Monday, October 26, 2020

Title: Conference Opening Keynote
When: 10/26/2020 1:00:00 PM - 2:00:00 PM
Presenter(s): Announcement Coming Soon
Track: Keynote
Full Description: Description Coming Soon

Title: Identifying and Achieving the Critical Success Factors for Digital Transformation
When: 10/26/2020 2:10:00 PM - 3:00:00 PM
Presenter(s): Amitabh Srivastav
Track: Advanced Information Concepts
Full Description: The digital transformation journey is wrought with challenges, but this session uses the Intelligent Information Management Maturity Model to help you surmount those hurdles – such as getting started, preparing the business case, and identifying the scope and the critical success factors. It is the critical success factors that link the digital transformation journey to its benefits and outcomes.

Title: Patchwork Privacy Compliance: Mobilizing Your Ground Troops, and Turning Defense Into Offense
When: 10/26/2020 2:10:00 PM - 3:00:00 PM
Presenter(s): Stephanie Booher, Virginia “Jinni” Zieleniewski
Track: Creating Structure and Improving Process
Full Description: The myriad privacy laws (CCPA, GDPR, GLBA, HIPAA and so on) coupled with tepid or erratic organizational commitment to IG can make for a very complicated situation. Can organizations truly make the leap from one of organization-first held information asset control to consumer-first held information asset rights? This session uses a problem statement-alternative solutions-key takeaways approach and uses lots of handouts as it demonstrates how to build cross-functional privacy compliance programs that manage to get organizational support.
Title: Solutions Showcase Session  
When: 10/26/2020 2:10:00 PM - 3:00:00 PM  
Presenter(s): Announcement Coming Soon  
Track: Solutions Showcase  
Full Description: Description Coming Soon

Title: Information Fundamentals Track Sponsor Session  
When: 10/26/2020 2:10:00 PM - 3:00:00 PM  
Presenter(s): Announcement Coming Soon  
Track: Information Fundamentals  
Full Description: Description Coming Soon

Title: Global Records Media, Location, and Transfer Compliance  
When: 10/26/2020 3:10:00 PM - 4:00:00 PM  
Presenter(s): Tom Corey  
Track: Legal and E-Discovery  
Full Description: How can your organization best comply with the patchwork of compliance requirements from around the globe? This session offers solutions regarding the varying media requirements; how inspections and audits affect the location of information; and the impact of GDPR and privacy laws on the transfer of information.

Title: How to Leverage Your Historical Assets to Create Organizational Value  
When: 10/26/2020 3:10:00 PM - 4:00:00 PM  
Presenter(s): William W LeFevre, CA, CRM, FAI  
Track: Information Fundamentals  
Full Description: Many organizations have a historian or author tell their corporate stories to enhance interest and bolster the brand. In this session, learn the benefits that can accrue from marketing your organization’s history. Tapping your corporate records to tell the organization’s story can help promote the brand, boost employee loyalty, enhance training, and bolster community outreach efforts.

Title: Panel Session featuring Bill Millican, Bill Tolson, & Susan Whitmire  
When: 10/26/2020 3:10:00 PM - 4:00:00 PM  
Presenter(s): Bill Millican, Bill Tolson, & Susan Whitmire  
Track: Advanced Information Concepts  
Full Description: Description Coming Soon
Title: Solutions Showcase Session  
When: 10/26/2020 3:10:00 PM - 4:00:00 PM  
Presenter(s): Announcement Coming Soon  
Track: Solutions Showcase  
Full Description: Description Coming Soon  

Title: Creating Structure & Improving Process Track Sponsor Session  
When: 10/26/2020 3:10:00 PM - 4:00:00 PM  
Presenter(s): Announcement Coming Soon  
Track: Creating Structure and Improving Process  
Full Description: Description Coming Soon  

Title: Keynote  
When: 10/26/2020 4:10:00 PM - 5:10:00 PM  
Presenter(s): Announcement Coming Soon  
Track: Keynote  
Full Description: Description Coming Soon  

Title: Networking Event  
When: 10/26/2020 5:10:00 PM - 6:00:00 PM  
Presenter(s):  
Track: Networking  
Full Description: Description Coming Soon
Title: Australasia Conference Kickoff Keynote  
When: 10/27/2020 1:00:00 AM - 2:00:00 AM  
Presenter(s): Announcement Coming Soon  
Track: Keynote  
Full Description: Description Coming Soon

Title: EMEA Conference Kickoff Keynote  
When: 10/27/2020 5:00:00 AM - 6:00:00 AM  
Presenter(s): Announcement Coming Soon  
Track: Keynote  
Full Description: Description Coming Soon

Title: Coffee & Connect Networking  
When: 10/27/2020 9:00:00 AM - 10:00:00 AM  
Presenter(s):  
Track: Networking  
Full Description: Description Coming Soon

Title: Keynote - Legal Powerhouse Panel  
When: 10/27/2020 10:00:00 AM - 11:00:00 AM  
Presenter(s): Announcement Coming Soon  
Track: Keynote  
Full Description: Description Coming Soon
Title: Building the Foundation of a Disaster-Resistant IG Program

When: 10/27/2020 11:10:00 AM - 12:00:00 PM

Presenter(s): Michael P. Allen, MBA, CRM, IGP

Track: Creating Structure and Improving Process

Full Description: The Coronavirus pandemic has not only exacted a devastating toll on populations around the world, it is also poised to devastate countless organizations along the way. The pandemic exposed a stark divide in preparedness, as crippled, paper-dependent entities struggled to gain access to the organization’s lifeblood – information. Now more than ever, IG and RIM leaders must take action to ensure the survivability of their organizations. Session participants will augment their disaster recovery toolkit by:

• Recognizing the IG program elements that impact business sustainability
• Applying lessons learned from the pandemic to bridge key gaps in their IG program
• Identifying the metrics needed to persuade organizational leaders to invest in a strong IG foundation

Title: Developing IG Strategy in Storage and Equipment Contracts

When: 10/27/2020 11:10:00 AM - 12:00:00 PM

Presenter(s): Nathan Curtis

Track: Legal and E-Discovery

Full Description: This interactive session focuses on the essential steps for transforming your RIM processes to a focus on IG. The session take-aways are:

• Determine the fundamental components of an IG program
• Learn how to implement an integrated “electronic-first” workflow
• Learn to create digital on-ramps for document conversion
• Understand fully the terms and conditions in records storage contracts
• Define a cost-effective destruction program and apply a retention policy

Title: Industry Intelligence Session

When: 10/27/2020 11:10:00 AM - 12:00:00 PM

Presenter(s): Announcement Coming Soon

Track: Industry Intelligence

Full Description: Business partner views on the dynamic changes in our industry. Learn more about industry trends and technologies that apply to business needs.
Title: Advanced Information Concepts Track Sponsor Session

When: 10/27/2020 11:10:00 AM - 12:00:00 PM

Presenter(s): Announcement Coming Soon

Track: Advanced Information Concepts

Full Description: Description Coming Soon

---

Title: Is Sustainability the Ninth ARMA Principle?

When: 10/27/2020 12:10:00 PM - 1:00:00 PM

Presenter(s): Sue Trombley, Kathleen Timothy

Track: Advanced Information Concepts

Full Description: This interactive session employs climate change as a comparison backdrop in asking whether the Generally Accepted Recordkeeping Principles (“the Principles”) should add Sustainability to its list. Records are the fuel that organizations operate on, and the Principles offer guidance for managing that fuel. Just as laws and contracts shift to be more mindful of our influence on the environment, many organizations have instituted sustainability targets to reduce their carbon footprint. The session goal is to share ways the IM pro can contribute to green ideas; the efforts of Honeywell and Iron Mountain are referenced to provide context and examples. Topics include:

- Movement to paper-light or free work models
- Earning carbon credits through vendor selection
- Workplace transformation with green in mind
- Content migration to more sustainable repositories
- The benefits of recycling programs for paper and IT assets

---

Title: The Data Map Gap: You Can’t Govern What You Don’t Know You Have

When: 10/27/2020 12:10:00 PM - 1:00:00 PM

Presenter(s): Patrick Cardiello

Track: Legal and E-Discovery

Full Description: With the California Consumer Privacy Act now in effect, companies need to steer into managing their entire data estates. An up-to-date and accurate data map helps organizations understand what data they are creating, collecting, storing, and deleting. This session demonstrates how to maneuver the complex world of data privacy and how to modernize unstructured data management. You’ll learn how to approach data mapping, how to identify and remediate areas of privacy risk in order to comply with global data privacy regulations, how to automatically find and remediate sensitive data, and best practices for updating data inventories and planning for data migrations.
Title: Industry Intelligence Session

When: 10/27/2020 12:10:00 PM - 1:00:00 PM

Presenter(s): Announcement Coming Soon

Track: Industry Intelligence

Full Description: Business partner views on the dynamic changes in our industry. Learn more about industry trends and technologies that apply to business needs.

Title: Session Announcement Coming Soon

When: 10/27/2020 12:10:00 PM - 1:00:00 PM

Presenter(s): Announcement Coming Soon

Track: Information Fundamentals

Full Description: Description Coming Soon

Title: Eliminating Paper: Technology Isn’t All You Need

When: 10/27/2020 12:10:00 PM - 12:25:00 PM

Presenter(s): Pilar C. McAdam, CRM

Track: Information Fundamentals

Full Description: There’s more to going paperless than scanning hard-copy documents into a digital repository. This rapid fire session discusses how to ensure a digital version is trustworthy and safe from modification. It also covers the ways documents are named and indexed for easy search and retrieval, and it identifies policies and procedures for safeguarding against improper access.

Title: Choosing a New Platform for Records or Document Management

When: 10/27/2020 12:25:00 PM - 12:40:00 PM

Presenter(s): Raoul Miller

Track: Creating Structure and Improving Process

Full Description: If your content management system is outdated – or, if you have none – don’t feel overwhelmed. In this rapid fire, you’ll learn how to identify your organization’s key needs so you can make an educated decision on how to procure the right tools for your information ecosystem.

