BFMA
Business Forms Management Association
Presents

SYMPOSIUM BALTIMORE 2011
May 16 - 19, 2011

BFMA Symposium 2011 Sponsors
Symposium Baltimore– 2011 Executive Overview

MAY 16, 2011 - MAY 19, 2011
The Tremont Plaza Hotel
222 St. Paul Place Baltimore, MD 21202

The 42nd International Symposium on Forms and Business Processes will be held on May 16 - 19, 2011 at the Tremont Plaza in Baltimore, MD. BFMA is the only provider of training and information specifically developed for forms and business process professionals. BFMA has offered superior education to the forms community for over 50 years!

Symposium Baltimore 2011 offers internationally renowned instructors covering intensive curriculum, facilitated venues for networking and problem solving, and one-on-one access to the experts from the industry's most influential product providers.

Whether you are seeking a basic knowledge foundation, learning about the latest technological advances, or are simply tired of wrestling with problems in isolation, come to Baltimore and open yourself to this exciting exchange of ideas. The possibilities are endless!

WHO ATTENDS?
Anyone whose job involves improving business processes and their forms.

The variation of job titles can be overwhelming. In general, your fellow attendees are forms designers, forms managers, business process analysts, usability professionals, application designers, workflow analysts, and IT support from large organizations or governmental bodies. Attendees hail primarily from industries considered to have “heavy paperwork” loads such as government, military, healthcare, insurance, finance, energy, law, and major manufacturing.

SO FAR 2011 ATTENDEES INCLUDE:
- Aetna
- Amtrak
- BC Pension Corporation
- Canvas
- Central Intelligence Agency (CIA)
- Cerenade
- CUNA Mutual Group
- Daimler Financial Services
- Department of Human Resources - Division of Administrative Services
- Department of the Treasury Financial Crimes Enforcement Network
- Dominion Resources Services, Inc.
- Essociates Group, Inc
- Farm Bureau Insurance
- Federal Reserve Board
- Forms Doc, LLC
- Formulate Information Design
- FSG Ltd.
- Hess Corporation
- Hewlett-Packard (HP)
- Holly Group
- Howick Design Pty Ltd
- Immigration and Customs Enforcement ICE
- Interstate Commission For Juveniles
- Johns Hopkins University
- Kinder Morgan
- LifeWay Christian Resources
- Mercedes-Benz Financial Services
- Mercia Eva Pty Ltd
- MetLife
- Minto Communities
- NASA Langley Research Center
- National Reconnaissance Office (NRO)
- NS Technology Group
- Office Support Services
- Palo Verde Nuclear Generation Station
- Peel Regional Police
- Rapid City Regional Hospital
- SmartDoc Technologies
- Spirit AeroSystems, Inc.
- Standard Insurance Company
- State Farm Insurance
- The Ben Graham Corporation
- U.S. Department of State
- United States Department of Agriculture - The Food and Nutrition Service (FNS)
- Vancity Credit Union
- Wisconsin Department of Corrections

Register at www bfma org
THE FORMAT
This is not a typical tradeshow. Think of Symposium as a college crash course on forms and business processes. On most days, there are also product tutorials featuring software and services from the leading industry providers. This is high-intensity education.

CURRICULUM TOPICS
All facets of forms and business process management are covered.
Educational courses cover everything from basic forms design and analysis, forms management, and workflow analysis to courses on usability testing, best practices, and data management systems. There are classes addressing all levels, from beginning to advanced.

PEER-TO-PEER LEARNING
Both organized and informal chances to digest what you’ve learned with your peers.
Networking opportunities are interwoven throughout the schedule. Attendees from similar industries exchange solutions to their specific problems in the Industry Groups. And, of course, the meal events offer attendees a chance to connect in a relaxed setting that invariably leads to ties that last well beyond the boundaries of the conference.

TALKING WITH SPONSORS
Our schedule offers you the time to focus on your project needs. Symposium is a one-of-a-kind opportunity to sit down with representatives from a full spectrum of industry products to discuss your specific project needs. No where else will you receive such focused, personalized attention with plenty of time to go back and cross-check offerings when new issues arise as you are gathering data.
To accomplish the setting for such focused research, Symposium begins with a product tabletop luncheon where you can gather literature from each sponsor and determine which companies you would like to explore further. After this luncheon you can sign up for one-on-one meetings with your chosen providers during the remainder of the week. You can also attend the company’s product tutorial session to gain perspective from your fellow attendees.

WHO IS BFMA INTERNATIONAL?
We are the association for forms and business process professionals.
For over 50 years, BFMA International, the Association for Forms and Business Process Professionals, has been providing education on theory and technology for the forms and business processes industry. This Symposium is created by volunteer BFMA members for the education and betterment of themselves and their industry peers.

WHY ATTEND?
For in-depth forms and business processes training, Symposium is the ONLY source. Consider all the benefits you and your company will gain from just one short week in the company of industry’s top experts.

STREAMLINE YOUR BUSINESS AND IMPROVE ROI
Symposium offers the kind of business skills and education that can save companies millions of dollars in the long-term, while simultaneously ensuring that its employees are the kind of value-added assets the enterprise needs to be successful.

COMPARE PRODUCTS AND USE NEW TECHNOLOGY!
The form’s industry’s leading technology providers and manufacturers will be in attendance at Symposium Baltimore 2011 to offer demonstrations of the latest products and technologies that are shaping the profession. Sponsor representatives will be available throughout the conference to discuss details of their products and programs and give you a personalized picture of how their products can suit your company’s needs.

COLLECT CRITICAL PROBLEM SOLVING RESOURCES
At Symposium, attendees will connect with fellow form system professionals who can help solve their form and document problems quickly. You will gain knowledge for a lifetime in a few short days, and the contacts you make will become critical resources throughout your career.

MAPPING A BETTER PATH FOR BUSINESS PROCESSES
Forms and business process developers are business consultants for their companies. They provide the enterprise with an individual map to the business process. Attendees will receive education on how to effectively use forms and documents to better manage those processes for their companies, presenting management with new opportunities for improved efficiencies as business operations accelerate in the digital age.
THE TREMONT PLAZA

222 St. Paul Place
Baltimore, MD 21202, United States
Tel: 410-727-2222

One Charming City, One Fabulous Hotel.

There is one fine Baltimore Maryland hotel that understands genuine hospitality. The Tremont Plaza Hotel has been regarded as a Charm City legend for over two decades. Offering a distinct combination of comfort and convenience and providing easy access to the city's best, their spacious Baltimore hotel suites are certain to make your stay in Maryland a memorable one. When you stay at the Tremont Plaza Hotel, you'll enjoy personalized service, thoughtful amenities, and elegant accommodations, all within a vibrant city setting.

HOTEL RATES

Single/Double $159.00 (available until 4/22/11)
- You can make your hotel reservations online or by calling the hotel directly.
- Visit BFMA.org to make your reservation online. Use BFMA2011 in the group code area to get the $159.00 rate.

Or call 1-800-TREMONT (800-873-6668) and mention the BFMA2011 group code.

DIRECTIONS TO OUR HOTEL

From Baltimore-Washington International Airport (BWI):
Exit onto I-95, continue to Exit 4 Baltimore. Follow the I-395 Exit heading downtown, and stay in the lane for the Inner Harbor. Bear right toward onto Conway Street. At the second traffic light, turn left onto Charles Street. At the 7th traffic light, turn right onto Saratoga Street, and go one block to St. Paul Place. Turn right. The Tremont Plaza Hotel is on the corner of Saratoga and St. Paul Place.

From I-70:
Take I-695 towards Glen Burnie. Follow I-95 north to Baltimore and follow the above directions (from south on I-95).

HOTEL PARKING

If you are an overnight guest at the Tremont Plaza Hotel, two parking options are available:

- Valet parking is available from the front entrance of the Tremont Plaza Hotel at 222 St. Paul Place. We offer 24-hour service that includes unlimited in-and-out privileges for $25 per night ($30 for oversized vehicles). The maximum vehicle height clearance is 6'6”.

- Self parking is available in a city-owned garage adjacent to the hotel, located at 210 St. Paul Place. This automated 13-story garage is managed by PMS Parking in cooperation with the Baltimore Parking Authority. The weekday maximum overnight parking rate is $15, and on weekends the maximum rate is $10 per night. The maximum vehicle height clearance is 7’0”. Please note that with the self parking option, you will be charged each time you exit the garage throughout your stay.

*Please note that rates in the 210 St. Paul Place public parking garage are subject to change without notice.

If you are attending a function at The Tremont Grand events venue or visiting the Tremont Plaza for non-overnight stay, the following parking options are available:

- Valet parking for a special event may be available at the front entrance of the Tremont Grand at 225 North Charles Street. Please inquire in advance with your host or meeting planner about the availability and pricing of this service.

- Valet parking is available at the front entrance of the Tremont Plaza Hotel at 222 St. Paul Place. The maximum daily valet parking rate is $20 for vehicles that depart within the same day. If you are attending an event at the Tremont Grand, there is a connector from the Tremont Plaza to the Tremont Grand, available via the 5th floor of the hotel.

- Self parking is available in a city-owned garage adjacent to the hotel, located at 210 St. Paul Place. This automated 13-story garage is managed by PMS Parking in cooperation with the Baltimore Parking Authority. The weekday maximum daily parking rate is $13, and on weekends the maximum rate is $10 per day. If you are attending an event at the Tremont Grand, exit the parking garage from the west side elevator to reach the Tremont Grand.

*Please note that rates in the 210 St. Paul Place public parking garage are subject to change without notice.
**How to Register**

1. **Online** - Already a member? Be sure to log-in to the member site before registering. You may pay by credit card or request "Bill Me" for an invoice to be sent via email. If you require group billing or have any other special circumstances please contact BFMA by phone at (888) 367-3078 or email bfma@bfma.org.

2. **By Phone (888) 367-3078** - Call BFMA Headquarters to register.

**Registration Fees**

- Full Registration before April 30 - $1189 Member/$1389 Non-Member*
- Full Registration after April 30 - $1389 Member/$1549 Non-Member*
- Full Registration includes the Welcome Reception, Opening Day Keynote Breakfast, All General Sessions, and all meal events on May 17-19 which includes Tuesday Breakfast, Wednesday/Thursday Continental Breakfast, Tuesday/Wednesday Luncheons, Tuesday Dinner.

*Non-member registration fees include a free one-year membership to BFMA beginning on date registration is processed.

**Government Track Sessions**

- Government Track before April 30 - $495 Member/$595 Non-Member*
- Government Track after April 30 - $595 Member/$695 Non-Member*
- Government Track Only includes Tuesday Only which will include the keynote breakfast, all Tuesday general sessions, sponsor luncheon and technology/sponsor evening event.

**Pre-Conference Training Sessions**

- Pre-Conference Session Only - $399
- Pre Conference includes all day session on May 16th with continental breakfast and lunch (Cerenade’s workshop is free but does not include lunch).

**Post-Conference Training Sessions**

- Post-Conference Session Only - $249
- Post Conference includes afternoon session on May 19th.

**Cancellation/Transfer Policy**

BFMA understands that life events can sometimes prevent an attendee from participating in Symposium even after the registration process is complete. We offer two options in this case:

**Transferring Registration**

With written notice on company letterhead or from a company email address, BFMA can transfer the registration to another employee. The new attendee must submit a new registration form and indicate on it the name of the attendee he/she is replacing.

**Canceling Registration**

As a last resort an attendee can cancel the registration by written notice from a company email address. Cancellation deadlines are as follows:
- By April 1, 2011 – Full refund
- By April 15th – Half-Refund
- After April 15th – No Refund

Credit card refunds will be processed as soon as possible. Check refunds will be issued at the end of every month.

**Terms of Payment**

All fees are payable in US funds. Checks, money orders, Visa, Mastercard or American Express will be honored. Only Government Purchase Orders will be accepted. Checks and money orders must be received no later than April 22, 2011.

