe is that traditional IAM needs to move from a static, structured environment to one that is more dynamic, inclusive and flexible as this will be critical in support of the Digital Enterprise. A strong identity ecosystem provides the foundation for much of the innovation we talked about earlier and will support how enterprises will evolve digitally.

In this session, the TechVision team discusses adapting existing enterprise IAM foundations to better support the digital enterprise, including developing a future state strategy that supports new objects (customers, partners, services, “things”), increased scale, and the movement of resources to the cloud. We’ll also set the stage for the rest of this section of the conference.

Speakers: TechVision Principal Consulting Analysts covering IAM to include Gary Rowe, Doug Simmons, Archer Reed and David Goodman

### Building New Identity Foundations; Sempra Case Study (Enterprise) and CIAM Case Study

Case studies in building new IAM foundations for the enterprise and customers; This session will provide a real-world example architecting and building a new and improved enterprise IAM foundation. We’ll first hear from Sempra Energy as they have, over the past several years evaluated their enterprise IAM infrastructure, collected requirements, built out their overarching IAM reference architecture, conducted an RFP and now are deploying and iterating on their new enterprise IAM services.

Speakers: Jenna Morton, Head of the Enterprise Identity Program, Sempra Energy  
CIAM End-User Case Study (pending)

### Customer IAM (CIAM) Has Emerged; Developing Your Customer-Facing IAM Program.

One of the hottest areas within Identity management, and rightly so, is CIAM. Customer experience has become a competitive differentiator in the world of digital enterprises. Today’s increasingly sophisticated consumers now view digital interactions as the primary mechanism for engaging with brands and, consequently, expect deeper online relationships delivered simply and seamlessly. Further, the customers expect some control around how firms collect, store, manage, and share their profile data—and regulatory controls are demanding it.

This panel session will start with key differences between Customer IAM and traditional enterprise identity management. We’ll then discuss different approaches to delivering the digital experience customers expect, how CIAM services support these goals and how this impacts enterprise business. We’ll also get a perspective on trends, customer requirements

and development priorities from some of the leading suppliers of CIAM products and services.

Speakers: David Goodman, Principal Consulting Analyst and leading CIAM Vendors are currently being invited

### The Disruptor: Decentralized (Blockchain/Self-Sovereign) Identity Systems and Verifiable Credentials

Traditional identity systems are mostly geared toward authentication and access management for known entities. A decentralized identity system adds a focus on authenticity and how a community can establish trust across the boundaries of any ecosystem. In a decentralized identity future, credentials can be shared between parties with authenticity, security, and privacy guaranteed; or at least, that's the promise.

This panel session will describe this new approach, assess industry and vendor offerings and address the prerequisites and timing of this nascent approach. We'll also contrast this model to one in which individuals "rent" IDs for every site they may conduct business with. We'll look to provide insights to help enterprises better understand what this new environment is, how it benefits the enterprise and when it will be ready for "prime time".

Speakers, Kurt Lieber, VP/Chief Information Security Officer (CISO), Aetna, Gary Rowe, TechVision Research, Bob Blakely, Head of Security Innovation at Citicorp, Phil Windley, Chair of the Sovrin Foundation and Architect, CIOs office at Brigham Young University, Ankur Patel, Principal Program Manager, Decentralized Identity, Microsoft

### Putting the IAM Pieces Together; Standards and Integration

IAM is a capability that's so established and critical to success that there's a strong hesitancy on the part of anyone to change what's working. But changes are required to make it work in the digital enterprise. Changes need to be made in ways that ensure a smooth and safe transition. This is where adhering to standards and having the right integration tools can provide the flexibility and inclusiveness required to support the modern digital enterprise.

This panel session describes the key standards, architectural elements, governance models and integration tools and approaches needed to extend/integrate existing services while transitioning the foundation for the future.

Speakers: David Goodman, TechVision Research and Executive Director Open Identity Exchange (OIX), Pamela Dingle, Director of Identity Standards, Microsoft, Wade Ellery, Radiant Logic

## Identity Legends Panel

This session will close out the day with a discussion about the past, present and future of Identity Management by five of the “legends” in the Identity Management and related areas. These leaders will discuss, debate, address your questions and provide advice to our attendees. They will also reflect on what has been discussed during the course of the day. The focus will be on how large organizations architect and develop strategies in the Identity Management area that support the Digital Enterprise. This will include pragmatic advice for the enterprise and the overall industry as to how we might approach lingering challenges and how we might prepare for the expected future. This session will leverage the expertise of legends and the audience to better frame the problems and potential solutions for enterprises and the industry. If these problems were easy to solve, we wouldn’t be debating some of the same issues we were discussing 30 years ago.

