



From InfoChaos to Information Opportunity:

Learn how to harness your information
for real business advantage





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From Information Chaos to Information Opportunity

Why IS #AIIM14 different?

The game has changed. Information is the world's new currency. Read just about any business publication and you will quickly conclude that how an organization manages its information assets is now just as fundamental a source of competitive differentiation as how it manages its physical, human, and financial assets.

Amidst all of this opportunity, organizations are drowning in a sea of content and information. File servers are overflowing and multiplying. Information is leaking out of the organization at every turn. New silos in SaaS applications that are beyond the reach of our conventional information governance frameworks are popping up everywhere.

Information Chaos reigns supreme.

On the following pages, we're giving you a glimpse into some of the issues we'll discuss at #AIIM14.

- #AIIM14 is a different kind of event.
- It is not a trade show.
- It is not a "talking at you" Conference.
- It is not education from the perspective of a single vendor.
- It is the gathering of a core "tribe" of information professionals who are charged by their organizations with shaping the future.
- It is a gathering of information professionals who will determine whether opportunity or chaos reigns supreme in their organizations.
- It is a highly interactive, 3-day community of fellow information professionals who will play a critical role in the future of their organizations.

Join us. On the next few pages, you'll find perspectives of the challenge of information chaos – and the beginnings of answers.

John Mancini, AIIM President



John Mancini,
President, AIIM



Come to the AIIM Reunion

By Betsy Fanning, Director, Standards and Chapter Relations, AIIM

Family reunions come in many flavors. I am sure that you have as many fond memories of your family reunions as I do of mine. It was always so much fun to spend a day with aunts, uncles, and cousins and learn what everyone was up to (this was before Facebook). I can still hear the clank of the horseshoe, the cheers at the volleyball game, and the general laughter at a cute or funny story. I can still picture my 70 something grandfather sliding down a hill on a block of ice into a row of bushes to the delight of all the family.

Our AIIM family has a reunion each year with the AIIM Conference. There may not be the clank of a horseshoe or a volleyball game in progress but there is a lot of learning and networking going on. I can remember my first AIIM Conference (with fond memories) in 1988. I went to the conference because I had just been assigned a project to implement an imaging system that would be for multiple departments. I was armed with a list of questions, sample documents (not all the easiest to scan documents but many of our problem documents,) and a list of vendors that were “must see”. I remember how overwhelmed I was with the amount and quality of information that I got out of the conference. Since that first conference I have only missed a few in the last 25 years and I have never regretted the time or money to attend the conference.

In addition to all of the educational opportunities of the AIIM conference, it is terrific to see colleagues and make new friendships. I have found the roundtable discussions to be particularly useful and an important way to share and lock in what I hear in the breakout sessions. This is an opportunity to apply the breakout knowledge to specific issues. We all learn from one another and these sessions allow us to share the issues we are confronting.

In 2012, AIIM introduced a new conference format that is upbeat and exciting. The breakout sessions are filled with excitement and energy. I came out of the sessions I attended recharged and ready to implement changes in the way I manage information. Last year, I noticed an even higher level of excitement among the speakers. The keynote speakers shared broad industry insights on where technology was headed. It is always good to get the headlights are turned on to know the trends!

I am particularly excited about this year's conference. I cannot guarantee that we will gangnam dance as we did in one of the breakout sessions last year but I can guarantee that you will get hard hitting technology information and the trends that are impacting the way we use information. AIIM Conference is the best use of your education dollars.

Much like we will turn our attention to Sochi, Russia and the winter Olympics, let's turn our attention to AIIM14 and Orlando in April for the best of breed and best in class to gain an understanding of where the industry is headed and how we can ensure our organizations are efficiently and effectively using information.

So, will I see you at AIIM's reunion in Orlando? I sure hope I will.



Betsy Fanning



AIIM 2014 KEYNOTES

Thoughtful – and thought-provoking – sessions that will expand your mind.



I Don't Need Governance (Or lower ediscovery costs or access to my content or . . .)

By Johnny Lee, Managing Director of Grant Thornton

So you think information governance boring and OK to ignore? Then you want to continually recreate content, pay more for ediscovery, and not be able to maximize your ability to gain insight about your business and customers from your information.

Johnny Lee explains why you need information governance (and suggestions on how to achieve it) in his keynote session at AIIM 2014 on April 2 at 4:30: Ediscovery & Data Governance: Flip Sides of the Same Coin.

Here's a taste of what you'll learn.

Q: Briefly define information governance

Lee: I would define Information Governance as an enterprise-wide program that incorporates multiple organizational disciplines and that contemplates policies, procedures, processes, and controls designed and implemented to manage information at AIIM 2014 Google Glass Registration Promotion an enterprise level. Properly derived, Information Governance supports an organization's immediate and long-term operational, regulatory, legal, and risk management requirements as they relate to the management of information.

Q: We keep reading about ediscovery and governance, who cares?

Lee: Organizations with a strategic view of these things recognize that Information Governance and ediscovery are flip sides of the same coin. Simply put, the only way to diminish the significant risks attendant with ediscovery is to go "upstream" of that triggering event, working to put in place the very policies, procedures, processes, and controls referenced above. The failure to "care" about this means that an organization will always venture into the ediscovery game on a reactive (and thereby less effective) footing.

Q: Who SHOULD care? And Why?

Lee: Historically, the province of ediscovery has been handled between an organization's IT department and legal counsel. That said, as missteps in both ediscovery and general data management practices carry increasingly severe penalties, creating proactive, long-term solutions is becoming the province of numerous groups across the enterprise -- from the compliance and legal departments to the operational, financial, and executive branches as well (i.e., those with the best knowledge of the content being sought and analyzed).



Johnny Lee

Johnny Lee, Managing Director of Grant Thornton, is a management and litigation consultant and former attorney, specializing in data analytics, computer forensics, and electronic discovery in support of investigations and litigation. He also provides advisory services to companies working to address complex data governance and records / information management issues. Johnny is a frequent speaker, panelist, and contributor on issues involving ediscovery, Records and Information Management, Data Analysis, Business Intelligence, and the effective use (and risk management) of Information Technology.



Q: You mention an IT and legal disconnect in your description, how do you bridge that gap?

Lee: For the most part, the legal and IT camps have been separated by a common language. Many of the issues related to Infobesity (or the unnecessary storage of data that carries no operational value -- and, worse, that carries significant risk) have arisen from the failure of these groups to communicate effectively about the long-term ramifications of maintaining the status quo. The only way to bridge this gap is for these two groups to meet in the middle, with each understanding the particular challenges the other is facing. This is not easy, but it is the only meaningful way that organizations can hope to reduce the digital haystacks before they are forced to sift through them in search of a few needles.

Q: What's one key enabling tool for ediscovery and/or governance?

Lee: While we're still many years away from any so-called magic bullet, there have been tremendous advances in technologies that can assist in these efforts. One of the most promising technological developments in recent years is the concept of predictive coding (or auto-classification) of large document sets. This technology holds a lot of promise for organizations looking for a cost-effective and defensible means to shrink their digital haystacks.

Q: One key best practice for ediscovery?

Lee: One of the most game-changing best practices in the ediscovery space is good, old-fashioned project management. Proactive communication, scope-setting, and right-expertise-at-the-right time can make all the difference between a successful ediscovery exercise and one that falters. This sounds simplistic, but many organizations still struggle to recognize this fundamental truth.