**Confirmation**

You should receive an automated confirmation email at the time of online registration. BFMA Headquarters will send an informational attendee letter prior to the event. If you do not receive an attendee informational letter by May 6th please contact BFMA Headquarters.
SCHEDULE AT A GLANCE

MONDAY, MAY 16 - PRE CONFERENCE SESSIONS
9:00am - 4:00pm
PR01 Free Workshop provided by Cerenade - Cerenade Enterprise Forms Management *Lunch not Provided
PR02 AIIM Business Process Management (BPM) Practitioner Certificate Course
PR03 LiveCycle Designer - Beginning
PR04 Project Management
12:00 - 1:00pm | Lunch Served

MONDAY, MAY 16 - NETWORKING RECEPTION
7:00 - 9:00pm | Welcome Registration

TUESDAY, MAY 17 - SYMPOSIUM PROGRAM
7:00am - 5:00pm
Registration/Information Desk Open
7:30am
Buffet Breakfast
8:00am - 8:30am
Main Stage Session: Importance of Accessibility
8:30am - 8:50am
Main Stage Session: History of Forms Industry
8:50am - 9:10am
Main Stage Session: Current to Future State of Forms
9:10am - 9:55am
Super Session: A Forms Professional’s Value to the Industry: Panel Discussion
9:55am - 10:45am
Super Session: Constructing, Cultivating, and Modernizing a Forms Program

11:00am - 12:00pm
Forms Control: The Heart of Forms Management
Managing our Business - Directives Business Matrix
Visual E-Forms
Migrating to Digital Processes that support Mobile Platforms

12:10pm - 1:10pm
Enterprise Forms Program Rebuilding
It’s about the 3 Ps - Policy, People and Products
Understanding Forms
Fact Gathering and Interviewing Skills

1:10pm - 3:00pm
Sponsor Exhibit and Buffet Lunch

3:00pm - 4:00pm
Visual Perception and the Design of Forms
Rethinking and Revitalizing a Forms Program
Business Forms on the Apple iPad
Business Process Analysis

4:10pm - 5:10pm
Marketing Forms: How to Create a Buzz and Make Your Program Cool
Pulling it all Together - Leveraging from our e-Forms Investment
Enabling Occasionally Connected Mobile Field Workers Using Interactive SmartForms
Mapping a New Direction: Using Process Maps to Take Your Forms to the Next Level

6:00pm - 8:00pm
Let’s Talk: A Networking Event

WEDNESDAY, MAY 18 - SYMPOSIUM CONTINUED
8:00am - 5:00pm
Registration/Information Desk Open
8:00am - 8:30am
Coffee and Continental Breakfast
8:30am - 9:30am
Conducting an Organization Wide Forms Review
Using the Web to Promote our Forms Program
Cerenade Product Tutorial
Agile Driven

9:40am - 10:40am
Product Tutorial: FSG Ltd. SCM2.0 Taking the Next Step
Questioning Questions
E-Forms and Job Security: Joined at the HIPAA and Other Compliance Imperatives
Mobile eForms in the Enterprise

10:50am - 11:50am
Take a Number: How to Sell Forms Management and Get Buy-In from Your Customers
Amgraf Product Tutorial
Building Blocks of an InfoPath 2010 Form
How SmartForms Enabled Australian Voter Registration

12:00pm - 1:30pm
Recognition Luncheon and Main Stage Session: Digital Signatures are the Key to Efficiency presented by Donna Hansen, Deputy Chief Information Officer, National Reconnaissance Office

1:45pm - 2:45pm
Developing Error Analysis for Forms
Avoka Form Factory Product Overview
IRS and the Land of the eForm (or Nightmare on eForm Street) Part 1
Understanding Business Processes
THURSDAY, MAY 19 - POST CONFERENCE SESSIONS
1:30pm - 4:30pm
PT01 LiveCycle Designer - Advanced
PT02 Building Forms with the New Acrobat Professional X
PT03 PDF Script-Off
PT04 The Power of InfoPath 2010 Functionalities

2:55pm - 3:55pm
Proofreading or Proof Reading
What's in a Name? The Continuing Story of Company Name changes and How to Survive Them
IRS and the Land of the eForm (or Nightmare on eForm Street) Part 2
Forms 2.0 - From Ink to iPad

4:05pm - 5:05pm
Associates Group Forms Management - Product Tutorial
PDF Scripting for Dummies
Should I use Adobe LiveCycle or Acrobat to Design my Forms?
Going Green While Making Forms Clean

5:15pm - 5:45pm
General Business Meeting

6:15pm - 8:30pm
Tour: Federation for the Blind Facility

THURSDAY, MAY 19 - SYMPOSIUM CONTINUED
8:00am - 11:30am
Registration/Information Desk Open

8:00am - 8:30am
Coffee and Continental Breakfast

8:30am - 9:30am
How the Department of State Markets their Forms Program to Customers
ISO PDF Standards for Forms
Forms Analysis and Design
The Total Systems Approach to Business Analysis

9:40am - 10:40am
Developing a Comprehensive Training Program for Form Designers
The Financial Value of Forms Design
Leveraging the Cloud for Complete & Affordable Eforms Solutions
Improvement Psychology

10:50am - 11:20am
Super Session: Changes...A Perspective of What is in Store for the Forms Professional

11:20am - 11:30pm
Closing Remarks
**WELCOME RECEPTION**  
Monday, May 16, 2011 from 7:00pm - 9:00pm  
Start Symposium experience off right and join us for some fun and camaraderie. Catch up with old friends, meet new ones and take part in the BFMA tradition of exchanging pins and stickers from your home city. Light food and drinks will be served. Have some fun before getting down to the business of education on Tuesday morning. Dress is casual.

**MAIN STAGE SESSION: IMPORTANCE OF ACCESSIBILITY**  
Presented by the Federation for the Blind  
Tuesday, May 17, 2011 from 8:00am – 8:30am  
More details to come!

**MAIN STAGE SESSION: HISTORY OF FORMS INDUSTRY**  
Tuesday, May 17, 2011 from 8:30am – 8:50am  
Presented by Ray Killam, Essoiates Group  
The evolution of forms is fascinating, where we were, and where we are now. This session will focus on the history of the forms industry with interesting information, bringing us to where we are today in the forms industry.

**MAIN STAGE SESSION: CURRENT TO FUTURE STATE OF FORMS**  
Tuesday, May 17, 2011 from 8:50am – 9:10am  
Presented by James Quigley, Canvas  
Technology is having a profound impact on the way people live, work and interact. This session will focus on the implications in the forms industry, from the current state to a predicted future state of the forms industry. Technology is driving rapidly changing consumer product and market value, with opportunities to enable a motivated, productive workforce, and competitiveness.

**SUPER SESSION: A FORMS PROFESSIONAL'S VALUE TO THE INDUSTRY PANELIST**  
Tuesday, May 17, 2011 from 9:10am – 9:55am  
Presented by David Miller, Youth & Family Services & Oliver Wischmeyer, MetLife  
Tools and technology continue to evolve, so how can a form professional stay relevant and necessary to an organization. Attend this session as this panel of experts discuss what a form professional’s value is to an organization and how they could be identified to have a “seat at the table”. In addition to, how their role may be changing as the organizational needs move towards automating workflow processes, the increasing need to manage information, legal issues around the privacy of data, the technical data management complications, and the logistical considerations associated with collecting and analyzing data.

**SUPER SESSION: CONSTRUCTING, CULTIVATING, AND MODERNIZING A FORMS PROGRAM**  
Tuesday, May 17, 2011 from 9:55am – 10:55am  
The Federal Government and private sectors continue to struggle with the decision to centralize or decentralize critical business units. This session delineates the challenges, opportunities, and policies that moved the Department of State toward a centralized Forms Program.

**SPONSOR EXHIBIT AND BUFFET LUNCH**  
Tuesday, May 17, 2011 from 1:00pm - 3:00pm  
During the luncheon, sponsoring companies will host tabletop exhibits of their products and services around the perimeter of the banquet hall. This is your chance to meet our sponsors and vendors and learn about the products and services they have to offer.

**LET'S TALK: A NETWORKING EVENT**  
Tuesday, May 17, 2011 from 6:00pm - 8:00pm  
Visit and network with sponsors and attendees.

**KEYNOTE: DIGITAL SIGNATURES ARE THE KEY TO EFFICIENCY**  
Wednesday, May 18, 2011 from 12:00pm-2:00pm  
With the great interest in digital signatures and certificates, Donna Hansen will discuss the security and the efficiency of having the forms industry move towards an authentication and encryption scheme. She will explain how the National Reconnaissance Office reached compliancy and how this has improved enterprise, environmental responsibility, and efficiency processes, setting them up for success within the overall organization to maintain the vision, “vigilance from above.”

BFMA also honors those whose efforts have advanced the form industry and profession.

**GENERAL BUSINESS MEETING**  
Wednesday, May 18, 2011 from 5:15pm – 5:45pm  
The general business meeting brings the installation of the new Board of Directors for the coming year and a chance for members to show their support of these people who volunteer so much of their time. The Association President will also discuss the state of the Association.

**TOUR: FEDERATION FOR THE BLIND FACILITY**  
Wednesday, May 18, 2011 from 6:15pm – 8:30pm  
More details to come!

**SUPER SESSION: CHANGES...A PERSPECTIVE OF WHAT IS IN STORE FOR THE FORMS PROFESSIONAL**  
Thursday, May 19, 2011 from 10:50am - 11:20am  
Presenter: Randy Popson, FSG  
The session will review changes in technology and the culture over the past 40 years. This information is used as a predictor for the future and what a Form Professional could expect to see regarding changes in their profession.

**CLOSING REMARKS**  
Thursday, May 19, 2011 from 11:20am - 11:30am
If you are researching new technology, products or services for your forms programs, Symposium Baltimore 2011 offers a focused series of venues where you can compare leading offerings side by side.

**NETWORKING RECEPTION**
Monday, May 16, 2011
7:00pm - 9:00pm
Start Symposium experience off right and join us for some fun and camaraderie. Catch up with old friends, meet new ones and take part in the BFMA tradition of exchanging pins and stickers from your home city. Light food and drinks will be served. Have some fun before getting down to the business of education on Tuesday morning. Dress is casual.

**SPONSOR EXHIBITS AND LUNCHEON**
Tuesday, May 17, 2011
1:10pm - 3:00pm
During the luncheon, sponsoring companies will host tabletop exhibits of their products and services around the perimeter of the banquet hall. This is your chance to meet our sponsors and vendors and learn about the products and services they have to offer.

**ONE ON ONES**
May 16 - May 19
You may want to sign up for a block of time with participating vendors and sponsors. This is the perfect opportunity to sit down with your wish list and see how the different products meet your project requirements.

**SPONSOR SESSIONS**
See our conference schedule for dates and times
The Sponsor sessions or Product Tutorials provide attendees with an opportunity to learn more about a product or service. If you already participate in the service or own the products you can bring your end user questions to these sessions and learn how to better utilize their products and services.
AMGRAF, INCORPORATED
http://www.amgraf.com

Amgraf provides the technology for developing and deploying “paper-friendly” e-business forms. E-business forms provide the structure for user interaction with business processes, including eCommerce and eGovernment. They meet all the requirements of professional business forms. They can result in paper, electronic or Internet output.

We are different from the competition in that we come from 30 years legacy of professional forms design software and support. We are the clear market leader in forms design. We provide a robust forms development platform, with an overall philosophy of “One design session - many uses”. We never require filler software or licenses to use forms created with our tools. And, we provide total support - “We’re with you all the way” - including training, design and mapping services, consulting and technical support.

Contact an Amgraf representative to schedule product demonstrations via the internet from your own office. Our website contains many sample forms and detailed descriptions. Visit us at www.amgraf.com.

AVOKA
http://www.avoka.com

Avoka Technologies is a leading provider of customer engagement solutions based on the Adobe LiveCycle ES platform and Adobe Flex. Avoka is an Adobe Gold Solution Partner that has been working with LiveCycle since its inception - with customers in the USA, Europe and Australia covering all major industry segments.

We offer the following LiveCycle products and services:

* Solutions & Solution Accelerators
* LiveCycle Productivity Tools & Components
* Professional Services & Application Development
* Training and Mentoring
* Expert LiveCycle Support

Avoka’s focus on Adobe enterprise technologies has enabled us to develop the deep skills and hard won experience that are critical to ensuring the success of your project. We have a track record and corporate culture of 100% customer satisfaction. Anything less is unacceptable.

CANVAS
http://www.gocanvas.com

Canvas makes it easy to publish data collection apps on wireless Smartphones and other mobile devices such as laptops, tablets, bar code scanning devices, and Netbooks. Canvas reduces paper consumption, redundant data entry, and excess processes for businesses and mobile professionals. The Canvas software service enables mobile professionals to collect information using their mobile devices, analyze that data on the Canvas web site, and share information across their business community. Canvas also offers the first mobile business app store of its kind allowing business users to find mobile applications that work on a wide variety of mobile devices, with every application being customizable by Canvas users. Founded in October, 2008, Canvas Solutions, Inc is headquartered in Herndon, VA.

CERENADE
http://www.cerenade.com/forms

Cerenade’s collection of Electronic Forms solutions caters to the diverse needs of Federal & State government, Oil, Manufacturing, Education and Consumer markets. As an example, US Department of State has rolled out Cerenade Filler to 35,000 employees worldwide. Cerenade’s solutions include Forms Converter, Forms Designer, Forms Server, Forms Manager, Forms Filler and Forms Output Manager. Cerenade is the only company that has developed lossless import and export tools for importing FormFlow, OmniForm and Dynamic PDF files into Cerenade’s FAR and for exporting Cerenade FAR files to Dynamic PDF, HTML, and Microsoft XPS file formats.

In response to a growing need for a Zero-Install Filler that runs on Windows and Mac operating systems Cerenade developed XWIDE. XWIDE is a patent-pending technology that presents, in HTML, dynamic eforms that look exactly like their paper version. For a demo of Cerenade XWIDE, please visit www.cerenade.com/forms.
ESSOCIATES GROUP
http://www.essociatesgroup.com

Essociates Group, Inc. serves the forms industry by providing expertise in developing and improving the workflow of forms-related processes.