The “legends” are some of the top analysts, thought leaders, consultants, visionaries and experienced practitioners in this area and will be given an extended session to share their wisdom. These industry icons include Jamie Lewis, the founder and thought leader of Burton Group and one of the early disrupters in the IAM area. Jamie will kick off this session with a presentation that lays out the key topics, and issues. He will be joined on stage by Bob Blakely, former Research Director at Burton Group and Gartner and head of Security Innovation at Citicorp, Ian Glazer former Research Director at Burton Group and Gartner and current Vice President, Identity Product Management at Salesforce.com, and Eve Maler, former Principal Identity Analyst at Forrester Research and current VP, Innovation and Emerging Technologies at ForgeRock.

## Conversations Continue in the Hospitality Suites...

Attendees, speakers, and other experts continue the conversations at several hospitality suites hosted by select vendors. Early hospitality suite vendors include Cloudfinity and Radiant Logic.



# Day Two

## Recap of Day 1, Day 2 Agenda

We'll start with a quick summary and highlights of the Day 1 sessions/discussions and a transition to what we can expect on Day 2.

Technology risk-management and security are key components for any business, but especially for digital businesses and, therefore, the components need to transform alongside the business. The Day 2 agenda is all about transforming the security capabilities to adapt to the needs of digital enterprise by maintaining the appropriate risk level while supporting new business requirements. These transformed security capabilities need to be cloud-friendly, flexible, user-friendly and provide necessary protection against not only the “bad guys” but provide protection from the emerging privacy and data protection regulations.

Speaker: Gary Rowe, TechVision Research

## A CIOs Perspective on Securing the Digital Enterprise and an Initiative to Secure Multi-Cloud Environments

This presentation will describe the challenges facing Emory University and most large enterprises and the proactive approach Emory has taken to address these challenges. A core challenge is supporting an open, multi-cloud world while developing consistent cloud-platform independent security models. The difficulty in achieving this capability within a reasonable budget led to the development of core cloud security controls within Emory, but this wasn't sufficient for their multi-cloud needs. This led to the formation of RhedCloud, an open source effort that includes participation by the “big 3 cloud vendors” to develop multi-cloud security controls in support of the needs of Research, Health Care and Higher Education. This is a model, TechVision sees as a viable path forward as enterprises both extend their digital reach and take advantage of multiple cloud-based services.

Speaker: Rich Mendola, CIO, Emory University and Founder of the RhedCloud Foundation

## New Security Models for a DevOps and Cloud World

The speed by which change occurs in enterprises today, the sheer volume of data, the relationships to be managed, the new development models such as DevOps and the diversity of the platforms that need to be appropriately secured require a new way to think about security. This session will describe this approach and provide food for thought for CIOs, CISOs, architects and LOB leaders as they plan to secure and mitigate risk in this new world.

A key premise is that organizational silos and traditional security architectures cannot support the business effectively as enterprises adopt cloud-native platforms. To protect



business assets in these environments, organizations must establish new methods, capabilities, and instrumentation. Security controls must be both agile and scalable (much like the identity services we discussed on Day 1), providing new capabilities that match this new environment. These new concepts and approaches will be described in this session.

Speaker: Jamie Lewis

### The New Security Foundation; Start with Zero Trust

This session will describe Zero Trust (ZT) at multiple levels and provide pragmatic recommendations for large organizations; we'll look at ZT from a philosophy level, a strategy/architecture approach and as implemented within silos (like Zero Trust Networking). This session will define this heavily hyped but critical security topic and provide pragmatic enterprise advice. We'll follow the level set presentation with a panel discussion with several vendors that are building products and delivering services in this space.

Speakers: Sorell Slaymaker, Principal Consulting Analyst, TechVision Research, leading Zero Trust vendors/industry experts being invited

### Security Models and Approaches for the API Economy

APIs are key conduit of an efficient and scalable digital enterprise, but also represent significant security risks. This session will focus on API security, key vulnerabilities and developing enterprise strategies and programs to address these risks. We'll also get insights about the approaches, strategies and expected future state from a few key vendors in this space.

Speakers: Archer Reed, Principal Consulting Analyst, TechVision Research, Nathanael Coffing, Founder of Cloudfity, additional panel members being invited

### Pay Particular Attention to Privileged Users—Developing Your Privileged Access Management (PAM) Program and Strategy

Many if not most breaches start with compromised credentials. This session will describe an approach to developing a “least privileged” security model and leveraging increasingly sophisticated PAM products and services. PAM is a specialized category of access management that provides increased protection for administrative accounts that are the most highly coveted by bad actors and can generally do the most damage. We'll also get insights into the directions and investments being made by key vendors in this space and include guidance for enterprise security leaders.