Title: What’s ROT and What’s Not

When: 10/27/2020 12:40:00 PM - 12:55:00 PM

Presenter(s): Steve Studer

Track: Creating Structure and Improving Process

Full Description: This rapid fire session will help you determine what information is “redundant, obsolete, and trivial (ROT)” so that you can trim the fat and operate your decision-making and IG more effectively.
Title: Industry Working Group - U.S. Federal Government

When: 10/27/2020 1:10:00 PM - 2:00:00 PM

Presenter(s):

Track: Industry Working Group

Full Description: Industry Working Groups bring together a specific industry vertical for discussion of industry-specific information challenges. Half of this year’s Working Groups will take place on Tuesday and the other half on Thursday.

Groups on Tuesday: U.S. Fed Government; U.S. State & Local Government; Utilities; Pharma/Biotech; Insurance; Retail; Healthcare; Military.

Groups on Thursday: Legal; Manufacturing; Professional Services & Consulting; Financial Services; Airline, Travel, Hospitality; Education; Energy; Other Verticals.

Not finding your specific industry vertical? Feel free to join the "Other Industry Verticals" working group on Thursday.

Title: Industry Working Group - U.S. State & Local Government

When: 10/27/2020 1:10:00 PM - 2:00:00 PM

Presenter(s):

Track: Industry Working Group

Full Description: Industry Working Groups bring together a specific industry vertical for discussion of industry-specific information challenges. Half of this year’s Working Groups will take place on Tuesday and the other half on Thursday.

Groups on Tuesday: U.S. Fed Government; U.S. State & Local Government; Utilities; Pharma/Biotech; Insurance; Retail; Healthcare; Military.

Groups on Thursday: Legal; Manufacturing; Professional Services & Consulting; Financial Services; Airline, Travel, Hospitality; Education; Energy; Other Verticals.

Not finding your specific industry vertical? Feel free to join the "Other Industry Verticals" working group on Thursday.

Title: Industry Working Group - Utilities

When: 10/27/2020 1:10:00 PM - 2:00:00 PM

Presenter(s):

Track: Industry Working Group

Full Description: Industry Working Groups bring together a specific industry vertical for discussion of industry-specific information challenges. Half of this year’s Working Groups will take place on Tuesday and the other half on Thursday.

Groups on Tuesday: U.S. Fed Government; U.S. State & Local Government; Utilities; Pharma/Biotech; Insurance; Retail; Healthcare; Military.

Groups on Thursday: Legal; Manufacturing; Professional Services & Consulting; Financial Services; Airline, Travel, Hospitality; Education; Energy; Other Verticals.

Not finding your specific industry vertical? Feel free to join the "Other Industry Verticals" working group on Thursday.
Title: Industry Working Group - Pharma/Biotech

When: 10/27/2020 1:10:00 PM - 2:00:00 PM

Presenter(s):

Track: Industry Working Group

Full Description: Industry Working Groups bring together a specific industry vertical for discussion of industry-specific information challenges. Half of this year’s Working Groups will take place on Tuesday and the other half on Thursday.

Groups on Tuesday: U.S. Fed Government; U.S. State & Local Government; Utilities; Pharma/Biotech; Insurance; Retail; Healthcare; Military.

Groups on Thursday: Legal; Manufacturing; Professional Services & Consulting; Financial Services; Airline, Travel, Hospitality; Education; Energy; Other Verticals.

Not finding your specific industry vertical? Feel free to join the “Other Industry Verticals” working group on Thursday.

Title: Industry Working Group - Insurance

When: 10/27/2020 1:10:00 PM - 2:00:00 PM

Presenter(s):

Track: Industry Working Group

Full Description: Industry Working Groups bring together a specific industry vertical for discussion of industry-specific information challenges. Half of this year’s Working Groups will take place on Tuesday and the other half on Thursday.

Groups on Tuesday: U.S. Fed Government; U.S. State & Local Government; Utilities; Pharma/Biotech; Insurance; Retail; Healthcare; Military.

Groups on Thursday: Legal; Manufacturing; Professional Services & Consulting; Financial Services; Airline, Travel, Hospitality; Education; Energy; Other Verticals.

Not finding your specific industry vertical? Feel free to join the “Other Industry Verticals” working group on Thursday.

Title: Industry Working Group - Retail

When: 10/27/2020 1:10:00 PM - 2:00:00 PM

Presenter(s):

Track: Industry Working Group

Full Description: Industry Working Groups bring together a specific industry vertical for discussion of industry-specific information challenges. Half of this year’s Working Groups will take place on Tuesday and the other half on Thursday.

Groups on Tuesday: U.S. Fed Government; U.S. State & Local Government; Utilities; Pharma/Biotech; Insurance; Retail; Healthcare; Military.

Groups on Thursday: Legal; Manufacturing; Professional Services & Consulting; Financial Services; Airline, Travel, Hospitality; Education; Energy; Other Verticals.

Not finding your specific industry vertical? Feel free to join the “Other Industry Verticals” working group on Thursday.
Title: Industry Working Group - Healthcare

When: 10/27/2020 1:10:00 PM - 2:00:00 PM

Presenter(s): Industry Working Group

Full Description: Industry Working Groups bring together a specific industry vertical for discussion of industry-specific information challenges. Half of this year’s Working Groups will take place on Tuesday and the other half on Thursday.

Groups on Tuesday: U.S. Fed Government; U.S. State & Local Government; Utilities; Pharma/Biotech; Insurance; Retail; Healthcare; Military.

Groups on Thursday: Legal; Manufacturing; Professional Services & Consulting; Financial Services; Airline, Travel, Hospitality; Education; Energy; Other Verticals.

Not finding your specific industry vertical? Feel free to join the "Other Industry Verticals" working group on Thursday.

Title: Industry Working Group - Military

When: 10/27/2020 1:10:00 PM - 2:00:00 PM

Presenter(s): Industry Working Group

Full Description: Industry Working Groups bring together a specific industry vertical for discussion of industry-specific information challenges. Half of this year’s Working Groups will take place on Tuesday and the other half on Thursday.

Groups on Tuesday: U.S. Fed Government; U.S. State & Local Government; Utilities; Pharma/Biotech; Insurance; Retail; Healthcare; Military.

Groups on Thursday: Legal; Manufacturing; Professional Services & Consulting; Financial Services; Airline, Travel, Hospitality; Education; Energy; Other Verticals.

Not finding your specific industry vertical? Feel free to join the "Other Industry Verticals" working group on Thursday.

Title: Industry Working Group - Education

When: 10/27/2020 1:10:00 PM - 2:00:00 PM

Presenter(s): Industry Working Group

Full Description: Industry Working Groups bring together a specific industry vertical for discussion of industry-specific information challenges. Half of this year’s Working Groups will take place on Tuesday and the other half on Thursday.

Groups on Tuesday: U.S. Fed Government; U.S. State & Local Government; Utilities; Pharma/Biotech; Insurance; Retail; Healthcare; Military.

Groups on Thursday: Legal; Manufacturing; Professional Services & Consulting; Financial Services; Airline, Travel, Hospitality; Education; Energy; Other Verticals.

Not finding your specific industry vertical? Feel free to join the "Other Industry Verticals" working group on Thursday.
Title: Investigating IG Ethical Nightmares
When: 10/27/2020 2:10:00 PM - 3:00:00 PM
Presenter(s): Megan Butcher CRM CIPP/US, Andrew Ysasi
Track: Information Fundamentals
Full Description: This interactive session uses the IG Implementation Model to discover brainstormed solutions to ethical issues in IG, such as being pressured to illegally destroy information. As an attendee, you’ll get to help decide which parts of the model should be engaged first in the resolution.

Title: Legal & eDiscovery Track Sponsor Session
When: 10/27/2020 2:10:00 PM - 3:00:00 PM
Presenter(s): Announcement Coming Soon
Track: Legal and E-Discovery
Full Description: Description Coming Soon

Title: Industry Intelligence Session
When: 10/27/2020 2:10:00 PM - 3:00:00 PM
Presenter(s): Announcement Coming Soon
Track: Industry Intelligence
Full Description: Business partner views on the dynamic changes in our industry. Learn more about industry trends and technologies that apply to business needs.

Title: Panel Session featuring Kiji Burston & Mark Buchanan
When: 10/27/2020 2:10:00 PM - 3:00:00 PM
Presenter(s): Kiji Burston & Mark Buchanan
Track: Creating Structure and Improving Process
Full Description:

Title: A Simple Guide for Moving Your Content Systems to the Cloud
When: 10/27/2020 2:10:00 PM - 2:25:00 PM
Presenter(s): Raoul Miller
Track: Information Fundamentals
Full Description: While organizations often move apps and storage to the cloud, they retain content management systems on-premises because of concerns about security, data residency, and complexity. This rapid fire session covers the basics of cloud server and storage offerings, advises how to choose a cloud vendor, and addresses the concerns that are commonly raised.
Title: Documenting your Digital Footprint
When: 10/27/2020 2:25:00 PM - 2:40:00 PM
Presenter(s): Mary V. Laverdure
Track: Information Fundamentals
Full Description: Often when loved ones die, it’s difficult to settle their obligations because we don’t know their passwords or may not be aware of digital payment accounts. In this rapid fire session, you’ll learn the value of setting up a “digital footprint,” and how to develop both an online and offline filing system to store digital data. Handouts include a simple spreadsheet.

Title: Prepare the Right RFP for the Right ECM
When: 10/27/2020 2:40:00 PM - 2:55:00 PM
Presenter(s): Pilar C. McAdam, CRM
Track: Information Fundamentals
Full Description: In this rapid fire session, you’ll learn how to construct an RFP to ensure you obtain the enterprise content management (ECM) system that best fits into your tech environment and best supports your strategic goals.

Title: The Politics of Information Governance
When: 10/27/2020 3:10:00 PM - 4:00:00 PM
Presenter(s): Doug Smith, Leigh Isaacs
Track: Advanced Information Concepts
Full Description: This on-demand rapid fire session refers to an ILTA white paper (“Politics of Information Governance”) as it presents philosophies for launching IG programs. The session will help you analyze your organization’s attitude toward IG, and will provide practical suggestions for moving from analysis to implementation.