We help your organization by designing forms, providing consultation services, and performing Forms Management Best Practices comparisons.

Essociates Group, whose web site contains a repository of valuable forms industry information (including a members-only area, Enformation Central) also offers Enstruction (various forms-related training courses) and forms design and management software solutions.

FSG, LTD.
http://www. FormSoftGroup.com

FSG Ltd. is an innovative technology company focused on providing products and services that reduce the cost to develop, manage, support and protect our customer’s investment in structured content and digital processes. We maintain a specific focus on building quality mobile computing software providing anytime, anywhere access to our solutions.

IBM
http://www. ibm.com

At IBM, we are dedicated to every client’s success by delivering real business results with our unique combination of consulting services, deep industry expertise, powerful research capabilities, cutting-edge software solutions and innovative thinking that provides our clients with the tools to create a smarter enterprise.
DIGITAL SIGNATURES ARE THE KEY TO EFFICIENCY

With the great interest in digital signatures and certificates, Donna Hansen will discuss the security and the efficiency of having the forms industry move towards an authentication and encryption scheme. She will explain how the National Reconnaissance Office reached compliancy and how this has improved enterprise, environmental responsibility, and efficiency processes, setting them up for success within the overall organization to maintain the vision, “vigilance from above.”

DONNA HANSEN
Deputy Chief Information Officer, National Reconnaissance Office

In April 2010, Ms. Hansen was appointed as the National Reconnaissance Office’s Deputy Chief Information Officer. Prior to her appointment, she had served as the Director of the Enterprise Architecture and Strategy Office in the NRO’s Chief Information Office.

Prior to serving at NRO, Ms. Hansen held a variety of federal positions of increasing responsibility, providing engineering and information technology support to the foreign affairs and military communities. Ms. Hansen’s recently held executive positions reflect a mix of IT strategic planning, IT program management, personnel management, technology implementation, and IT O&M experience.

Ms. Hansen graduated with a Bachelors of Science degree in Electrical Engineering from Louisiana State University in 1988, and a Masters of Science degree in Electrical Engineering from George Washington University in 1993. Before becoming a federal employee, Ms. Hansen worked as an electrical engineer on the research and development of leading edge radar and infrared search-and-track technology at GE Aerospace in Utica, New York. A native of Baton Rouge, Louisiana, Ms. Hansen presently resides in the Washington, DC metropolitan area with her husband and young daughter.
### Monday, May 16, 2011

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00am</td>
<td>PR01 Free Workshop provided by Cerenade - Cerenade Enterprise Forms Management (Lunch not included)</td>
</tr>
<tr>
<td>9:00am</td>
<td>PR02 AIIM Business Process Management (BPM) Practitioner Certificate Course - Canceled</td>
</tr>
<tr>
<td>9:00am</td>
<td>PR03 LiveCycle Designer - Beginner</td>
</tr>
<tr>
<td>9:00am</td>
<td>PR04 Project Management</td>
</tr>
<tr>
<td>9:00am</td>
<td>PR05 Call for Forms</td>
</tr>
</tbody>
</table>

### Tuesday, May 17, 2011

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:00am</td>
<td>Registration/Information Desk Open</td>
</tr>
<tr>
<td>7:30am</td>
<td>Buffet Breakfast</td>
</tr>
<tr>
<td>8:00am</td>
<td>Main Stage Session: Importance of Accessibility presented by the Federation for the Blind</td>
</tr>
<tr>
<td>8:30am</td>
<td>Main Stage Session: History of Forms Industry</td>
</tr>
<tr>
<td>8:50am</td>
<td>Main Stage Session: Current to Future State of Forms</td>
</tr>
<tr>
<td>9:10am</td>
<td>Super Session: A Forms Professional's Value to the Industry Panel</td>
</tr>
<tr>
<td>9:55am</td>
<td>Super Session: Constructing, Cultivating, and Modernizing a Forms Program</td>
</tr>
<tr>
<td>11:00am</td>
<td>Forms Control: The Heart of Forms Management</td>
</tr>
<tr>
<td>11:00am</td>
<td>Managing our Business - Directives Business Matrix</td>
</tr>
<tr>
<td>11:00am</td>
<td>Visual E-Forms</td>
</tr>
<tr>
<td>11:00am</td>
<td>Migrating to Digital Processes that Support Mobile Platforms</td>
</tr>
<tr>
<td>12:10pm</td>
<td>Enterprise Forms Program Rebuilding</td>
</tr>
<tr>
<td>12:10pm</td>
<td>It's about the 3 Ps - Policy, People and Products</td>
</tr>
<tr>
<td>12:10pm</td>
<td>Understanding Forms</td>
</tr>
<tr>
<td>12:10pm</td>
<td>Fact Gathering and Interviewing Skills</td>
</tr>
<tr>
<td>1:00pm</td>
<td>Sponsor Exhibit and Buffet Lunch</td>
</tr>
<tr>
<td>3:00pm</td>
<td>Visual Perception and the Design of Forms</td>
</tr>
<tr>
<td>3:00pm</td>
<td>Rethinking and Revitalizing a Forms Program</td>
</tr>
<tr>
<td>3:00pm</td>
<td>Business Forms on the Apple iPad</td>
</tr>
<tr>
<td>3:00pm</td>
<td>Business Process Analysis</td>
</tr>
<tr>
<td>4:10pm</td>
<td>Marketing Forms: How to Create a Buzz and Make Your Program Cool</td>
</tr>
<tr>
<td>4:10pm</td>
<td>Pulling it all Together - Leveraging from our e-Forms Investment</td>
</tr>
<tr>
<td>4:10pm</td>
<td>Enabling Occasionally Connected Mobile Field Workers Using Interactive SmartForms</td>
</tr>
<tr>
<td>4:10pm</td>
<td>Mapping a New Direction: Using Process Maps to Take Your Forms to the Next Level</td>
</tr>
<tr>
<td>6:00pm</td>
<td>Let's Talk: A Networking Event</td>
</tr>
<tr>
<td>Time</td>
<td>Session</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>8:00am - 5:00pm</td>
<td>Registration/Information Desk Open</td>
</tr>
<tr>
<td>8:00am - 8:30am</td>
<td>Coffee and Continental Breakfast</td>
</tr>
<tr>
<td>8:30am - 9:30am</td>
<td>Conducting an Organization Wide Forms Review</td>
</tr>
<tr>
<td>9:40am - 10:40am</td>
<td>Product Tutorial: FSG Ltd. SCM2.0 Taking the Next Step</td>
</tr>
<tr>
<td>10:50am - 11:50am</td>
<td>Take a Number: How to Sell Forms Management and Get Buy-In from Your Customers</td>
</tr>
<tr>
<td>12:00pm - 1:30pm</td>
<td>Association Awards and Recognition Lunch (Buffet)</td>
</tr>
<tr>
<td>1:45pm - 2:45pm</td>
<td>Developing Error Analysis for Forms</td>
</tr>
<tr>
<td>2:55pm - 3:55pm</td>
<td>Proofreading or Proof Reading</td>
</tr>
<tr>
<td>4:05pm - 5:05pm</td>
<td>Associates Group Forms Management - Product Tutorial</td>
</tr>
<tr>
<td>5:15pm - 5:45pm</td>
<td>General Business Meeting</td>
</tr>
<tr>
<td>6:15pm - 8:30pm</td>
<td>Tour: Federation for the Blind Facility</td>
</tr>
<tr>
<td>8:00am - 11:30am</td>
<td>Registration/Information Desk Open</td>
</tr>
<tr>
<td>8:00am - 8:30am</td>
<td>Coffee and Continental Breakfast</td>
</tr>
<tr>
<td>8:30am - 9:30am</td>
<td>How the Department of State Markets their Forms Program to Customers</td>
</tr>
<tr>
<td>9:40am - 10:40am</td>
<td>Developing a Comprehensive Training Program for Form Designers</td>
</tr>
<tr>
<td>11:20am - 11:30am</td>
<td>Closing Remarks</td>
</tr>
<tr>
<td>1:30pm - 4:30pm</td>
<td>PT01 LiveCycle Designer - Advanced</td>
</tr>
<tr>
<td></td>
<td>PT02 Building Forms with the New Acrobat Professional X</td>
</tr>
<tr>
<td></td>
<td>PT03 PDF Script-Off</td>
</tr>
<tr>
<td></td>
<td>PT04 The Power of InfoPath 2010 Functionalities</td>
</tr>
</tbody>
</table>
Forms Management: Forms management principles involve work skills consisting of cost benefit analysis, consultation, project management, and environmental and safety awareness. Forms administration involve version control, identification systems, filing systems, software distribution, warehousing, standards, tracking, operating procedures, obsolescence, forms libraries, business continuity, procurement, and inventory management.

Technology: Technology principles include electronic technologies involving digital demand imaging, recognition systems, post processing, data merge printing and production principles. This also includes systems architecture involving hardware, operating system, networks, communication systems, and applications software.

Process/Workflow: Process and workflow consists of assessment of objectives and project scope, fact finding, data organization, analysis, solution development, recommendations, implementation, and follow-up and evaluation.

Design/Development: Design and development principles include graphics, use of color, typography, plain language, graphical user interface, techniques. Including general layout principles for paper and electronic form design including manufacturing considerations, printing specifications, interface design, field formatting, masks, data validation, and development specifications.

Government: Attend this track and benefit from the US Department of State’s knowledge and experience with implementing their eforms program. This special dedicated government forms track entitled the Evolution of the Department of State Electronic Forms Program focuses on various aspects of eforms program implementation and will be presented by US Department of State forms professionals.

Product Tutorial: These sessions will present information about products and show demonstrations.

*The sessions listed below are subject to change.

**MONDAY MAY 16, 2011**

**Pre Conference Sessions**

**PR01 Business Process Management (BPM) Practitioner Certificate Course | Steve Weismann**

Monday, May 16, 2011 9:00am - 4:00pm

Learn how an industry-grade Enterprise Forms Management system from Cerenade helps you eliminate tedious, paper-based processes that waste time and money by transforming them into automated process-driven E-Forms.

Join us for a free workshop, where you will learn how an Enterprise Forms Management system from Cerenade will help your organization improve productivity through implementation of an enterprise-wide e-forms solution at a fraction of the time and cost.

Cerenade combines comprehensive enterprise forms management (EFM) functionality with flexible business process management (BPM) tools to both manage and process information.

With Cerenade, all of your company’s information—captured via e-forms—resides in a secure, centralized repository. Cerenade Workflow, a sophisticated BPM tool built on Microsoft Workflow Foundation, then automates your content-based business processes to ensure that they are performed accurately and efficiently.

Since 1995, Cerenade has helped hundreds of organizations import entire libraries of PDF, FormFlow, OmniForm, Shana and paper forms to Cerenade e-forms, increase productivity, and provide better service. Attend this workshop to learn how Cerenade will help you:

- Get Cerenade Enterprise Forms Management up and running in less than a week.
- Import your existing library of forms to Cerenade.
- Create custom applications and add-ons using Cerenade Toolkit (ActiveX, Web Services and .NET components.)
- Automate collaborative business processes such as travel & expense, timesheet, employee performance review, loan applications, contract management and many others using Cerenade Workflow.
- Auto-populate e-forms from external data sources.
- Design once and deploy to many platforms, including iPhone and iPad.
- Make your e-forms Accessible.

**PR02 AII Business Process Management (BPM) Practitioner Certificate Course | Steve Weismann**

Monday, May 16, 2011 9:00am - 4:00pm

This session has been canceled.

**PR03 LiveCycle Designer - Beginner | Angie Okamoto**

Monday, May 16, 2011 9:00am - 4:00pm

In this session, we will begin with the basic tools of Designer, exploring the form components in the standard library as well as create our own in the custom library. Learn design tips and tricks while avoiding common design problems. Discussion around how static form design compares to dynamic form design will be included as well as Tab-order, Importing from Word or Existing PDF files, Action Builder, Alignment and Layout Techniques, Tables, Basic Math Calculations with Scripting, Master Pages, and Multiple Page Layouts.

This session will also discuss techniques that enable you to add intelligence to your form and to create dynamic layouts that react to the data or to user interactions.

This is a hands-on course. A Laptop is required with LiveCycle. LiveCycle version 9.0 is preferable which is included with Acrobat X but all versions of designer will be addressed. Laptops are available for rent. Please contact BFMA to rent a laptop for the course.
FORMS MANAGEMENT AND BUSINESS ANALYSIS ACTIVITIES ENCOMPASS BOTH MACRO AND MICRO BUSINESS ACTIVITIES; FROM IMPLEMENTING AN ORGANIZATION-WIDE EFORMS FRAMEWORK TO CONDUCTING DETAILED PROCESS ANALYSIS OF A SINGLE FORM. HOW DO YOU MANAGE ‘PROJECTS’ OF SUCH CONTRASTING SCOPE?

