

Digital Transformation

EMBRACE THE CHAOS

A Comprehensive Preview of #AIIM15



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At AIIM 2015, you'll learn how to grasp chaos in a firm embrace.



Digital Transformation **EMBRACE THE CHAOS**

BY JOHN MANCINI, PRESIDENT, AIIM

Why would anyone want to “embrace” the chaos?

THESE ARE NOT “NORMAL” TIMES...

In the 25 years I’ve been helping organizations use technology to improve their business, I’ve never seen a more disruptive time.

On the one hand, in the digital economy, information is the world’s new currency. On the other, information chaos reigns supreme. If you’re an IT executive or business manager or legal counselor, you need to help your organization build a strategy to deal with information chaos. This Conference will help you do just that.

We’re moving into a new game -- an era of radical digital transformation. This Conference is designed to help you develop two strategies that will keep you in the winner’s circle.

First, how can you be more valuable to your organization? How will you help your organization prepare so that it’s not left behind by the information-chaos steamroller?

Second, how can you, as an individual, prepare for the era of digital transformation? What skills do you need to operate in this new world? What skills will you need not only to survive, but to thrive in an era of digital transformation?

... AND AIIM15 IS NOT YOUR “NORMAL” CONFERENCE.

5 keynotes
including authors **Brian Solis** and **Tom Koulopoulos**.

4 Industry Insight panels
to help you prepare for the future – facilitated by futurist **Thornton May**.

36 “Embracing Chaos” presentations
by experts on the risk, transformation, engagement, and insight challenges facing your organization.

45 Roundtables
Led by subject matter experts, join 25 peers to share experiences and perspectives on topics that matter to you in a “Powerpoint-free” zone.

The industry’s most awesome party on the deck of the U.S.S. Midway.

Learn. Engage. Strategize. Make connections. And most importantly, have fun.

25 DISRUPTIVE TECHNOLOGY TRENDS FOR 2015-2016

BRIAN SOLIS, PRINCIPLE, ALTIMETER GROUP AND AUTHOR OF WHAT'S THE FUTURE OF BUSINESS (WTF)

With every new year comes a landslide of predictions and trends to guide us into the new year. While the year advances, rarely do such transformative trends or changes take place in alignment with a calendar. Not even Y2K could do so.

Now with that said, I was asked to present my thoughts on what lies ahead in Vegas during CES at Brand Innovators "Mega Trends" event. By the first week of January, there were already some tremendous thoughts already shared by some of the best. So, I thought about and thought about some more. What I assembled was a list of the most notable trends that brands and consumers need to know this year and next.

Consider this list v 1.0. It represents technologies and trends that I'm paying attention to and also high level thoughts around them. It's not complete as there's more to add on each topic or new topics to introduce of course. But this list is definitely worth exploring. I also invite you to share your ideas and the technologies you're watching.

The trends are visualized and explained in the embedded Slideshare. I also touch upon each below...

25 DISRUPTIVE TECHNOLOGY TRENDS 2015 - 2016

1) Social Media 1.0 is dead.

Social media becomes part of a digitally transformed ecosystem Real-time and content marketing becomes more sophisticated and portable Social becomes key hub for shaping customer experiences Social connects the Zero Moment of Truth and the Ultimate Moment of Truth

2) The future of search and SEM also lies outside of Google.

More than 88% of consumers are influenced by other consumers' online comments. Customers are also starting searches in places such as Youtube, Pinterest and also in apps directly.

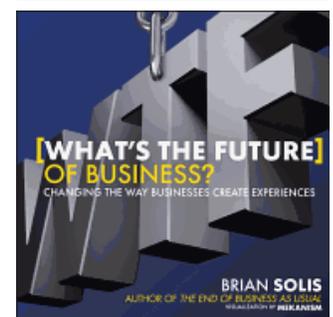


By Brian Solis, Principle, Altimeter Group and Author of What's the Future of Business (WTF)

Brian Solis is principal at Altimeter Group, a research firm focused on disruptive technology. A digital analyst, sociologist, and futurist, Solis has studied and influenced the effects of emerging technology on business, marketing, and culture. Solis is also globally recognized as one of the most prominent thought leaders and published authors in new media. His new book, What's the Future of Business (WTF), explores the landscape of connected consumerism and how business and customer relationships unfold and flourish in four distinct moments of truth.

Don't miss Brian's keynote session: **The Race to Digital Transformation**

March 18, 1:00 PM to 2:00 PM



3) Messaging apps become the new social media.

4) Asia and other foreign competitors will compete to gain share and push messaging forward.

5) Notification windows introduce a thin layer for rapid engagement.

Apps such as Yo, while a novelty at first, will redefine what an app is and will be...no kidding.

6) Chinese innovation is going to disrupt the U.S. from the outside in and the inside out.

7) The Internet of Things is a hot and beautiful mess until it becomes the Internet of Everything.

By 2020, the number of devices connected to the Internet is expected to exceed 40 billion. We're just getting started.

8) Wearables will struggle to find their place in everyday life.

While cute and seemingly on the wrists, necks or fingers of all of our friends, wearables as an industry and market are incredibly immature. The Apple watch will start create a rising tide. Wearables are all over CES, but most are single purpose, redundant, cute or just plain useless. They need a killer app!

9) Virtual and augmented reality experiment with killer apps for consumer and vertical markets.

In 2015, Google Glass gets a ctrl alt del.

2015 represents the consumer introduction of Oculus Rift. Vertical industries along with gamers will drive early adoption.

Companies such as Skully are creating killer vertical apps for augmented reality.

10) Focus on the kids! Generation Z is mobile first and mobile only and they're nothing like Millennials.

11) Youtube, Vine, etc., represent "a" new Hollywood.

Youtubers and Viners and the financial ecosystem emerging to support them is reminiscent of Hollywood in the early 1900s. More kids can name online celebrities than they can traditional movie and music stars. To capture attention, advertising and content will require an entirely new approach.

12) Cyber security becomes paramount to prevent the next #Sonygate.

Nothing creates a sense of urgency like an emergency. Sony sat on advice to upgrade security. They're hardly alone.

13) Some companies are still greedy and believe the internet should not be open for the sake of profitability. This will impede innovation unless we fight back.

Debate over Internet regulation positions it as either a utility or a premium service.

14) Music streaming will continue to undermine the music business and artistry. Artists will fight back.

Streaming services condition consumers to seek out their favorite music and play it for free. Sales of music continues to freefall.

Artists feel they're underpaid for stream plays.

Spotify, Pandora and the like compare payment models to radio stations. Artists such as Taylor Swift, Garth Brooks, ACDC, et al, believe artistry is worth more than appreciate today.

I argue that streaming services teach people to listen at will because they can whereas radio stations encouraged consumers to buy.

15) Wall Street becomes influential again forcing brands to trump customer experience for revenue.

Stakeholders and investors find it difficult to assess the ROI of customer experiences and the impact of positive reinforcement on the bottom line. I guess you can't trade on something so fluffy. Instead, Wall Street analysts and shareholders alike accused JetBlue of being "overly brand-conscious and customer-focused." Wall Street has spoken and JetBlue CEO Dave Barger will be replaced by someone willing to embrace extra fees, narrower seats, and diminished customer experiences...unless they're willing to pay for something better.

16) Crowd capitalization accelerates disruption...everywhere.

Everything is subject to creative destruction because ideas can now be crowdfunded. Every product. Every industry. Innovation is democratized.

17) Bitcoin and other cryptocurrencies lose value but teach us about how to think differently about money.

There are 163 cryptocurrencies in circulation. Bitcoin is widely known. Though its market cap is down, The Bitcoin Stack will revive the movement. h/t Joel Monegro and Fred Wilson.

18) Mobile payments early today, but will soon skyrocket.

In late 2013, just 6% of US adults said they had made a payment in a store by scanning or tapping their smartphone at a payment terminal. It will go up to 8% this year. Apple's introduction of the Apple Pay will be the key factor that will drive this percentage up.

Mobile payments are already gaining traction. Nearly 15% of Starbucks customers already pay with their phones. And, 60% of consumers use their smartphones to pay because of loyalty benefits.

19) The Sharing Economy is really about renting or borrowing.

Everything will become "on-demand" and available through a mobile apps that connect idle or new supplies with new or organized demand.

New supply will stimulate new demand. Mobile platforms combined with geoloco will continue to bring everyday people and businesses together to do interact with trust and efficiency serving as facilitators.

"Technology has made renting things (even in real time) as simple as it made buying things a decade ago" - Fred Wilson

20) New enterprise drone management platforms change the game for logistics.

It's not about whether we get pizza or Amazon packages to our homes. First, drone delivery will impact B2B. Over time, the concept of a personal mail box will be upgraded with dedicates codes that will facilitate new types of drove deliveries.

21) Cyber Warfare: Political battles will play out in the 5th dimension.

22) Your privacy is Gone: It was traded for perceived security and also better customer experiences.

Older generations think about privacy differently.

Younger generations use privacy as a currency.

23) Big data and beacons: Connect online, in-app, and in-store experiences. Also opens the door to new forms of engagement.

- Footfall, visits online, visits through apps
- Regency and frequency of visits, behaviors and transactions
- Brand affinities
- Favorite products
- Demographics
- Location
- Loyalty program utilization
- Service quality, queue and abandonment
- Capacity planning and resource utilization

Beacons provide businesses with endless opportunities to collect massive amounts of untapped data, such as the number of beacon hits and customer dwell time at a particular location within a specified time and date range, busiest hours throughout the day or week, number of people who walk by a location each day, etc. Retailers can then make improvements to products, staff allocation in various departments and services, and so on.

24) Webrooming becomes more common than showrooming (69% to 46% respectively), according to Harris poll.

- Millennials prefer webrooming.
- Amazon remains #1 destination for both showrooming and webrooming.
- Emerging connected in-store experiences link online and offline, leveraging both.

25) Mass personalization and full funnel marketing suites reset vendor landscape and change how brands “think” and work.

Brands and agencies start to think about “full funnel marketing” and new “experience cloud” suites will take shape to unite marketing, service and CRM. New adtech companies will focus on strategy + programmatic context, content AND ads.

This article originally appeared on BrianSolis.com, one of the best business and technology blogs on the planet. Check it out!

THE GRAVITY OF THE FUTURE

WHAT CAN WE SAY FOR CERTAIN ABOUT THE FUTURE? ONLY THAT IT WILL BE STRANGER THAN ANYTHING WE CAN DREAM OF.

HERE'S AN ANALOGY TO HELP UNDERSTAND WHY.
TOM KOULOPOULOS, CEO, DELPHI GROUP AND AUTHOR OF THE GEN Z EFFECT

What can we say for certain about the future? Only that it will be stranger than anything we can dream of. Here's an analogy to help understand why.

As a child I couldn't grasp the concept gravity. If you drop an object from twice as high it doesn't take twice as long to reach the ground. It only takes 1.4 times as long. The reason is that the higher the object the more time it has to accelerate. (Yes, for those of you who did pay attention in physics class, I'm leaving out air resistance, distance from sea level, and terminal velocity.) The simplest analogy is to think of pulling onto a highway. When you accelerate from 0-105 KPH in ten seconds you are actually covering more ground with each passing second.

So what does this have to do with the future? Well, the future has its own form of gravity that pulls us to it faster and faster, it's called technology, and we simply cannot project technology change at the same rate going forward as it has occurred in the past.

Pulling into the Slow Lane

The last 50 years have been the first few seconds of the onramp as we prepare to enter the highway; we haven't even pulled into the slow lane yet!

If we keep accelerating at the rate of the past 60 years-which we will-by the year 2025 every human being will have access to a computing device and be connected to the Internet. And it's not just humans who will be connected. Everything from the food we eat to the clothes we wear, the cars we drive (or that drive us), to the implants that are part of us; they will all be threads in the fabric of technology woven into every aspect of our lives.

Billions of people who today are outsiders to the economic mainstream will be suddenly thrust into a maelstrom of interconnected commerce. Ten billion human beings all entwined in one great, interconnected, global value chain. Is your business ready? Are you?