Ediscovery & Data Governance: Flip Sides of the Same Coin

April 2 from 4:30 PM – 5:00 PM

Electronic Discovery (“ediscovery”) can be a time-consuming, burdensome, and costly undertaking for organizations. Studies indicate that most organizations feel that formal data retention policies are valuable, but relatively few actually have one in place. Despite the prominent headlines, case law, data privacy issues, and regulatory risks, the “disconnects” between in-house IT and legal departments are growing more pronounced every year. Join us to discuss the enabling technologies and leading practices available to address these issues.





Overcoming Information Chaos

By John Mancini, President, AIIM

Information chaos is the “order” of the day. However, there is a way to untangle the chaotic nature of information. To do so, you need to first understand the drivers and the four critical business questions of our time.



John Mancini

Q: When we say “information is the new world currency,” what do we mean by that?

Mancini: Read just about any business publication and you will quickly conclude that how an organization manages its information assets is now just as fundamental a source of competitive differentiation as how it manages its physical, human, and financial assets.

Everything and every process is being re-imagined. Gartner’s Peter Sondergaard has it exactly right: “Every budget is an IT budget. Every company is an IT company. Every business leader is becoming a digital leader. Every person is becoming a technology company. We are entering the era of the Digital Industrial Economy.”

Q: What is “Information Chaos” (#infochaos)?

Mancini: Amidst all of this opportunity, organizations are drowning in a sea of content and information. File servers are overflowing and multiplying, making it difficult for anyone to find anything. Information is leaking out of the organization at every turn. If information silos in our existing solutions weren’t bad enough, we now have our content popping up in new silos in SaaS applications that are beyond the reach of our conventional information governance frameworks.

Content and information is coming at us at breakneck speed in an ever-changing array of formats and on PCs and laptops and tablets and phones. Organizations are struggling with the cost of legacy systems of record and fearful of the loss of control that’s represented by new systems of engagement.

Everywhere I turn, I hear about organizations struggling with this Information Chaos. I believe that managing Information Chaos is THE business challenge of the next decade.

Q: Thornton talks about a SMAC attack, is that “just” a continuation of consumerization?

Mancini: Thornton’s SMAC stack — social, mobile, analytics, and the cloud — is another (and perhaps more powerful) way of talking about the forces that are unleashed by consumerization. Mobile represents the fifth wave of information technology – 1) mainframes, 2) minis, 3) client/server, 4)

John Mancini is an author, speaker, and respected leader of the AIIM global community of information professionals. He is a catalyst in social, mobile, cloud, and big data technology adoption and an advocate for the new generation of experts who are driving the future of information management. John predicts that the next three years will generate more change in the way we deploy enterprise technologies and whom we trust with this task than in the previous two decades.

Follow John on Twitter:
[@jmancini77](https://twitter.com/jmancini77)



Internet, and now 5) mobile. The consequences of this fifth wave are only now being felt at the enterprise level, and organizations must address them if they are to survive and remain viable in the fifth wave.

Q: Where are we as an industry — are we beyond ECM yet?

Mancini: I've spent a lot of time over the past year thinking about this question, and my conclusion is that perhaps we're asking the wrong question.

There are three major disruptors that are simultaneously colliding to transform the world as we know it.

1. Consumerization: transforming what users expect from applications.
 2. Mobile and Cloud: leading to an expectation of anywhere, anytime access.
 3. Changing Nature of Work: forcing organizations to think flat and agile, not hierarchical and slow.
- Is ECM different than it once was? Yes.
 - Is ECM being transformed by the volume, velocity, and variety of new content coming at us at breakneck speed as a consequence of the SMAC stack? Yes.
 - Do systems of engagement need to connect and integrate with legacy systems of record? Yes.
 - Is the effective and efficient management of content critical to addressing the central challenge of Information Chaos? Hell, yes.

When I say I've been perhaps asking the wrong question, what I mean is that the label we apply to the technologies represented by our industry – “ECM” – is perhaps more relevant to those on the “sell” side of the industry than it is to those on the “buy” side. Industry labels are something that vendors and analysts love to debate – and change more frequently than is perhaps useful – in order to position a company or a service.

Very few user organizations I know wake up in the morning, slap themselves on the forehead and proclaim, “Daggone, I need content management today.” They wake up with business problems triggered by these disruptors that content management can help them solve.

As Linus would say – after all, it's only been a few weeks since the holiday season – “And that's what ECM is all about, Charlie Brown.”

Mancini: As a result of the disruptive power of consumerization, cloud and mobile, and the changing nature of work; there is now a massive migration in progress. The intersection of content and process in the world we are moving into is best summarized by this new continuum:

Capture -> Analyze -> Engage -> Automate -> Govern.



In this new world, much of the following will be true:

- The central mission of IT is value creation.
- Senior executives are now technology aware. (Note this is different from technologically-competent, but that's another story.)
- The coin of the realm is now simplicity rather than complexity.
- We have quickly moved into an environment in which mobile and social are becoming table stakes rather than differentiators in an enterprise IT strategy.
- The desired purchase mode is by the drink rather than by the gallon -- OPEX instead of CAPEX. Oh, and also don't talk to me about implementation cycles longer than a quarter.
- The really desirable technology players are those with domain/technical skills, but in a business context. Technology staff who can think more like engineers ("How can I fit the pieces together for systems that we didn't necessarily invent here?") have increasing value.

As we shift our frame of reference to the world that is ahead, four major questions emerge for information professionals and the organizations they serve:

1. How do we manage the RISK of growing volumes of content?
2. How do we TRANSFORM our content-intensive business processes?
3. How do we use content to better ENGAGE customers, employees, and partners?
4. How do we get any business INSIGHT out of all the information we are gathering?

Overcoming Information Chaos

Everyone says this is the Digital Era and Information Opportunity reigns supreme. And yet amidst all this opportunity, file shares are overflowing, content is seeping out of control from an ever-increasing array of consumer devices, and the C-Suite increasingly questions the value of our IT spend. How did we get to this strange place? What do we do about it? How do we turn #infochaos into Business Opportunity?





Reboot Your Thinking — AIIM 2014 and the SMAC Stack

By Thornton May, Futurist, Executive Director, and Dean of the IT Leadership Academy



Thornton May

On Wednesday, April 2 at 8:30, get ready for a cognitive reboot as we kick off AIIM 2014 with Thornton May's keynote presentation, Don't Blow your (S.M.A.C.) Stack.

Q: What do you mean when you say “cognitive reboot?”

May: Technology changes what is possible. Every “age” has a feel, a zeitgeist. That zeitgeist is very much a function of the fact that every age has a defining technology. The age we are just now entering has four defining technologies – Social, Mobile, Analytics, & Cloud – the SMAC stack. The economics and ergonomics of experimentation have changed. It has never been easier – or more profitable – to do new things. To do new things require new modes of thought. That is why I advocate a “cognitive reboot.”

Q: What's causing one now?

May: 2014 is going to be a BIG year for change. All the environmental factors contributing to massive change [e.g., dissatisfaction with status quo, disruptive buzzing of new participants deploying new technologies in unique and unorthodox ways, and available/affordable capital] are in massive abundance.