TWO DIFFERENT PROGRAMS, ONE AMERICAN AND ONE CANADIAN, ONE HIGH-LEVEL GOVERNMENT AND THE OTHER HEALTHCARE, HAVE EACH DISCOVERED THAT APPLYING PROJECT MANAGEMENT TECHNIQUES WITHIN THEIR OPERATIONS HAVE PROVIDED A PRACTICAL AND SUCCESSFUL FRAMEWORK FOR MANAGING DIVERSE FORMS SYSTEMS PROJECTS. IN THIS FUN-FILLED WORKSHOP YOU WILL LEARN THAT PROJECT MANAGEMENT TOOLS AND METHODS ARE HIGHLY ADAPTABLE AND VERY EFFECTIVE WHEN APPLIED IN A FORMS ENVIRONMENT.

THROUGHOUT THIS SESSION PARTICIPANTS WILL EXPLORE PROVEN BEST PRACTICES FOR DEFINING, PLANNING, ORGANIZING AND EXECUTING A PROJECT AND HOW TO APPLY THEM TO YOUR FORMS PROGRAM: FROM THE MINI-PROJECTS TO THE MAJOR INITIATIVES. THE LEARNING MATERIALS AND INTERACTIVE EXERCISES WILL PROVIDE LEARNERS WITH HANDS-ON EXPERIENCE USING THE PROJECT MANAGEMENT AND BUSINESS ANALYSIS TOOLS AND METHODOLOGIES NEEDED TO PROPERLY DEFINE, PLAN, MANAGE AND SUCCESSFULLY IMPLEMENT A PROJECT. SPECIAL EMPHASIS WILL BE GIVEN TO UNDERSTANDING THE PROJECT MANAGEMENT TRIANGLE (SOMETIMES CALLED THE TRIPLE CONSTRAINT) AND THE IMPORTANCE OF THE PLANNING STAGES; KEY UP-FRONT EFFORTS TO CLEARLY DEFINE THE PROJECT SCOPE, STRATEGIC VALUE AND EXPECTED RESULTS.

THROUGHOUT THE DAY, PARTICIPANTS CAN EXPECT TO ENCOUNTER AND APPLY WIDELY RECOGNIZED PROJECT MANAGEMENT TECHNIQUES, TOOLS AND TEMPLATES. A COMPREHENSIVE LEARNING GUIDE AND COLLECTION OF REUSABLE TEMPLATES WILL BE PROVIDED.

TUESDAY MAY 17, 2011

FORMS CONTROL: THE HEART OF FORMS MANAGEMENT | MARGARET TASSIN
TUESDAY FROM 11:00AM - 12:00PM

The forms control function is one of many separate areas of responsibility in a well-run forms management department. Different from analysis and design, all of the forms control functions go to the very heart of the forms management process. Learn the areas that you need to consider in forms control and who should handle these tasks. Find out why this area important and worthy of examination.

MANAGING OUR BUSINESS - DIRECTIVES BUSINESS MATRIX | NIGEL WALSH
TUESDAY, MAY 17 FROM 11:00AM - 12:00PM

This session will cover how the Business Matrix work-flow application provides the Department of State the ability to track across five distinct but interrelated business lines of the Office of Directives Management’s daily operations. The presenter will cover management reporting, correspondence tracking and how we manage historical information.

VISUAL E-FORMS | BEHDAH PAYAMI
TUESDAY FROM 11:00AM - 12:00PM

Cerenade Visual E-Forms suite of products include: Designer, Converter for existing forms and data, web-enabled Forms Management, Zero Filler, e-Forms Life-Cycle Manager, Output Manager, Workflow/BPM, and a Case Management solution.

MIGRATING TO DIGITAL PROCESSES THAT SUPPORT MOBILE PLATFORMS | RANDY POPSON
TUESDAY FROM 11:00AM - 12:00PM

Technology such as smartphones and tablet computers provide tremendous opportunity to fully automate processes. When you create a true digital process, your users are freed from platform dependence and they are able to quickly and easily participate in a process whenever and wherever they are. The class will cover:

• How mobile technology is changing and challenging the industry.
• Best practices for using mobile technology to automate business processes.
• How to migrate your electronic forms program to a Digital Process program that will get management’s attention.

***ONE LUCKY CLASS ATTENDEE WILL WIN A NEW IPAD2 THANKS TO FSG LTD.***

ENTERPRISE FORMS PROGRAM REBUILDING | BARBARA FIGUEROA
TUESDAY FROM 12:10PM - 1:10PM

In this session, you will learn how the U.S. Department of the Navy (DON) forms program has transformed. Topics discussed will include:

How to:

• Choose a new forms solution
• Update legacy forms solutions
• Convert from a paper based forms inventory to an electronic inventory
• Update workflows/databases during forms conversion
• Educate users to new/old formats
• Eliminate duplication and stove piped processes

The importance of:

• Version control
• Adapting to new policies
• Updating and asking for enterprise resources
• Advocating for the enterprise (not just forms)
• Ready inter/intranet access to forms
• Direct linkage to workflows/databases
• Dynamic forms with digital signatures
• Ensuring the forms review process is useful, complete, appropriate, and legal

Barbara will educate symposium attendees on how she accomplished these objectives for the DON and conducted many initiatives to bring 20th century processes into the 21st century.

16 Symposium 2011 / Baltimore
SYMPOSIUM PROGRAM DESCRIPTIONS

It’s about the 3 Ps - Policy, People and Products | Maureen Whitsett
Tuesday from 12:10pm - 1:10pm
PM PW GV

In conjunction, with the Department of State movement toward a centralized Forms Program, equivalent attention was placed on new policies under the eGovernment Act, and other mandates that were being introduced such as Section 508, eSignature, and data integration. This session covers how policies, products and our people are key factors to the success of our Forms Program.

Understanding Forms | Ray Killam
Tuesday, May 17 from 12:10pm - 1:10pm
PA

Forms are the most common document type and can be very complex. To make it easier to study forms analysis, forms design and forms management, it is useful to separate a form into its basic components. This presentation analyzes the five basic components that are present in all forms and provides an understanding of the complexities involved with forms development.

The class is designed for persons new to the forms management industry and as a study refresher class for veterans. Its unique approach provides food for thought for anyone involved with forms.

Fact Gathering and Interviewing Skills | Dr. Ben S. Graham
Tuesday, May 17 from 12:10pm - 1:10pm
PW

Two people can go into the same are to gather facts and experience entirely different results. One spends many hours and gets incomplete and misleading data. The other is done in minutes and has complete and solid facts. This session outlines some of the things that the second person does to win cooperation and to collect relevant facts quickly.

This session will take participants through the interview process including how to initiate fact gathering, what facts to gather, (using a powerful gathering model that we call the description pattern), recording technique, level of detail, how to take notes quickly, how to keep organized and how to complete the interview and capture the facts the same day.

Visual Perception and the Design of Forms | Jessica Kerr
Tuesday, May 17 from 3:00pm - 4:00pm
GS

Thanks to many decades of research, we know a lot about how the human brain translates bits of light hitting our retinas into a cohesive image of the world around us. In this fun, enlightening and practical session, take a tour through the principles of visual perception that have direct relevance to the way people see and work with forms.

With a great mix of both good and bad real-world examples, and the opportunity to put these into practice with your own forms, you’ll soon have the tools to make informed decisions about how to lay your form out, regardless of whether it’s paper-based or electronic.

Note: Attendees are invited to bring along copies of their own forms. Nothing helps cement new concepts more than applying them straight away to your own situation.

Rethinking and Revitalizing a Forms Program | Kim Casem
Tuesday, May 17 from 3:00pm - 4:00pm
PM PW GV

This session encompasses the Department of State’s journey of eradicating a legacy application and how they moved into the 20th century with e-Forms. The journey will take you through how the Office of Directives Management made a paradigm shift from the “old way of doing business” to a “more innovative way of delivering services”. They will share their challenges and framework used to revitalize their Forms Program.

Business Forms on the Apple iPad | J.P. Terry
Tuesday, May 17 from 3:00pm - 4:00pm
GP

This session will introduce BFMA attendees to the new world of business forms on Apple’s iPad. It will cover traditional BFMA concepts and concerns but the session will focus on how our collective business form expertise can be applied in the new world of portable and interactive tablets. We will demonstrate an example of an interactive and dynamic iPad expense report and attendees will be able to download this app to their own iPads.

This is a critically important topic for the BFMA because many field personnel are now using the iPad to complete business forms while they are on-the-road or working with clients. Designing and developing iPad-based business forms is considerably different than traditional paper forms or traditional interactive PDF forms. However, the BFMA has always been a leading voice in form management and the BFMA will continue to lead with this new and exciting iPad course.

Business Process Analysis | Ben B. Graham
Tuesday, May 17 from 3:00pm - 4:00pm
PW

This session explores with a hands-on case, a proven structured method for understanding and analyzing business processes. While reengineering, ISO Certification, Business Process Improvement, Six Sigma, Sarbanes-Oxley all specify an organizational focus on business processes, none provides a specific method for understanding the processes. This leaves many people attempting to figure it out as they go. Without a solid methodology to support process understanding and improvement, many efforts fail, drag on, or (at best) require more effort than was initially anticipated. Detail process charts provide level of understanding that is essential for effective analysis. They have been used by world-class organizations to achieve excellent results for over half a century.
Marketing Forms: How to Create a Buzz and Make Your Program Cool | Kelli Lozada Reese  
Tuesday, May 17 from 4:10pm - 5:10pm

Are you uncertain of how to create a buzz about boring forms? Do you need to create a more positive user experience? Are you interested in making your program soar to new heights? Learn how the NRO is transforming a once underappreciated program, making forms more visible within the organization. The NRO Forms Lead will share a secret tool as well as how taking a leap, learning about your customers, motivating your team, and creating an efficient and effective program can boost your program’s image and gain you exposure that is needed for more support from management and customers. Take your forms program from boring to cool with 5 easy steps.

Pulling it all Together - Leveraging from our e-Forms Investment | Diane Darling  
Tuesday, May 17 from 4:10pm - 5:10pm

This session covers how new technology enhanced The Department of State’s forms program. The session shares the framework used by the State Department to upgrade the e-Forms application, implement new features, and communicate across a global user community. Additionally, the session will cover the critical paths, risks and how those risks were mitigated to bring an upgraded e-Forms application, new features and services to our customers.

Enabling Occasionally Connected Mobile Field Workers Using Interactive SmartForms | Howard Treisman  
Tuesday, May 17 from 4:10pm - 5:10pm

Does the emergence of devices such as the iPad herald a new era for larger format forms used by mobile workers? We believe it most certainly does. We’ve seen a number of innovative organizations starting to use interactive PDF SmartForms to automate the collection of data by their remote field teams. This session will describe the use cases and technologies used for a client solution that pushes partially complete forms out to mobile worker, allowing them to gather information while disconnected, and re-synchronizing when back online, through a fully managed process.

Mapping a New Direction: Using Process Maps to Take your Forms to the Next Level | Kelly Halseth  
Tuesday, May 17 from 4:10pm - 5:10pm

The single most powerful weapon in your forms management arsenal is the lowly process map. Forms management is about business processes and understanding the processes driving your mission critical forms is crucial to both paper and electronic forms design. How do you describe a business process to a variety of stakeholders with varying degrees of understanding of a particular process and ensure a common understanding? How do you demonstrate a process as it crosses departmental barriers? How do you identify critical control or quality control points? Learn how to use process maps to define business needs, identify cross-departmental processes and determine 'where the paper goes.' Learn how to how to ask 'why?' to get to the fundamentals of a business process, describe it in a visual format (map) and then use that map to define, refine and improve your organization’s business processes. The session will include practice exercises in process development and mapping and an overview of different mapping styles and when to use each one. Includes a case study illustrating how a process map impacted a forms design.

Conducting an Organization Wide Forms Review | Craig Dartnell  
Wednesday, May 18 from 8:30am - 9:30am

In 2006, a major Australian Government Department took on the challenge of reviewing all of its public-use forms with a view to making them far easier for the public to fill out. Because of time constraints and a large number of forms, much of the review was conducted by previously untrained staff.

In this session we will look at:

- What the reviewers were taught about improving forms.
- Problems the public had with existing forms and why they were making so many errors.
- The causes of the problems and what was done to correct them, including a totally new approach to layout.
- How usability testing and error analysis was used to highlight the problems and to show business owners why the forms needed to change.

The session will include numerous practical examples of ‘before’ and ‘after’ situations along with insights gained from an extensive observational testing program.
Using the Web to Promote our Forms Program | T.J. Furlong
Wednesday, May 18 from 8:30am - 9:30am
PW GY

This session will cover how the Department of State is using the web to brand the products and services offered as part of the Form Program.

The presentation will address the benefits of using the web and other tools such as Sharepoint, Adobe Flash and digital audio, video and 3-D animation to brand the services within your organization.

Cerenade Product Tutorial | Behdad Payami
Wednesday, May 18 from 8:30am - 9:30am
TE Proc

This session will go over an end-to-end process that involves import of a PDF form into Cerenade Enterprise Forms Management solution, followed by routing and tracking to collect additional information and signatures before ending with archiving the form into a document management solution.