Trying to fathom the specific changes that this will bring to the way in which we do business today stretches our imagination well beyond its limits and nearly into the realm of science fiction. And because it seems so unimaginable we discount the possibility of that change as though it were part of some distant dystopian view that is too far off to require action today.

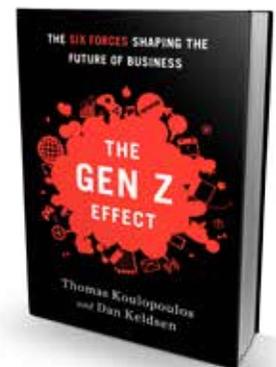


Tom Koulopoulos, CEO, Delphi Group and Author of The Gen Z Effect

Tom Koulopoulos is the author of ten books and founder of Delphi Group, a 20-year-old Boston-based think tank, which was named one of the fastest growing private companies in the US by Inc. Magazine. Delphi provides advice on innovation practices and methods to Global 2000 organizations and government agencies. Geoff James of CBS Interactive Media called Tom "one of the truly deep thinkers in the arena of technology and culture." His new book, *The Gen Z Effect*, explores the six forces shaping the future of business.

Don't miss Tom's keynote session **The Gen Z Effect: The Six Forces Shaping the Future of Business**

March 19, 8:30 AM to 9:30 AM



FIVE PREDICTIONS FOR THE NEXT TWENTY YEARS

I'll give you five examples of changes that will happen in the next twenty years, from my upcoming book *The Gen Z Effect*, that are already slingshotting us into the future:

Open sourcing patents. The days of winning through protecting IP are numbered. Elon Musk already sounded the siren in a brilliant move to alter policy by altering business practice when he announced that Tesla would not sue anyone for the fair use of their patents. The world is moving much too fast to expect that we can innovate through the closed minded behaviors that got us here. Could you survive if your IP wasn't protected?

The Death of Retirement. 50% of all Millennials and Gen Zers plan to be self employed. Retirement is history. Every Knowledge worker will need to build their own brand to sustain themselves for life. We'll have seven generations working side by side by 2050. Good luck if you're still trying to figure out how to get Matures and Millennials to work together. How will you create an organization that can handle seven simultaneous generations of employees, partners, prospects and customers?

Higher Education will crumble under it's own weight. Trillion dollar debt load on students and their parents. Open classrooms for anyone with a mobile device anywhere on the planet. Research funded by the crowd. The Ivy is tightening its grip over its brick ensconced hallowed halls and cutting off the oxygen of traditional classroom/ instructor-based higher education. Starbucks is paying for the online education of its employees-but not brick and mortar education. How will you educate, and re-educate, lifetime employees?

We will no longer understand how computers work. The promise of artificial intelligence has always been measured against how well a computer can think like a human, it's called the Turing test and it recently passed the level of a 13 year-old, but it's not human intelligence that computers will mimic. The real shift will occur when computers think in ways we can't even begin to understand. It's already happening on Wall Street with high frequency trading. Over the course of the last seven years hyper-fast algorithms have taken over Wall Street and their behaviors have confounded analysts. Is your organization smarter than a 13-year-old?

Half of all new cars will be self-driving. We fear them and chuckle at them as a curiosity today. But, self-driving cars are like dishwashers or washing machines; once you get another month of your life handed over to you you'll never, ever think of giving it back. What we fail to appreciate in any disruptive change is that the way we value a technology in the future changes faster than the sum of our fears about it. What would you do with another month in the year?

Its' not the End of History, It Just Feels That Way I can hear you now, "Within twenty years! Really?" That's OK, it's completely normal; we always put ourselves at the end of history-it's what humanity does best, repeatedly. Each generation sees itself as the pinnacle of civilization. Their model of the world, their science, their society, are always the best there can be. Each one has been wrong. We are no different.

If history has taught us anything it's that we're never at the end of history. We're really always at the beginning.

A SEARCH DITTY:

THE STORY OF HOW FINDING WHAT YOU NEED TO DO YOUR JOB IS OFTEN LIKE TWO TEENAGERS IN LOVE

MATT VARNEY, INTRANET MANAGER, KENTUCKY COMMUNITY AND TECHNICAL COLLEGE SYSTEM

In 1982, the song “Jack and Diane” was released by John Cougar (later known as John Mellencamp) and went on to spend four weeks at number one on the Billboard Charts. These days, the song is regularly played on classic rock stations around the world and is in millions of fans’ collections and playlists. Part of what made the song successful with broad appeal was its use of familiar themes of high school love and nostalgia. The story was relatable to a lot of people.

I believe that telling the story of how search works and how people interact with it can be similar. The song is structured in a way that lets us introduce the main characters and scenarios succinctly, before moving on to the central dilemma, and finally passing with some sort of resolution. As with any art, the interpretation can be in the eye of the beholder, but, with apologies to Mr. Mellencamp, here’s my take on this story, with the emphasis on search:

Little ditty about Jack and Diane Just a couple of people, workin’ in the heartland Jacky’s the search admin, deep in IT Diane’s looking for documents, she’s on Level C

The story opens simply and the characters are identified. Each plays a part in how search is not only managed and defined, but also how it is experienced. This is a critical way to frame the totality of search – understanding that there are many players that define what it is in the first place.

Searchin’ for info, from her desktop and while on the go, Diane’s looking hard, but finding no answers, looking high and low. Jacky says. “Hey Diane, can I help with your woes? I’d be glad to help, and can help you better with the more that I know” And they sing...

At this point, we can clearly see that Diane is frustrated by the search experience and can’t find what she needs. Jackie, being the rock star search admin in IT is eager to help. Because he is such a rock star, he starts talking with Diane in non-technical terms and tries to elicit exactly what she expects to find. He is focusing on how Jackie works, what she is trying to accomplish, and how she expects to accomplish it. He could have probably guessed at some of that alone on his end. He maybe could have looked at search logs to find patterns to exploit, or found keyword synonyms to define. But he realized that he would not have all these answers. Diane played a big part in the work to be done.



Matt Varney,
Intranet Manager,
Kentucky
Community &
Technical College
System

Matt Varney is a technology architect specializing in both the technical and organizational aspects of enterprise IT strategy and solutions. With over 16 years of experience, he enjoys nuts-and-bolts work like server farm administration, but is also focused on creating the business process and people conditions necessary for effective implementations. A native of West Virginia, he has been a Kentucky resident for 24 years and has adopted the local passions for fine bourbon, fast horses, and winning basketball.

See Matt speak
A Picture is Worth 1000 Words (Or More): An Engaging Search Experience

March 19, 11:40 AM to 12:25 PM

“Oh yeah, the search goes on, Long after the thrill of looking is gone”. Say ah, “Oh yeah, the search goes on, Long after the thrill of looking is gone”. And they search on...

In this section of the story, the original song talks about how “life goes on” and is a little more sentimental than you’d normally find in a search experience. The original song implies that the most thrilling times for the high school characters may be happening in their present, and that the future, with all of that boring work and career stuff ahead of them, will not provide the excitement in their lives. I’m a bit of a contrarian on this section when the story is co-opted for search. I think that the way I have framed it implies that, to most, search can seem a bit overwhelming or even hopeless. People search for stuff and either can’t find what they need, or are presented with so many results that it is difficult to find relevant results. They sometimes know that searching will be fruitless, but they continue to try. After all, Google or Amazon can find what they need when they search for personal items from home. Why can’t the search at work be that good?

Jacky sits back, listens to the needs of Diane, Scratches his head and does his best Mancini, Jackie says, “Well Diane, I think I can help you”. Comes back later with a lamp and magic genie. And they sing...

After listening more to Diane, Jacky goes to work thinking. If he gets stuck and needs help, he looks for other experts and thought leaders who have run into similar issues. He has many references at hand and, combined with his existing experiences starts to formulate a plan. He re-engages Diane in conversation and again, while avoiding overly technical terms, delivers a solution that seems magic. The search results that Diane was looking for in this scenario are being delivered to her as she expects and she is happy. But the story doesn’t end there....

“Oh yeah, the search goes on, Long after the thrill of looking is gone”. Say a, “Oh yeah, the search goes on, Long after the thrill of looking is gone”. They search on...

In the original song, the repeat of this chorus underscores the main point about life going on. In my story, the repeat of this section emphasizes that while a particular solution for a particular scenario was delivered, there are likely more scenarios to be tackled and the technology that helps us address search needs is continuing to evolve. Again, as the contrarian, I believe that the best times are yet to come. So, we press on.

The next section of the original song is the bridge – a slightly different musical part that connects sections of a song. In my story, I’m treating this bridge as a snapshot into how we continue the evolution of search:

Gonna start with the box Get results, then scroll. Let the information come down And achieve the goal. “Hold on, there’s more than a million sixteen”, they both say “Oh man!!” Diane says “fix the chaos!” Jackie says “I’ll embrace it if I can”

Here, an even more particular scenario is played out – the one where there are too many search results to deal with. Diane is completely overwhelmed as an end user. The experience is definitely not a good one for her. She demands action. Jackie, understanding the broader picture of what needs to happen, sees this as an opportunity. He feels he can address the underlying problems technically and feels that he has a good working relationship with Diane. He starts to formulate a longer term strategy to build on the support of the Diane and others in C Level to empower (and fund) his efforts to improve search from both a technical point of view and from the end user experience.

As we wrap up this story, the chorus is repeated and life indeed does go on. The importance of and reliance on search will continue and grow. There will be many challenges, of course, and they may all not be solved by songs and stories, but they will be overcome by diligence, dialogue, and enduring partnerships between technology and end user experience.

“Oh yeah, the search goes on, Long after the thrill of looking is gone”. Say a, “Oh yeah, the search goes on, Long after the thrill of looking is gone”. They search on...

Little ditty about Jack and Diane Just a couple of people, workin' in the heartland

EMBRACING THE CHAOS:

DATA CRUSH, ACCELERATING CHANGE AND “THE NEW NORMAL”

CHRISTOPHER SURDAK, AUTHOR OF DATA CRUSH

Today, we live in a society that is alight with constant, relentless, accelerating change. It seems every aspect of our daily lives is changing before our very eyes and the beliefs, structures and experiences that we take for granted are evaporating every day. What is most surprising in all of this is not that these changes are coming so quickly. Rather, what’s remarkable is that all of us appear to be so blasé with it, if not downright welcoming!

Modern society has focused upon globalization, quality, information technology and connectedness for half of a century, and there are some outcomes from these efforts which may have been somewhat unexpected. Some key consequences of these efforts include:

- **QUALITY:** Consumers simply expect perfection. Deliver anything less, and your customers will immediately abandon you for someone else
- **UBIQUITY:** Globalization and just-in-time logistics have made it possible to have nearly anything, anywhere at any time. And now, for most of us anything less than this is simply not acceptable.
- **IMMEDIACY:** Globalization, Logistics and smartphones with apps have also created the expectation of immediate gratification. Customers want their needs fulfilled instantly, and now predictively.
- **DISENGAGEMENT:** It was common in the past for people to build their own solutions to their problems. Then, they began to outsource certain functions, while maintaining a degree of control. Going forward, this will no longer be the case. Customers will only care about obtaining a result; how they get there will become less and less important and more and more difficult to discern in any event.
- **INTIMACY:** Conversely, customers’ increasing disengagement with how they obtain products and services will leave them hungering for other forms of connectedness. Feeling like part of a community will be even more important as our needs are met more anonymously.
- **PURPOSE:** Ultimately, these trends will leave many people feeling adrift in their lives. They will hunger for a sense of purpose, for a reason for being, for something to feel passionate about. Whomever can fulfill this need for purpose will hold a tremendous influence over those whose needs they meet.

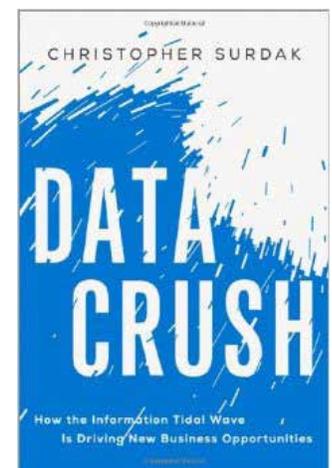


Christopher Surdak,
Author of Data Crush

Christopher Surdak is an information technology expert with over 20 years of experience. He has held roles with companies such as HP, Accenture, Siemens and Citibank. He began his career with Lockheed Martin as a rocket scientist. He wrote the book “Data Crush,” GetAbstract’s International Book of the Year for 2014. He also writes the column “BeMused” for European Business Review.