Q: In the SMAC Stack, is any one more disruptive than the others or is each as disruptive in their own way?

May: The organizations who will truly prosper in 2014 are those who attack the SMAC stack not one technology at a time but focus rather on how all these four disruptive technologies can fundamentally change value drivers.

Q: How are each disruptive to the status quo?

May: If you aren't at a parity point regarding social, mobile, analytics, and cloud mastery – employees won't work for you and customers won't buy from you. You can't get much more disruptive than that – no workers and no revenues.

Q: How does this affect managing content?

May: It places content management [meaning making] back on top of the strategic agenda.

Thornton May is Futurist, Executive Director, and Dean of the IT Leadership Academy — and the author of *The New Know, Innovation Powered by Analytics*. His extensive experience researching and consulting on the role and behaviors of boards of directors and “C”-level executives in creating value with information technology has won him an unquestioned place on the short list of serious thinkers on this topic. Thornton combines a scholar's patience for empirical research, a stand-up comic's capacity for pattern recognition and a second-to-none gift for storytelling to the information technology management problems facing executives.



Q: You talk about the pupil to data ratio and the deluge of information, are these tools causing or helping address that issue? Or both?

May: Industrial-age enterprises were designed to operate at the lowest possible informational level – because at the time information was scarce, hard to collect, expensive to store, and impossible to analyze in a timely basis. The fact that there is a super-abundance of information floating around for anyone to do anything with IS NOT A BUG – IT IS THE DEFINING FEATURE OF OUR NEW CIVILIZATION.

Q: So, how do companies avoid a SMAC upside the head?

May: Organizations need to re-examine what they do and why they do it – down to the activity level – with any eye toward how the SMAC stack change things.

Avoid a SMAC upside your business' head. Join us in Orlando for AIIM Conference 2014.

Don't Blow your (S.M.A.C.) Stack

April 2 from 8:30 AM - 9:30 AM

As a futurist I am obligated to attempt to identify inflection points — things that fundamentally disrupt the status quo, change the competitive dynamic, call into question existing practices and require a general cognitive reboot. I predict that four disruptive technologies, mnemonically labeled the “S.M.A.C. Stack” [Social, Mobile, Analytics/Big Data, and the Cloud] will shape the next competitive cycle. These technologies need to be understood, mastered, and deployed to maximum effect..





Fragmentation, Social Business, and Where We're Going From Here

By Alan Pelz-Sharpe, Research Director for Social Business, 451 Research



Alan Pelz-Sharpe

Q: Your title has a little (un?)intended black humor in it. ECM was supposed to bring all content across an organization under one umbrella – eliminating fragmentation. We're not there yet, was this goal too ambitious or too ambitious with the existing tools to date?

Pelz-Sharpe: The goal of one master file, stored and managed in one location and shared through multiple channels, was a worthy ECM goal, but it proved too impractical for most. I think it's still a valid goal for the most critical and high-risk business information but that accounts for probably less than 10% of an organization's information load. I don't think it is a problem with the tools as such, more one of governance, culture, and common sense. Everything needs to be managed, but to a greater or lesser extend. Some information needs incredibly tight control; other information just needs a sell-by date on it.

Q: Why the fragmentation?


Pelz-Sharpe: The repository was the holy grail of ECM systems, but now we have repositories everywhere, on our laptops, smart phones, our Dropbox/Box/Hightail/SugarSync accounts, etc. Figuring out what we have to work with is becoming a huge and relatively new challenge. But fragmentation has come in many more forms, through BYOD (bring your own device), an increase in home working, the growth of road warriors, cloud and mobile computing, smarter devices, and flatter organizational structures. It's all just come together at once, a bit like the Polar Vortex, and just like the vortex has dumped a pile of problems in its wake.

Q: What's the most interesting thing about the content industry today?

Pelz-Sharpe: The most interesting thing about the content industry is figuring out what that even means anymore. Certainly there is a core market that will remain fairly unchanged in the foreseeable future (case management, forms processing, accounts payable, etc.) but at the same time we are seeing the beginning of the end of traditional big business applications. We are seeing that whole (and massive) world re-evaluated,

Alan is the Research Director for Social Business at global analyst firm 451 Research. He has over 25 years of experience in the information management and consulting industry, providing strategic advice to numerous enterprises, government departments and suppliers around the world. By design or default he has become an opinionated and sometimes divisive industry skeptic, fortunately he is also a passionate sabre fencer and a jobbing actor - so he figures that at a push that he can sword fight or talk his way out of most tricky situations.

Follow Alan on Twitter for sword fighting and social business insights:
[@socialbizalan](https://twitter.com/socialbizalan)



lighter weight, modular, task-oriented, easy-to-use, low cost, cloud/mobile apps emerge to compliment, challenge, or even replace legacy applications. Building the next generation of lighter-weight specific applications will involve processes and content in most cases, so that is where many content management vendors today are refocusing their efforts.

Q: Give us your thumbnail definition of social business.

Pelz-Sharpe: Business that leverages the power of the crowd and the cloud would be the glib answer – and essentially that’s what it boils down to. Businesses are aware that connections exist between their customers, products, and employees – connections that, if identified, could dramatically improve both margins and overall efficiency. But finding those connections and valuing them is hard, and always will be. Hence today we are seeing most social business activities focused on discrete and critical activities, be that monitoring the launch of a new product, or better supporting an engineering team on a tight schedule.

Q: What’s the link between ECM, social business, and the implications of the “Internet in every pocket” untethered world?

Pelz-Sharpe: The link is tying everything back to a measurable business process, all the new technology and new ways of working are of zero value unless you can do that. That is the big lesson of the initial failure of enterprise social networks (ESN’s) brought us (for example) – social for social’s sake is fun but not something I want to pay for, seems obvious but it was a painful lesson for many vendors and investors. Tie that social/ collaborative support to a line-of-business and improve that line-of-business then the checkbook comes out. Some real world examples we are starting to see emerge are in the world of better hospital patient monitoring/diagnosis and triaging customer support in real time via social networks.

Q: What unresolved issue or key challenge do you think is the key to making social business a positive?

Pelz-Sharpe: The recognition that technology needs to be human centric — rather than the other way round. I like to reference the Big Bang Theory’s Sheldon in this regard, as he stereotypically personifies much of the legacy thinking in our industry. Sheldon believes everything can be automated, everything can be done faster, and the world would be better without changeable, fickle humans. Tech for its own sake is on a short tether and the really smart money in Silicon Valley is recognizing that today, tech increasingly needs to meet specific business and job needs rather than just be fast and shiny (think IBM Watson). It needs to meet requirements in government, healthcare, retail, and manufacturing – tech increasingly needs to support the critical work that we do, not attempt to replace it. You can’t process-map people.



Q: Let's end on an up note; What's a positive opportunity this new world holds for us?

Pelz-Sharpe: I don't really do positive.....so this is a hard one! Actually I think there are huge opportunities opening up, ways to better engage with customers, citizens, and employees. No matter how you cut it, computers will always come back to 1s and 0s – yes or no – humans have a thousand variations between and change with the wind, that's what makes one company succeed, another fail – it's what saves or loses a life – the next era of enterprise computing will be easier to use, adapt to our needs, and will be super reliable anywhere anytime – that gives me hope.