Agile Driven | Kelli Lozada Reese
Wednesday, May 18 from 8:30am - 9:30am
PW

Development teams across the world are not only trying out new technology but also new processes. Learn about what ‘Agile’ is and how you can apply it to build forms successfully. This session will focus on the NRO’s success using Agile methodology. There will be an explanation of what Agile development is, how it can be used for various sizes of programs, implementation strategies, and why choosing to be flexible with shorter term goals can actually make programs more cohesive and efficient.

Product Tutorial: FSG Ltd. SCM2.0 Taking the Next Step | Randy Popson
Wednesday from 9:40am - 10:40am
TE PW ID Proc

In today’s environment, electronic forms are being replaced by vertical web applications at a rapid pace. The use of SharePoint and need for mobile platform support are accelerating the movement away from e-forms in the enterprise. How can a forms professional continue to add value within their organization? FSG’s Structured Content Manager 2.0 provides the answer. SCM2.0 provides support for both legacy electronic form technology (MS Infopath, Adobe Livecycle PDF’s, IBM Lotus forms) as well as simple integration with MS SharePoint and built in out-of-the-box capability for mobile SharePoint and tablet technology. The following capability of SCM 2.0 will be demonstrated during the class.

- 3 Elegant portal interfaces for computer, smartphone, and tablet computers that greatly simplify initiating, approving, and tracking digital processes
- Web-based generator that creates HTML from Adobe Livecycle forms providing quality support for mobile platforms that do not support PDF’s
- Graphical workflow design wizard that simplifies building multi-stage, multi-platform digital processes
- Simple Sharepoint portal integration

***One lucky class attendee will win new 23 inch 1080P Monitor at this session thanks to FSG Ltd. C***

Questioning Questions | Jessica Kerr
Wednesday from 9:40am - 10:40am
TE

We forms professionals talk a lot about process: what systems to use; data security; organizational structures etc. Yet all that process refinement is for nothing if, at the pointy end, the person filling out your form is scratching their head about what “unpreserved benefits” are and whether the term “child” includes their 26-year-old step son.

If a form is to succeed in its goal to collect high quality data, it is imperative that questions be well written. But writing good questions is hard. (If you think it’s easy, come along to this session and see where your questions might be failing, without you knowing it.)

In this hands-on session, we’re going to look at-and practice-a model that simplifies the question writing process and helps produce questions that work.

Note: Attendees are invited to bring along copies of their own forms. There’s nothing better than working on a realistic question set!

E-Forms and Job Security: Joined at the HIPAA and Other Compliance Imperatives | Steve Weissman
Wednesday from 9:40am - 10:40am
TE PW

If your organization hasn’t yet embraced electronic forms technology – or worse, if you haven’t – then it’s long past time you took the bull by the horns and started riding.

Why? Because e-forms’ efficiencies and economies are so long proven that it’s downright irresponsible not to deploy them – and because “we can’t find it” and “it’ll take days to retrieve it” are unacceptable responses when your senior executives are before the presiding judge in a compliance lawsuit. Either way, your tenure is likely to be tenuous when they learn you’re the one at the nexus of forms and technology.

Attendees of this session will learn why it’s in their best interest to get on and drive the e-forms bandwagon and start capitalizing on the technology’s ability to enhance efficiency, lower costs, and buttress organizational privacy, records, and other compliance policies.

Mobile eForms in the Enterprise | Darren Mathis
Wednesday from 9:40am - 10:40am
TE PW ID Prod

We all know that capturing customer data using dynamic Web-based, Enterprise eForms—thus avoiding the delays of paper altogether—can have a rapid and exceptionally beneficial impact on business. However, what is the best way to go about implementing a truly “soup-to-nuts” electronic capture strategy that can leverage today’s iPad and mobile tablet revolution?

Presented by Darren Mathis, CEO of LincWare and developer of LincDoc, this energetic session, void of repetitive concepts and theory and rich in results-getting best practices discussion, will cover your questions on how to win buy-in from decision makers, handling employee training and fostering customer adoption. Not to be missed for those seeking ways to take the next step in eForms use.
**Symposium Program Descriptions**

**Take a Number: How to Sell Forms Management and Get Buy-In from Your Customers | Kelly Halseth**
**Wednesday from 10:50am - 11:50am**

We all know it...for a Forms Management Program to be successful it needs Senior Management support and buy-in from organizational stakeholders. So how do you cultivate support from your wide variety of customers some with varying or even conflicting agendas? Learn about hard and soft ‘currencies’; personal and professional values, motivations and politics and how they impact perceptions of your program and services. Understand what is important to each of your customers and use that knowledge to construct specific benefits that are meaningful to them. Explore creative ways to raise your profile, sell your services and educate your customer.

**Amgraf Product Tutorial | Franklin Garner**
**Wednesday from 10:50am - 11:50am**

Amgraf, Inc. offers a collection of software packages for electronic forms, Internet forms, and the total automation of high-volume print production. Our capabilities include order-entry, data capture, electronic proofing and annotation, interactive layout and design, batch composition and pagination, variable imaging, imposition and ganging, digital printer interfaces, and complete prepress workflow management. Many of the largest print manufacturers, governmental agencies, and in-plant print shops in North America rely on Amgraf software technology for their forms management and prepress operations. Our product tutorial will focus on Amgraf’s OneForm Designer Plus software and will include a demonstration of how it is used to convert PDF files into fillable, database-linked electronic and Internet forms that can be freely distributed worldwide without costly end-user filler licenses.

**Building Blocks of an InfoPath 2010 Form | Todd Stark & Eric Stein**
**Wednesday from 10:50am - 11:50am**

This demo will provided an overview of key features to build an automated form using InfoPath. See how InfoPath forms can help to gather and share information by creating and implementing XML based forms. Discussion will include the benefits of using electronic forms and an explanation of how the SharePoint workflow takes over in the forms submission process.

**Avoka Form Factory Product Overview | Howard Treisman**
**Wednesday from 1:45pm - 2:45pm**

The problem many organizations face moving paper or static forms to interactive SmartForms is resource constraints. In many instances IT is consumed with major cost reduction initiatives like data center consolidation and server virtualization. Other times the IT department lacks the UI skills needed to create effective user experiences. This session will look at how organizations are deploying Avoka Form Factory for Adobe LiveCycle to open up the LiveCycle innovation process to business teams, so that organization’s can create more LiveCycle SmartForms at less cost and in less time. Form Factory’s intuitive, easy-to-use Smart Templates, style sheets and wizards that allow users to create, deploy and manage LiveCycle SmartForms without having to write code.

**Developing Error Analysis for Forms | Margaret Tassin**
**Wednesday from 1:45pm - 2:45pm**

You have a form with problems and know that it needs re-work. But what is the magnitude of the problem? What sort of priority does the form have in your unending stack of other work? One way to tell is via an error analysis. This process enables you to determine how many errors and what kind of errors are being made, who is affected by the error, what is the consequence of the errors and their cost. This effort can support a form redesign or a complete system redesign, and it will have a big impact on the visibility of your forms management program.

**Understanding Business Processes | Ben B. Graham**
**Wednesday from 1:45pm - 2:45pm**

What records are used, Who is doing the work, Where the work is being done and How long it takes.

**How SmartForms Enabled Australian Voter Registration | Howard Treisman**
**Wednesday from 10:50am - 11:50am**

The Australian Electoral Commission (AEC) is responsible for conducting federal elections and referendums, and maintaining the Australia’s electoral roll. In 2010 the AEC offered an online enrolment capability to improve customer service, reduced the time to process enrolment applications, and significantly reduce the costs of processing paper enrolment forms. The AEC online solution processed 217,000 electronic submissions in the three weeks leading up to the 2010 federal election, saving the AEC almost $900k by eliminating the need to hire temporary staff to process paper forms. This session will examine the implementation and the benefits of the AEC’s electronic enrolment solution.
Proofreading or Proof Reading | Bill Hill
Wednesday from 2:55pm - 3:55pm

Ever watch Dirty Jobs on the Discovery Channel? Some can be really miserable. In fact almost every job has at least one aspect of a ‘dirty’ job. What about Proofreading? Not a favorite? Personally, Mr. Hill had never heard of a class on Proofreading although it was part of his career. So what is there to this? Upon research and instructing this class, there is a lot to this subject. It takes a unique talent that reaches far beyond the use of the standard editing marks. This session will give you tips and tricks for proofing and editing the forms to include graphics and design standards, branding standards data field testing, and more. If your company does not have a full-fledged forms analyst on staff, then the proofreading phase is a possible route to introducing some basic forms analyst work. This class will review proofreading resources and how to develop skills to include documents, forms and postal regulations where proofreading is more than just checking the words. This class always has lively discussion with the audience.

What’s In A Name? The Continuing Story of Company Name Changes and How to Survive Them | Nancy Flor-Gawel
Wednesday from 2:55pm - 3:55pm

How many times has your company’s name changed? What type of work was involved? How much time were you given to make the change and how many people worked on the change? Was the effort successful?

These questions and others will be answered and discussed during this session, where Nancy will recall the different name change efforts that she has experienced, including the most recent name change in November 2010. Form organization, personnel assignment, and the ever-popular “rogue” form collection will be just a few topics discussed.

Part of the session will include open discussion with the audience, where you can share your name change experiences and how you coped with the situation. Come prepared to help your fellow forms professionals cope with this all-too-frequent forms management challenge.

IRS and the Land of the eForm (or Nightmare on eForm Street) Part 2 | Dave Brown, Karen Gill, Paul Showalter & Barbara Ying
Wednesday from 9:40am - 10:40am

This session will focus on the task of binding XML schemas to forms and how IRS is making their internal (and several external) forms intelligent. IRS has published schemas for tax forms for several years. In 2006, we were tasked with developing a way to integrate those schemas with our composed forms so IRS could create a more efficient process. Moving to the Adobe Designer, IRS was able to leverage the increased capabilities of the designer to meet the ever increasing development demands of our customers. The second half of this presentation will discuss enhancing the user experience through the use of scripting. This presentation will discuss the steps taken during our process and the lessons we learned.

Forms 2.0 - From Ink to iPad | James Quigley
Wednesday from 2:55pm - 3:55pm

The mobile revolution is shaping up to be more impactful on the forms industry than the advent of e-forms. With users being able to gather information where ever they are, and collect key information just not possible on paper forms (image capture, GPS, real time time/date stamps etc.) and get that information back real time opens up a world of possibility.

In this session we will outline options available today to “mobilize” forms and forms based processes on Smartphones and Tablet based computing devices. Also covered will be a discussion of the market forces that are making the move to mobile solutions more affordable, easier and more powerful than ever before.

Featured will be a demonstration of the Canvas offering; a solution that provides the ability to rapidly and simply convert forms into mobile apps that work on a wide variety of popular mobile computing devices.

Essociates Group Forms Management - Product Tutorial | Ray Killam
Wednesday from 4:05pm - 5:05pm

Essociates Group, Inc is a consultancy corporation specializing in Forms Management. We are uniquely positioned to help clients establish Best Practices forms management programs. In addition, we offer a specialized forms management database for organizations of any size. This session will feature this database, including a demonstration of its capabilities.

Essociates Group has served the forms management industry for more than nine years. In addition to consulting services, we offer a variety of forms training, including Design and Analysis, Understanding Forms - A Complete Guide, Conducting a Call for Forms, and more.

We welcome your participation in our session. Join us and discover how we may be of assistance to your organization.

PDF Scripting for Dummies | Ben Walsh
Wednesday from 4:05pm - 5:05pm

Are you a PDF designer who would like to take your skills to the next level? Would you like to bring your forms to life, but are bamboozled by jargon and assumed knowledge? Perhaps, you do not want to script yourself but would like a better understanding of what your developer colleagues are talking about.

This session will introduce you to the basics of PDF scripting using simple, easy to understand language. You will learn how to script useful behavior into your forms including: display a pop-up message when the user clicks a button, sum values into a total field, display a text field when the user selects ‘other’ in a drop-down and adding and removing table rows.
Should I use Adobe LiveCycle or Acrobat to Design my Forms?  | Lisa Croft & Angie Okamaoto  
Wednesday from 4:05pm - 5:05pm  
**TE**  
LiveCycle Designer is included with Acrobat Professional for Windows. LiveCycle Designer enhances the form-creation features in Acrobat and offers a robust collection of advanced features and controls. This session will show the similarities and differences between the two tools. Angie and Lisa will help you understand which is the best tool for your projects and why.

Going Green While Making Forms Clean | Casey Tricarico  
Wednesday from 4:05pm - 5:05pm  
**PW GV**  
Wherever you are in your forms career, a good day of spring forms cleaning is always essential. Learn how cleaning up your forms (electronic, paper, and even filing cabinets), investing in your stakeholders, and collecting out of date and non compliant forms can help to reinvent and build a better forms program. This session takes you through the logistics (mapping it out, scheduling, marketing), implementation of inter-departmental boundaries, and how to collect real metrics so management is all in! If you’ve ever wondered what you do with the paper forms or how to clean up forms that are now electronic, then this class is for you. The National Reconnaissance Office has effectively engaged the workforce in massive cleanup days to better educate and make the workforce a more efficient and green organization. Learn their tricks and tips and take them home to your groups!