See Chris speak
Forecast: Disruption

March 19, 11:40 AM to 12:25 PM



Together, these six trends will form the basis of our “New Normal;” the way in which each of us lives in the new world we are creating.

Constant accelerating change is also a part of our new normal. When a new app is released or a new electronic gizmo is launched, we not only adopt them nearly instantaneously, we also grow tired of them almost as quickly. When a new smartphone is released it sells millions of units on its first day of sale. When a new app becomes popular, it may also sell millions of copies in a single day. It seems our technology-driven society has tapped into our ingrained lust for discovery and change and is now hyper-stimulating all of us into a frenzy of activity. Rather than being sated, our hunger for newness and change seems to grow sharper by the moment.

This then defines the opportunities and challenges that present themselves to organizations who wish to tap into this revolution. How do you hold true to any sort of consistent message, brand and value proposition in a world that rewards constant, relentless change over all else? Almost certainly, the answer lies in data and analytics.

Data analytics has been a key driver of organizational performance since the dawn of the computer age. The availability of information has allowed organizations to constantly improve their performance and to better address the needs of their audiences. As such, data and analytics have leveraged the human mind just as levers, pulleys and wheels enhanced the power of human muscles. The application of new insights and knowledge that is derived from data and analytics will be the basis of economic growth and power over the coming decades, and only those organizations that adapt to this fundamental change will likely survive the disruption that this change will necessarily entail.

EMBRACING THE CHAOS

In light of these thoughts, the theme of AIIM 2015, “Embrace the Chaos,” seems particularly apropos. We live in extremely chaotic times, where much of what we take for granted is being degraded by our lust for newness. Indeed, I now live by the axiom, “If you’re not uncomfortable with what you’re doing, you’re either not trying hard enough, or you’re already irrelevant.”

The challenge for business leaders is to stay in this zone of discomfort, embracing the chaos around you and still building value from what you know and what you do. Walking this tightrope means using business information and analytics to constantly question your existing beliefs, and bravely stepping out on the tightrope of change. If this doesn’t make you at least a little bit nervous, you’re not trying hard enough.

CHANGE MANAGEMENT: FROM CHAOS TO TRANSFORMATION

LAURIE FISCHER, MANAGING DIRECTOR, HURON CONSULTING GROUP

Change permeates and envelopes us, and is the one constant in our lives. Think of all the workplace changes in just the past few years related to how we create, use, share, retain and dispose of information. Our ever-increasing need to collaborate and communicate, to analyze and innovate, and to “be mobile” has led to sometimes massive change to existing technologies as well as new solutions that enable us to attain our objectives.

Since change is inevitable, then why is the lack of managing that change the number one reason technology projects fail? The oldest and strongest emotion in mankind is fear, with fear of the unknown topping the list. So perhaps it is fear of the unknown that is behind the failure to adopt, accept and enable change.

Often, change management efforts focus on process changes, and training employees on those revised processes required by the implementation of new technologies. There is so much more to change management, however, than a training plan and a communication protocol. Where change management is really needed is on the “people side” of change. What are some obvious signs of employee resistance to change?

- Decline in productivity as employees feel de-motivated
- Key employees get frustrated and quit
- Work-around’s (often very creative!) escalate
- A culture of failure grows and employees ask themselves “why bother?”
- Deterioration in morale and employees spend a lot of time sharing in the misery
- A mistrust of management and leadership due to a lack of transparency and availability
- Employees proactively try to sabotage the system

Let’s look at the other side of the coin now, where change is embraced and integrated. The impact to the bottom line can be significant. Adapting to change (and doing so quickly) in response to marketplace needs or technology innovation can result in a competitive advantage, increased market share and profits. Organizations that refuse to change get left behind.



Laurie Fischer,
Managing Director,
Huron Consulting Group

For over 20 years, Laurie Fischer, has helped design, develop and implement effective information governance programs for a wide variety of organizations. Laurie has combined her information management expertise and vision with exceptional solution delivery and leadership skills to help her clients implement practical yet innovative solutions in today’s complex and challenging legal, regulatory and technology environments. She has designed and implemented all aspects of information governance programs, including policies, procedures, global retention schedules, electronic records assessments and strategic plans, program gap analyses, audits and reviews.

See Laurie speak
Change Management: From Chaos to Transformation

March 19, 1:30 PM to 2:15 PM

Of course, not all change management efforts are the same. The magnitude of the change (type, scope, size, number of employees affected, etc.), the potential resistance, and a vision of what the change will look like are all significant factors in determining the complexity of a change management strategy. An initial impact analysis will help define the capacity for change. However, if there is one key critical success factor to all change management initiatives, it is the clear demonstration of leadership support. Is there a leadership team that is accountable for the success of the change? Do leaders invest their personal time and attention to following through on actions related to the change?

Come join me at AIIM where, straight from the trenches, I will share real life examples of successful change management efforts as well as epic failures. We'll investigate the winning formula for successful integration of change into the organization - whether it's a change in information management roles and responsibilities, process and procedures and / or technology. Incorporating key change management principles will increase the success of change management initiatives by applying a structured framework of methods, tools and processes, to manage the change from current to future state, and realize real ROI.

OIL & GAS: THE MOVE FROM DOCUMENTS TO DATA

NEALE STIDOLPH, HEAD OF INFORMATION MANAGEMENT, LOCKHEED MARTIN UK

People often seem to think oil & gas companies are leading-edge and have enough money to invest in whatever systems they like, and that they live in a World of 3D models, data and analytics. The real picture is often very different. Exploration and production companies, who search for and extract hydrocarbons, see information systems and information management as something necessary but not something that excites the interest of the board. Data is certainly much in evidence, but information overall is not treated as 'the new oil' by the industry. Much of the focus on data is within the geoscience discipline, from the creation of seismic surveys to reservoir modeling and interpretation. The techniques have changed a bit, but mostly we see increases in resolution, frequency and speed of analysis. This clearly improves the odds of making a discovery and reduces the financial risks of drilling.

Engineering is the domain where there are pockets of data and certainly plenty of systems and methods that could help, but it isn't working very well for many businesses. Most oil companies do not achieve data-centric engineering and do not practice engineering lifecycle management, though they may believe their engineering contractor does this for them. Records, drawings, specifications, datasheets and other documents are variously controlled, uncontrolled, lost, out of date, duplicated, rendered and generally not in an acceptable condition or one that can be used to advantage. The data is there, data which could provide for faster, less risky and cheaper engineering projects. It is not readily available in the right form, cannot always be trusted and spans incompatible systems often involving several firms in the oil supply chain, with inconsistent or missing metadata.

Value is being eroded or destroyed and opportunities are being missed. In most other sectors that would be game-over, and tragically in some cases we see fatal consequences. Why does it persist in oil? Because the industry has been profitable enough to be inefficient and just works around the problems.

So, what's the issue? Nothing stays the same and what worked in one era may not work in another. The current oil & gas business environment is very challenging. It is tough enough finding and exploiting reserves, be it oil sands, fracking, high-pressure / high-temperature, deep water and often unstable geopolitics. Add to that the problems of huge swings in oil price, fast-rising costs and falling production volumes in mature provinces and you have a perfect storm.



Neale Stidolph,
**Head of
Information
Management,
Lockheed
Martin UK**

Neale has thirty years' experience providing information services, twenty of which have been in the oil & gas sector. Over the past seven years he has specialized in information management. Neale now runs the Information Management practice at Lockheed Martin Information Systems and Global Solutions and is based in Aberdeen, UK. It is a personal mission to solve some long-standing organizational, performance and value issues in the information management world, with a major focus on the UK oil & gas exploration and production industry. Too much emphasis is often placed on technology so Neale advocates a more balanced approach.

See Neale speak
**What the Oil and Gas Industry
Can Tell You About Documents
and Data**

March 18, 5:00 PM to 5:45 PM

The sector is challenging with huge projects and lots of legacy information changing hands over the life of assets. The digital age is suffering from rising information chaos, scale of growth and pace of change. A documents and records approach is only partially working and does not support easy use of underlying data. Data is the key to analytics and better decision making. This will be the future as resources diminish, risks rise and returns fall.

1. Tackling legacy information

Oil feels like a modern industry but it is one that has existed through a time of great technological change. We have gone from drawings made with pen and paper, to primitive CAD systems, smarter systems with 3D capability and engineering data warehouses. Many firms are holding information spanning these technical generations, archives of paper, microfiche, scanned image files and a range of electronic files or tape media some of which were made by systems that no longer exist, so can't be easily opened or converted. Value still exists but you have to know where to look and how to do it. Legacy projects can take many years and be very labor intensive and that will not suit the board.

If you are in a firm that acquires an oil field from another firm you should expect a very large and diverse range of information and are unlikely to be given much guidance or structure. That presents a major risk. This first phase is about discovery, what do you have, in what forms and what are the areas of greatest value?

2. Mining data from documents

Once there is an appreciation of what documents or drawings to target it is time to get tactical and deploy appropriate techniques that will make them more useful. Common safety-critical documents include piping and instrumentation diagrams (P&IDs), isometrics, and line lists. If you are working with a scan you can use OCR, but it isn't easy to do well, you may need to have it re-drawn or at least manually checked by someone with appropriate engineering or document control skills. That takes time and money.

You will also need to validate if the drawing version control is correct as drawings are often marked up for changes but never re-mastered or 'as-built', sitting in backlogs that can last years. You will also need to look at current processes to make sure appropriate data capture exists for new drawings, otherwise your legacy stack will just increase. What we are looking to do is relate engineering objects, such as a pump with a tag number, to drawings and other documents. We would also then like to know what class of pump it is, details of its technical and physical features and have the ability to link all that to a maintenance plan and spare parts inventory. This will all support safety cases and ultimately the license to operate. Poor asset lifecycle management will lead to issues such as poor handover from projects to operations, where gaps in information will cause delays, extra costs and inefficiency. We must remove the problems that are leading to duplicated effort and costs.

3. Using data analytically

This is where the action is, where we get the real returns for all our efforts. Much of the labor of information management is about governance, or in other words building a stable foundation for our information. That is a tough and thankless task. Many fall short of even this level of maturity. It is not a popular line to pursue for the CIO, he won't be making friends. So, we answer it with analytics. Show the business the money to be saved, risks avoided and improved decision making. From the previous example of our pump, analytics can ingest all forms of information concerning this single item. We can use inspection reports (free text), maintenance systems (database), sensor readings (real-time data), images and more. What do we get? Historical analysis and future prediction. We could just replace that pump after a number of hours use as per manufacturer guidelines, but what we really want to do is know exactly how it is performing, how best to manage it and the most cost-effective yet safe way of proceeding. The benefit across an oil business may result in a few percent savings in operations and maintenance. Sounds small? Given that this is often the largest area of expenditure for the business the savings can be very large indeed. One day of lost production can cost millions of dollars. Skillful information management can play a leading role in improving production efficiency and delivering competitive advantage. It all hinges on digging into the data and being smart.

My AIIM 2015 presentation will cover the range of points made in this blog and provide some practical suggestions on solving them.

A CASE STUDY OF A ONE SIZE FITS ALL RIM SHAREPOINT

CHRISTINE PADILLA, DIRECTOR, ECM, SUNOVION PHARMACEUTICALS

Hello All - I'm excited to be speaking about our RIM/Sharepoint implementation in March. Let me give you a little taste of what Renee (RIM Director) and I will be presenting at the conference.

While I've been in the industry for over 15 years that last 5 years of working on Records Information Management (RIM) at Sunovion have been my first experience with this program. I say "program" because that is what RIM is -it never ends like a project - but continues on and on and reaches deep within a company - impacting every employee as trusted custodians and many departments such as IT and Legal.