Speakers: Doug Simmons, Principal Consulting Analyst, TechVision Research, Invited vendors from TechVision's PAM Vendor short-list

## Why is Fine Grained Authorization so difficult and how can we fix this?

Over the past 30 years the industry and IT/LOB teams at large organizations continue to seek the utopia of fine-grained authorization; the ability to use attributes, granular role-based data or information collected in real-time to make informed authorization decisions. This, of course, gets more difficult as we add the complexity and real-time access decision requirements associated with the digital enterprise. We'll look at why this has been the case and what vendors, enterprises and the industry can do to move this in the right direction. This is necessary to achieve the right access to the right resources for the right people at scale.

Speakers: Dan Beckett, Principal Consulting Analyst TechVision Research and Managing Partner at Security Architects Partners, Gerry Gebel, VP Business Development, Axiomatics and former Research Director, Burton Group, Eve Maler, VP, Innovation and Emerging Technologies, ForgeRock

## Upgrading Authentication Models

We have anticipated the demise of password-centric authentication for decades. Our position is that this future is now or at least rapidly approaching. For the reasons we have been discussing – device and network ubiquity, reliability, Bring Your Own Device (BYOD) initiatives coupled with the accelerating levels of fraud associated with password-based authentication, the time has arrived to deploy MFA or other means of dynamically authenticating given the risk profile within your enterprise.

MFA is becoming the standard, while password-less authentication, biometrics and other advances in authentication are being explored in support of the digital enterprise. This session will include a TechVision “level set” and perspectives from selected vendors as to how this landscape will and should change.

Speakers, Doug Simmons, Principal Consulting Analyst, TechVision Research, Alex Weinert, Group Security Program Manager, Microsoft, other invited panel members

## DevSecOps

In the digital enterprise, DevOps -- the principle of integrating development and IT operations under a “single automated umbrella” -- has helped with everything from more frequent feature releases to increased application stability. However, many security and compliance monitoring tools have not kept up with this pace of change, as they simply weren't built to test code at the speed DevOps requires. This has only solidified the view that security is the biggest block to rapid application development and -- more generally - - IT innovation. DevSecOps is a natural and necessary response to the bottleneck effect of older security models on the modern continuous delivery pipeline.

Speakers: Patrick McClory, Principal Consulting Analyst, TechVision Research, Chris Haddad, Principal Consulting Analyst, TechVision Research, Nick Nikols, VP Strategy Microfocus and former Principal Consulting Analyst at TechVision Research

## The Evolving Role of Analytics

The pace of change in development and production environment in the digital enterprise quickly becomes harder and harder to manage. Monitoring user behavior, service deployment and failure, error detection, and data access at real-time scale requires a different strategy than a traditional IT environment. It also creates challenges with respect to privacy.

In this session we will discuss the trends in using Analytics (AI, ML) to manage application delivery, quality, security, and performance in a dynamic DevSecOps / cloud native environment.

Speakers: Jeff Nichols, Principal Consulting Analyst, TechVision Research, Jackson Shaw, Former VP Product Management One Identity, Additional Panel member pending

## Privacy and Regulatory Controls Frame the Digital Enterprise

As enterprises extend their digital reach, secure their data, identify and provide context for all connections, we also need to consider the escalating global privacy landscape. Regulations such as the European General Data Protection Regulations (GDPR) and the California Consumer Privacy Act (CCPA) add regulatory clout to given individuals greater control of their data and provide escalating penalties for those that violate these regulations. This session will provide an update on the evolving responsibilities enterprises face.

Speakers: Sari Ratican, Attorney focusing on privacy regulations and former Chief Privacy Officer from Amgen, David Goodman, Principal Consulting Analyst, TechVision Research, John Myracle, Principal Consulting Analyst, TechVision Research.

## Security Legends Panel

The Security topic will close out with a discussion about the past, present and future of Security and risk by three of the “legends” of the Security space. These leaders will discuss, debate, take questions and provide advice to our attendees. They will also reflect on what has been discussed during the course of the conference that pertains to security and risk management. The focus will, in particular, be on how large organizations architect and develop strategies that support a “safe” Digital Enterprise.

This session will leverage the expertise of legends and the audience to better frame the problems and potential solutions for enterprises and the industry.

These “legends” represent some of the top analysts, thought leaders, consultants, visionaries and practitioners that have unparalleled knowledge and experience in this area. This panel includes Dr. Fred Cohen; he is widely considered to be one of the leading security/risk experts in the world. He is best known as defining the term “computer virus” in the early 80s and the inventor of the most widely used computer virus defense techniques. Fred also started the security practice at Burton Group. The panel also features Dan Blum, one of the world’s foremost analysts, consultants and thought leaders in the

security and identity management areas. The panel also features Nick Nikols who has designed security services, led product teams and served as a top analyst and consultant in this space over the past 30 years. And last but not least, it includes Kurt Lieber the Chief Information Security Officer from Aetna, with prior senior security leadership positions at Target, Kaiser Permanente and Goldman Sachs.