Title: Updating a 10-Year-Old Retention Schedule
When: 10/27/2020 3:10:00 PM - 4:00:00 PM
Presenter(s): Tom Corey
Track: Information Fundamentals
Full Description: Ponder for a moment the changes you’ve seen in laws and technology these past 10 years. Has your retention schedule kept pace? This session uses case studies to help demonstrate how to modernize a schedule. You’ll learn about the evolution from paper-based schedules to electronic ones; the impact of new laws from around the globe; and the relevant shifts that organizations have made along the way that affect RIM and retention.
Title: User-Driven Data Governance: Putting the “People” Back In “People, Process, And Technology”

When: 10/27/2020 3:10:00 PM - 4:00:00 PM

Presenter(s): Jeffrey Sharer, Rick Wilson, Chris Bednar

Track: Creating Structure and Improving Process

Full Description: Traditional approaches to data governance start with policies and procedures and then rely on one or maybe two, but rarely all three, of the timeworn trio “people, process, and technology.” The results often are enormous volumes of information retained that are neither required by law nor valuable to business, but that create risk and increase costs.

New thinking challenges traditional mindsets that the weak leg of the “PP&T” stool is people: When everyone has more work to do than hours in the day, corporate IG may struggle to get end-users to not hoard data as their path of least effort.

This session discusses how emerging technologies and proven processes and workflows can empower end users to make and communicate informed, actionable decisions about retention and disposition of their own data. Those choices, in turn, can be implemented in real time, improving information hygiene and resulting in better compliance, less over-retention, and reduced risk and cost.

Title: Session Announcement Coming Soon

When: 10/27/2020 3:10:00 PM - 4:00:00 PM

Presenter(s): Announcement Coming Soon

Track: Legal and E-Discovery

Full Description: Description Coming Soon

Title: Industry Intelligence Session

When: 10/27/2020 3:10:00 PM - 4:00:00 PM

Presenter(s): Announcement Coming Soon

Track: Industry Intelligence

Full Description: Business partner views on the dynamic changes in our industry. Learn more about industry trends and technologies that apply to business needs.

Title: Keynote

When: 10/27/2020 4:10:00 PM - 5:00:00 PM

Presenter(s): Announcement Coming Soon

Track: Keynote

Full Description: Description Coming Soon
Title: Networking Event

When: 10/27/2020 5:00:00 PM - 6:00:00 PM

Presenter(s):

Track: Networking

Full Description: Description Coming Soon
Thursday, October 29, 2020

Title: Coffee & Connect Networking
When: 10/29/2020 9:00:00 AM - 10:00:00 AM
Presenter(s): 
Track: Networking
Full Description: Description Coming Soon

Title: Keynote
When: 10/29/2020 10:00:00 AM - 11:00:00 AM
Presenter(s): Announcement Coming Soon
Track: Keynote
Full Description: Description Coming Soon

Title: How to Build a Winning Team in Today’s Multi-Generational Workplace
When: 10/29/2020 11:10:00 AM - 12:00:00 PM
Presenter(s): Olivia Vinkler, Kurt Thies
Track: Professional Advancement
Full Description: Success in the RIM workplace often relies on interdepartmental collaboration. This session discusses how RIM pros can best work with generationally diverse colleagues. It uses research from psychology, socioeconomics, and ARMA International resources – as well as first-hand stories of success – to show how to create a winning team. You’ll get:
• Evidence-backed recommendations on how to build a successful, collaborative team
• Insights on what motivates the various generations
• Tips on how to create and foster inter-department cooperation
• Guidance on how to appreciate the varying talents of all team members and why it matters

Title: Privacy and Risk Mitigation Lessons Learned From COVID-19
When: 10/29/2020 11:10:00 AM - 12:00:00 PM
Presenter(s): Tina Teree Baker, Scott Wandstrat
Track: Reducing Organizational Information Risk
Full Description: In this session, thought leaders from the legal and IG fields, in industries with critical privacy requirements, discuss strategies for effectively protecting PII when working remotely. From this session, you will be able to:
• Redefine remote workforce policies to protect data privacy based on lessons learned from the pandemic
• Describe legal insights from industries whose core operations deal with PII
• Identify topics a comprehensive privacy awareness program should cover
Title: Records, IG, and Baseball Card Collecting: 3 Exercises in “Need It,” “Got It,” and “Ditch It”

When: 10/29/2020 11:10:00 AM - 12:00:00 PM

Presenter(s): Steve Weissman

Track: Information Forward (Advanced Technology)

Full Description: Baseball cards are essentially data-filled files that for decades people have collected. For many, their value was determined through neighborhood games like flip, toss, and colors. Over time, such collections accrued damaged, unwanted, and duplicate cards. Game players had to decide which cards to keep and which to ditch – questions similar to those IM pros ask every day on the job.

This session describes how to apply these childhood skills to our professional lives. You will:

- Learn the role and value of metadata extraction and auto-classification
- Identify applications to apply these tools to
- Gain insight into how to convince others to invest the time and money needed to succeed
- Obtain general data reference points from real-world client projects

Title: Microsoft Technologies Track Sponsor Session

When: 10/29/2020 11:10:00 AM - 12:00:00 PM

Presenter(s): Announcement Coming Soon

Track: Microsoft Technologies

Full Description: Description Coming Soon

Title: Solutions Showcase Session

When: 10/29/2020 11:10:00 AM - 12:00:00 PM

Presenter(s): Announcement Coming Soon

Track: Solutions Showcase

Full Description: Description Coming Soon

Title: Examining Blockchain Use-Case Scenarios in Records Management

When: 10/29/2020 12:10:00 PM - 1:00:00 PM

Presenter(s): Pari Swift, Pat Franks

Track: Information Forward (Advanced Technology)

Full Description: How useful is Blockchain technology in records management? This session will review key attributes of Blockchain and examine its pros and cons when used with real estate, personnel, criminal, and education records. You’ll gain a better understanding of how Blockchain applies to retention, privacy and security, costs, and more. And you’ll feel more prepared to discuss the technology with vendors and your internal stakeholders.
Title: Getting the Most From Microsoft Teams

When: 10/29/2020 12:10:00 PM - 1:00:00 PM

Presenter(s): Renu Hall

Track: Microsoft Technologies

Full Description: Many organizations are not ensuring adequate governance of the Microsoft Team information. Roll-outs are often characterized by uncontrolled sprawl, confusion from knowledge workers, and halt orders from compliance, legal, or the C-suite. In the session, you’ll learn the why, what, and how of a proven Teams deployment approach that addresses business needs while ensuring RIM and IT concerns are met. Explore the benefits of Teams and the common missteps, apply the essential strategic and tactical element of a deployment, and identify the Office 365 governance features that help you manage Teams.

Title: Session Announcement Coming Soon

When: 10/29/2020 12:10:00 PM - 1:00:00 PM

Presenter(s): Announcement Coming Soon

Track: Professional Advancement

Full Description: Description Coming Soon

Title: Reducing Organizational Information Risk Track Sponsor Session

When: 10/29/2020 12:10:00 PM - 1:00:00 PM

Presenter(s): Announcement Coming Soon

Track: Reducing Organizational Information Risk

Full Description: Description Coming Soon

Title: Solutions Showcase Session

When: 10/29/2020 12:10:00 PM - 1:00:00 PM

Presenter(s): Announcement Coming Soon

Track: Solutions Showcase

Full Description: Description Coming Soon
Title: Industry Roundtables (Legal; Manufacturing; Professional Services & Consulting; Financial Services; Airline, Travel, Hospitality; Energy; Other Verticals)

When: 10/29/2020 1:10:00 PM - 2:00:00 PM

Presenter(s):

Track: Industry Working Group

Full Description: Industry Working Groups bring together a specific industry vertical for discussion of industry-specific information challenges. Half of this year’s Working Groups will take place on Tuesday and the other half on Thursday.

Groups on Tuesday: U.S. Fed Government; U.S. State & Local Government; Utilities; Pharma/Biotech; Insurance; Retail; Healthcare; Military.

Groups on Thursday: Legal; Manufacturing; Professional Services & Consulting; Financial Services; Airline, Travel, Hospitality; Education; Energy; Other Verticals.

Not finding your specific industry vertical? Feel free to join the “Other Industry Verticals” working group on Thursday.

Title: Industry Working Group - Legal

When: 10/29/2020 1:10:00 PM - 2:00:00 PM

Presenter(s):

Track: Industry Working Group

Full Description: Industry Working Groups bring together a specific industry vertical for discussion of industry-specific information challenges. Half of this year’s Working Groups will take place on Tuesday and the other half on Thursday.

Groups on Tuesday: U.S. Fed Government; U.S. State & Local Government; Utilities; Pharma/Biotech; Insurance; Retail; Healthcare; Military.

Groups on Thursday: Legal; Manufacturing; Professional Services & Consulting; Financial Services; Airline, Travel, Hospitality; Education; Energy; Other Verticals.

Not finding your specific industry vertical? Feel free to join the “Other Industry Verticals” working group on Thursday.

Title: Industry Working Group - Manufacturing

When: 10/29/2020 1:10:00 PM - 2:00:00 PM

Presenter(s):

Track: Industry Working Group

Full Description: Industry Working Groups bring together a specific industry vertical for discussion of industry-specific information challenges. Half of this year’s Working Groups will take place on Tuesday and the other half on Thursday.

Groups on Tuesday: U.S. Fed Government; U.S. State & Local Government; Utilities; Pharma/Biotech; Insurance; Retail; Healthcare; Military.

Groups on Thursday: Legal; Manufacturing; Professional Services & Consulting; Financial Services; Airline, Travel, Hospitality; Education; Energy; Other Verticals.

Not finding your specific industry vertical? Feel free to join the “Other Industry Verticals” working group on Thursday.
Title: Industry Working Group - Professional Services & Consulting

When: 10/29/2020 1:10:00 PM - 2:00:00 PM

Presenter(s): 

Track: Industry Working Group

Full Description: Industry Working Groups bring together a specific industry vertical for discussion of industry-specific information challenges. Half of this year’s Working Groups will take place on Tuesday and the other half on Thursday.

Groups on Tuesday: U.S. Fed Government; U.S. State & Local Government; Utilities; Pharma/Biotech; Insurance; Retail; Healthcare; Military.

Groups on Thursday: Legal; Manufacturing; Professional Services & Consulting; Financial Services; Airline, Travel, Hospitality; Education; Energy; Other Verticals.

Not finding your specific industry vertical? Feel free to join the “Other Industry Verticals” working group on Thursday.