Over the course of these past 5 years our program has had many stops and starts as we lost and gained executive sponsorship, changed strategic direction and evaluated technology options. But all along we have known that perfect couldn't get in the way of progress. We have used that approach to get our company two-thirds of the way to a complete implementation of the RIM lifecycle - classification, declaration, legal hold, expiration, disposition and finally deletion. Legal hold, while in the middle of the lifecycle, is our current and last focus - with the other pieces in place and/or fully tested just waiting to be implemented. We've made gotten this far on a small budget with limited resources. Both Renee (RIM Director) and I were a team of 1 when we started and we are each a team of 2 now - still small when it comes to supporting a company of over 800 employees, more than 500 collaboration sites and 25 years worth of content on file servers. We knew we had to leverage the technology we had - SharePoint - to the expertise we had in-house for RIM - to create a solution that would be accepted by the employees, meet the business requirements and be supportable by IT.

So maybe this strikes a chord with you - limited resources, small budget, lots of content to manage but potential to make a big impact on the organization. Let me know what questions you might have - See you in March.



Christine Padilla,
**Director, ECM,
Sunovion
Pharmaceuticals**

Christine has 20 years experience in Information Technology and working in the Pharma sector. In her current role at Sunovion she is responsible for strategy and governance of content management and leads the technical SharePoint team. She has worked in her field as both an employee and an independent consultant. For the last 5 years at Sunovion has partnered with the RIM function to design, develop and implement the Sharepoint RIM Solution. Christine has an MBA and is a member of NAPW, recently recognize by them as one of the 2014 Professional Woman of the Year

See Christine speak
Letting Go Of "Perfect": A Case Study of a One Size Fits All RIM SharePoint

March 19, 1:30 PM to 2:15 PM

YOUR DATA MUST BE CLEAN AT CAPTURE

DAN LUCARINI, CMO, IBML

What are the three biggest challenges you see your customers facing while trying to “Embrace the Chaos”?

1. Bad data for Big Data. Companies lack an information quality control process and continue to fill up drives and repositories and databases with “unpurified” data that is not useful for analytics.
2. Managing risk and compliance. In the U.S., the Affordable Health Care Act and the Dodd-Frank financial services legislation have increased paperwork and forced companies to comply with stricter privacy and reporting rules.
3. Paper won't go away. In a recent study from InfoTrends, 38% expect paper volumes to INCREASE over the next 24 months. Companies who fail to manage it intelligently and efficiently create more chaos.

What do you see as the three most important trends related to Information Management facing organizations over the next 18-24 months? What will be different in our industry two years from now?

1. The rise of analytics will increase the pressure to provide high quality, purified data from the capture process.
2. Digital documents will finally pass paper to comprise over 50% of captured documents. But most companies will still have separate processes for digital and paper capture.
3. Companies who fail to upgrade their legacy imaging systems to intelligent capture solutions will become less competitive with lower profits and at higher risk of non-compliance.

What are the three most important things attendees should know about your company?

1. We have a proven reputation as the document capture experts who can help you to create a purified data stream to vertical business applications, Big Data and ECM systems.
2. You can integrate paper scanning and digital document capture into one solution and eliminate the “capture silos”.
3. You can replace all of your old imaging systems with one secure and efficient solution that helps you comply with regulations and stay ahead of the competition.



Dan Lucarini,
CMO, ibml

Dan Lucarini is a long-time ECM software enthusiast. He became an AIIM Professional Member in 1994 when he launched Alchemy archive management software. He has held senior management positions at Kofax and OpenText and served on the AIIM Board of Directors from 2007-2009.

ibml is hosting a Roundtable Discussion
Learn How Your Capture Operations Measure Up

March 19, 1:30 PM to 2:15 PM

DOING BUSINESS IN THE CUSTOMER-DRIVEN ERA

DAVID CALDEIRA, SENIOR VICE PRESIDENT OF PRODUCT AND SOLUTIONS MARKETING, KOFAX

What are the three biggest challenges you see your customers facing while trying to “EMBRACE THE CHAOS”?

The biggest challenge that we at Kofax see our customers struggling with is the crucial need to increase their business agility to better serve rapidly changing customer demands. This has always been a problem for businesses, but with the advent of mobile-first customers the pace of change has accelerated the need for businesses to keep pace.

Closely related to the challenges to meet the demands of mobile-first customers are the challenges that our customers face to extend their back-end business processes beyond their front offices and corporate firewalls to directly engage their customers at the point at which information originates. The gaps between back office, front office and customer self-service processes must be closed to provide the services their clients demand.

Finally, we see our clients struggling to process the deluge of information that is flooding them. Clients are swamped with information, some of which is meaningful and some of which is noise. Keeping up with this fire hose of data is a challenge in itself that’s compounded by the challenge to act on the information while it is still relevant.

What do you see as the three most important trends related to Information Management facing organizations over the next 18-24 months? What will be different in our industry two years from now?

Trend 1: Customer-Driven Engagement

Customers today want to interact with businesses on their terms, any way and anytime they want... and expect immediate, high-quality service.

In order to survive, let alone succeed, in the customer-driven era, every company must become more nimble and responsive. With their always on, persistently connected smart devices, customers expect your organization to be there for them whenever they want, regardless of time, channel or geography. This is driving a digital business imperative, compelling organizations across all industries to digitize both their business and the manner in which they engage with customers.



David Caldeira, Senior Vice President of Product and Solutions Marketing, Kofax

David Caldeira helps drive Kofax’s strategy to deliver smart process applications for the business critical First Mile™ of customer interactions. Prior to Kofax he spent 13 years as a product executive in the ECM market at FileNet which was acquired by IBM in 2006. There he lead the delivery of FileNet P8 which unified content and business process management into a single platform and provided the foundation for the next generation of adaptive case management.

David is hosting a Roundtable Discussion Transform the Customer Experience with Mobile Engagement

March 18, 4:10 PM to 4:55 PM

Trend 2: Process Intelligence

Each end customer expects to be treated individually and no longer tolerates a standard, fixed process for doing business—and if confronted with that, they can very easily (usually at the swipe of a finger on their mobile device) switch to a competitor.

Given this dynamic environment, it's becoming increasingly important to have the tools to monitor and mine the information created, and provide the business with real-time dashboards that deliver the ability to react to changing conditions. The real-time nature of this requirement is essential as it provides the context for quality decision making. A critical need here is for business users to design and implement this analysis capability, and not be burdened by the time and cost that comes with traditional business intelligence infrastructures.

Trend 3: Smart Process Applications

Traditional packaged applications simply don't meet the expectations of today's customers and of your own employees.

The goal of smart process applications (SPAs) is to deliver much more intelligence, dynamically and in real time, into the system to allow users to adapt to the unique information and events that are happening on every transaction. Multiple approaches to analyzing information (structured, unstructured, historical and predictive as examples) and providing input and guidance to decisions are critical.

Knowledge workers are essential to delivering business outcomes that will delight the end customer. SPAs must empower those knowledge workers with the right information, presented in context of the unique customer situation, so they can perform the right work necessary to get the job done. This means very flexible work management concepts, with a high degree of collaboration and dynamic processing, versus traditional, predictable workflows.

SPAs easily fill gaps between the systems of engagement and the systems of record. They support all of the organization's channels of interaction and allow their customers to traverse these channels, including a mobile-first approach, while leveraging the information and transaction capabilities of the monolithic back-office systems that are difficult to change.

What will be different in two years?

Our crystal ball is seeing pretty much the same view as yours. Disruptive changes to the nature of people's work and to the channels through which they perform that work.

Two Gartner predictions support this view:

- By 2017, US mobile commerce revenue will comprise 50% of US digital commerce revenue.
- By 2018 digital business requires 59% less business process workers and 500% more key digital business jobs compared to traditional models.

Work isn't going away, but with the automation of the mundane it's nature will qualitatively change. Most workers will directly engage their clients - through the client's preferred channels - and our systems must change to support those engagements.

What are the three most important things attendees should know about your company?

Kofax is much more than a capture company.

1. Kofax is a leading provider of software to simplify and transform the First Mile™ of customer engagement.
2. Kofax TotalAgility, our award-winning process automation platform, has been recognized by leading analyst firms including Gartner and Forrester.
3. More than 20,000 customers, including the vast majority of the Global Fortune 100, use enterprise-ready software from Kofax to help automate and streamline their business processes for competitive advantage and growth.

EXTRACTING DATA FROM UNSTRUCTURED CONTENT

MARK WERNER, SR. VP OF PRODUCT MANAGEMENT AND R&D, AXIS TECHNICAL GROUP

What are the three biggest challenges you see your customers facing while trying to “EMBRACE THE CHAOS”?

Unstructured data denotes to information that either does not have a well-defined or organized data model. Unstructured information is characteristically text-heavy, but may contain data such as amounts, percentage’s, dates, numbers, and facts as well, for example: contracts terms, loan amounts and terms, correspondences, proposals, legal descriptions, vesting information, etc. Some experts estimate that up to 80 percent of the data in any organization is unstructured. Moreover, the amount of this data in enterprises is growing substantially, often many times faster than structured databases are growing.

In many organizations, the unstructured data includes information that could assist them making better decisions and in many cases it is critical to the business process. Just imagine how much content has been created just in the mortgage industry, for every property there are literally dozens of pages describing each location. Unfortunately, it is often very difficult to analyze and extract this unstructured data as it is typically highly variable in nature.

This challenge for document management solutions has created a market for data entry shops to analyze, classify, index and store this information into more structured database driven DMS solutions. With offshoring offering reasonable price-effective solutions, many companies have settled as this to be the only practical solution. However, is this the most affordable, scalable, secure and flexible option?

So, we see our customers faced with these three challenges:

- How do we extract data from our unstructured content
- How can we analyze this data
- Once we have the data, how are we going to store and search it? In some cases our clients have tens of millions of documents to organize. In one case Billions!

Some forward-thinking organizations have turned to the few software solutions available specifically designed to search unstructured data and extract relevant content, but how much success have they seen and where are the big wins?



Mark Werner, Sr.
VP of Product Management and R&D, Axis Technical Group

Mark Werner has close to 25 years of executive leadership experience in the real estate information and technology industries. Mark is somewhat of a real estate technology icon in that he designed, developed, and maintained the largest public land records imaging and title plant system in the industry. He architected and led the development of the world’s largest real property document image database and delivery system consisting of over 5.5 billion document images covering over 85 percent of the U.S. population.

Mark is hosting a Roundtable Discussion **Best Practices for Processing Unstructured Content**

March 19, 2:20 PM to 3:05 PM

During AIIM 2015, the Axis Technical Group will facilitate a discussion around the challenges and invite our guests to share their experiences addressing and solving this critical topic in regards to information management.

What do you see as the three most important trends related to Information Management facing organizations over the next 18-24 months? What will be different in our industry two years from now?

1. Mobile access to content. It won't be optional, it'll be mandatory.
2. The Cloud still has a way to go but it's moving in the right direction. Information security will be a huge part of the challenging, trusting your host to secure corporate information.
3. How companies control social. Everyone wants it, nobody knows how to govern it.

Two years from now the industry will know Axis as the "Unstructured Capture Company"

What are the three most important things attendees should know about your company?

Axis Technical Group is a trusted business IT advisor to leading companies in the mortgage, title, healthcare, oil and gas, and financial services industries, and provides the industry leading Axis AI solution for advanced data extraction. The global Axis team provides the sophisticated skills and resources of a global consulting firm with a personal, solution oriented approach.

Axis was founded in 2002 to fulfill a need in the industry which was not being met. While similar firms operate from a "one size fits all" attitude, our main focus is, and has always been, tailoring business and IT solutions to the specific goals and needs of each client we engage. It's not just about the technology - it's what it can do for your business.

For the past 12 years, Axis has a track record of success by building and implementing IT and business strategies for companies of all sizes. This success is achieved either by utilizing our own technology product offerings or by building custom solutions specifically tailored to the client's needs and desires. From strategy to design, development, implementation and management, Axis' team of business and IT professionals has the right solution for your business.

THE KEY TO DIGITAL TRANSFORMATION IS USER ADOPTION

ALAN MCMILLEN, CEO, REPSTOR

What are the three biggest challenges you see your customers facing while trying to “EMBRACE THE CHAOS”?