Speakers: Fred Cohen, Principal Consulting Analyst TechVision Research/CEO of Management Analytics, Dan Blum, Managing Partner at Security Architects Partners, Nick Nikols, VP Strategy, Micro Focus, Kurt Lieber, VP and CISO, Aetna.

#### Closing: Conference Summary, Enterprise Action Plan

This closing session will include Gary Rowe, Jamie Lewis, Doug Simmons and other guests to provide summary thoughts, recommendations, conclusions and next steps. This closing session will summarize what we heard, the continuity of thinking and the “takeaways” for our enterprise attendees.

## Conference Format

<b>Monday November 11, 2019</b>	<b>Tuesday November 12, 2019</b>	<b>Wednesday November 13, 2019</b>	<b>Thursday November 14, 2019</b>
	Breakfast (location TBD)	Breakfast (location TBD)	Breakfast (location TBD)
Level Set Sessions 8:00am – 5:00pm	General Sessions 8:00am – 5:00pm	General Sessions 8:30 am – 6:00pm	Workshops 8:00am – 5:00pm
Lunch (location TBD)	Lunch (location TBD)	Lunch (location TBD)	Lunch (location TBD)
Registration (location TBD) 7:00am – 6:00pm	Registration (location TBD) 7:00am – 8:00pm	Registration (location TBD) 7:00am – 7:00pm	Registration (location TBD) 7:00am – 9:00am
Workshop Information Desk (location TBD) 7:00am – 2:00pm	Workshop Information Desk (location TBD) 7:00am – 5:00pm	Workshop Information Desk (location TBD) 7:00am – 5:00pm	Workshop Information Desk (location TBD) 7:00am – 9:00am
	Complimentary Consultations (location TBD)	Complimentary Consultations (location TBD)	
	Hospitality Suites 6:00pm – 9:30pm		

## Expert Speakers Scheduled to Appear Include:

Dan Beckett  
 Bob Blakley  
 Dan Blum  
 Nathanael Coffing  
 Fred Cohen  
 Pamela Dingle  
 Wade Ellery  
 Gerry Gebel  
 Ian Glazer  
 David Goodman  
 Chris Haddad

Karen Hobert  
 Noreen Kendle  
 Wil Koenig  
 Kurt Lieber  
 Jamie Lewis  
 Eve Maler  
 Patrick, McClory  
 Rich Mendola  
 Jenna Morton  
 John Myracle  
 Jeff Nichols

Nick Nikols  
 Ankur Patel  
 Sari Ratican  
 Archie Reed  
 Gary Rowe  
 Jackson Shaw  
 Doug Simmons  
 Sorell Slaymaker  
 Alex Weinert  
 Phil Windley  
 Gary Zimmerman



## Conference Registration Fees

Pricing Overview	Early Bird Pricing	Discounted Pricing	Standard Pricing
General Sessions Only	<del>\$1,995</del>	\$2,375	\$2,795
Super Pass – Full General Sessions and unlimited access to pre and post conference workshops		\$3,445	\$3,960
Al la Carte Pricing		Standard Pricing	
Half-day Level Set	\$595		
Full-day Workshop	\$895		

Clients enjoy exclusive discounts over and above the pricing shown.

**Discounted pricing ends September 30, 2019.**

## Registering for the TechVision Chrysalis Conference

*Please note: Registrations will be processed upon receipt of payment. TechVision Research offers the following payment options and honors Visa, MasterCard, and American Express. We are happy to make arrangements for organizations that require invoices for payment.*

Online Registration

[www.techvisionresearch.com/conference-2019](http://www.techvisionresearch.com/conference-2019)

Credit Card information required

Phone

+1.844.832.4737

Credit Card information required

Client Discounts and Group Rates

Contact Sharon Shanahan at [sharon@techvisionresearch.com](mailto:sharon@techvisionresearch.com) or 805-527-1658 for assistance and to arrange for client discounts or group rates.

Conference fees include attendance at all the main conference sessions, breakfast and lunch daily, the Opening Reception, and all vendor Hospitality Suites.

## Travel and Hotel Information

Manchester Grand Hyatt San Diego

One Market Place

San Diego, CA 92101

Single/Double Rate: \$275

*The Manchester Grand Hyatt provides superior amenities and a spectacular waterfront location with easy access to everything San Diego has to offer.*

You can register on the conference website

[www.techvisionresearch.com/conference-2019](http://www.techvisionresearch.com/conference-2019)



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