---

Title: Industry Working Group - Financial Services

When: 10/29/2020 1:10:00 PM - 2:00:00 PM

Presenter(s): 

Track: Industry Working Group

Full Description: Industry Working Groups bring together a specific industry vertical for discussion of industry-specific information challenges. Half of this year’s Working Groups will take place on Tuesday and the other half on Thursday.

Groups on Tuesday: U.S. Fed Government; U.S. State & Local Government; Utilities; Pharma/Biotech; Insurance; Retail; Healthcare; Military.

Groups on Thursday: Legal; Manufacturing; Professional Services & Consulting; Financial Services; Airline, Travel, Hospitality; Education; Energy; Other Verticals.

Not finding your specific industry vertical? Feel free to join the “Other Industry Verticals” working group on Thursday.

---

Title: Industry Working Group - Airline, Travel, Hospitality

When: 10/29/2020 1:10:00 PM - 2:00:00 PM

Presenter(s): 

Track: Industry Working Group

Full Description: Industry Working Groups bring together a specific industry vertical for discussion of industry-specific information challenges. Half of this year’s Working Groups will take place on Tuesday and the other half on Thursday.

Groups on Tuesday: U.S. Fed Government; U.S. State & Local Government; Utilities; Pharma/Biotech; Insurance; Retail; Healthcare; Military.

Groups on Thursday: Legal; Manufacturing; Professional Services & Consulting; Financial Services; Airline, Travel, Hospitality; Education; Energy; Other Verticals.

Not finding your specific industry vertical? Feel free to join the “Other Industry Verticals” working group on Thursday.
Title: Industry Working Group - Energy

When: 10/29/2020 1:10:00 PM - 2:00:00 PM

Presenter(s):

Track: Industry Working Group

Full Description: Industry Working Groups bring together a specific industry vertical for discussion of industry-specific information challenges. Half of this year’s Working Groups will take place on Tuesday and the other half on Thursday.

Groups on Tuesday: U.S. Fed Government; U.S. State & Local Government; Utilities; Pharma/Biotech; Insurance; Retail; Healthcare; Military.

Groups on Thursday: Legal; Manufacturing; Professional Services & Consulting; Financial Services; Airline, Travel, Hospitality; Education; Energy; Other Verticals.

Not finding your specific industry vertical? Feel free to join the "Other Industry Verticals" working group on Thursday.

Title: Industry Working Group - Other Industry Verticals

When: 10/29/2020 1:10:00 PM - 2:00:00 PM

Presenter(s):

Track: Industry Working Group

Full Description: Industry Working Groups bring together a specific industry vertical for discussion of industry-specific information challenges. Half of this year’s Working Groups will take place on Tuesday and the other half on Thursday.

Groups on Tuesday: U.S. Fed Government; U.S. State & Local Government; Utilities; Pharma/Biotech; Insurance; Retail; Healthcare; Military.

Groups on Thursday: Legal; Manufacturing; Professional Services & Consulting; Financial Services; Airline, Travel, Hospitality; Education; Energy; Other Verticals.

Not finding your specific industry vertical? Feel free to join the "Other Industry Verticals" working group on Thursday.

Title: Industry Working Group - Education

When: 10/29/2020 1:10:00 PM - 2:00:00 PM

Presenter(s):

Track: Industry Working Group

Full Description: Industry Working Groups bring together a specific industry vertical for discussion of industry-specific information challenges. Half of this year’s Working Groups will take place on Tuesday and the other half on Thursday.

Groups on Tuesday: U.S. Fed Government; U.S. State & Local Government; Utilities; Pharma/Biotech; Insurance; Retail; Healthcare; Military.

Groups on Thursday: Legal; Manufacturing; Professional Services & Consulting; Financial Services; Airline, Travel, Hospitality; Education; Energy; Other Verticals.

Not finding your specific industry vertical? Feel free to join the "Other Industry Verticals" working group on Thursday.
Title: How to Motivate Employees to Stop Hoarding Documents

When: 10/29/2020 2:10:00 PM - 3:00:00 PM

Presenter(s): Mark Diamond

Track: Reducing Organizational Information Risk

Full Description: Employees who hoard e-mails and other e-documents create mountains of data and mountains of problems. Data hoarding exposes companies to risks related to privacy, security, eDiscovery, and more; and it saps productivity for those who cannot find the e-files they need. Common anti-hoarding measures can be too aggressive and may drive “underground archiving,” whereby employees save information in unsecured locations. This session provides case studies that identify ineffective strategies that are commonly used, as well as real-world IG tactics and strategies that do incentivize employees and business units to change their behavior for the better.

Title: Imagine Your World Is Free From Burnout

When: 10/29/2020 2:10:00 PM - 3:00:00 PM

Presenter(s): Michael Levitt

Track: Professional Advancement

Full Description: In this session, learn techniques that help you identify signs of burnout within yourself and your team; how to take immediate action to mitigate the burnout; and how to establish boundaries that will help prevent future feelings of burnout.

Title: Session Announcement Coming Soon

When: 10/29/2020 2:10:00 PM - 3:00:00 PM

Presenter(s): Announcement Coming Soon

Track: Microsoft Technologies

Full Description: Description Coming Soon

Title: Information Forward (Advanced Technologies) Track Sponsor Session

When: 10/29/2020 2:10:00 PM - 3:00:00 PM

Presenter(s): Announcement Coming Soon

Track: Information Forward (Advanced Technology)

Full Description: Description Coming Soon

Title: Solutions Showcase Session

When: 10/29/2020 2:10:00 PM - 3:00:00 PM

Presenter(s): Announcement Coming Soon

Track: Solutions Showcase

Full Description: Description Coming Soon

This Schedule is Subject to Change
Title: Information Architecture Tools in Modern SharePoint

When: 10/29/2020 3:10:00 PM - 4:00:00 PM

Presenter(s): Erica Toelle

Track: Microsoft Technologies

Full Description: The tools and building blocks for information architecture have changed in modern SharePoint. We now have hub sites, new navigation options, Office 365 groups for security, and more. It can be difficult to know where and how to start your planning. This session:

• Helps you understand the modern SharePoint information architecture building blocks
• Reviews how these building blocks can affect services such as search, security, compliance, workflow, and branding
• Looks at best practices for putting all of these components together into an information architecture

Title: Rules, Tools, and Mules: Responding to Resistance

When: 10/29/2020 3:10:00 PM - 4:00:00 PM

Presenter(s): Lewis Eisen

Track: Reducing Organizational Information Risk

Full Description: Your IM initiative would be advancing faster, except for some stubborn dissenters. To respond aggressively with rules and enforcement may be counterproductive. People resist for many reasons, and this interactive session looks at considerations when comparing solutions focusing on policy and rules, people management, and environmental factors.

Title: BYO Functionality: The Content Services Primer

When: 10/29/2020 3:10:00 PM - 4:00:00 PM

Presenter(s): Laurence Hart

Track: Information Forward (Advanced Technology)

Full Description: Description pending

Title: Professional Advancement Track Sponsor Session

When: 10/29/2020 3:10:00 PM - 4:00:00 PM

Presenter(s): Announcement Coming Soon

Track: Professional Advancement

Full Description: Description Coming Soon
Title: Solutions Showcase Session
When: 10/29/2020 3:10:00 PM - 4:00:00 PM
Presenter(s): Announcement Coming Soon
Track: Solutions Showcase
Full Description: Description Coming Soon

Title: Keynote: Announcement Coming Soon
When: 10/29/2020 4:10:00 PM - 5:00:00 PM
Presenter(s): Announcement Coming Soon
Track: Keynote
Full Description: Description Coming Soon

Title: Networking Event
When: 10/29/2020 5:00:00 PM - 6:00:00 PM
Presenter(s):
Track: Networking
Full Description: Description Coming Soon
Title: Coffee & Connect Networking  
When: 10/30/2020 9:00:00 AM - 10:00:00 AM  
Presenter(s):  
Track: Networking  
Full Description: Description Coming Soon

Title: Keynote  
When: 10/30/2020 10:00:00 AM - 11:10:00 AM  
Presenter(s): Announcement Coming Soon  
Track: Keynote  
Full Description: Description Coming Soon

Title: A Case Study: Large-Scale Migration at a Government Agency  
When: 10/30/2020 11:20:00 AM - 12:10:00 PM  
Presenter(s): Michael Schweitzer, Jas Shukla  
Track: Microsoft Technologies  
Full Description: In this session, you’ll walk through the ins and outs of the HUB Project, a compliance-inspired digital transformation initiative for a billion-dollar provincial government agency. The HUB Project used SharePoint and Collabware to migrate and classify more than four million records. These records management solutions helped the organization collaborate more effectively, reduce compliance risk, increase confidence in a trusted single source of truth for documents, and increase productivity through enhanced search, retrieval, and information sharing. You’ll learn how the team used an Agile-Hybrid approach to manage a SharePoint and Collabware rollout and how the project leveraged fun, interactive tools and processes to keep stakeholders engaged.

Title: Beyond the Headlines: Putting the IG Implementation Model into Practice During a Pandemic  
When: 10/30/2020 11:20:00 AM - 12:10:00 PM  
Presenter(s): Megan Butcher CRM CIPP/US, Andrew Tsasi CRM IGP  
Track: Reducing Organizational Information Risk  
Full Description: 
Title: Boost Privacy Protections with Attribute-Based Control
When: 10/30/2020 11:20:00 AM - 12:10:00 PM
Presenter(s): Raoul Miller
Track: Information Forward (Advanced Technology)
Full Description: Most content management systems assign security using role-based access control, but today an attribute-based approach will provide greater security. This session explains the differences between the two approaches, why you need to move to attribute-based control, which attributes are pertinent to the approach, and how to implement it.

Title: Leaders Always Play Offense
When: 10/30/2020 11:20:00 AM - 12:10:00 PM
Presenter(s): Angelo Lombardo
Track: Professional Advancement
Full Description: This session employs stories and examples to demonstrate the five traits that all highly effective “offensive-minded” leaders have. You’ll learn the mindset, tools, and processes to realize you’re a leader capable of developing a bold vision for yourself and your teams. The session emphasizes the role integrity plays in leadership and how it’s the most important of the traits.

Title: Industry Intelligence Session
When: 10/30/2020 11:20:00 AM - 12:10:00 PM
Presenter(s): Announcement Coming Soon
Track: Industry Intelligence
Full Description: Business partner views on the dynamic changes in our industry. Learn more about industry trends and technologies that apply to business needs.