Beautiful weather. Giant castles. A man-sized mouse. We're coming to Orlando! Haven't you always wanted to say, "I'm going to Disneyworld!"?

The Fragmented Enterprise: ECM in the Era of Social Business

April 3 from 8:30 AM - 9:00 AM

The traditional organizational structure of workers sat at desktops, connecting to a business application protected by a firewall is rapidly eroding. In a short period of time we have gone from a wired and bound world, to an unwired "Internet in the pocket" world. Driven by the power of the cloud and the crowd, enterprise technology is experiencing innovation at an unparalleled pace with no sign of things slowing down. In this keynote session we will look at what this new digital infrastructure enables, both the positive opportunities for truly social business to emerge alongside the challenges and serious unresolved issues it also raises.





CONTROL

Discovering how to minimize the risk associated with growing volumes of content.



A Walk in the Clouds (Without the Bad Acting by Keanu Reeves)

By Monica Crocker, Corporate Records Manager, Land O'Lakes

I've noticed something about people that do jobs (formerly known as "end users"). They have infinite creativity. If you put an obstacle in the way of them getting their job done, they will figure out a way around it. You can put strict rule in place, but they will do their work - even if it means disregarding the rule completely. I've found the easiest way to obtain compliance is to make the rules simple, and make following the rules easier than not following them.

Here's an example of a Land O'Lakes Records Management Policy: *All employees are responsible for managing the corporate information within their scope of influence in a manner that complies with the corporate records retention schedule.* Oh, wait, that's our entire policy. Well, almost. We do have an exception statement for information subject to a legal hold, in which case, the retention schedule is superseded by the legal hold notice. We also have an Information Governance policy that states: *No Land O'Lakes information may be stored on a non-Land O'Lakes managed device or other storage location, except as permitted by a Land O'Lakes contract.*

To make policy compliance "the path of least resistance" we have an enterprise-wide, cloud-based file sharing service. This solution can be leveraged for individuals and business units. It also gives business units the ability to grant file-specific access to external business partners. And, we apply the "convenience copy" retention period to those documents, based on our understanding of the use case for documents stored there.

Simple rules...simple solutions. At least from the perspective of the people trying to do their jobs. Behind the scenes, significant research and planning is required to deploy these solutions. Each simple policy is supported with multiple standards and procedures. But not everyone needs to know the standards (like how to configure the default retention on the Exchange email server) so we don't muddy the policies with unnecessary detail.

We didn't do this because we're super smart. We did it because we were desperate. One division wanted to use iPads to access sales materials; another needed to exchange large files with an advertising agency; and an independent records management survey revealed widespread use of thumb drives to make documents portable. We needed a solution enabling access to content from any device and any location. We didn't embrace the cloud so much as grasp it in a panic.



Monica Crocker

Monica Crocker will talk about how embracing cloud computing isn't a bad thing and has actually HELPED governance issues at Land O'Lakes. Monica's AIIM 2014 sneak peek provides a glimpse into how Land O'Lakes embraced the cloud.

Monica currently serves as Corporate Records Manager for Land O'Lakes. She's a proponent of information governance and an advocate for animal welfare. Recent publications include the chapter "SharePoint Governance" in *Managing Electronic Records: Methods, Best Practices, and Technologies*, and the feature article in this year's AIIM Records Management ECM Toolkit. She is a CRM, PMP, and CIP.

Follow her on Twitter:
[@Rec_Rocker](https://twitter.com/Rec_Rocker)



Concerns about the security of information stored in the cloud are valid. But how much more secure is your current solution that involves storage of your organization's content on the following:

- Unencrypted thumb drives;
- Personal email accounts;
- Free file sharing services;
- Computing devices owned by employees; or
- iCloud?

Any credible cloud storage solution provider is going to be better than that mess. Whenever I hear someone say "if you build it, they will come," I think to myself, "no, if you don't build it, they will staple together a tar paper shack without adequate sanitary facilities and invite their friends to live there, too."

When I present at AIIM 2014, I'll cover more about the logistics of leveraging cloud computing to support business requirements. My goal will be to give other information management professionals enough background on the different cloud solutions to optimize any organization's cloud strategy.

Come see my presentation! I promise to avoid any weak Disney references (just because we'll be in Orlando doesn't make it OK). But all other cheesy metaphors are on the table.

You Can't Hug a Cloud, But you can Embrace Cloud Computing

April 1 from 5:00 PM to 5:30 PM

Records in the Cloud? My mother always said, "every problem is a people problem." The Cloud is no different. It is not a technology issue; it is a challenge that can only be addressed with processes that are implemented by people. Cloud computing solutions bring new risks and challenges. Those can be managed. If you have a real business need that can be solved with a Cloud solution, addressing those challenges makes the effort worthwhile.

Because you're an Information Professional and this event is designed for you.





Governance in the Midst of Chaos: Maintaining “Control” in the Face of Social, Mobile, and the Cloud

By Nick Inglis, Owner, Left Lane Group

We’re dealing with an influx of information. Some information is on our local systems. Some is out in the “cloud.” Other information is on external services provided by Facebook, Google, and others. We have some information on local desktops and laptops, yet we have EVEN MORE information on phones, tablets, and other devices. How the heck are we supposed to manage all of this information?

To some, the solution is all about records declaration. If we train our staff enough and drill into their brains “risk reduction, risk reduction, risk reduction,” they’ll magically become records managers and declare and place information under retention (yeah, keep dreaming).

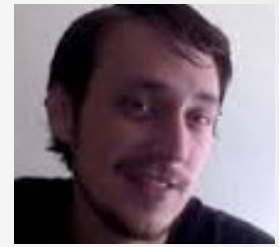
To others, the solution is all about writing policy. In this, we’re again relying on our users to manage their information. Frankly, our users can’t organize their personal computers, how do we expect them to organize enterprise information or rely on them to follow policies in managing information? We can’t.

A History of Records Management & Risk Reduction

Let’s go back to the world of paper. Times were simpler then in reducing risk and managing information. We had paper created by our organization and we reviewed all of that paper. The papers that needed to be kept were filed away. Those pieces of paper were given a descriptive term: a record. Eventually, we were dealing with more paper than we could handle so we started relying on our user population to provide to us the paper that should be declared as “records.” For a time, that worked because we were still dealing with an amount of information that could be reviewed manually.

Then the PC revolution hit and we started the same process over once again. We now had digital content that we treated just like we had previously managed paper. We took “records” and filed them away in our digital representation of our file rooms. Eventually, the volume grew and we started relying on and delegating the art of records declaration to our users.

Now with email, social, and mobile, we’re dealing with volumes such that our users are being overwhelmed by the volumes of information they need to use to do their work (much less take the time to declare any information as a record). It’s time for a strategy change, a fundamental shift in how we manage our information.



Nick Inglis

Nick Inglis is an expert on enterprise software and is the author of the AIIM SharePoint Governance Toolkit. Nick provides consulting services, training and vendor marketing support and has worked with many of the world’s leading organizations. Previously, Nick served as the Director of Professional Development at AIIM. He is a noted keynote speaker on the topics of SharePoint, Information Management and Collaborative Technologies. Nick is an AIIM SharePoint Master, AIIM Enterprise 2.0 Master, AIIM Enterprise Content Management Specialist, Inbound Marketing Certified Professional. Nick enjoys acting crazy with his son, Conor Atom Inglis.