- 1. User Adoption of organizational content systems.** According to AIIM, the top reason for ECM deployment failures is user adoption, and top of the list of user adoption issues is persuading users to manage and share their information within an ECM system. We see this all the time with our customers – the information systems team has implemented a “shiny new ECM system” that unfortunately no one uses. ECM systems can be complex. If our customers are going to successfully “Embrace the Chaos” organizations will need to think about the User and put their greatest emphasis on encouraging users to adopt their ECM systems.
- 2. Consistent filing and saving of emails and content.** Managing emails as records has topped the AIIM survey charts for many years as the most important issue for records managers. People are particularly bad at filing important emails. The huge issue here is that a high proportion of litigation revolves around emails, as well as important contractual elements between customers, suppliers and, indeed, employees. However, given the already onerous task of working through the daily inbox workload, most employees will skip the important step of pulling off the important ones, and filing them in the SharePoint, ECM or RM system.
- 3. Finding intuitive tools that make managing content in multiple locations easy.** For many organizations, SharePoint is only one of the document repositories in use. File shares are still used extensively, especially for work-in-progress, and many organizations will have one or more legacy systems, particularly for formal records management. Providing a single point of search and access across these repositories is important for knowledge recall and decision support, and will also encourage appropriate filing behavior if each system is easily and consistently available.



Alan McMillen,
CEO, Repstor

Alan McMillen has over 25 years’ experience in the I.T. industry. He has been active in the Enterprise Content Management market since the 90’s when he was a co-founder of Amacis, an email management specialist who are now part of Oracle. He then moved to Meridio where he spearheaded their US market entry.

Alan is hosting a Roundtable Discussion
The Best Way to Manage Your Content - Outlook!

March 18, 5:00 PM to 5:45 PM

What do you see as the three most important trends related to Information Management facing organizations over the next 18-24 months? What will be different in our industry two years from now?

1. There will be an uptake in Office 365 for all sizes of organizations, commoditizing storage of information and how organizations manage information. Previously smaller and medium organizations couldn't afford to move to the Microsoft platform for full ECM but now there is a large incentive for them to do so, right now they aren't quite sure how to take advantage of this but this will develop over time.
2. Managing information in multiple systems will present a challenge for organizations. With over a quarter of companies having 4 or more types of repository, organizations will be faced with managing content in legacy repositories and avoiding big bang migration. There will be a demand for tools that link up multiple internal systems and present both the old and new systems with the same consistent interface and functionality.
3. User adoption will continue to be key. Given that budgets continue to be restricted organizations will seek to maximize their investment in current systems by selecting tools that are easy to use for the end user and help them to better manage their information, minimizing change management costs.

What are the three most important things attendees should know about your company?

1. Repstor is in business to inspire enterprise ECM adoption. Repstor provides products for managing content easily within document management systems that users will adopt by making them intuitive and familiar.
2. Repstor products make it easy for people to file, save and access content regardless of the content system the information is stored in. Multiple systems can be accessed in parallel.
3. The latest addition to our product line, Repstor custodian enables your standard SharePoint/Office 365 document management system for case and matter management. All of the key common Case and Matter Management activities are completed in the familiar Outlook user interface.

HOW A DOCUMENT VIEWING COMPANY EMBRACES THE CHAOS

SIMON WIECZNER, CEO, SNOWBOUND SOFTWARE

What are the three biggest challenges you see your customers facing while trying to “EMBRACE THE CHAOS”?

1. One of the biggest challenges Snowbound Software sees right now for our customers is implementing new ECM systems for the enterprise without fully knowing the complete needs of all the users. People are often very creative and find ways to make their applications do things that were never initially intended. When embarking on a replacement system, it can be very difficult to determine what people are doing and how they are actually going to use it. There is a big risk that you are creating a solution that doesn't fit the needs of the current users.
2. In large organizations, hardware resources can differ widely—many can be legacy systems that will not handle newer technology. The risk here is that you design and implement a system depending on the latest technologies of 64 bit processors and operating systems with plenty of high speed memory and then discover some important subset of your users have obsolete computing technology that cannot be easily upgraded because of legacy software or budget restrictions.
3. As an HTML document viewer vendor, Snowbound deals with hundreds of different document formats on a daily basis. One thing we are reminded of constantly is that not all documents are created equally, even if they share a format extension. Similarly, when introducing an ECM system, one of our biggest challenges is needing to not only handle the popular document formats but also be able to handle documents from across the globe.

What do you see as the three most important trends related to Information Management facing organizations over the next 18-24 months? What will be different in our industry two years from now?

Security, cloud based applications and storage, greater consolidation of software products. We expect that security will consume a huge amount of effort and resources over the next two years. Where cloud-based applications can help security, they will see much greater success and penetration. Organizations will try to get applications off the desktop in order to better control application access, the version levels will be updated to utilize the latest security improvements, and document storage will be kept on the server as much as possible (sending only select portions of documents to the client).



Simon Wieczner,
CEO, Snowbound
Software

Simon Wieczner has over 25 years of software industry experience. His management and marketing experience spans a number of companies including First Data, Computervision, ADP, BSO/Tasking, Numonics, Ergo Computing, and AccuSoft as well as his own ventures. He has extensive experience developing start-ups into profitable, growing enterprises. Educational credentials include a BS in Management and an MBA in Marketing from MIT.

Snowbound Software is hosting a Roundtable Discussion **Solving Your Document Viewing & Conversion Chaos**

March 18, 4:10 PM to 4:55 PM

What are the three most important things attendees should know about your company?

1. Snowbound is one of the very few remaining independent document viewing and conversion companies in the business. Our goal is to please every customer, not just our owners. Our greatest success has been solving specific customer problems through our engineering expertise. We sell to the most demanding companies in the world (9 of 10 US banks, 7 of 10 international banks, insurance, shipping, etc).
2. Almost all the technology we sell is created in-house by our engineers. Because we are the only ones with intimate knowledge of our products, we can offer fast responses to document viewing challenges—both in terms of rendering documents and in converting or viewing them.
3. We are the only company that offers specific products for both Windows and Java - thereby supporting the greatest range of computer systems.

SECURITY IN A WORLD OF ANYWHERE, ANYTIME ACCESS

MIKE MAXEY, DIRECTOR OF CONTENT SOLUTIONS, AIRWATCH BY VMWARE

What are the three biggest challenges you see your customers facing while trying to “EMBRACE THE CHAOS”?

Access, Enablement and Control.

The reality people want to work anywhere, anytime, as life allows and end users now dictate which tools they are going to use to manage their business life. With the explosion of mobile, dozens of tools have been created for workers to access productivity tools on multiple devices, with the functionality they need and usability that is simple. Unfortunately for IT leaders, this paradigm has opened many issues with tough planning dynamics. The possibility for data breaches and sensitive data leakage has grown exponentially with many consumer grade tools being used in the enterprise. Without an enterprise-grade alternative with end user centric features, IT leadership is often forced to be the “bad guy,” blocking services to access files, videos or social networks that are becoming critical to workers who use these services to manage their personal and business lives. Organizations need a partner who can help bring these tools to business, while satisfying security concerns in a world where we see almost monthly high-profile data breaches.

What do you see as the three most important trends related to Information Management facing organizations over the next 18-24 months? What will be different in our industry two years from now?

First, with more and more high profile data breaches, organizations are adding up the costs of their peers and realizing just how much is at risk in an unencrypted, poorly controlled and non-managed information sharing environment. Second, as more workers become familiar with collaboration tools, work between multiple affiliated organizations around the globe will need to be facilitated with enterprise-grade tools. Lastly, this is being driven by adoption of tools in business that younger generations have been using to manage their personal lives for several years. These workers continue to take on broader roles in organizations, including leadership positions and the work-style they are implementing requires flexibility in information management policies and access privileges that work for the user, not against them.



Mike Maxey,
Director of Content
Solutions, AirWatch
by VMware

Michael Maxey is the director of content solutions at AirWatch by VMware, the leading enterprise mobility management (EMM) provider. He brings nine years of technology and software industry knowledge to AirWatch. Most recently, he worked for more than three years as a senior retail account executive to Fortune 500 clients at Accruent, a business process automation software company, where he initiated business development of target accounts. At Accruent, he earned President's Club status two years in a row.

Two years from now, I see automation becoming much more widespread, intelligent workflow expanding across multiple systems and organizations being tied into these processes. What will really change the game is when machine learning experts begin integrating some of those technologies into workflow and the process improves itself over multiple cycles, learning from the data gathered in real time and historically.

What are the three most important things attendees should know about your company?

Leaders need a partner for technology solutions that empower them to be flexible to meet their employee's needs. Knowledge workers are very adept to identifying tools, applications and processes to do their jobs most effectively. Often, this means IT managers are forced to support and manage multiple systems and solutions, which creates silos and complexity. AirWatch Content Locker and the entire AirWatch productivity suite, takes an open integration approach that solves this friction and brings everyone together regardless of storage strategy to collaborate, communicate and share on a single secure platform that solves IT concerns and gives workers freedom. In summary, our company gives three important things: IT piece of mind, user freedom, and application openness.

THE YEAR CIO MEANS “CAREER ISN’T OVER”

PHIL ROBINSON, SVP OF BUSINESS DEVELOPMENT, ZIA CONSULTING

What are the three biggest challenges you see your customers facing while trying to “EMBRACE THE CHAOS”?

The three biggest challenges we’ve seen our customers face here at Zia are 1.) Garnering ECM user adoption (vs. “ECM avoidance”), 2.) Addressing the compliance and security needs of the organization versus the wants of users, and 3.) Avoiding the notion that CIO means “Career is Over”.

ECM Avoidance and IT vs. Users: The legacy of ECM systems is one of complexity, with challenging user interfaces, multiple logins, and more—which is why for most organizations, email applications and shared drives are still the dominant form of “content management”. It’s also why many ECM technologies are best known as “shelfware”. We believe that when you offer solutions that “work the way you do, using the tools you use today,” users aren’t forced to embrace alternatives that don’t fit Enterprise IT strategy. Solutions that leverage tools like Office, Email, and SharePoint Integration and Cloud Sync deliver content management systems that work—providing the ease of use and familiarity users want, with the security and compliance companies need.

CIO = Career Isn’t Over. If CIOs can solve the ECM avoidance issue—maintaining employee usage of tools they prefer to use like email and SharePoint—while addressing security concerns around tools like Dropbox and solving Governance with simplified Records Management processes, they will have taken a major step in ensuring they still have a job in 2016. Once that’s done, the CIO can take the next step towards the boardroom by delivering technology as a competitive advantage, truly impacting the strategic direction of the enterprise. Thus, the title of CIO can actually mean “Career Isn’t Over”.

What do you see as the three most important trends related to Information Management facing organizations over the next 18-24 months? What will be different in our industry two years from now?

We believe the three most important trends related to Information Management over the next 18 - 24 months are 1.) Solving SharePoint, 2.) Solving document security, and 3.) Solving information governance/records management issues.



Phil Robinson,
SVP of Business
Development, Zia
Consulting

Zia Consulting is the leading provider of Alfresco Enterprise Content Management (ECM) and Ephesoft Intelligent Document Capture (IDC) Solutions for the public and private sector.

Zia Consulting is hosting a Roundtable Discussion
How CIO can now mean “Career Isn’t Over

March 19, 2.20 PM to 3.05 PM

Solving SharePoint: Across both the public and private sector, companies have made an investment in SharePoint and it is clear that it isn't going to simply disappear from their daily operations. Instead of looking to replace SharePoint, executives often want to implement control and compliance around it—essentially implementing a co-existence strategy. Through our partnership with SeeUnity, we'll often integrate existing SharePoint instances with a more powerful content hub on the backend such as Alfresco, so that users can continue to collaborate in the way they are accustomed to while still addressing the company's true document and records management needs.

Solving Document Security: Often what keeps a CIO up at night are concerns about appearing on the front-page of the newspaper due to a leak of corporate data/ documents. Fortunately, there are secure collaboration solutions available that address this issue for both internal documents as well as those going outside the organization. Through a strategic partnership with Covertix, Zia's Universal Document Security (UDS) solutions deliver secure collaboration whether it's via email, Alfresco Cloud, or even consumer sharing technologies such as Dropbox or Box.net. These solutions enable internal and external parties to share confidential files with monitoring, auditing and control--significantly reducing overall risk.