Title: AI and Business Continuity: Where Are Your Disaster Recovery Records?
When: 10/30/2020 1:00:00 PM - 1:50:00 PM
Presenter(s): Amitabh Srivastav
Track: Microsoft Technologies
Full Description: Identifying and consistently classifying unstructured content as a vital record is a profound challenge. In this session, learn how AI can automate business processes to improve business continuity planning and reduce the risk associated with disaster recovery. The session covers the features in Office 365, SharePoint Online, and Project Cortex that use AI to support auto-classification.

Title: Successfully Using Vital Records Remotely
When: 10/30/2020 1:00:00 PM - 1:50:00 PM
Presenter(s): Janet French
Track: Reducing Organizational Information Risk
Full Description: The surge in remote work due to the pandemic raises the importance of vital records accessibility. This session will help enable your organization to transition to off-site work with reduced operational risk. It explains why and how to identify, document, and support:

- Systems of record used to store vital records
- Applications used to create, modify, and access vital records
- Databases associated with vital records
- Means of accessing vital records
- Security protocols for vital records

Title: Tending the Garden of Change in Organizational Culture
When: 10/30/2020 1:00:00 PM - 1:50:00 PM
Presenter(s): Stephanie McCutcheon
Track: Professional Advancement
Full Description: IG professionals usually bring change to their organizations . . . and sometimes this leads to an urge to “shoot the messenger.” This presentation explores such topics as roles, processes, and technologies as it helps to prepare your organization and yourself for such change.

Title: InfoGov in the Cloud Part 1
When: 10/30/2020 1:00:00 PM - 1:50:00 PM
Presenter(s): Carol Stainbrook, Darron Dickinson MBA/MSCIS
Track: Information Forward (Advanced Technology)
Full Description: Description pending

Title: Industry Intelligence Session
When: 10/30/2020 1:00:00 PM - 1:50:00 PM
Presenter(s): Announcement Coming Soon
Track: Industry Intelligence
Full Description: Business partner views on the dynamic changes in our industry. Learn more about industry trends and technologies that apply to business needs.

Title: Keynote
When: 10/30/2020 2:00:00 PM - 3:00:00 PM
Presenter(s): Announcement Coming Soon
Track: Keynote
Full Description: Description Coming Soon
Title: “Information Finds A Way” – A Jurassic Park Case Study for IG Practitioners

When: On-Demand

Presenter(s): Adrienne Girone IGP, Jeff Pierantozzi CRM PMP

Track: Creating Structure and Improving Process

Full Description: What can RIM and IG pros learn from “Jurassic Park?” Much like the dinosaur theme park, end users and the information they generate can often feel downright unmanageable. This on-demand session provides fresh perspectives on how to approach data management and structural organization in the workplace, and how to articulate a compelling business case for IG. The session:

• Uses a case study to examine inherent assumptions about organizational data and RIM practices
• Advises how to recognize, anticipate, and mitigate disconnects between competing parties
• Emphasizes the need for ongoing IG program vigilance
• Explores the importance of deploying the right people, processes, and technologies for your specific situation
• Practices improved strategies for coping with the inevitable IM chaos in daily operations and long-term planning

Title: “Welcome to RIM. Now, Establish an IG Program Right Away!”

When: On-Demand

Presenter(s): Rick Stirling

Track: Information Fundamentals

Full Description: This on-demand session is designed for those who are new to RIM and have been – or expect to be – dispatched with the task of establishing an IG program. The session takes you through the process, step by step, with careful consideration of your newness to the profession.

Title: 5 Ways a Content-Cleaning Project Can Reduce Your Organization’s Risk

When: On-Demand

Presenter(s): Jonah Jimenez

Track: Creating Structure and Improving Process

Full Description: Unstructured or “dark” data is inherently more risky than structured data, and it’s compounding beyond measure. This on-demand rapid fire session focuses on cleaning your data estate before you’re compelled to by a data breach or other event. Governance and compliance are nearly impossible without a clear understanding of the data you’re storing and its risk profile. You’ll learn strategies that drive effective data governance, where to begin with such a project, and how to unlock the value of dark data.
Title: A Deep Dive into SharePoint Content Types and Managed Metadata

When: On-Demand

Presenter(s): Erica Toelle

Track: Microsoft Technologies

Full Description: This on-demand session looks closely at the recent changes made to SharePoint Content Types and Managed Metadata. Employing a demo, the session explores the new and refreshed capabilities coming to SharePoint Online and provides practical advice for those who are new to the tools, as well as SharePoint pros.

Title: A Little History in Unstructured Data Description Goes a Long Way

When: On-Demand

Presenter(s): G. Mark Walsh, CA CRM

Track: Creating Structure and Improving Process

Full Description: In this session, RIM pros are advised to follow the lead of archivists by using descriptive standards and developing access points that can provide intelligence to the unstructured information under their custody. Specifically, the session discusses:

- Useful archival appraisal and descriptive techniques that can apply to unstructured e-data
- The difference between taxonomies and subject heading authorities
- Classification of unstructured data according to new descriptive structures, including auto classification
- Reduced risk by applying appropriate retention practices

Title: A Roadmap to Stop Using Offsite Storage in 10 Years

When: On-Demand

Presenter(s): Rob Mattern

Track: Legal and E-Discovery

Full Description: Firms across the Am Law 100/200 express similar dissatisfaction with their offsite records storage vendor but feel handcuffed by their contracts. Meanwhile, monthly costs spike due to a lack of destruction, the permanent withdrawal fees are an obstacle to implementing effective IG, and consolidation is too expensive. Consequently, firms suffer an inefficient mix of multiple vendors from around the country. In this session, you’ll learn a financially viable strategy to wean the firm off of offsite storage. The session focuses on key terms in contracts, the nuts and bolts of a 10-year plan, and realistic pricing benchmarks.
Title: Achieving Your 20/20 Vision for IG

When: On-Demand

Presenter(s): Todd Brown, Robert O’Connor, Sarah Holleman

Track: Creating Structure and Improving Process

Full Description: This on-demand session uses case studies from various verticals (engineering & construction, financial services, military, government) to help share IG project planning and execution lessons learned. You’ll hear the perspectives of practitioners and consultants on how to:

• Get executive support for IG
• Foster partnerships with other stakeholders
• Integrate change management and conduct effective communications
• Attain ongoing support for program adoption

Title: Addressing Bias in Artificial Intelligence

When: On-Demand

Presenter(s): Jason Fung

Track: Information Forward (Advanced Technology)

Full Description: Artificial intelligence (AI) can significantly impact people’s lives. Among its countless applications, AI provides judges with recommendations for sentencing, for instance, and helps agencies detect fraudulent applications for unemployment insurance. As AI becomes more embedded in our lives, questions of its potential bias must be addressed. The rapid fire will discuss the dangers of bias in data and the methods that are attempting to mitigate bias in AI.

Title: An Overview of Records Management in Office 365

When: On-Demand

Presenter(s): Erica Toelle

Track: Microsoft Technologies

Full Description: This on-demand session provides an overview of the RIM features in Microsoft Office 365, such as retention, file plans, disposition, immutability, event-based retention, and more. You’ll learn best practices and ways to address common implementation challenges, and you’ll see examples of real-life lessons from large organizations.

Title: Applying a Risk-Based Approach to RIM Execution & Delivery

When: On-Demand

Presenter(s): Alicia Fortunato, Julie Lockmiller

Track: Reducing Organizational Information Risk

Full Description: RIM challenges can sometimes seem overwhelming, leaving info pros at a loss as to where to begin. This on-demand session helps you get your arms around the challenges by providing guidance on how to identify gaps, apply risk ratings, prioritize projects, and gain buy-in from the key stakeholders. It refers to the Generally Accepted Recordkeeping Principles, risk rating models, and other tools to illuminate this risk-based approach.
Title: Back-up Tapes 101  
When: On-Demand  
Presenter(s): Dean Michael Felicetti  
Track: Information Fundamentals  
Full Description: This on-demand rapid fire session answers your basic questions about how back-up tapes should be managed in an IG program. Among the topics are case law, media-related services, preservation, cataloging, media format, back-up software, restoration processes, and more.

Title: Beyond ECM: The Role RIM Pros Have in Information System Development  
When: On-Demand  
Presenter(s): Bruce Wirth, MPA, CIP, CRM  
Track: Professional Advancement  
Full Description: This on-demand session discusses how RIM pros can expand their roles by collaborating with IT to design intelligent information systems that enable more efficient use and retrieval. It gives guidance on how RIM pros can leverage their years of experience in classification, business analysis, risk management, governance, and project management to enhance the RIM program with the help of IT.

Title: Big Data: Keep or Sell? You Be The Judge!  
When: On-Demand  
Presenter(s): Galina Datskovsky PhD CRM FAI, Ronald J. Hedges  
Track: Information Forward (Advanced Technology)  
Full Description: Many organizations have discovered the value of monetizing big data, but at what cost? IoT, AI, and other factors are complicating the matter, all against the backdrop of burgeoning data privacy regulations, each with their own unique requirements – but all of them essentially encouraging a minimization of data collection and storage. This on-demand session:  
• Examines case law involving big data  
• Describes how AI is necessary to do the right kinds of data mining  
• Identifies the implications to traditional concepts of IG  
• Presents hypothetical cases based on real disputes in current cases  
In the end, you are invited to be the judge and decide whether to keep or sell big data.
**Title:** Build it and They Will Come: Effective Repository Design  
**When:** On-Demand  
**Presenter(s):** Robyn Biggar  
**Track:** Creating Structure and Improving Process  
**Full Description:** In a redesign of its EDRMS, the City of Port Coquitlam reduced the amount of manual work for its records staff by:

- Simplifying and automating its filing system
- Using transparent records management to improve performance
- Eliminating silos to ensure all staff were following the same practices

The end result was an increase of usage and improved processes that enabled staff to perform much more efficiently.