You can connect with Nick at www.nickinglis.com



What Is Past & What Remains

What still remains are our regulations and our compliance requirements. Not only do these requirements remain, they've also grown in their scope and force. The amount of risk due to negligence in managing information has grown as judgment sizes have grown. What remains is our need to dispose of information according to the information's worth and it's potential for risk.

What is dead is the concept of a record. We have been deluding ourselves into believing that our user population can accurately identify and file content as records. The fact is, that this experiment in user empowerment has failed. We're declaring records in a haphazard manner where policy is being applied inconsistently, multiple versions of information are being declared (or not declared) as records, and our inconsistencies are one of the primary ways that we're losing lawsuits.

So if our need to categorize and dispose of information remains, but our concept of a record has failed, what are we left with? We're left with managing all of our information but the veiled curtain of records management has been torn. Instead of categorizing and retaining just these mythical creatures called records, all of our information, however, can be categorized and retained.

Join us at the AIIM Conference 2014 to learn more about how to move your organization forward, reduce risk, and develop new strategies in managing information in your organization. I'll be speaking on this topic and I look forward to seeing you in Orlando!

Governance in the Midst of Chaos: Maintaining "Control" in the Face of Social, Mobile, and the Cloud

April 3 from 10:30 AM to 11:00 AM

BYOD, the Cloud, Remote Workers, Mobility... Now how the heck do we manage this information nightmare we've built for ourselves? We've got information everywhere: structured and unstructured. It's on computers, it's on phones, it's on tablets, it's on your employees home computers, it's in their email, etc. How can you ensure information governance in this environment? If you're not worried, you're not paying attention.





Zero-Based Information Governance

By Deborah Juhnke, Director of IM Consulting, Husch Blackwell LLP

When it comes to governance, at some point you just have to get started. Deborah Juhnke tells us how. For more, join her (and hundreds of your peers) for AIIM Conference 2014 in Orlando on April 1 – 3.

Remember the paper-based world when junk mail was clearly junk? When we could easily identify the important mail? When there was no middle ground? When we were not afraid to throw anything away?

No longer. We now hoard our electronic documents and communications - all of them—in the new, “keep everything” culture. Because we can. Or can we? Exponential email growth strains even the most sophisticated servers and retrieval tools. Network shares are overflowing, and cloud storage is clouding our ability to understand the true extent of our information governance crisis.

We can't go back to paper, but we can take control of the creation, retention, and disposal of data. Enter “Zero-Based Information Governance.”

Rather than focus first on the seemingly insurmountable challenge of dealing with the backlog of messaging and unstructured storage, consider instead applying the finance-inspired concept of zero-based budgeting. Reverse the traditional approach that addresses only variance from an established baseline, which in the case of information governance is woefully outdated. Instead, start from zero.

Start today to identify and justify every line item, every action. Cut costs by slowing the growth of information creation and applying a more critical eye to Band-Aid technology requests such as email archives or yet more storage, and thereby also achieve better alignment with long-term business goals. Interrupt the prolific creation of information at the beginning of its lifecycle, break through the paralysis of inaction, and avoid an early outlay for high-dollar technology. Establish oversight, personal accountability, controls, and guidance so employees may embrace their role for responsible creation and management of information, *including* timely disposal.

Zero-based information governance begins, therefore, by working to improve *today-forward* activities, rather than tackling the ever-growing backlog of information in a one-step-forward, two-steps-back shuffle. Though in time it may become important to address legacy data stores, the effort here is to first establish *new* creation methods and controls for *new* information. Eight basic tenets form the basis of zero-based information governance:

1. **Executive mandate**
2. **Cultural attention**
3. **Personal accountability**
4. **Incremental improvement**
5. **Process & policy based**



Deborah Juhnke

Deborah Juhnke, Director of IM Consulting, Husch Blackwell LLP, is a Certified Records Manager and Director of Information Management Consulting at Husch Blackwell LLP. As a member of the Firm's Information Governance group she assists clients with information governance initiatives, including risk assessments, records retention, and email system remediation. Juhnke brings more than 25 years' experience to her work in records inventory, retention schedule and policy development, project management, records management program implementation, and legacy data cleanup. Her work has benefitted clients in a variety of industries, including public utilities, retail, manufacturing, business-to-business services, financial services, education, and healthcare.



6. **Coordinated, inter-disciplinary approach**
7. **Foundational structure based on law and business needs**
8. **No early technology purchases**

Each of these is a critical component of the program. Without an executive mandate, without personal accountability, without cultural change, information governance initiatives fail. Early technology purchases mask the problem and often fall short of full implementation. The key to zero-based information governance is to do *something* to change the status quo across *all* of these dimensions and to do it well, even if the first wave initially serves only a small group.

Find out more at AIIM 2014 during Wednesday's session, "Zero-Based Information Governance: Breaking the Paralysis of Inaction," where we'll explore the oversight, accountability, controls, and guidance necessary for employees to embrace their role for responsible creation and management of information.

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Zero-Based Information Governance: Breaking the Paralysis of Inaction

April 2 from 2:00 PM to 2:30 PM

Zero-Based Information Governance is a way of interrupting the prolific creation of information at the beginning of its life-cycle and instilling a culture of accountability for day-to-day information governance. It is a method for breaking the paralysis of inaction while avoiding high dollar technology purchases at the outset. This session examines the oversight, accountability, controls, and guidance necessary for employees to embrace their role for responsible creation and management of information.





Getting Lost in the Cloud: Privacy and Cloud Computing

By Else Khoury, Manager, Information Management, Niagara Region

The dawn of cloud technology has brought with it unprecedented opportunities to address Register for AIIM 2014 #AIIM14 issues which in the past have limited productivity, economy, and efficiency. The resulting ability to collaborate and share information regardless of geographic boundaries or the confines of technical infrastructures has resulted in the opening up of creative and collaborative processes.

But with these benefits come questions: Where is my information going? How is it getting there? Who has access to it?

Following the events of 9/11, the enactment of invasive and restrictive laws like the USA Patriot ACT and the Canadian Anti-Terrorism Act opened up a whole host of new questions: Who has access to my information and what will it be used for without my ever knowing?

While it is true that the ability to share data for security purposes across borders existed long before the Patriot Act was put into place, the recent exposure of the National Security Association's international surveillance activities has brought these concerns into sharper focus.

In Canada, privacy law exists at the federal, provincial, and municipal levels, and applies to both the public and private sector. Each law is monitored and overseen by a Privacy Commissioner, who in most cases has the power to investigate and order actions when an impropriety has occurred. Many Commissioners are highly visible public figures with the ability to shine a spotlight on an institution's privacy-related transgressions, with the damaging result of a sudden and dramatic loss of public trust in the institution in question.

Across the country, Privacy Commissioners have taken different positions on cross-border information transfer and the Cloud in general. While most have recommended a cautious and considered approach, some have gone so far as to prohibit the off-shore transfer of personal and personal health information.

With these restrictions in mind, how's a global cloud service provider to compete? And as a consumer, what questions should you be asking before jumping into the Cloud?