Solving Information Governance/Records Management: The legacy of Records Management systems is one where RM solutions have traditionally been designed for dedicated compliance offers, rather than content creators, and deployed in a standalone environment, disconnected from collaboration and ECM systems. This duplication of effort, moving documents from ECM to RM systems and back again, adds tremendous cost and complexity to the information governance effort within the Enterprise, and makes it challenging for Users to find and use records when they need them. To combat this issue, we provide Easy Records Management (Easy RM) Solutions where "everyone's a records manager, and nobody knows it" - connecting those who are creating content with the compliance process. Easy RM incorporates the tools you use on a daily basis, reducing barriers to implementation and adoption.

What are the three most important things attendees should know about your company?

The three most important things to know about our company in 2015 are 1.) If you are a CIO, we can help save your career, 2.) We are content people who solve your business needs surrounding the management of your business critical content, and 3.) We work with you.

CIO = Career Isn't Over: Traditionally, the primary role of the CIO is to secure and govern information, while also make technology investments that provide cost savings for the company. The CIO is known for putting their focus on reducing costs instead of adding new value, and has been criticized widely since 2008 as having little knowledge of what it actually means to be a CEO or sit on a board. However, Zia would like to offer 5 reasons you still need a CIO (and how we can help save their career)

1.) To solve ECM avoidance once for all, 2.) To solve SharePoint, 3.) To solve the DropBox problem, 4.) To solve Information Governance, and 5.) Once 1-4 are completed, deliver true business value with technology as a competitive advantage.

Content People: Zia understands the importance of content to your success—with a focus on where your content comes from and, more importantly, where you need it to be. We recognize that these requirements may be unique to your industry, which is why we have established Zia Public Sector Solutions, Zia Solutions for Financial Services, and other vertical-focused practice groups. Additionally, we appreciate that content workflows differ by division or department, which is why we've developed solutions for Corporate Finance, Corporate Legal, Human Resources, and other branches of your organization. To address the critical role that content plays in the strategic direction of your organization, Zia's "Content Consultancy" Services deliver an end-to-end assessment of your existing content processes and a roadmap for how document automation and other enhancements can provide a measurable impact on your organization's success.

Working with You: At Zia, we are committed to providing measurable business results on time and within budget. We deliver solutions powered by industry-leading partners like Alfresco for ECM and Ephesoft for Intelligent Document Capture to give us the benefits of an open platform and the most modern technology in the content world. As a guiding principle, we will always work with you, in a true partnership, to provide a solution that is yours to own and manage in the future.

THE DARK AND DIRTY OF BIG DATA

ROGER BEHARRY LALL, DIRECTOR OF MARKET STRATEGY & RESEARCH, ADLIB

What are the three biggest challenges you see your customers facing while trying to “EMBRACE THE CHAOS”?

1. The collection, organization and publishing of all of the required information in order to meet compliance demands – from internal corporate mandates to broad-based industry standards like FDA, SOX and more.
2. The inability to access content to support business growth. Organizations are looking to improve collaboration across the enterprise, which means better access to content. One way to do this is to implement effective archiving solutions so that content is always accessible and available for the long term. Leveraging industry standards like PDF/A will enable teams across the organization to access content at any time from anywhere.
3. The inability to understand and access information. While organizations have done a good job of moving from paper to electronic format, and standardizing with formats like PDF for digitally born content, they now face an additional challenge around digesting this information: ensuring that text and images are readable; that information can be accessed automatically without manual reformatting; easily extracting insight from documents; sorting, de-duplicating, attributing and deleting files. These are all critical, but often ignored in favor of more advanced ‘Big Data’ initiatives.

What do you see as the three most important trends related to Information Management facing organizations over the next 18-24 months? What will be different in our industry two years from now?

1. The shift in focus from “Big Data” projects to more specific projects like addressing “Dark Data” and “Dirty Data”, focusing on more effective/efficient content analytics endeavors.
2. The recognition that content management solutions should be “enterprise”, not departmental solutions.
3. With more and more importance being placed on compliance, the PDF and PDF/A standards will become more and more prevalent in solving this for organizations. Moreover though, organizations will actively look at solutions to optimize those PDFs making them more accessible, standardized, and automated.



Roger Beharry Lall, **Director of Market Strategy & Research, Adlib**

Roger Beharry Lall is a strategic marketing expert in the B2B technology arena and a certified ECM Practitioner. With over 15 years of experience, he is an insightful researcher and frequent commentator. He regularly addresses the overlap between technology and business, focusing on such topics as business process reengineering through IT, the impact and practical application of mobile and social technologies, enterprise software integration, and content creation/management.

Roger is hosting a Roundtable Discussion **Reduce Risk & Extract Insight with PDF Technology**

March 19, 11:38 AM to 12:23 PM

We believe that in two years, information chaos will have reached an all time high unless organizations act now to gain control of their content. This situation will put many of them at great risk. Think compliance, archiving, the draining of resources. There is a way to get ahead of the curve and proactively ensure content is secure so that in two years they aren't playing catch up and having to turn their attention away from core business projects to deal with document problems.

What are the three most important things attendees should know about your company?

1. That PDF is more than just a standard - it can be applied to organizations in a broad range of industries to solve complex business problems.
2. That our Advanced Rendering technology centralizes, automates and enhances critical business processes like compliance and archiving – reducing manual dependencies to reduce information risk.
3. That customers and partners are using Advanced Rendering technology not only for content output and archiving, but also to optimize the capture and ingestion of incoming or digitally born information.

HOW DO YOU ENGAGE THE CUSTOMER ON THEIR TERMS?

BRUCE ORCUTT, VP OF PRODUCT MARKETING AND MANAGEMENT, ABBYY

What are the three biggest challenges you see your customers facing while trying to “EMBRACE THE CHAOS”?

Here are the key challenges we hear from our customers:

1. Meeting Customer Expectations: How customers engage your business or your agency is being defined by their current expectations for what they can achieve with their mobile device. Customers have a “now” or “immediate” expectation that your processes and services will be exposed to them in a direct and meaningful way. As companies “Embrace the Chaos” they need strategies that can engage the customer on their terms via their preferred channel.
2. Self-Service: With customers being even more empowered to engage with you via any channel they demand the visibility and transparency required to manage their own transaction end to end. They are willing participants, but now your services and processes have to be automated and presented in a meaningful way that will enable your customers to achieve their goals.
3. Real-Time: Gone are the days where someone submits something and patiently waits days or weeks for a reply, status or update. Business and customer engagement is a real-time experience. That means all of your services and processes need to be optimized to give context and response to your customers in real-time. I submit my ID and I receive a quote, I provide my repair order and my claim is paid, I provide my utility bill and my account is open.

What do you see as the three most important trends related to Information Management facing organizations over the next 18-24 months? What will be different in our industry two years from now?

1. Understanding Context: Processes and procedures are driven by documents and enterprises and agencies are being overwhelmed with the amount of content provided to them by customers, partners, and suppliers. Organizations that are able to understand this content and extract meaningful context will have competitive advantage as they are able to accelerate transactions, understand more about their customers, ensure better compliance, and generate additional revenue opportunities. It is no longer about finding and reading an account number. The future opportunity is about understanding all the context on the document and delivering meaningful data to the process and decision engines for better customer outcomes.



Bruce Orcutt, VP of Product Marketing and Management, ABBYY

Bruce Orcutt is a veteran Product Marketing and Product Management professional with over 20 years' experience in Enterprise Software. Bruce has successfully developed and launched global enterprise software products, platforms and solutions for Financial Services, Insurance, Transportation, Manufacturing, and Government with an emphasis on accelerating transactions, improving competitive advantage and reducing costs.

Bruce is hosting a Roundtable Discussion **Exceeding Customer Expectations**

March 18, 5:00 PM to 5:45 PM

2. Multi-Channel: Engaging customers, agents and brokers via mobile, web, email, fax, scanner, multi-function printer, or embedded camera is an important industry trend. Not only is the channel of engagement important, but many times customers will start in one channel and finish in a second. This is why advanced platforms that support all primary engagement channels will be very important going forward.
3. Data: The ability for enterprises to capture more data from customer provided documents will drive new use cases, opportunities for automation and significantly reduce the costs of transactions.

What are the three most important things attendees should know about your company?

First, ABBYY has the most advanced and sophisticated text recognition products in the market. This technology is delivered via desktop, server, hosted service, and cloud based solutions in addition to developer SDKs.

In addition, ABBYY technology does not stop at text recognition, we also offer a robust platform for data extraction, validation and delivery enabling companies the ability to capture more information from every customer interaction via any channel.

Lastly, ABBYY text analytics and discovery technologies are improving the categorization and context delivery of content while providing additional insights related to compliance, e-Discovery and information governance.

REENGINEER YOUR CONTENT PROCESS - OR FAIL

DAVE WHITE, CTO, QUARK SOFTWARE

What are the three biggest challenges you see your customers facing while trying to “EMBRACE THE CHAOS”?

Enterprises in industries such as financial services and manufacturing are evaluating their multi-channel customer communications requirements and their related internal publishing processes and technology. Companies know they must change, but truly struggle with:

1. Prioritizing their business¹'s urgent demand to deliver customer communications in the richest experiences across the broadest selection of devices and formats at the lowest cost with the more complex and initially costly need to re-engineer business processes to accomplish those communication goals efficiently now and for the future.
2. Identifying the minimal number of vendors and solutions through all the marketing noise that can truly address their current needs as well as offer flexibility to address the very rapidly changing content technology landscape.
3. Identifying internally or hiring the right personnel or consultants who can lead a team responsible for the customer communications department through a successful transformation because the new world requires much broader and deeper technology understanding than most publishing teams have traditionally been required to have.

What do you see as the three most important trends related to Information Management facing organizations over the next 18-24 months? What will be different in our industry two years from now?

1. Brand will become even more critical to organizations as they differentiate customer experience. Brand and content will be even more inseparable. One of Information Management¹'s driving purposes today is to efficiently support digital content delivery where the dramatic fragmentation of consumption devices continues to increase. Businesses are often selecting the lowest cost but broadest reach systems, but this often equates to content delivery with the lowest functionality and business control as is seen with many responsive design implementations. We¹'re currently in a cycle that is led by breadth at the cost of richness, but we are seeing signs that businesses are identifying that they need more control and flexibility related to brand in terms of styling, design, layout, and interactivity in order to deliver an optimized customer experience on every device and media type.



Dave White,
CTO, Quark
Software

Dave White has two decades of experience in the enterprise content management and publishing software industries. He has helped to define XML standards, shaped product and business development strategies, and shared his extensive knowledge of science and technology with diverse groups at a variety of conferences.

Dave is hosting a Roundtable Discussion **Drive Multi-Channel Publishing with Smart Content**

March 18, 3:20 PM to 4:05 PM

2. Many companies are struggling with the need for content and document management that actually understands content not just files, file associated metadata, and file driven workflows. Content management needs to become more comprehensive and include deep connection and real-time integration to the authoring, re-use, design, and multi-channel publishing processes. Too many enterprise content management implementations have stopped at supporting centralized file stores with workflow or have just become systems of record.
3. Capturing knowledge with semantic richness and granular metadata directly from subject matter experts such as financial analysts, product managers, and technical staff in a form that can be reused, repurposed, and automatically published is critical to remove the manual labor and time-intensive publishing processes of old. Supporting that authoring process across a breath of devices and with content specific capabilities such as direct integration of data components including tables and charts versus the traditional copy/recreate/redesign steps will shorten time to market and deliver better content consumption experiences.

What are the three most important things attendees should know about your company?

We have a deep understanding and extensive global experience in helping large organizations change from traditional publishing processes to dynamic publishing solutions that reduce time and costs by up to 85%. Organizations such as Standard and Poor's, National Bank of Canada, HSBC, UNICEF, IBM, Louis Vuitton and many more rely on our solutions daily to continue to transform their businesses.

Secondly, Quark is one of the only vendors in the market with an end-to-end solution from structured content authoring (using MS Word or any modern Web browser), review and approvals and content management through to multi-channel output for print, PDF, Web, eBooks, and interactive mobile apps. Our technology is commonly deployed alongside leading enterprise content management platforms such as FileNet and Documentum.