---

**Title:** Build. Break. Repeat. Complete?  
**When:** On-Demand  
**Presenter(s):** Jay Jorgensen  
**Track:** Reducing Organizational Information Risk  
**Full Description:** In this on-demand session, you’ll learn to deconstruct IG into palatable pieces that highlight organizational information risk, and you’ll learn what the business process owners must know to mitigate it. The session will help you:

- Achieve incremental wins and/or fail fast in establishing an organizational information risk baseline
- Understand operational practices and outcome-based planning to integrate IM concepts and compliance
- Enable organizational change through targeted communications and relationship building
- Build your knowledge via specific use cases that employ combinations of right-sized technology, infrastructure, process, and management controls to protect and enhance the quality of organizational information assets

---

**Title:** Case Study: An Office 365 Retention Implementation  
**When:** On-Demand  
**Presenter(s):** Caroline J. Walters  
**Track:** Microsoft Technologies  
**Full Description:** This on-demand session covers the journey of the RIM team at the University of Virginia’s implementation of Office 365 records retention. Learn about the challenges of coordinating with IT, implementing across more than one tenant, and communicating to users in a large, diverse organization. You’ll learn about handling challenges within your organizations, managing continual changes in functionality within Office 365, and developing and delivering user training and communication on Office 365 functionality.
Title: COVID-19: Lessons Learned, Next Steps

When: On-Demand

Presenter(s): Laurie Fischer

Track: Reducing Organizational Information Risk

Full Description: This on-demand session focuses on how the pandemic is impacting IG, and it looks ahead to its ongoing effects.

Title: Cybersecurity and IG

When: On-Demand

Presenter(s): Andrew Ysasi

Track: Creating Structure and Improving Process

Full Description: This on-demand rapid fire session focuses on the ways IG pros can team with cybersecurity pros to defend our organizations from cyber attacks. It covers the challenges, the joint issues, and specific questions to ask the cyber pros.

Title: Decommissioning Structured Data Without Regrets

When: On-Demand

Presenter(s): Timothy Chasteen

Track: Reducing Organizational Information Risk

Full Description: This on-demand session provides practical advice and best practices on retiring your database applications. Its topics include:

- Assessment
- Blame & Beautification
- Choices, Choices, Choices
- Documentation
- Execution
- Feedback
- Growing Pains
- Authentication & Approval
Title: Developing a Privacy Compliance Program

When: On-Demand

Presenter(s): Raoul Miller

Track: Reducing Organizational Information Risk

Full Description: This on-demand session has one important focus: demonstrating how to ensure your program is in compliance with the patchwork of data privacy legislation. Among its topics are the GDPR and similar laws – whom do they pertain to? what data is covered? how do we comply? Additionally, the session looks at ways to make sure your systems perform searching, indexing, reporting, retention, etc., in compliance as well.

Title: Developing an Effective Digital Transformation Strategy for IG

When: On-Demand

Presenter(s): Blake Gilmore

Track: Creating Structure and Improving Process

Full Description: In this on-demand session, learn why a digital transformation strategy is important, identify its critical components, and learn how to connect IG to key business process outcomes. The session discusses how digital transformation defines how an organization can better respond to rapid change, how a well-communicated strategy help you focus on what’s most important, how IG practices are more successful when connected to larger business outcomes, and how discovery should be built from a basic lifecycle framework.

Title: Doing Business in a 5G, AI, ML, DL World

When: On-Demand

Presenter(s): Ron Bush

Track: Information Forward (Advanced Technology)

Full Description: Disruptive technologies are ready to dominate the business world. In the next 2 to 5 years, 5G, artificial intelligence (AI), machine learning (ML), and deep learning (DL) may either destroy your business or help you capitalize on the new ways of doing things. For instance, 5G will bring driverless and flying cars sooner than we think, and with it will bring governance risks as well. AI, ML, and DL will revolutionize the advances in technology at unheard of speeds. This on-demand session will help you get your arms around these dynamic topics – before it’s too late.
Title: Five Ways to Automate Your IG Using Native Office 365
When: On-Demand
Presenter(s): Mark Diamond
Track: Microsoft Technologies
Full Description: The secret to automating your IG program may already be in your possession: Microsoft Office 365. In this session, you’ll learn about:

• Key O365 automation capabilities, including enforcement of schedule changes to resolve retention and legal hold conflicts
• How to better enforce retention, privacy, legal, and compliance requirements with intuitive one-step processes
• Ways to automate publishing and training
• Ways to audit for compliance

Title: Formatting Forms & Call Recordings for Better Automation
When: On-Demand
Presenter(s): Sandra Serkes
Track: Information Fundamentals
Full Description: Many organizations are digitizing paper forms and transcriptions of audio calls for easy searching, records management, data privacy, and regulatory compliance purposes. But often the results are wrought with errors, usually because of the format of your source content. In this on-demand rapid fire session, you’ll learn the fundamentals of setting up for automation success when using textual and audio-to-text, and you’ll get examples of the right and wrong ways to digitize. You’ll learn small changes you can implement today that will result in big improvements.

Title: Forward Slash: Cutting a Path Between Records Management/Archives
When: On-Demand
Presenter(s): Chuck Piotrowski
Track: Reducing Organizational Information Risk
Full Description: This on-demand session chronicles the long history of the NYPA/Canal Corporation’s archive of the New York Barge Canal. It discusses the lesson learned from collecting and managing the records of a 100-year-old, 500-mile-long continually operating machine. Hear about the ups and downs of inter-agency cooperation, living on the edge between RIM/archives, and digitally transforming a national treasure.
Title: Generational Mentoring Relationships: Creating Balance and Reaping Benefits

When: On-Demand

Presenter(s): Stephanie McCutcheon, CRM, IGP

Track: Professional Advancement

Full Description: Seasoned professionals have much to offer the generations that follow them. The up-and-coming generations have a lot to bring to the professional table. A mentor is an experienced and trusted adviser. A mentee is one who is advised, trained, or counseled by a mentor. This can be an extraordinarily valuable relationship for both parties. This presentation explores the two aspects of this relationship and how to get (and give) the most benefit to the other.

Title: How a Large International Company Got Its RIM House in Order

When: On-Demand

Presenter(s): Sandra Serkes

Track: Information Fundamentals

Full Description: This on-demand session tracks how a company got its recordkeeping in order, even after dozens of mergers and with a hundred-thousand employees in hundreds of locations around the world. How was it done? One step at a time. You’ll learn how the company:

• Broke a giant undertaking down into bite-sized, manageable pieces
• Positioned the project to executive stakeholders and got executive buy in for a pilot
• Rallied internal departments and stakeholders needed to support the project
• Intends to roll out the program across the rest of the organization

Title: How Are You Managing Legal Hold Orders – or Are You?

When: On-Demand

Presenter(s): Earl Johnson, Jr.

Track: Legal and E-Discovery

Full Description: This on-demand rapid fire session focuses on the initial step in e-discovery: legal holds. It examines why RIM pros must be involved when an order is issued, and how they should be involved.
Title: How File Analysis and Digital Preservation Future Proof Electronic Records in Highly Regulated Industries

When: On-Demand

Presenter(s): Mark Evans

Track: Reducing Organizational Information Risk

Full Description: Public sector agencies and commercial enterprises have been managing electronic records since the 1970’s. That’s 50 years of born-digital records to track, store, and disposition or maintain in perpetuity – no easy task! Not to mention the millions of essential records created and stored on paper and film that have been digitized to improve retrieval and access. The resulting deposits in file shares, document management systems and other content repositories are overwhelming and represent significant risk and cost due to digital fragility and uncontrolled access to sensitive information.

Faced with tight budgets, unprecedented global events, and an exponential increase in digital information under management, government and private sector records managers in highly regulated industries are uniquely challenged to balance accountability and transparency of operational actions and decisions with efficient records capture, long-term records management and digital preservation.

This session will explore proven techniques for analyzing unstructured ROT (Redundant, Obsolete and Trivial) data, enriching content with metadata, and identifying resources that need to be maintained and preserved to ensure full regulatory compliance. By combining file analysis with active digital preservation, information governance professionals can ensure their organizations reduce storage costs, risks, improve records search and retrieval, facilitate records transfer and migration, and ensure long-term temporary and permanent electronic records remain authentic and are accessible, now, and far into the future.

Attendees of this session will learn:

• How file analysis tools scan content repositories to enforce security policy and retention mandates
• Techniques to address missing and incomplete records metadata
• Best practices for file migration, transformation and information governance
• Actionable strategies for long-term and permanent records management using active preservation technologies

Title: How to Align Systems Development & Implementation with RIM/IG

When: On-Demand

Presenter(s): Tod Chernikoff, CRM, IGP, CIP

Track: Creating Structure and Improving Process

Full Description: Choosing the wrong systems or effecting a poor implementation will result in inefficiencies and great expense. This on-demand session provides guidance on how to ensure the systems you develop or acquire will align with your RIM or IG requirements. It explores such topics as the SDLC process, ways to review compliance, and potential workarounds when issues arise.
Title: How to Benefit From Data Mapping and Metadata

When: On-Demand

Presenter(s): David Smythe

Track: Creating Structure and Improving Process

Full Description: IG pros commonly share challenges with those in IT, legal, compliance, and the business units. This on-demand session:

- Defines data mapping, data flow mapping, and metadata management
- Illustrates the concepts as used in a real-world program
- Relates the terms to digital transformation and information lifecycle management initiatives – referencing recent market research

Title: How to Build a Policy Library to Support and Reduce your Organization’s Risk Profile

When: On-Demand

Presenter(s): Alex VanVeldhuisen

Track: Creating Structure and Improving Process

Full Description: Policies are the framework by which many organizations manage and secure their important data. These policies in today’s ever-changing and fast-paced business environment must be well thought out and work across departments to meet the regulatory needs and business goals. This session will provide best practices to help your organization build and maintain a policy library that meets your organization’s current and future needs.