For service providers, the answer is simple: do your research so that you will be able to placate the doubts of potential clients, especially those in the public sector. Considering various legislative requirements ahead of time is essentially the first step of Privacy by Design, a concept developed by the Information and Privacy Commissioner of Ontario. Ensuring that the principals of privacy protection are embedded into each cloud solution and/or contract will go a long way to addressing the concerns government organizations and individuals may have.



Else Khoury

Else Khoury is the Manager of Information Management Services and the Freedom of Information and Privacy Coordinator for Niagara Region, an upper-tier municipal government body which serves a population of 440,000 in Ontario, Canada. Else is in the unenviable position of managing privacy issues for approximately 3,000 staff, many of whom believe that "the cloud" is the best thing since chocolate dipped bacon. Else is responsible for developing policy, training, and compliance on FOI, Privacy, and Information Management, which she accomplishes with the help of an incredibly dedicated team and a healthy dose of ridiculous idealism.



For consumers and users, think about:

- Who is collecting your information?
- What are they collecting?
- Where is it going to be held/moved/stored?
- How will your information be protected?
- When will it be destroyed?
- Why does the service provided need this information?

And yes, this means actually committing to reading those terms before you click “I agree.” If you have any discomfort with the answers that you receive to these questions (or if you don’t receive answers at all), consider whether the service you are considering engaging in is worth the potential risk to your own (or your clients’) privacy.

The Cloud represents the solution to many modern information-based problems. Ensuring that privacy has been factored in to the provision of cloud services is the right thing to do, for ourselves and for business.

Less theory, more actionable advice. Return to your office armed with ideas you can USE to cut through your information chaos.

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Getting Lost in the Cloud: Privacy Risks and Cloud Computing

Although cloud computing presents a compelling business case for companies looking to reduce spending, streamline processes, and increase accessibility, the very idea of trans-border data flows raises the hackles of privacy advocates all over the globe. In Canada, government and members of the public have expressed serious concern over the potential misuse of personal information gone offshore. Join Else for an overview of those concerns and what they might mean for your organization





The Good, The Bad, and The Ugly of Defensible Disposition

By Richard Medina, Co-Founder and Principal Consultant, Doculabs

Most organizations hoard and fail to destroy their piles of files in a legally defensible manner when business and law allow. How do you tackle the monster problem of over-retention of electronic information? The session, Rich shows how to develop and execute the four most important steps in defensible disposition: the Defensible Disposition Policy, Assessment Plan, Technology Plan, and Disposition Plan. He'll outline business case development and tool selection.

Defensible disposition addresses the problem of over-retention - organizations have been over-retaining electronic information and failing to dispose of it in a legally defensible manner when business and law will allow. The best way to address this monster problem is to break it into more tractable sub-problems: day-forward information disposition and historical informational disposition. I won't go into day-forward information disposition here, because it is an easier problem to solve. Let's stipulate that it's taken care of and focus on historical information disposition.

First, note that you may have hundreds of TBs lying around waiting to cause you problems. It may take you years to fully address that pile of information. However, you should start soon and plan to take many smaller steps rather than just a few big steps. Second, here I'm going to focus on just the methodology that's specific to defensible disposition. I'm going to talk about 4 specific steps in the defensible disposition methodology, but these 4 steps should be embedded in a larger ECM-type program and project methodology.

Here, then, is how to do defensible disposition. It primarily consists of developing and then executing four pieces:

1. **The Defensible Disposition Policy**
2. **The Technology Plan**
3. **The Assessment Plan**
4. **The Disposition Plan**

1. Develop your Defensible Disposition Policy

The first step is to develop your **Defensible Disposition Policy**. This is the design specification that states very clearly the objectives that your methodology will fulfill. You should be able to defend your actions by pointing at your policy for defensible disposition, which shows what you intend to do, and then showing that you are following it. The good news is that you don't need to be perfect – you don't have to perfectly satisfy your retention demands. You *do* need to use the **Principle of Reasonableness** and act **In Good Faith**.

2. Develop your Technology Plan

Using technology for the heavy lifting in the file assessing and disposing processes is absolutely necessary. But there are two sources of complexity in finding and using the right tools that make it a challenge: First, the “analysis, classification, and disposition” market is young and a mess. Second, to



Richard Medina

Richard Medina is co-founder and a Principal Consultant at Doculabs. Doculabs was founded on three simple principles: objective recommendations, analysis grounded by benchmark data and a specialization in content-based applications. Doculabs has established itself as the premier consultancy in the enterprise content management (ECM) market, engaged by most of the Fortune 100 over its 20-year history.



efficiently assess a pile of files you typically have to use a variety of different techniques and thus tools, since the tools have different sweet spots. There is no universal assessment technique and thus no universal assessment tool.

This means that you need a **Technology Plan** that fits the right tools to your **Assessment Plan** and **Disposition Plan**, both of which are discussed below.

3. Develop your Assessment Plan

The **Assessment Plan** specifies which information and systems you're investigating and the particular processing rules you're going to use. The first step in developing the **Assessment Plan** is to do the legwork and get a picture of what repositories the information is in and anything else that will help you create a plan of attack. You then create processing rules based on the different types of file attributes.

4. Develop your Disposition Plan

The **Disposition Plan** evaluates your assessment results against your **Defensible Disposition Policy** and lays out a roadmap for disposing of the various kinds of files you found. Then you start executing the **Disposition Plan**. This may require one or more FTEs managing the purges and cleanup over months or even years.

And finally, as you go through your first disposition cycle, you'll probably want to refine your **Defensible Disposition Policy** – as you've now got a much more realistic picture regarding the real cost impacts of every action you take, and more generally what actions are reasonable.

Ride Space Mountain, Splash Mountain, or Thunder Mountain while you're learning to tame your growing mountain of content. We're just minutes away from all the great parks. (Just, you know, don't play hooky from AIIM14!)

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The Good, the Bad, and the Ugly of Defensible Disposition

April 3 from 11:30 AM to 12:00 PM

Most organizations hoard and fail to destroy their piles of files in a legally defensible manner when business and law allow. How do you tackle the monster problem of over-retention of electronic information? The session, Rich shows how to develop and execute the four most important steps in defensible disposition: the Defensible Disposition Policy, Assessment Plan, Technology Plan, and Disposition Plan. He'll outline business case development and tool selection.





PHIGs Take Phlyte – Changing a Project to a Program

By Christian Walker, CEO, PHIGs Information Management Consulting, Inc.

This is a little story about how the Principles of Holistic Information Governance (the PHIGs) were leveraged to turn a pure records management project into something the entire organization, and its stakeholders, could benefit from.

A partner asked me to help them out on a project for a public transportation company. Their project is to put together (and implement) a new Web communication and presence strategy. Where they asked me to help out is on developing a records management (RM) strategy. The two projects were to be separate from each other since the RM project was really to fill in some gaps in the client being compliant with legislation and in helping them to respond to Freedom of Information (FOI) requests. There was no thought given to integrating the two projects or to looking at how a holistic approach could benefit the entire organization and its stakeholders.

As all good analysts and consultants do, I started gathering as much information about the organization and the projects as I could. The two critical documents that I had access to were the Web communication project strategy (summary and detailed) and the organization's 20-year strategic plan and roadmap.