General Business Meeting  
Wednesday from 5:15pm – 5:45pm  
The general business meeting brings the installation of the new Board of Directors for the coming year and a chance for members to show their support of these people who volunteer so much of their time. The Association President will also discuss the state of the Association.

THURSDAY MAY 19, 2011

How the Department of State Markets their Forms Program to Customers | Kim Casem  
Thursday from 8:30am - 9:30am  
**PM GV**  
The session outlines how the Department of State markets their e-Forms products and services to customers.

ISO PDF Standards for Forms | Lisa Croft  
Thursday from 8:30am - 9:30am  
**TE**  
Adobe is known for developing PDF. It first became a de facto standard and is now a de jure standard known as ISO 32000-1. Exemplifying innovation through standards, PDF is everywhere. From day one, the PDF specification was publicly published by Adobe without any licensing restrictions, which helped it become the de facto worldwide standard for the reliable distribution and exchange of electronic documents. International Organization for Standardization (ISO) published the approved ISO 32000-1 standard based upon PDF 1.7 in July 2008. ISO will also produce future versions of the PDF specification. This provides a formal, open standard for the more than one billion PDF files in existence today and guides the hundreds of developers creating software to process PDF files. This session will provide an overview of the standards and focus on the standards related to PDF forms.

Forms Analysis and Design | Ray Killam  
Thursday from 8:30am - 9:30am  
**PM PW**  
Before an effective business form can be designed, a thorough analysis of the workflow requirements is needed to identify and confirm the need for the form and the business rules it must enforce. Based on the analysis, the appropriate design elements can be used to create an effective container and define the medium that most efficiently satisfies the requirements of the variable data and user interaction. This class presents an overview of the forms development process and provides useful tools for forms design.

The Total Systems Approach to Business Analysis | Joyce E. Endres  
Thursday from 8:30am - 9:30am  
**PW**  
What are the needs of your business? During this session, Joyce will define business analysis, a business analysis methodology and competencies needed to be an effective and successful business analyst. The goal of the session is to provide a process for you to help identify and define the business and technical needs and problems within your business to help you find solutions to meet the needs of your business.

The business analysis methodology includes:
- Strategic Planning
- Core Business Functions
- Process Life Cycle Definition
- Enterprise Analysis and Requirements Definition, Business and Technical Requirements and Solutions Definition
- Recommendations, Validation; and Follow-up Implementation Tips
Developing a Comprehensive Training Program for Form Designers | Diane Darling, Maureen Whitsett, David Record, Kim Casem, and Kelli Delaney
Thursday from 9:40am - 10:40am

This session covers how the Department of State developed a comprehensive training program for their designers.

The Financial Value of Forms Design | Oliver Wischmeyer
Thursday from 9:40am - 10:40am

In today’s economy the value of professional forms design can be difficult to demonstrate to senior management. An important factor is the cost of forms design to the business. This session will discuss ways to prove the value, including reducing the cost of forms design compared to alternatives.

Leveraging the Cloud for Complete & Affordable Eforms Solutions | Alan P. Proctor
Thursday from 9:40am - 10:40am

Case studies demonstrate how commercial and government organizations are currently using cloud-based solutions to accelerate forms automation and the business processes they support to reduce costs and improve performance without up-front investments in hardware and software.

Improvement Psychology | Dr. Ben S. Graham
Thursday from 9:40am - 10:40am

Dealing with people while working on improvement projects can be frustrating when good intentions are misunderstood. Psychological factors arise as we set goals, select team members, choose team leaders, search for creative solutions, deal with delays, get caught up in assigning credit and blame, and as we run into the seemingly inevitable resistance to change. This session will cover the basics of healthy improvement psychology.

Super Session: Changes...A Perspective of What is in Store for the Forms Professional | Randy Popson
Thursday from 10:50am - 11:20am

The session will review changes in technology and the culture over the past 40 years. This information is used as a predictor for the future and what a Form Professional could expect to see regarding changes in their profession.

Closing Remarks
Thursday from 11:20am - 11:30am

POST CONFERENCE SESSIONS

PT01 LiveCycle Designer - Advanced | Angie Okamoto
Thursday 1:30pm - 4:30pm

LiveCycle Designer can be used to create basic interactive forms, but why go with basic when you can really make your forms come alive? This hands-on session will discuss techniques that enable you to add intelligence to your form and to create dynamic layouts that react to the data or to user interactions. Topics to be covered include: Dynamic Form Layout Checklist, Form Letters/Mail Merge Type Documents, Databinding, Scripting for Dynamic Layouts and Troubleshooting Dynamic Forms and Scripts.

This is a hands-on course. A Laptop is required with LiveCycle. LiveCycle version 9.0 is preferable which is included with Acrobat X but all versions of designer will be addressed. Laptops are available for rent. Please contact BFMA to rent a laptop for the course.

PT02 Building Forms with the New Acrobat Professional X | Lisa Croft
Thursday 1:30pm - 4:30pm

This hands-on course will show you the basics of creating forms using the latest version of Adobe Acrobat Professional. During this session students will work through the different types of form fields including checkboxes, buttons, radio buttons, text fields and drop downs. Each of these field types have different options and settings available that will also be discussed throughout the day. This session is hands-on and students will need to provide a laptop for use during the course. The laptop will need to have Adobe Acrobat Professional X installed and Microsoft Office, preferably version 2007 or higher.

PT03 PDF Script-Off | Ben Walsh
Thursday 1:30pm - 4:30pm

Are you a LiveCycle Designer gun looking to pit your prowess against a scripting pioneer? Perhaps, you are a developer who has recently discovered the power of LiveCycle Designer scripting and want to pick up hot tips and new techniques?

Come to this open session armed with your fastest laptop, LiveCycle Designer ES (or higher) and most challenging form requirements. No slides, no agenda, just wholesome PDF geek fun. Not for the faint of heart.

PT04 The Power of InfoPath 2010 Functionalities | Todd Stark
Thursday 1:30pm - 4:30pm

This is an overview of using the power of InfoPath to gather and share information by creating and implementing XML based forms. Learn how to design an intelligent form in InfoPath, from beginning to deployment. Understand how form templates work and activating to a site collection.
DAVID BROWN  
Senior Publishing Specialist, Internal Revenue Service, Washington DC  

David Brown has worked in electronic publishing at IRS since 1987. In the early 1990’s, he managed a project to develop a Standard Generalized Markup Language (SGML) application for automating the Internal Revenue Manual, a 50,000 page loose-leaf directives publication. In 1996, Dave was invited to join the newly launched IRS Digital Daily web site team and was responsible for forms upload processing, and application development. In 2002, Dave began prototyping use of the Topic Maps standard at IRS. He is currently project manager for IRS Tax Map, a topic maps based electronic research tool for IRS tax law telephone assistants. In 2006, Dave joined a team to begin looking at the feasibility of using LiveCycle Designer as a single source file for forms composition and for displaying XML tax return data. In 2008, Dave joined the XML Integrated Process Team and led the research and development effort to display electronically filed tax return data in a PDF form using the LiveCycle technology. Dave has an MA in Instructional Systems Development and a BS in Industrial Technology - Graphic Arts Management.

Sessions at Symposium 2011:  
- IRS and the Land of the eForm (or Nightmare on eForm Street) Part 1 | Wednesday from 1:45pm - 2:45pm  
- IRS and the Land of the eForm (or Nightmare on eForm Street) Part 2 | Wednesday from 2:55pm - 3:55pm

KIM CASEM  
Department of State - Office of Directives Management  

Kim Casem enjoyed 6 years of teaching a variety of subjects at the middle school level, the last 4 at Bethel Christian Academy in Savage Maryland. While at Bethel, she developed a comprehensive literature curriculum for 6th, 7th, and 8th grades, and founded several after-school clubs. In 2005, Kim joined Geneva Software, Inc. As a Senior Documentation Specialist and was assigned to the Department of State. As a consultant, she played a major role in assisting the customer in transitioning from their legacy forms application Form Flow to the new, robust e-Forms application. Kim joined the Department of State Office of Directives Management in 2009, and currently works as a Forms Developer and Quality Assurance Coordinator. She contributes to several major projects, including implementing accessibility for 508 Compliance, applying electronic signature, and utilizing workflow management tools. She presents the many attributes and services of e-Forms to customers across the Department of State.

Sessions at Symposium 2011:  
- Rethinking and Revitalizing our Forms Program | Tuesday from 3:00pm - 4:00pm  
- Marketing your Forms Program to Customers | Wednesday from 8:30am - 9:30am  
- Developing a Comprehensive Training Program for Form Designers | Thursday from 9:40am - 10:40am

ERIC COHEN  
Portal and Social Collaboration Specialist, National Security and Justice, IBM  

Eric Cohen is on the Federal Government Team for IBM Collaboration Solutions. Eric has been involved with social media and the evolution of collaboration technologies for the last 12 years.

Sessions at Symposium 2011:  
- Building Dynamic Form-Driven Web Experiences without Coding

LISA CROFT  
Acrobat Systems Engineer, Adobe Systems, Inc.  

Lisa Croft is an Acrobat Systems Engineer with Adobe Systems, Inc. She graduated from Southwest Texas State University with a BBA in Computer Information Systems. Her professional career began by working for Pennzoil Company. After leading their project on Sales Force Automation, she formed a consulting company to provide services and training to various companies including Reliant Energy and United Space Alliance. Her specialization in forms and workflow automation brought her to Jetform Corporation as a Sales Engineer. When Jetform was acquired by Adobe Corporation in 2002, she moved into the ePaper Division supporting Acrobat and other business software. She currently focuses on the Adobe Acrobat product family and is thrilled to work with customers across the entire US.

Sessions at Symposium 2011:  
- Should I use Adobe LiveCycle or Acrobat to Design my Forms? | Wednesday from 4:05pm - 5:05pm  
- ISO PDF Standards for Forms | Thursday from 8:30am - 9:30am  
- PT04 Building Forms with the New Acrobat Professional X | Thursday from 1:30pm - 4:30pm
Diane Darling has an extensive career working in domestic, international and government environments. In 1980, while working at MCI Telecommunications as Director of the Control Center, she was responsible for conducting comprehensive business process reengineering across organizations, aimed at improving and elevating efficiency and effectiveness in their operation. In 1998 she joined Iridium (start-up) to provide leadership for their end-to-end build-out of Business Centers in 15 countries chartered to provide consistent business solutions globally. While working internationally with a diverse cultural team, she used project management methodologies, and business process engineering strategies as essential tools to ensure the same methods were deployed worldwide. Currently, she is the President and CEO of “Solutions by Darling” working as a contractor for Geneva Software Inc. and assigned to the Department of State, Office of Directives Management where she collaborates with management to incorporate project management and business process re-engineering to assist in delivering a global forms program.

Sessions at Symposium 2011:
PR04 Project Management | Monday from 9:00am - 4:00pm
Pulling it all Together - Leveraging from our e-Forms Investment | Tuesday from 4:10pm - 5:10pm
Developing a Comprehensive Training Program for Form Designers | Thursday from 9:40am - 10:40am

CRAIG DARTNELL
Managing Director, Howick Design Pty Ltd
Craig Dartnell is Managing Director of Howick Design. Based in Sydney Australia, Howick Design is a consultancy service that specialises in the analysis and design of paper and electronic forms for high volume form users – typically banks, financial institutions, insurance companies and government departments. For over 20 years Mr Dartnell has worked with a wide cross section of clients and has demonstrated the ability to develop forms that are functional, user friendly and that meet both business and user requirements. Mr Dartnell is a regular speaker on forms related topics.

Sessions at Symposium 2011:
Conducting an Organization Wide Forms Review | Wednesday from 8:30am - 9:30am

KELLI DELANEY
Department of State - Office of Directives Management
Kelli Delaney joined The Department of State in the Bureau of Administration and currently works in the Office of Directives Management. Kelli Delaney assignment included working in the Regulatory and most recently the Forms Program. She has evolved into one of the Department’s subject matter experts in form design and has the capability to apply cutting edge technology for forms, such as: Tagging forms for 508, administering electronic signatures, implementing version controls, and supporting web publication of over 1,700 forms for the Department of State.

In 2009, Kelli received her Bachelor’s degree in Business Management and is currently working on her Master’s Degree in Business Administration. Kelli brings a wealth of knowledge as a hands-on-user of eForms; she has a clear and concise understanding of customer service and continues to be a key attribute to the Department of State’s Forms Program.

Sessions at Symposium 2011:
Developing a Comprehensive Training Program for Form Designers | Thursday from 9:40am - 10:40am

JOYCE E. ENDRES
Information Management Business Analyst Consultant, Je Consulting, LLC
Joyce is an Information Management Business Analyst Consultant under Je Consulting, LLC. She is currently working part-time on an Electronic Records Management Project for the State of Wisconsin. She retired from Wisconsin State Government as an IT Strategic Planning and Business Systems Analyst after forty years of service. She is a Charter member of the BFMA Madison Chapter, a past BFMA Association President, and currently serves the associations VP Administration. She is a Certified Form Systems Professional (CFSP). Joyce has presented sessions at BFMA International Symposia and local seminars for BFMA and various other organizations.