Lastly, dynamic publishing covers a wide array of areas, so whether you are looking to automate multi-channel publishing, better manage compliance documents or standard operating procedures, deliver interactive sales materials securely to a distributed sales team, create compelling interactive apps, or take government regulatory processes online, dynamic publishing is widely applicable and Quark has a range of solutions to meet your needs.

DOCUMENT SOLUTIONS USING THE SOFTWARE THAT IS ALREADY THERE

NOEL WILLIAMS, MANAGING DIRECTOR, MACROVIEW DOCUMENT SOLUTIONS

What are the three biggest challenges you see your customers facing while trying to “EMBRACE THE CHAOS”?

1. Use SharePoint behind the scenes, but allow users to continue working in familiar rich-client applications, particularly Microsoft Office
2. Gain economies of scale via global deployment, but ensure adoption by accommodating local requirements and language
3. Gathering meaningful usage metrics, to enable effective refinement based on actual usage patterns

What do you see as the three most important trends related to Information Management facing organizations over the next 18-24 months? What will be different in our industry two years from now?

1. The current plethora of Cloud offerings will rationalize down to a few big players
2. Globalization - an unstoppable trend that has major impacts on design and deployment of Information Management solutions
3. Constant driving down of operational costs - accomplish more with fewer people and less cost

What are the three most important things attendees should know about your company?

1. MacroView is about document solutions using the software that business prefers - Microsoft Office and SharePoint
2. Our solutions are designed to cope with volume and to be extensible / customizable to handle sophisticated requirements in the areas of document generation, document management and email management
3. The MacroView customer base extends worldwide, across diverse industry sectors including financial services, legal, engineering / construction, energy and government.



Noel Williams,
Managing Director,
Macroview Document Solutions

Noel Williams is the co-founder of MacroView, a vendor that for over 20 years been assisting organizations with their systems for document generation and management. MacroView specializes in document solutions based on Microsoft Office and Microsoft SharePoint, because these are the software platforms that Business prefers.

Noel is hosting a Roundtable Discussion
Document Solutions That Let Your Organization Grow

March 18, 3:20 PM to 4:05 PM

DEALING WITH THE DOUBLE-EDGE SWORD OF SECURITY & ACCESS

GRAHAM GILLEN, VICE PRESIDENT, SEARCH TECHNOLOGIES.COM

What are the three biggest challenges you see your customers facing while trying to “EMBRACE THE CHAOS”?

We see three challenges related to a common theme - recruiting talent to deal with and understand:

1. How do you deal with data security issues and prepare for cyberattacks?
2. How do you best leverage analytics and machine learning for automated business insight?
3. What are the best technologies and architectures for information management to ensure performance for increasingly demanding applications and users?

What do you see as the three most important trends related to Information Management facing organizations over the next 18-24 months? What will be different in our industry two years from now?

Here are some of our thoughts on the most important trends and what will be different in the industry two years from now.

1. Re-platforming to the cloud, and a standardization (and dumbing down) of the functionality available to information workers. The move to the Cloud is primarily cost-driven - not something that information workers have asked for.
2. Heightened concerns about information security (as found in the recent AIIM survey), exacerbated by high profile hacking news stories.
3. Proliferation of devices and platforms. More information, living in more places, and accessible in more ways.

In two years, successful enterprises will be those who correctly handle the double edged sword of information security and demand for ubiquitous accessibility.

What are the three most important things attendees should know about your company?

1. We are a small company, but probably the largest IT services company (170 people) focused exclusively on search and big data applications and technologies.
2. We have conducted over 600 successful projects in e-commerce, media & publishing, professional staffing, manufacturing, and government sector.
3. In 2015, we will be celebrating 10 years of steady growth and profitability.



Graham Gillen, Vice President, Search Technologies.com

Graham Gillen is an experienced marketing executive with a pragmatic perspective gained from over 20 years successfully implementing and marketing technology products and services for companies like VeriSign, webMethods, Netuitive and Honeywell. Graham has a BS in Engineering from the University of Virginia and an MS in Operations Research from Georgia Tech. He is Pragmatic Marketing Certified and has a Certificate in Marketing Management from UVA's Darden School of Business.

Search Technologies is hosting a Roundtable Discussion **Search for Big Data and Big Data for Search?**

March 18, 5 PM to 5:45 PM

WHAT'S IN YOUR ECM AND ERM SYSTEM?

BRIAN TUEMMLER, INFORMATION GOVERNANCE PROGRAM ARCHITECT, NUIX

How do you see the value that Information Governance can deliver to organizations?

A popular topic of discussion among the community of information professionals is what information governance (IG) can do for your records and information management program. IG tools that provide Information Transparency™ into your dark data can help you solve known problems and a bunch of new problems you didn't know you could fix. IG can also help you with enterprise content and records management (ECM or ECRM) systems in ways you probably didn't know were possible.

What has gone wrong with ECM along the way?

A recent blog from "Info Gov Guerrilla" Christian Walker, called "ECM Isn't Delivering," explores some of the shortcomings about ECM systems and implementations. Walker writes, "The stuff I want to see is still the exception; getting value out of information and solving business problems."

I have been an ECM consultant for a large portion of my career and I would mostly agree that ECM has not delivered these high-level benefits for many companies. It has succeeded, however, where the perceived benefits of greater control outweighed the expected costs of getting the content into a repository. The problem is that most of your content doesn't rise to this level.

As Chris wrote, "If an organization doesn't have the processes and will to get their information under control and leverage it, spending butt-loads on software will get them nowhere."

What does Nuix do to address this problem?

As it turns out, companies are figuring out interesting and innovative new solutions for this problem using Nuix. Nuix is not an ECM solution (nor are we consultants), but our customers are breathing more value into the ECRM space.

As a bit of background, Nuix will crawl through your shared drives, email systems, SharePoint sites, Notes databases, and other collections to build an inventory of what is there, so you can go explore and act upon what you find. Once you have this ability, you can suddenly use that information to grow—and measure—your success with ECM in some pretty clever ways.

There are two ways to get more content into an ECM:

- Increase the value of the data you migrate
- Lower the cost of migration.



Brian Tuemmler, Information Governance Program Architect, Nuix

Since 1991, Brian Tuemmler has advised clients in the areas of strategic and information planning projects with an emphasis on new technologies, classifying content, and identifying the benefits of process improvement and technology enhancement. As an Information Governance Program Architect, his responsibilities include helping Information Governance practitioners and sponsors set up and manage enterprise governance programs through methodology, training, tools and software.

Brian is hosting a Roundtable Discussion **Info Transparency for ECRM**

March 18, 3:20 PM to 4:05 PM

You can achieve both by eliminating from consideration any content that will not benefit from ECM. One manufacturing company is using Nuix to cull out non-records, noncontent, non-collaborative, un-secure, and non-capturable content before users ever get involved. The company is then tagging the remaining, relatively more valuable content with metadata to increase its usability in the new ECRM. In other words, don't assume you need to move everything to the ECRM; be selective, but maximize your value.

ECRM is not a successful technology until it has content. People want to know if they are maximizing their investments, and the evidence for that resides in the existing unstructured content. Nuix can help you establish value, prepare ECRM strategies, and assist with migration as part of a larger IG program.

Can you give me some examples?

A large financial institution has been using a records classification team to classify content when moving it into an ECRM. The company asked Nuix to help judge the success and accuracy of that classification. In short, the records team want to know what has been classified, what was misclassified, and if they are improving with training. In general, I would argue that the machine should do the classification and humans the validation, but this is an interesting way to judge the value of their effort.

A large construction manufacturer wanted to benchmark its progress in migrating content to the ECRM system. The migration team wants to generate a quarterly trend report to department heads. They know that migration occurs but want the business metrics to show how well. In other words, "We know what to do; we just don't know how well we are doing it!"

WELCOMING DIGITAL NATIVES WITHOUT CREATING DIGITAL MAYHEM

ANDREA CHIAPPE, DIRECTOR OF STRATEGIC INNOVATION, SYSTEMWARE

What are the three biggest challenges you see your customers facing while trying to “EMBRACE THE CHAOS”?

It’s difficult to limit to three, but here are the three biggest challenges I see:

First, Welcoming digital natives into business environments has created a catalyst for change in how technology enables work. On the front line, the struggle between IT and business departments are amplified by the introduction of these technologically evolved business users. They challenge the status quo in order to get their jobs done more quickly and efficiently.

This creates mayhem within businesses, as users are no longer conforming to the age-old ways of doing work that have been imposed on them by outdated procedures and solutions. Instead, they are quickly establishing new standards and intelligent processes that embrace the context of who they are, what they are doing, and where they are in respect to their work.

Often, this internal revolution leads to the development of standalone department solutions unregulated by existing IT processes. These unmonitored “shadow” or “stealth IT” solutions further compound the siloed nature of the technology landscape within companies, adding yet another dimension to the chaos.

Second, Although companies admit that they need to define a comprehensive ECM Strategy very few have. Company-wide ECM strategies with C-level stakeholder involvement are still lacking from small to large organizations alike. An obvious consequence with the increasing volume, velocity, and variety of content coupled with the lack of visibility is that the exposure to critical information risks also increases within their ECM landscape. We have all read about some of the more obvious problems in the last 18 months but these are the tip of the iceberg to what is actually happening. Simply understanding your current state ECM environment is fragmented and difficult:

- How many ECM systems are there?
- What departments, users, and systems do they serve?
- What information is stored in them?
- What platforms are used?
- What level of risk exists in keeping the platform (is it outdated, secure, etc.)?
- How does the ECM solution enable business goals, other systems, users, partners, and customers?
- How agile, flexible, and capable are the solutions in meeting ever-evolving business requirements?
- Does the solution meet the needs of your security, compliance, records management, and information governance policies?



**ANDREA CHIAPPE,
DIRECTOR OF
STRATEGIC
INNOVATION,
SYSTEMWARE**

Andrea Chiappe is the Director of Strategic Solutions & Innovation at Systemware. Architect of vertical functionality now represented within the Systemware Content Cloud platform, her current focus is on the application of emerging technologies and processes to meet the evolving challenges and complexities within the technical fabrics of ECM ecosystems. She is Systemware’s representative to the AIIM Executive Leadership Council and a member of IEEE. Andrea began her career in the R&D of artificial intelligence to solve next-generation business challenges facing financial and telecommunications organizations.

Only after understanding the gaps in current state ECM environment can a business establish a plan to move forward to the desired future state ECM environment.

And lastly, a lack of flexibility in aged or legacy ECM systems restricts companies from capitalizing on new uses and views of the information that they already manage. The lack of flexibility limits the opportunities to realize new value in their information or processes.

What do you see as the three most important trends related to Information Management facing organizations over the next 18-24 months? What will be different in our industry two years from now?

1. Flexible ECM frameworks will be Information Ecosystem aware, allowing organizations to establish compliant multi-organizational and dimensional digital business places to meet their content needs. Content derivatives will carry as much if not more value than the content itself in commoditizing content within these defined Information Ecosystems.
2. The evolution of the digital business will expose a paradigm shift in the approach to securing data.
3. Companies will continue to move from overly complex cumbersome ECM solutions to elegant and simple ECM solutions that further leverage consumer-oriented methodologies to engage employees in the digital workplace.

What are the three most important things attendees should know about your company?

1. Systemware¹'s Content Cloud, an intelligent enterprise content management network, provides a blended, or cross-platform hybrid deployment flexibility that optimizes the utilization of existing infrastructure, so corporations can leverage their investment in both the centralized and distributed platforms. Systemware¹'s seamless solution helps companies securely capture, analyze, secure, and enable content, all within the context of their business.
2. Systemware UX design is focused on easy and unobtrusive access to content and metadata with the goal of increasing productivity in the digital workplace rather than creating distractions. Systemware's holistic approach presents the most meaningful or relevant content in coordination with the context of the end user. Within the same UI, IT and Business administrators alike have the flexibility to quickly create content applications and app stores to effectively meet the tailored needs of their users and departments.
3. Systemware's secure services oriented architecture offers: 1) A well-documented API that exposes 100% of ECM capability, without restrictions; 2) Allows for the in place rationalization of existing ECM platforms; and 3) Interoperates seamlessly with existing systems

ADVANCED CAPTURE - THE FIRST STEP TO “EMBRACING THE CHAOS”?