There were obvious tie-ins to linking the RM project and the Web project, but selling them to the organization wasn't easy as they just didn't care all that much. They were happy to go forward with identifying what was a record, and subject to FOI, then just firing that content into their RM tool (which they don't have yet). The real clincher to getting the organization to accept a PHIGed approach was the long-term strategic plan. In the plan were articulated six values and five major objectives.

Values

1. **Safety**
2. **Customer service**
3. **Sustainability**
4. **Integrity**
5. **Innovation**
6. **Collaboration**

All six of the values can be directly supported by information, provided it's properly governed and managed, from cradle to grave.



Christian Walker

Christian Walker is an Information Management consultant with over 25yrs of experience. My focus is more on the business and functional side than it is on the technical / product side of information management solutions. I work with public and private sector clients in a variety of industries in North America and Europe. My job is to provide solutions, not documentation. I believe that information is a valuable asset and my goal is to help organizations leverage its full potential. Risk and compliance are real fears, however, I focus on the value and benefits of information management; I don't let fear take over. I am also a blogger, tweeter, and speaker.



Major Objectives

1. **Develop financial sustainability**
2. **Support and shape liveable communities**
3. **Change the perception of Transit**
4. **Deliver operational excellence**
5. **Strengthen our people and partnerships**

Like the values, the objectives will benefit from taking a holistic view of how information lives in the organization.

One of the other things that I did was to review the RM strategy document I was provided and link those objectives to the objectives in the Web communication strategy and the long-term strategy. It's both funny and sad that folks get so focused on their own view of the world that they don't see the bigger picture. The RM strategy probably had 85% of what was needed for an organization-wide (I'm trying not to use the word "enterprise" too much) information management strategy.

From a technology point of view there will be many different tools used to provide the solutions that the organization will, over time, implement. But, they'll be underpinned by the PHIGs. The PHIGs are there to help organizations take a look at how and why information exists and affects all relevant stakeholders. The PHIGs aren't about technology; they're about business and doing it better by understanding what you need from information.

By reordering and rewording some of the RM strategy objectives, and adding a couple of new ones, we were able to change the focus from an RM *project* that would provide very limited benefits, to an organization-wide information management *program* that will benefit all stakeholders. Of course it'll take longer to get to the end, but at least the client has taken the first step and realized the importance of information to the proper running of the business.



PHIGs: Principles of Holistic Information Governance

April 3 from 2:00 PM to 2:30 PM

Information Governance needs to be applied holistically across the organization. It's more than just access and records management; it's also about how organizations use information to conduct business. Principles of Holistic Information Governance will help organizations understand how, when, and why they use information. PHIGs help organizations balance the need and value of information against information related risks, to make sound information management related decisions.





ENGAGE

How to use content more effectively to better engage with customers, employees, and partners.



Developing an Information Community

By Sherri Adame, Director Information Governance for Premier Farnell

Managing information falls on the shoulders of everyone in your organization. So how do you engage workers to understand how information security policies relate to data standards? How do you keep in touch with what challenges the business has with information? Learn how Premier Farnell started their Information Community for educational and interactive discussions. Get tips and steps for how you can start one at your organization.

I love community. I love attending data and information-related conferences because it's a community of people that are as passionate about data as I am. People just like me that dream of delivering big data to drive the right decisions at the right time to positively impact the bottom line. If you are one of the big data dreamers you must attend AIIM 14 for the strategies to transform information into action.

At the conference I will deliver a practical plan to bring home the community and embed it into your organization. It's definitely not an overnight process. It takes time and energy to create a community of "I care a lot about Information" people in your organization. It starts with taking small steps to educate and inform and then hop to collaboration. A community by nature is filled with like-minded individuals that can share and collaborate.

The first step to any Information Community is to identify the like-minded individuals that should be a part of the community. It can be as simple as asking HR to pull a list of individuals that have the word data or information in their title or by completing a set of stakeholder interviews to determine who should be a part of the community. The key is finding the right people in your organization that care about the data. It is very difficult to create a community if the people don't care about it.

The second step is to establish a forum for bringing the community together. The forum can be virtual or face-to-face. It is the place the community come together to learn and grow. Once the forum is identified, a communication plan or process needs to be established. Communication needs to be consistent and reliable and planned in advance. Enlist help of a creative person to make what could be a "dull" topic interesting.

Finally, a list of related topics to baseline understanding and start the community off on the right foot are required. The first topics educate the community. During the first six to 12 months establish correct terminology by reviewing what means what. Include a look at how technology supports the data/information and best practices described. A data term can be used 1,000 different ways and the general populous could incorrectly assume the acronym for meta-data management is MDM. Review concepts, technology, and terminology to baseline understanding of community member.



Sherri Adame

Sherri works as a data and information evangelist in her organization. She is defining standards, pushing the data metrics to be related to costs and dollars, and enacting data and information governance where there has been none before. In the last year, she has established an Information Community that has regular educational meetings on data and information practices. In her short overview she will provide a proven process for developing an Information Community.



Remember, community is hard work. If no one asks a question at the end of the educational session – do not be discouraged. Count the number of people that attend. If it's increasing, that is a good sign. Pay attention to the ripple effect the community has the participants. You may find that an always-silent participant may have her team build a data quality dashboard without your help. It could be that you are getting more phone calls or connect more of the data dots for people. Passion and excitement for data and information can be contagious. When the opportunity presents itself have the members present a topic or case study. A successful community will become self-sustaining.

For a list of topics, building the second year agenda and beyond, you have to come to the AIIM Conference. I hope to see you and your team there and share in your excitement for information as a part of the AIIM conference community.

**Learn the Art of Enchantment. Hug a Cloud.
Try not to Blow Your Stack. Our keynotes will
entertain and enlighten you.**

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Overcoming Change Management Resistance: Creating an Information Community in your Organization

April 1 from 5:00 PM to 5:30 PM

Managing information falls on the shoulders of everyone in your organization. So how do you engage workers to understand how information security policies relate to data standards? How do you keep in touch with what challenges the business has with information? Learn how Premier Farnell started their Information Community for educational and interactive discussions. Get tips and steps for how you can start one at your organization.





Who Hoards What? Bring More Focus to Content Management

By Dan Antion, Vice President, Information Services,
American Nuclear Insurers

OK. I admit it. My session title is a cheesy attempt to cash in on the popularity of a few History Channel shows. In my defense, I do feel the title speaks to both the problem with enterprise content management (ECM) today and the solution. Simply put, we aren't managing content; we are hoarding stuff.

Stuff we think might have value, stuff we think we have to keep, and stuff we simply lost track of so long ago that we no longer know what it is. I have stuff like this in my inbox; you may have some of this stuff too. If you don't, you don't have to look very hard to find it. Maybe it's in a shared drive; maybe it's on your C: drive; maybe it's still in a file cabinet; and maybe it's already made its way into SharePoint.

There is a difference between the hoarder mentality and the picker mentality – and this can affect your organization. Hoarders keep stuff. Pickers ignore junk and seek out that which has value. If you watch the shows, you realize that hoarders don't want to be pickers, they just want to keep stuff – ALL the stuff. For the most part in business, we aren't dealing with the kind of hoarder whose stuff is about to bury them. We're dealing with the people that the pickers find; the people with large warehouses, multiple outbuildings, or a fleet of abandoned school buses and RVs dotting their property. Hoarding doesn't hurt them; it only hurts the generations that will inherit that stuff. That's us; that's business hoarding. We pile document after document, spreadsheet after spreadsheet, and PowerPoint presentations from everywhere into all the virtual outbuildings our network has to offer – and they never fill up!