Sessions at Symposium 2011:
The Total Systems Approach to Business Analysis | Thursday from 8:30am - 9:30am
BARBARA FIGUEROA  
Forms & Reports Manager, U.S. Department of the Navy (DON)  
Barbara Figueroa has been working in forms and reports management since 1998. In February of 2006 she was selected to become the U.S. Department of the Navy (DON) Forms Manager. In that role she works with over 140 subordinate commands and is responsible for over 26,000 forms. Since 2006, Barbara has lead the DON in rebuilding the enterprise forms program from paper based to paperless. This project has required her to develop new policies and training for over 750,000 employees around the world.

Sessions at Symposium 2011:  
Enterprise Forms Program Rebuilding | Tuesday from 12:10pm - 1:10pm

NANCY FLOR-GAWEL  
Manager - Operations Services, Mercedes-Benz Financial Services  
Nancy started the electronic form program at Chrysler Financial in 1996 and led the eform initiative both at Chrysler Financial and at Mercedes-Benz Financial. Before she entered the forms world, she was a computer systems analyst and project leader in Chrysler Financial’s ITM department. In November 2010, she will have finished her 5th name change effort for all forms in the company!

Nancy holds a Bachelor’s Degree in Computer Science/Business Administration from Lawrence Technological University and a Master’s Degree in Business Administration from Wayne State University. She is married and has two sons. In her spare time, she enjoys travel, reading, and is learning to golf.

Sessions at Symposium 2011:  
What’s In A Name? The Continuing Story of Company Name Changes and How to Survive Them | Wednesday from 2:55pm - 3:55pm

THELMA FURLONG  
Director, Department of State - Office of Directives Management  
Ms. Thelma (T.J.) Furlong was appointed as the Director, Office of Directives Management in June 2000. During her tenure she managed the expansion of that office which included the development of a Department-wide forms program, management of the Undersecretary for Management’s FAM-X Project to update the Foreign Affairs Manual, the development of new sections to oversee the Department’s requirements under the Paperwork Reduction Act and Office of Management and Budget Regulatory requirements for Rulemaking.

Previously, Ms. Furlong worked in the Resources Management Office in the Bureau of Human Relations. She also has had an extensive federal career which has taken her to various locations in the U.S. and abroad while working with the Federal Bureau of Investigation, Department of Treasury, Department of Navy, and the United States Agency for International Development. Ms. Furlong is also very active in her community where she holds senior leadership positions with her church and the Boy Scouts of America.

A native of Maryland, Ms. Furlong holds degrees in Information Technology from the University of Maryland, Criminal Law from Anne Arundel Community College, and a Masters in Business Administration from University of Maryland.

Sessions at Symposium 2011:  
Super Session: Constructing, Cultivating, and Modernizing a Forms Program | Tuesday from 9:55am - 10:55am  
Using the Web to Promote our Forms Program | Wednesday from 8:30am - 9:30am

FRANKLIN GARNER  
President and CEO, Amgraf  
Franklin has served as a speaker and instructor at numerous BFMA events, and in 2009 was a recipient of the prestigious Jo Warner Award. He also contributes to the forms-related programs at the Print Services & Distribution Association (PSDA), and was Treasurer for the North American Security Products Association (NASPO) from 2002-2009. During his career, he has written and co-authored several research papers and articles for leading business documents industry trade magazines and journals. Franklin co-founded Amgraf, Inc. in 1976. Amgraf specializes in forms software technology for print manufacturing, industry and government. Amgraf’s products are widely used for business forms pre-press automation, web-to-print solutions, and electronic and Internet forms systems.

Sessions at Symposium 2011:  
Amgraf Product Tutorial | Wednesday from 10:50am - 11:50am
Karen Gill
Senior Publishing Specialist, Internal Revenue Service, Washington DC

Ms. Karen Gill is a graduate of the University of Maryland with a Bachelor of Science degree in Business Management and Accounting. Karen started her career with the Internal Revenue Service in 1978 when she joined the Tax Forms and Publications Division, Rulings Disclosure Branch. In 1984, Karen moved to the Publishing Division and started working on tax forms composition. At various times, Karen has been the Chief of the Composition Unit, Acting Chief of the Composition and PSD Section, system administrator for the tax forms composition system, and is currently working as the Senior Composition Specialist on a detail to the XML Process Improvement Team. She will retire in 3.5 years and still doesn’t know what she will do when she grows up.

Sessions at Symposium 2011:
IRS and the Land of the eForm (or Nightmare on eForm Street) Part 1 | Wednesday from 8:30am - 9:30am
IRS and the Land of the eForm (or Nightmare on eForm Street) Part 2 | Wednesday from 9:40am - 10:40am

Ben B. Graham
President, The Ben Graham Corporation

Ben is President of The Ben Graham Corporation and author of the book ‘Detail Process Charting: Speaking the Language of Process’ published by John Wiley Publishers. His company pioneered the field of business process improvement, and has provided process improvement consulting, coaching and education services to organizations across North America since 1953.

He holds a BA in Economics from UCLA and an MBA from USC and has more than twenty years of experience working with the Graham Process Improvement Methodology with organizations in the United States, Canada and South America. Ben has worked with many of organizations to build libraries of business process maps and develop effective, process-focused, continuous improvement programs. His organization publishes Graham Process Mapping Software, which is designed specifically to help people understand business processes.

Sessions at Symposium 2011:
Business Process Analysis | Tuesday from 3:00pm - 4:00pm
Understanding Business Processes | Wednesday from 9:40am - 10:40am

Dr. Ben S. Graham
Chairman, The Ben Graham Corporation

Dr. Graham is a recipient of BFMA’s Jo Warner Award, a Fellow of the Institute of Industrial Engineers and received a doctorate from UCLA in Behavioral Science - with distinction.

He is the Chairman of the Ben Graham Corporation of Tipp City Ohio (a training, consulting and software organization focused on Process Improvement). He has personally trained over 30,000 people and taken pride in seeing many of them use this training to develop outstanding work processes for their organizations, while simultaneously saving those organizations millions of dollars.

Sessions at Symposium 2011:
Fact Gathering and Interviewing Skills | Tuesday from 12:10pm - 1:10pm
Improvement Psychology | Thursday from 9:40am - 10:40am

Kelly Halseth
Provincial Lead, Forms Management, Alberta Health Services

Kelly Halseth hails from Donalda, Alberta, the Lamp Capital of the World (she did not make that up). The youngest of five children she answers to Kelly, Becky, Margaret, Kevin and Hey You. After completing her second undergraduate degree Ms. Halseth was forced to find gainful employment. A chance two-week contract in health care became a nine year passion for business improvement that shows no signs of abating. Rumor has it she can converse on topics not related to forms, process analysis or Brett Favre, but this theory remains largely unproven.

She does have a legitimate and very serious job as the Provincial Lead, Forms Management for Alberta Health Services (AHS), leading a team of very talented individuals in a newly created organization of 90,000 staff and 80,000 forms (and counting). She holds a BA in English and a BSc in Biochemistry from the University of Calgary. During Symposium you’ll find her either teaching a session, attending a session or, when there are no sessions; in the nearest pub.

Sessions at Symposium 2011:
PR04 Project Management | Monday from 9:00am - 4:00pm
Mapping a New Direction: Using Process Maps to Take Your Forms to the Next Level | Tuesday from 4:10pm - 5:10pm
Take a Number: How to Sell Forms Management and Get Buy-In from Your Customers | Wednesday from 10:50am - 11:50am
Donna Hansen
Deputy Chief Information Officer, National Reconnaissance Office

In April 2010, Ms. Hansen was appointed as the National Reconnaissance Office’s Deputy Chief Information Officer. Prior to her appointment, she had served as the Director of the Enterprise Architecture and Strategy Office in the NRO’s Chief Information Office.

Ms. Hansen graduated with a Bachelors of Science degree in Electrical Engineering from Louisiana State University in 1988, and a Masters of Science degree in Electrical Engineering from George Washington University in 1993. Before becoming a federal employee, Ms. Hansen worked as an electrical engineer on the research and development of leading edge radar and infrared search-and-track technology at GE Aerospace in Utica, New York. A native of Baton Rouge, Louisiana, Ms. Hansen presently resides in the Washington, DC metropolitan area with her husband and young daughter.

Sessions at Symposium 2011:
Wednesday Keynote - Digital Signatures are the Key to Efficiency | Wednesday from 12:45pm - 1:15pm

Jessica Kerr
Principal, Formulate Information Design

Jessica Enders is Principal of Formulate Information Design, an Australian business providing form design consulting services to government agencies, companies and not-for-profit organisations.

Jessica has designed forms—in paper, on the desktop and on the web—for some of Australia’s most influential organisations including Wesfarmers, SEEK, Origin Energy, GE Money, the Australian Prudential Regulation Authority and the Therapeutic Goods Administration. In 2010, an insurance quoting and purchasing interface that Jessica designed won the international Pegasystems “Customer Experience Transformation” award, beating many big names in the industry such as Zurich, American Insurance Group and ING.

Formulate’s aim is to fix people’s frustration by creating efficient, effective and user-friendly forms. Jessica’s knowledge, skills and experience extends to all aspects of a form’s design, including the way questions are asked, the layout of the form and the business process and workflow that surrounds it. As a speaker, Jessica aims to share this knowledge in a relaxed and tangible way.

Sessions at Symposium 2011:
Visual Perception and the Design of Forms | Tuesday from 3:00pm - 4:00pm
Questioning Questions | Wednesday from 9:40am - 10:40am

Ray Killam
President, Essociates

Ray H. Killam, CFSP, CFC is President of Essociates Group, Inc, a forms management consulting company. Ray is past-president of BFMA, is currently President Emeritus, and serves on the Past Presidents’s Council and on the BFMA Education Foundation Board of Trustees. He was presented the Jo Warner award in 2001. Ray holds a BBA-Economics from Washburn University, an MBA from George Mason University, and a Masters Certificate in eCommerce from Creighton University.

Sessions at Symposium 2011:
Main Stage Session: History of Forms Industry | Tuesday from 8:30am - 8:50am
Essociates Group Forms Management - Product Tutorial | Wednesday from 4:05pm - 5:05pm
KELLI LOZADA REESE
Forms Management Lead, Federal Government/National Reconnaissance Office

Kelli Lozada Reese serves as the National Reconnaissance Office (NRO) Forms Management Program Lead. Since taking this position, she has initiated multiple process improvement initiatives. Mrs. Lozada Reese has been a driving force in investigating and accessing new forms management and workflow technologies. She has developed an agile program management methodology applicable to forms. She has built an overall stronger, more recognizable program throughout the NRO with a focus on branding and awareness.

For the last 15 years, Mrs. Lozada Reese has served in many government positions as a trainer, team member, or leader, bringing enthusiasm, expertise, and efficiencies to programs. She has a Bachelor of Arts in English from Stetson University.

Sessions at Symposium 2011:
Marketing Forms: How to create a Buzz and Make your Program Cool | Tuesday from 4:10pm - 5:10pm
Agile Driven | Wednesday from 8:30am - 9:30am

ANGIE OKAMOTO
Senior Technical Consultant, Avoka Technologies

Angie has been in the technology training industry for over eight years and is well known in the LiveCycle community. She has provided technology training and consulting to hundreds of businesses throughout the United States and is a frequent speaker for various business associations and technology events. She's an Adobe Certified Expert, an Adobe Certified Instructor and a Master Level Microsoft Office Specialist but it's the Adobe LiveCycle Enterprise Suite are the products she most enjoys teaching.

Sessions at Symposium 2011:
PR03 LiveCycle Designer - Beginner | Monday from 9:00am - 4:00pm
Should I use Adobe LiveCycle or Acrobat to Design my Forms? | Wednesday from 4:05pm - 5:05pm
PT01 LiveCycle Designer - Advanced | Thursday from 1:30pm - 4:30pm

BEHDAD PAYAMI
VP of Operations, Cerenade

Behdad Payami is a software engineer with an extensive programming and development background. Mr. Payami co-founded Cerenade in 1992 and has since been instrumental in the development of a host of groundbreaking electronic forms products. He has over 30 years experience in the IT sector and over 17 years dedicated to the electronic forms industry.

Sessions at Symposium 2011:
PR01 Free Workshop provided by Cerenade - Cerenade Enterprise Forms Management | Monday from 9:00am - 4:00pm
Visual E-Forms | Tuesday from 11:00am - 12:00pm
Cerenade Product Tutorial | Wednesday from 2:55pm - 3:55pm
RANDY POPSON  
President, FSG Ltd  

Randy Popson, President of FSG Ltd. and 2008 Jo Warner award winner. Randy has over 18 years of experience in building software to simplify automating business processes. Randy has participated in BFMA activities for the past 18 years, been a presenter at the last 15 BFMA Symposiaums, and is sharing his knowledge and insights with us again at the 2011 BFMA Symposium.