FRANK TIEDT, CHIEF SALES OFFICER, I.R.I.S. AG

What are the three biggest challenges you see your customers facing while trying to “EMBRACE THE CHAOS”?

1. Identifying the right process to start with and to empower individuals to pursue solutions that will allow them to work more flexibly
2. Finding the right partner and technology with which not just one process can be dealt with but that will allow the company to move, one step after the other, towards structured and digital information management
3. Going for the investment that will, at some point, increase efficiency and thus decrease recurring costs

What do you see as the three most important trends related to Information Management facing organizations over the next 18-24 months? What will be different in our industry two years from now?

1. Mobility and the need for increasing accessibility and information sharing with broader audiences (internal, external)
2. Outsourcing of IT departments: Cloud services reduce costs and resources
3. Decreasing process cycle completion times to meet changing expectations.

What are the three most important things attendees should know about your company?

1. IRIS capture solutions are flexible, proven and field-tested in a variety of businesses and organizations
2. IRIS solutions are mobile, cloud ready and adaptable to various production environments
3. IRIS solutions are for production level deployment, built for high-volume processing.



FRANK TIEDT,
CHIEF SALES
OFFICER,
I.R.I.S. AG

Frank Tiedt is Chief Sales Officer at “I.R.I.S., a Canon Company. IRIS, is a leading provider of ‘Content to Process’ technologies: With their solutions for document classification and data extraction business processes are optimized – thanks to automated document and information management.

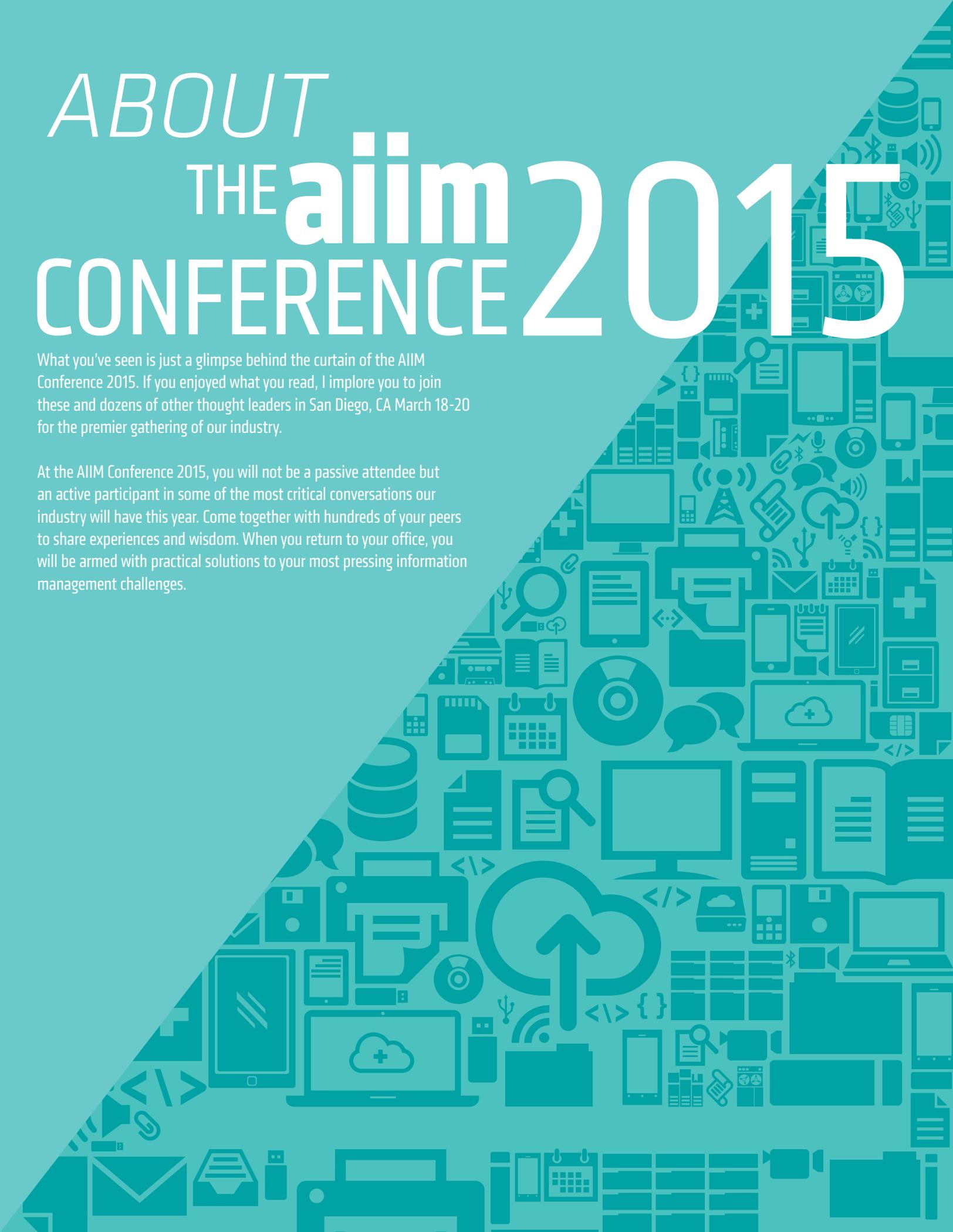
HERE'S A GLIMPSE AT SOME OF THE OTHER FORWARD-LEANING PRESENTATIONS YOU'LL SEE AT AIIM15.

- Managing Chaos: Digital Governance by Design - Lisa Welchman, Author
- Innovative Use of SharePoint 2013 for IKM in a 9000+ Person Organization - Barry Byrne, Irish Defense Forces HQ
- Using Social Media and Other Online Tools to Build and Strengthen Your Community - Sarah Robinson, Author
- Transforming Chaos: Developing a Data Placement Strategy - Mark Diamond, Contoural
- Information Maps for Information Insight - Maurice Labrie, Director Product Portfolio, Iron Mountain
- Before leaping into that technical solution, consider assessing your ECM status - Alix Kniefel, A.Kneifel and Associates
- Smooth is Fast: Transforming Your ECM Strategy - Rich Medina, Doculabs
- The Future of Computing: Tomorrow's Impact on Business, Legal & Finance - Dan Elam, Techead
- So You've Got Big Data Now What? - Kim Bartley, WhiteCastle
- How your 21st Century ECM Tools can act as Trojan Horses in a Stone Age Culture - Filip Callewaert, Port of Antwerp - Belgium
- Deciphering Digital Signatures: Business Process & Risk - Shiva Hullavarad, University of Alaska
- File Sync & Share - The future of ECM? - Alan Pelz-Sharpe, 451 Research
- SharePoint: embrace, engage or divorce? - Doug Miles, AIIM
- The Culture of Change - Russ Stalters, BP
- Weathering the Perfect IM/IT Storm - Allain Lauzon, Canada Citizenship and Immigration
- Can You Legally Destroy Paper Records that Have Been Imaged? - Robert Williams, Cohasset Associates

ABOUT THE **aiim** 2015 CONFERENCE

What you've seen is just a glimpse behind the curtain of the AIIM Conference 2015. If you enjoyed what you read, I implore you to join these and dozens of other thought leaders in San Diego, CA March 18-20 for the premier gathering of our industry.

At the AIIM Conference 2015, you will not be a passive attendee but an active participant in some of the most critical conversations our industry will have this year. Come together with hundreds of your peers to share experiences and wisdom. When you return to your office, you will be armed with practical solutions to your most pressing information management challenges.



WHAT ARE PAST ATTENDEES SAYING ABOUT THE AIIM CONFERENCE?



“AIIM’s Conference 2014 was the best I have ever attended. For the first time, it felt like a real community of likeminded individuals traveling together on the same journey, sharing a collective insight and knowledge. We were bound together by the AIIM App, which kept us all plugged into every aspect of the conference in real time and, like ants in a colony, we all moved in concert to the same beat. It was a wonderful thing to behold; at last a technology conference had lost its sterility and coldness; it had become a warm and wonderful place to be.”

Diane Bertrand, *CEO, The Spirit Group Ltd.*



“AIIM14 nailed The Changing Face of Records Management. Records Management is changing worldwide. It now includes the management of information in various repositories, all formats, and not just physical records. Hence, the evolution of its new title Records and Information Management (RIM). Additionally, with the new Information Governance concept, Records and Information Managers will be challenged to stretch themselves beyond their comfort level. RIM managers who embrace the concept effectively, will succeed; however, those who cannot, run the risk of getting left behind.”

Nadeen Duhaney, *Records Management Specialist, School District of Palm Beach County*



“I was blown away by the AIIM14 staff! Each staff member I encountered was extremely personable, welcoming and went out of their way to make a newbie feel like a part of the conference. I have been to other industry conferences and I have never felt more welcomed as part of the community as I did at AIIM14! Yes, I learned a great deal at the conference but what resonates was the staff and the overall welcoming atmosphere at AIIM14.”

Donda Young, *Manager of IRM Projects & Programs, Unum*

WHAT ARE PAST ATTENDEES SAYING ABOUT THE AIIM CONFERENCE?



“Not only were the presentations stellar, I had the opportunity to make new professional contacts that I suspect will be lifetime friends.”

Allen Podraza, *Director of Records Management & Archives, AMA Plaza*



“AIIM 2014 reinforced the fact that we are not alone as ECM professionals. Because the backgrounds of the attendees was diverse, it was a great opportunity to share common challenges (and potential solutions) for ECM issues and best practices in organizations from every sector.”

Carah Koch, *Document Manager, Metropolitan Council*



“As a professional in a new career of content management, attending the AIIM Conference provided a fast-paced and thorough look at the overall profession and maturity of various organizations. The experience quickly brought me up to speed regarding my role and efforts within my own organization. It was also great to meet peers and experts that I can reach out to when needed.”

Kimberly Huntzinger, *Vice President, Enterprise Content Manager, Bank of Hawaii*

A PARTY YOU WON'T SOON FORGET

For many, The AIIM Conference is just as much about networking as it is about the sessions. There will be plenty of opportunities for you to rub elbows, including happy hours, lunches, and everyone's favorite, the "AIIM Celebrates!" party.

"AIIM Celebrates!" has become a crucial part of the AIIM Conference experience. At AIIM15, we'll be partying on the USS Midway, a decommissioned aircraft carrier! Until 1955, the USS Midway was the largest ship in the world and has a rich and colorful history of naval aviation breakthroughs and humanitarian missions.

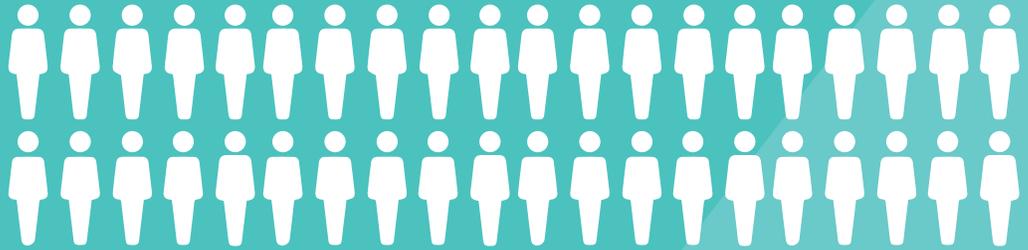
The party will take place Thursday, March 19 from 7-10 pm. There will be dinner, drinks, music, and great conversation. Admittance to the party comes complimentary with your ticket to The AIIM Conference. This will be a night to remember!



AIIM14 BY THE NUMBERS...

An event with interaction like no other:

650
ATTENDEES



6
KEYNOTES



66
SPEAKERS



4,056
STATUS UPDATES



1,930
PHOTOS



42

ROUNDTABLE DISCUSSIONS



11,340
LIKES IN THE EVENT
MOBILE APP



4
PRE-CONFERENCE
SESSIONS

2,897
COMMENTS



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