Title: How to Create a Data Map and Why It Is Critical

When: On-Demand

Presenter(s): Kirke Snyder

Track: Creating Structure and Improving Process

Full Description: “Data map” doesn’t appear in the GDPR or CCPA, but most experts agree that a data map is the first step to documenting compliance with these new privacy laws. Careful: do not confuse data maps with data inventories. This session explores the distinctions between the two terms and focuses on how a data map is conducive to compliance. The session also walks you through the process of creating a data map.
Title: How to Protect Privacy in Structured Database Applications

When: On-Demand

Presenter(s): Erik Wold, Timothy Chasteen

Track: Reducing Organizational Information Risk

Full Description: GDPR and CCPA have raised the bar on privacy regulations, and it imperative for organizations to effectively find and classify their private and sensitive data. Often structured database applications submerge private information without regard to the original design of the tables, rows, and columns. They are also notorious for seamlessly sharing private information with other applications. Without visibility into the origins, dwellings, and shared destinations of private information within structured database applications; an organization is unlikely to administer a successful privacy program. Session topics include:

- The wide range of private information
- Column names make it seem simple
- Pattern searches
- Comparing column data to known matches
- Mapping enterprise applications (aka The Chase)
- The Clone Wars (Who has access to your test & QA data instances?)
- Data subject access requests and their rights
- Encryption and/or masking option
- Mapping protection fundamentals to regulations and frameworks

Title: How to Respond Effectively to FOIA

When: On-Demand

Presenter(s): William Tolson, James M. McCarthy

Track: Legal and E-Discovery

Full Description: Many government agencies have difficulty responding to FOIA requests – and at times these responses de-escalate into the e-discovery process. In this on-demand session, you’ll hear how many agencies have responded to FOIA requests via data decentralization and legacy RIM technology. The session will highlight the obvious shortcomings in information management, and will discuss how agencies can get their arms around the growing data-flood to enable accurate and timely FOIA response.

Title: How Today’s Headlines Will Impact Tomorrow’s IG

When: On-Demand

Presenter(s): Tom Corey

Track: Information Fundamentals

Full Description: COVID-19 has complex privacy and security implications related to health information. Election 2020 is generating questions of paper ballots versus electronic voting. These are just two news headlines that suggest 2020 will transformationally impact the way we approach RIM and IG in the years to come. This session is designed to be highly interactive, with the facilitator leading an audience-driven discussion, with the goal of helping info pros get ahead of the curve on these big RIM and IG challenges and solutions.
Title: IG and Data Analytics

When: On-Demand

Presenter(s): Andrew Ysasi

Track: Advanced Information Concepts

Full Description: What is data analytics, and why should IG professionals care? This on-demand session seeks to answer those questions. You’ll learn the basics of data analytics, how you can best work with data analytics groups, and how to run your own data analytics to measure and improve your IG program.

Title: IG Considerations for Microsoft 365

When: On-Demand

Presenter(s): James Koziol

Track: Microsoft Technologies

Full Description: Many organizations that use Microsoft 365 are struggling with balancing compliance and usability. This on-demand session will highlight e-discovery and legal hold considerations and will address the topics of data governance, records management, retention, and collaboration.

Title: IG Minds - The BAU of IG

When: On-Demand

Presenter(s): Kedar Thakkar

Track: Information Fundamentals

Full Description: When IG doesn’t go smoothly, there may not be a simple explanation – or perhaps the wrong “unsub” is identified. To further the “Criminal Minds” analogy, consider this on-demand session to parallel the steps taken by the FBI’s Behavioral Analysis Unit (BAU). It will explore the behaviors that can cause challenges with IG, solve those problems, identify the real “unsub,” and describe how to create a BAU of IG to sustain and maintain IG order.

Title: InfoGov in the Cloud Part 2

When: On-Demand

Presenter(s): Carol Stainbrook, Karen Ehrlich

Track: Information Forward (Advanced Technology)

Full Description: Description pending
Title: Information Management as a Service

When: On-Demand

Presenter(s): D Madrid

Track: Creating Structure and Improving Process

Full Description: This session presents and information management (IM) methodology that establishes a day-forward approach for ongoing organization support and for specific projects as well. The methodology is system agnostic and repeatable for any system that stores information (including physical storage). You’ll learn how to:

• Increase the chances for user adoption of the tool
• Incorporate change management throughout the process
• Collaborate with your business partners to create a structure that will provide a win-win environment for the business and information managers

Title: It’s a Bird - it’s a Plane – No, it’s InfoGOAT!

When: On-Demand

Presenter(s): Micheal Shearman, Katherine (Katie) Tall

Track: Information Fundamentals

Full Description: Is InfoGOAT the steward of good IG? This on-demand rapid fire session reveals the secrets of InfoGOAT’s ability to forage for far-flung, disparate information across the enterprise, using machine learning, natural language processing, and named entity extraction to digest dark data. See also how InfoGOAT uses its four stomachs to govern, oversee, automate, and trace information throughout its lifecycle.

Title: Managing Electronic Records in Office 365

When: On-Demand

Presenter(s): Tim Shinkle

Track: Microsoft Technologies

Full Description: Microsoft Office 365 has evolved to meet more and more real-world requirements for the automated lifecycle management of records, including better compliance and reduced storage costs. In this on-demand session, you’ll learn how organizations are implementing an ERM framework that leverages Office 365 for meeting compliance with records policies and helping control the growth of data storage costs.

You’ll get an overview of a framework for improving the management of electronic records across all systems; learn how to optimize your file share cleanup and migration to the cloud and Office 365; and see how the ERM framework is being used to implement automated controls in Office 365.
Title: Meet Your Teammates - Guardians of the IG Galaxy!

When: On-Demand

Presenter(s): Katherine (Katie) Tall

Track: Other

Full Description: You don’t need superhuman abilities to comply with regulations, enforce information security, and manage the growing volume of enterprise information. Instead, you only need a solid foundation of communication and teamwork. This on-demand rapid fire session focuses on how to enhance and synergize the superpowers of these overlooked resources (legal, compliance, IT, operations, sales, execs) to get your program off the ground and into the sky (while wearing a stylish cape!).

Title: Moving Stinks . . . Except When it Furthers RIM

When: On-Demand

Presenter(s): Jacqueline DiOrio

Track: Creating Structure and Improving Process

Full Description: In 2018, the University of California, Office of the President, set out to unite four offices in Oakland into two buildings side by side. This on-demand session explores how the University completed the move and simultaneously strengthened its RIM program. You’ll hear how the school persuaded employees to purge information, used marketing to attract attention to the project, and implemented OnBase and a complicated scanning project.

Title: Need Records Cleanup ROI? Then Let’s Get Physical!

When: On-Demand

Presenter(s): Michael P. Allen

Track: Legal and E-Discovery

Full Description: In recent years a number of tools have been developed to calm the big data beast and, while IT managers continue to argue that “storage is cheap,” there is clear evidence that ROT removal and retention schedule management bring tangible benefits to the organization. While tremendous progress has been made in the battle of the digital bulge, let’s not forget that faraway place that provides shelter to those risky and costly organizational relics…the records center! Participants will come away armed with:

- Awareness of the risks and costs of a bloated physical records inventory
- Easy-to-use physical cleanup ROI formulas designed to compel management to take action
- A business case model that demonstrates how physical records cleanup can help fund electronic records cleanup
Title: Negotiating Contracts for Management of Offsite Documents & Data

When: On-Demand

Presenter(s): Robin B. Leonard

Track: Information Fundamentals

Full Description: This on-demand session acquaints you with the Commercial Offsite Document Storage and Data Management industry and its philosophy of providing quality service and cost-efficient solutions built to operate as an extension of your internal staff. The session will address all line item Schedule A pricing as it pertains to developing a sound, cohesive solution for your organization. Among the session topics are cooperative service pricing approach, permanent removal, container-specific pricing, and developing a true partnership with your service provider are just a few of the topics that will be covered. You’ll walk away with a better knowledge of how to expand your service levels while reducing cost.

Title: Office 365 eDiscovery for Internal Investigations and Litigation

When: On-Demand

Presenter(s): Erica Toelle

Track: Legal and E-Discovery

Full Description: Responding to data discovery requests can be costly and time-consuming. Fortunately, the new intelligent discovery tools in Office 365 can minimize these impacts. In this on-demand session you’ll learn how you can use Office 365 eDiscovery and Advanced eDiscovery to meet your organization’s internal investigation and litigation needs, across SharePoint, Exchange, Teams, Yammer, and more.

Title: Practical Considerations When Launching a Self-Service Records Portal

When: On-Demand

Presenter(s): Allen Smith, Timothy Chasteen

Track: Advanced Information Concepts

Full Description: Launching and administering a public portal requires extensive planning, testing, and maintenance. This on-demand session provides first-hand info on best practices and lessons learned. The topics include:

+ Planning - Understanding your audience
+ Design - Browser and device options, intuitive interface design components, branding and customization elements, testing environments
+ Security – Connection and back-end record security, audit details
+ Execution – Testing and validation, issue/change management, cutover
+ O&M - Maintenance and help desk considerations, day-to-day operations and monitoring
+ What could an end product look like? Oregon Metro / Kirkland demo
Title: Privacy & RIM: We’re All in it Together

When: On-Demand

Presenter(s): Mary Beth Weaver

Track: Information Fundamentals

Full Description: This on-demand rapid-fire session compares key privacy and RIM statutes and their impact on organizational value. You’ll learn to recognize how each program fits within the IG framework, the key challenges in privacy and RIM, the value that both disciplines bring, and ways for both departments to work together to better meet their goals.

Title: Privacy During a Pandemic

When: On-Demand

Presenter(s): Andrew Ysasi

Track: Information Fundamentals

Full Description: This on-demand rapid fire session focuses on how governments are allowed to use private information during a pandemic, how organizations are sharing knowledge, and the lessons learned so far. It also takes a close look at the new privacy standard ISO-27701.

Title: Problems People Want to Solve: Focus on Key IG Risk and Business Objectives

When: On-Demand

Presenter(s): Lynn Molfetta

Track: Reducing Organizational Information Risk

Full Description: Sometimes it’s not practical to develop an entire IG program; the best solution may be to take a modular approach, focusing on immediate problems. In this on-demand rapid fire, follow a real-world case study that:

- Highlights the “in demand” risk and business objectives that most demand attention (such as data privacy and defensible disposition)
- Details a practical approach to analyze, assess, and solve acute issues
- Demonstrates measures of value to provide proof of concept.

Title: Recordkeeping in Microsoft 365: An Independent Assessment

When: On-Demand

Presenter(s): Bruce Miller

Track: Microsoft Technologies

Full Description: Recordkeeping capabilities of Office 365 include retention policies, multi-stage recycle bins, file plan manager, labels, inclusions/exclusions, retention precedence, and more. And the capabilities differ among the elements of Office 365, such as OneDrive, email, SharePoint, etc. What are these capabilities, and are they adequate for your organization? Do you need third-party software to fill the gaps? This on-demand session provides an honest, definitive assessment of recordkeeping in Office 365 from a truly independent source.
Title: RIM 101 – Building a RIM foundation for the Future

When: On-Demand

Presenter(s): K. David Quackenbush

Track: Information Fundamentals

Full Description: This on-demand session demonstrates how to build an enterprise-scale RIM program that has a keen eye on the future needs of information management. It begins with the end in mind: What are the goals of a RIM foundation? The session acknowledges that a RIM foundation is evergreen and should not be vulnerable to the whims of the latest technology. It answers the question “What are the right skills for leading and operating a next-generation RIM program?”