Sessions at Symposium 2011:  
Migrating to Digital Processes that Support Mobile Platforms | Tuesday from 11:00am - 12:00pm  
Product Tutorial: FSG Ltd. SCM2.0 Taking the Next Step | Wednesday from 9:40am - 10:40am  
Super Session: Changes...A Perspective of What is in Store for the Forms Professional | Thursday from 10:50am - 11:20am

ALAN PROCTOR  
Federal Solutions, SpringCM

Alan Proctor leads federal solutions for SpringCM and has a career of experience working with forms to improve the effectiveness of commercial and government organizations. This experience includes 15 years as the CIO of the Federal Trade Commission, consulting and systems integration work with Booz Allen, and broad experience implementing technology solutions involving forms and cloud computing.

Sessions at Symposium 2011:  
Leveraging the Cloud for Complete & Affordable Eforms Solutions | Thursday from 9:40am - 10:40am

JAMES QUIGLEY  
CEO & Co-Founder, Go Canvas

Jim is an award winning mobile and wireless solution executive. Prior to founding Canvas, Jim was V.P and Managing Director of Enterprise Wireless Solutions for VeriSign. Jim has also held wireless leadership roles within Aether Systems (the first major BlackBerry re-seller), Orbcomm, and Peak Technologies (R.R. Donnelley). Jim has also held roles within United Technologies and Transamerica.

Jim was named as of the top 20 executives in his field by the World Supply Chain Forum / Chief Logistics Officer Magazine. He has also won the prestigious Motorola Wireless Solution of the Year award.

JIM SHOWALTER  
Senior Publishing Specialist, Internal Revenue Service, Washington DC

Paul Showalter specializing in forms management and design. He also manages the IRS’s electronic database of published products. He currently serves as the publisher of the IRS Tax Products DVD and as a gatekeeper for the Publishing Division web site, where his responsibilities include the creation and management of electronic forms and documents that are electronically distributed to the world. He specializes in the conversion of paper forms to intelligent electronic forms. Showalter, a graduate of Rochester Institute of Technology, has presented at XPLOR, BFMA (Business Forms Management Association), AIIM, Seybold Seminars, and numerous PDF Conferences. He was the 2002 Innovator in eGovernment Honoree at FOSE and BFMA’s International Member of the Year in 2005.

Sessions at Symposium 2011:  
IRS and the Land of the eForm (or Nightmare on eForm Street) Part 1 | Wednesday from 8:30am - 9:30am  
IRS and the Land of the eForm (or Nightmare on eForm Street) Part 2 | Wednesday from 9:40am - 10:40am
TODD STARK
Proactive Performance Solutions, Inc.

Todd Stark is a computer expert and Microsoft Certified Professional. He specializes in the use of software to facilitate data gathering, problem solving, and decision making processes in groups to automate business processes.

Through his engineering, consulting, analysis, and problem solving skills, Mr. Stark has helped develop control system software for nuclear power plants, was instrumental in deploying the TDRS Satellite Ground Station for NASA, served as a webmaster for a major petrochemical corporation, developed a revolutionary portal framework for collaboration in law firms, and guided the successful deployment of a project management and document sharing portal for a well-known Philadelphia hospital. Mr. Stark is a full-service consultant known among his peers as a near-fanatic about careful, accurate documentation and ongoing improvement of reusable methodologies.

Sessions at Symposium 2011:
Building Blocks of an InfoPath 2010 Form | Wednesday from 10:50am - 11:50am
PT04 The Power of InfoPath 2010 Functionalities | Thursday from 1:30pm to 4:30pm

ERIC STEIN
Principal, Proactive Performance Solutions, Inc.

Eric Stein is a principal of Proactive Performance Solutions, Inc. As Vice President of Sales and Services, Eric is responsible for both Sales and Marketing and has consistently met revenue targets. Key to this success is developing strategic partner relationships.

Eric started his IT career as a Field Service Engineer at Digital Equipment Corporation, moving quickly to Software Engineering where he developed a number of business-critical customer applications.

In his role at Proactive, Eric is also responsible for Services including identification of strategic directions and developing new business development initiatives. Eric was instrumental in Proactive taking a lead in delivering SharePoint Consulting Services. Proactive is now seen as one of the leaders in delivering SharePoint consulting, and its Portal practice delivers a full suite of Business collaboration and workflow solutions. Electronic forms are a key component for these solutions.

Sessions at Symposium 2011:
Building Blocks of an InfoPath 2010 Form | Wednesday from 10:50am to 11:50am

MARGARET TASSIN
President, Forms Doc, LLC

Margaret Tassin, CFSP, CDC, is president of Forms Doc, LLC. She was previously the manager of forms, records and information management for Pennzoil-Quaker State Company, where she initiated its forms automation project. She has been an active member of BFMA since 1982. Ms. Tassin has chaired BFMA's Form System Certification Board. She was one of the four initial inductees into Business Document's End User Hall of Fame. At the 1997 Symposium, Ms. Tassin was presented with the Award of Excellence, one of BFMA’s most prestigious honors.

Sessions at Symposium 2011:
Forms Control: The Heart of Forms Management | Tuesday from 11:00am - 12:00pm
Developing Error Analysis for Forms | Wednesday from 1:45pm - 2:45pm

J.P. TERRY
CEO, SmartDoc Technologies

J.P. Terry is the CEO of SmartDoc Technologies, a leading consultant in the field of intelligent document solutions with offices in NY, NJ, and Beijing, China. SmartDoc specializes in LiveCycle and has developed paperless solutions for Fidelity Investments, Merrill Lynch, and Citigroup. J.P. often writes and speaks about dynamic PDF and is the author of Creating Dynamic Forms with Adobe LiveCycle Designer (Adobe Press, 2007) and Paperless: Real-World Solutions with Adobe Technology (Adobe Press, 2010). Prior to SmartDoc Technologies, J.P. founded BrandWizard Technologies, a division of Omnicom (OMC), and was the CEO of BrandWizard from 2000 until 2005.

Sessions at Symposium 2011:
Business Forms on the Apple iPad | Tuesday from 3:00pm - 4:00pm

SPEAKERS
**HOWARD TREISMAN**

CTO, Avoka Technologies

Howard Treisman is a founder and CTO of Avoka Technologies, a company specializing in building forms and form-related systems using Adobe Technologies. Howard graduated as an Electrical Engineer, and has spent most of his career trying to help organizations save money and time through the use of creative and innovative software solutions.

*Sessions at Symposium 2011:*
- Enabling Occasionally Connected Mobile Field Workers Using Interactive SmartForms | Tuesday from 4:10pm - 5:10pm
- How SmartForms Enabled Australian Voter Registration | Wednesday from 10:50am - 11:50am
- Avoka Form Factory Product Overview | Wednesday from 1:45pm - 2:45pm

**CASEY TRICARICO**

Information Management Officer, National Reconnaissance Office

Casey Tricarico serves as the National Reconnaissance Office (NRO) Forms Management Program Associate Lead. Since taking this position, she has helped to initiate multiple process improvement initiatives. Mrs. Tricarico has been a driving factor in the customer service aspects of the NRO Forms Management Program. She has worked alongside hundreds of forms owners to implement a forms design process, and to bring all forms into compliance. She also has revised every form in need of a change and kept the NRO workforce apprised of the new versions.

Mrs. Tricarico graduated Virginia Tech with a Bachelor’s of Science and for the last 10 years, has served in many information management type positions as a trainer, team leader, or business consultant, bringing enthusiasm, expertise, and efficiencies to programs.

*Sessions at Symposium 2011:*
- Going Green While Making Forms Clean | Wednesday from 4:05pm - 5:05pm

**BENJAMIN WALSH**

Forms Practice Manager, Avoka Technologies

Ben is a certified Adobe trainer with 12 years technical consulting experience. He is an Adobe LiveCycle Designer specialist who regularly contributes to the community through blogs, forums and speaking at conferences.

*Sessions at Symposium 2011:*
- PDF Scripting for Dummies: PDF Script-off | Wednesday from 4:05pm - 5:05pm

**NIGEL WALSH**

Senior Software Engineer, Department of State - Office of Directives Management

Mr. Nigel Walsh works for Geneva Software Inc. and is currently assigned to the U.S. Department of State. Mr. Walsh has over 33 years of experience in the Information Technology field and has held a wide variety of positions, consulting for a wide variety of industries. Mr. Walsh is a knowledgeable and experienced MS Office/VBA and SQL database application developer with an extensive track record of successfully implementing complex technical projects.

Mr. Walsh re-engineered the Business Matrix application for the U.S. Department of State, Office of Directives Management, which he currently maintains and supports. The Business Matrix is developed in MS Access/VBA and supports workflows for five distinct but interrelated business lines. Additionally, Mr. Walsh has developed several database applications to support the transfer of data between e-Forms and other application/platforms.

*Sessions at Symposium 2011:*
- Managing our Business - Directives Business Matrix | Tuesday from 11:00am - 12:00pm
STEVE WEISSMAN  
Executive Director, Holly Group  
Steve Weissman has been helping people work better and work better together for more than 20 years. A respected industry analyst and consultant in the forms, workflow, and information delivery spaces, he is regarded for his strong business sense, marketing savvy, and innate ability to pinpoint critical success factors. A dynamic public speaker, his populist style and flair for the dramatic regularly ‘wows’ audiences at industry events of all kinds. Publisher of several significant research studies on e-forms adoption, he is an ongoing resource for such diverse media outlets as Business Week, DOCUMENT magazine, World Business Review, and Entertainment Tonight.

Sessions at Symposium 2011:  
PR02 AIMP Business Process Management (BPM) Practitioner Certificate Course | Monday from 9:00am - 4:00pm  
E-Forms & Job Security: Joined at the HipAA (and Other Compliance Imperatives) | Wednesday from 1:45pm - 2:45pm

OLIVER WISCHMEYER  
Director, eForms, MetLife  
Oliver has been with MetLife for 30 years, 20 in sales and sales management and 10 in his current role managing the eForms group. In this role he is responsible for forms design, intelligent forms, and a website that provides access to the over 13,000 forms MetLife has. Oliver received his CFSP designation in November 2008. Oliver lives in Easton, Pennsylvania with his wife Stella.

Sessions at Symposium 2011:  
Super Session: Perspectives of a Form Professional’s Value in the Future | Tuesday from 9:10am - 9:55am

BARBARA YING  
Senior Publishing Specialist, Internal Revenue Service, Washington DC  
Barbara Ying is a Senior Printing Specialist with the Publishing Division at the Internal Revenue Service. She is currently working as the leader for accessibility on the XML-enabled Tax Forms Integrated Process Team which is working to efficiently combine electronic forms and XML data. During her career at IRS, Ms. Ying has worked with several of the Publishing computer systems in the critical roles of liaison between users and developers, requirements development, user support and application administration. In addition to her time at IRS, Ms. Ying ran her own business while living for a short while in New Mexico. Ms. Ying has a Bachelor of Science in Printing Technology and Management from Rochester Institute of Technology.

Sessions at Symposium 2011:  
IRS and the Land of the eForm (or Nightmare on eForm Street) Part 1 | Wednesday from 1:45pm - 2:45pm  
IRS and the Land of the eForm (or Nightmare on eForm Street) Part 2 | Wednesday from 2:55pm - 3:55pm

MAUREEN WHITSETT  
Assistant Program Manager, Department of State - Office of Directives Management  
Maureen Whitsett is the Acting Forms Manager for the Department of State’s Forms Program. Maureen has over ten years of service with the Federal Government, first working for the Department of Commerce and most recently with the Department of State, Office of Directives Management. As the Forms Manager, she is responsible for ensuring that a premier forms program is designed and delivered worldwide. As technology changes, Maureen is leading the way with implementing new services and programs to meet the Department’s ever evolving requirements: such as: e-Forms Workflow, Information Sharing, eSignature and Group Mailboxes. In this capacity, she is responsible for incorporating best practices and project management for major forms projects. In 2009, Maureen completed the intense Department of State’s Executive Leadership Program which has heightened her management skills.

Sessions at Symposium 2011:  
It’s about the 3 Ps - Policy, People and Products | Tuesday from 12:10pm - 1:10pm  
Developing a Comprehensive Training Program for Form Designers | Thursday from 8:30am - 9:30am
BFMA International is the Association for Forms and Business Process Professionals. For over 50 years our group of industry experts have donated their time and expertise to help advance the profession and make your job easier.

Symposium Baltimore 2011 is our 42nd annual event. Learn the techniques of good forms and business process design. Symposium San Jose offers internationally renowned instructors covering a wide variety of curriculum, problem solving and one-on-one access to the experts from the industry.

Please contact BFMA Headquarters if you have any questions. We are happy to help!

BFMA Headquarters
3800 Old Cheney Road, Suite 101-285
Lincoln, NE 68516

Phone: 888-367-3078
Fax: 877-204-5979

www.bfma.org
bfma@bfma.org