Title: Speak Up! Proactive Communications Skills to Move Projects Forward and People to Action

When: On-Demand

Presenter(s): Shakira M. Brown

Track: Professional Advancement

Full Description: This workshop provides effective ways to communicate and exert influence when the going gets tough. Learn to:

• Proactively communicate and position work plans for maximum success
• Implement strategies for navigating touchy situations, with specific words to avoid and phrases to use
• Employ techniques for removing nonverbal barriers to communication (that you likely didn’t even know were there!)
• Perform influential and persuasive communication to get more of what they want
• Use tactics when presenting to groups of all sizes with improved confidence and effectiveness to inspire calls to action

Title: Supercharged eDiscovery with The Data Lake

When: On-Demand

Presenter(s): Tom Ng

Track: Advanced Information Concepts

Full Description: Most of us waste too much valuable time looking for information. In this on-demand session, you’ll learn the benefits of streaming all your content sources into a data lake. Such an approach will ensure legal and regulatory records compliance across systems, enable cross-system business processes, and leverage comprehensive search and discovery capabilities without affecting end users and the systems they use.
Title: The Art & Science of IG in Acquisition and Divestiture Transactions

When: On-Demand

Presenter(s): Lynn Molfetta

Track: Creating Structure and Improving Process

Full Description: Acquisition and divestiture transactions innately promote change. How the change to IG is conducted can help reduce risk and increase efficiency in any transaction. This on-demand session focuses on a real-world divestiture wherein attention was given to keeping the integral business and regulatory and legal information, through effective policies, procedures, and solutions. You’ll receive a checklist of actions that can help you improve safety and increase efficiencies from these transactions.

Title: The Case for RIM – Even as AI Increases

When: On-Demand

Presenter(s): Mary Beth Weaver

Track: Information Forward (Advanced Technology)

Full Description: Every year it seems a new “it” product will completely automate RIM. The latest is artificial intelligence (AI). This on-demand rapid fire session explores the capabilities of AI and posits how it will change – but not replace – RIM. The session identifies the advantages and challenges associated with using AI to manage records, distinguishes the truth from the hype surrounding AI, and anticipates how properly leveraging AI may change the RIM profession for the better.

Title: The HeART and Science of Making Connections

When: On-Demand

Presenter(s): Yvette M Clark, Todd Brown

Track: Professional Advancement

Full Description: This on-demand session will show how to make meaningful connections and develop engagement at work, thereby developing strong teams. True engagement has to start with meaningful connections. A unique mix of the “heArt” (authenticity and desire) and the “science” (skill and knowledge) helps build lasting connections with others, and it nurtures robust and resilient teams. You’ll learn practical methods for making meaningful connections at work with a variety of individual types.

Title: The Hitchhiker’s Guide to IG

When: On-Demand

Presenter(s): Micheal Shearman

Track: Information Fundamentals

Full Description: This on-demand session, borrowing liberally from the classic work The Hitchhiker’s Guide to the Galaxy, will help longtime info pros adapt to and conquer the challenges wrought by new technologies, new regulations, and new expectations from internal business stakeholders. Learn how AI and other advanced technologies are driving to a new view of IG, characterized by a “management in place” approach and the use of natural language processing, machine learning, and other AI technologies. You’ll get a new “to do” list that will ensure you’re prepared to lead the transition from traditional records management to IG in your organizations.
Title: The Rising Tide: The Challenge of Managing e-Communications in the Modern Enterprise

When: On-Demand

Presenter(s): Ricelle San Juan

Track: Reducing Organizational Information Risk

Full Description: Enterprise users communicate using email, chat rooms, SMS apps like Whatsapp, and business tools like Slack and Microsoft Teams. The volume and variety of electronic channels has grown in parallel with regulatory scrutiny. Enforcement actions and fines for reporting and supervision failures are increasing the pressure to locate content, understand its context, and answer increasingly data-specific regulatory queries. This on-demand session discusses:

• How e-communication channels can expose firms to risks
• Current e-communication management strategies
• E-communication management best practices

Title: There are No “Stranger Things” than Dark Data

When: On-Demand

Presenter(s): Pat Dawson

Track: Reducing Organizational Information Risk

Full Description: This session takes a fun approach to the challenges of dark data using analogies from Netflix’s “Stranger Things,” in which characters are threatened by the largely unseen world of the upside-down – much like dark data. Often, end users are trapped in the upside-down, navigating the redundant, obsolete, or trivial information in search of what they need. Like the character Joyce Byers, RIM pros must work to understand the problem (Christmas lights) and apprise others of the risk that dark data poses. To defeat these challenges, RIM pros must rely on the force multiplier of innovative technologies that can automate the discovery, categorization, and full lifecycle governance of enterprise information to keep risks posed by the dark data upside-down permanently at-bay. We must also learn the cautionary tale of “Stranger Things” – that attacking the problem of dark data without the aid of innovative technology powers will doom us to the fate of the character Bob, who meets a messy end. Bob is brave and full of good intentions, but he lacks the tools and support to do his job effectively.

Title: Three RIM Program Successes from City, County, and State Governments

When: On-Demand

Presenter(s): Kurt Thies

Track: Information Fundamentals

Full Description: While the roles of a records manager and archivist can vary between city, county, and state government entities, all of their roles can be summed up with this theme: Mining our Past, Engineering our Future. Regardless of organizational size, budget, or location, records managers and archivists must juggle the past and the future: dealing with legacy technology, making sense of unorganized paper records, prioritizing history preservation – while simultaneously looking ahead and implementing additional connected processes and systems. Learn about the panelists’ challenges and successes and come away with techniques and action items you can apply in your own roles.
Title: Transforming IG Through Audit and Analytics

When: On-Demand

Presenter(s): Steve Studer

Track: Information Forward (Advanced Technology)

Full Description: Subpar information management and noncompliance can lead to lost business, a poor reputation, financial penalties, and even prison sentences. The smart use of auditing and analytics can help organizations build trust in their data, leading to better decision making and less risk. This on-demand session:

• Defines audits and analytics
• Explores the topic of merging content with data
• Discusses metadata management, automated exception handling, and PII & automated redaction

Title: Turn Your Ideas Into Gold: The Business Owner’s Guide to Intellectual Property

When: On-Demand

Presenter(s): Bill Honaker

Track: Legal and E-Discovery

Full Description: Having your ideas stolen is a bad thing; being sued is even worse. Intellectual property (IP) can account for 1/3 or more of your company’s value. In this on-demand session, learn how to cash in on the assets you may not even recognize, and avoid costly litigation. Also learn how to:

• Leverage the 5 pillars of IP value
• Protect your IP from theft
• Avoid being sued
• Create an inventory of your most valuable IP assets
• Recognize, prioritize, and maximize business value

Title: Up and Running! A New RIM Program for a Large University

When: On-Demand

Presenter(s): Christine Rigda

Track: Information Fundamentals

Full Description: This on-demand session walks through a case study in which the University of Toledo established a RIM program within Archives and Special Collections. Learn how the program was developed, how to use experiential learning, and how to overcome the likely challenges you’ll face in establishing your own program.
Title: Updating to an Easier, Compliant Retention Schedule

When: On-Demand

Presenter(s): Mark Diamond

Track: Advanced Information Concepts

Full Description: Retention programs that are paper-centric are difficult to execute and aren’t conducive to ensuring compliance. Is your retention schedule in need of an update? This session will discuss how to develop a more modern retention schedule that most efficiently handles paper and electronic information while complying with the dynamic regulatory and privacy environments.

Title: Use IG & a Privacy Compliance Plan as the Fulcrum for Data Privacy and Continuous Compliance

When: On-Demand

Presenter(s): John Frost, Rafael Moscatel

Track: Reducing Organizational Information Risk

Full Description: This on-demand session explores how to use IG and a privacy compliance plan to assure continuous compliance with the constantly evolving and proliferating privacy laws. It recognizes that the usual checkbox compliance, ad-hoc governance, and reactive policies are doomed to fail. Instead, you’ll get three key take-aways:

1. An understanding of the full scope of organizational compliance
2. The need for a governance framework that goes beyond IG – and how to build one
3. How to work with your stakeholders to deploy transparent governance and frictionless security policies

Title: Virtual Reality is Today’s Reality: How Our Meetings are Changing

When: On-Demand

Presenter(s): Megan Butcher CRM CIPP/US, Marshall Commons IGP INFO, Freddy Flores

Track: Other

Full Description: This on-demand session provides practical advice for optimizing your virtual conferences. You’ll participate in the set-up and marketing of a virtual meeting, and will share insights on how best to maintain relationships with colleagues and business partners while meeting remotely.

Title: What’s Working for Defensible Destruction of Information in 2020

When: On-Demand

Presenter(s): Susan Cisco Ph.D. CRM FAI, Suzanne J. DiCicco

Track: Advanced Information Concepts

Full Description: This on-demand session draws from a 2020 survey of pros in IG, privacy, and compliance, and focuses on the experiences of highly regulated companies that are defensibly deleting useless and outdated information. Respondents identified the strategies that were most successful in discouraging over-retention of information and in managing information according to its risk and value. Additionally, an IG director for an international financial services company will discuss how protection and privacy concerns increased the company’s appetite for destroying unnecessary information, which resulted in establishing an IG program.
Title: Why Automated IM is the answer for GDPR, CCPA, and Whatever Comes Next

When: On-Demand

Presenter(s): K. David Quackenbush

Track: Advanced Information Concepts

Full Description: Automation represents a powerful opportunity to solve the immense challenges of complying with data privacy laws. In this on-demand session, you’ll learn how automation can evaluate data from capture to disposition to help ensure it’s being managed in compliance with the myriad privacy laws. The session specifies that automation is not a magic wand; there is work that remains to be done to optimize the use of automation for purposes of compliance.