To combat the hoarders, some of us have to become pickers and some of us have to become family. As pickers, we have to ask questions like: "Where did you get this?" "How much do you think this is worth?" But, as family, we have to ask the really hard questions: "Why on Earth would anyone want this?" "What do you expect me (or my coworkers) to do with this?" Not to mention: "Don't we have 10 or 20 of these? Do we really need this one too?"

As for becoming Pawn Stars, that's the tricky part. One difference between Pickers and Pawn Stars is that Pawn Stars know how to repurpose stuff by turning it into more valuable stuff. They know that with the right amount of work, something interesting can become something truly remarkable. That's the real goal. We have to find that content that has value and we have to make the right investment to amplify that value and bring it to the surface.

Let me give you a short example: We have an engineering department that performs loss control inspections of the facilities we insure. We keep those inspection reports, all of them, forever. We have them on paper, on microfilm, on microfiche, in Word Perfect files, Word files, and PDFs. Up until a couple



Dan Antion

As Vice President, Information Services at American Nuclear Insurers, Dan is responsible for the overall planning of technology services and for guiding teams that are building ANI's next generation information systems. These systems include transaction processing, reporting and document-centric applications designed to maximize the benefit of the information ANI creates, encounters and maintains. Dan shares the experiences of his team through his popular SharePoint Stories blog, the AIIM Experts blog series, and he periodically rants on NoFacilities.com. He is the VP of Programs for the AIIM New England Chapter and a member of the AIIM Board of Directors.



of years ago, nobody could access those reports without a guide and a Sherpa. Today, we have several years' worth of those reports in SharePoint, easily accessible by facility, by insurer, by engineer. Recently, we added a workflow so engineers who are researching older reports, can quickly add them to SharePoint and expand the library of "managed" reports. We still have to work on throwing away the other media, but I'm happy that we are extracting value from the pile.

I'll see you in Orlando.

All those folks you know on Twitter, LinkedIn, Facebook, Google+; meet them IRL (and see if the avatars look anything like the reality).

Share this ebook



From Hoarders to Pickers and Pawn Stars

April 2 from 2:00 PM to 2:30 PM

Content management shouldn't be restricted to gathering and preserving documents. Content management should find and emphasize the value in those documents, and find ways to exploit that value in order to improve business processes. In this session, Dan will share some of the ways in which we have expanded the conversation about documents we create, how we now focus on the entire life-cycle of those documents and how we are working to build content-centric applications.





Knowledge Development and Knowledge Sharing

By Guy St. Clair, Knowledge Services Evangelist, Columbia University

A friend confronted me with a sweet challenge the other night.

“Guy,” she said, “a lot of people know you teach about KM and knowledge services, that you’re considered a kind of evangelist for knowledge services.”

“How nice,” I thought a little egotistically. “I like being recognized for my professional efforts.”

I might even have made a comment along those lines because then I heard my friend continuing:

“Here’s the thing, Guy,” she said. “I was telling someone about you and your work, and she wasn’t sure she knew what I was talking about.” Uh-oh. Now I was caught, and I began to get a little uncomfortable. “Just what is it you do?” she asked, and it was clear she expected a response.

Trying to be a good conversationalist, I asked back: “What is it you want to know?”

“I’ve been thinking about it,” she said. “I need to know three things: You talk about knowledge management – which you call “KM” – and knowledge services, and you talk about knowledge strategy. Why? What’s the connection? I’m not sure I know what these things are.”

Fair enough. I would start with some quick definitions. But my friend continued (she’s very smart, and she’s successful – she runs her own business). “And when you work with KM, knowledge services, and knowledge strategy, how do you get started?”

I wasn’t going to get out of this one (not that I really wanted to – I love this kind of conversation).

Here’s how I responded to my pal’s challenge (I said something along these lines):

First, I rearranged the questions. It’s all about KM – about managing an organization or a company’s intellectual capital. But we can’t “manage” something like that. All we can do is work with it, figure out what services we can come with so people can work with the knowledge that they create in the workplace, and how they can share that knowledge. In fact, we have a little acronym for knowledge development and knowledge sharing. We call it “KD/KS.”

So it’s about KM. But not about *just* KM. It’s about all three (KM, knowledge services, and knowledge strategy), and I try to describe them so there is an interaction, so we can see how they all come together.



Guy St. Clair

Guy St. Clair is recognized as an expert adviser in KM/ knowledge services and in building the organizational knowledge culture, with a special emphasis on knowledge strategy development. He is well known as a speaker about the role of knowledge strategy and knowledge services in organizational effectiveness. Building on his KM, knowledge services, and knowledge strategy development expertise and experience, Guy contributed to the creation of the Columbia University IKNS program, advising the university on curriculum development, marketing and industry outreach, and student enrollment management. Guy teaches Management and Leadership in the Knowledge Domain in the program. Follow Guy on Twitter: [@smr_knowledge](https://twitter.com/smr_knowledge)



For example, we try to “manage” knowledge – that is, to work with knowledge – by trying to come up with a management framework or methodology that enables people to work with knowledge. That’s what we call “knowledge services” – what I describe as the coming together of information management, KM, and strategic learning so the organization benefits when people share the knowledge they’ve developed. Knowledge services is the practical side of KM, you might say (that’s a phrase from my business partner Dale Stanley). It’s how you “put KM to work” for the benefit of the company.

And that leads to a second response, responding to why KM and knowledge services are important. If we do KM right, and if we manage knowledge services right, the company is closer to meeting its organizational objectives. When we talk about how information and knowledge contribute to the company’s success, we often put it in terms of what we call organizational “effectiveness,” that whole area of management where we think about what it is we’re trying to accomplish, and how we get there. It’s a given that we must share information, knowledge, and even strategic learning (anything we learn that helps us do our work better), but we often don’t think about the sharing “process” – that’s what KM and knowledge services are all about.

And do we need a strategy? Absolutely. When we think about how much organizational energy gets focused on collecting, storing, retrieving, analyzing, and – especially – using data, information, and knowledge, it becomes clear why we need a strategy (preferably an *enterprise-wide* strategy but we can do knowledge strategy on a smaller scale if we need to). It’s the knowledge strategist’s job to ensure that all our knowledge services are coordinated and made to match all other knowledge services efforts going on throughout the company or the organization. Devising that knowledge strategy is – in many organizations – the biggest knowledge challenge of all but (as has been well proven over and over again) worth doing, and doing right.

Is there a first step for capturing employee knowledge, for “moving into” a knowledge strategy “frame of mind” (we might call it). Again, the response is yes. No matter what department or business unit of a company or organization you’re a part of, you need to start the conversation. People are talking about KM



in a big way these days. There's lots of conversation – even among management leaders – about how KM and knowledge services can be part of the company's overall KD/KS effort. To my way of thinking, this is where we implement that “first step”: we listen (and often, we initiate) conversations about KM and knowledge services. We read what we can, we listen to others to find out what knowledge-sharing problems need to be addressed, we talk with others in the company or the firm to identify how we can be part of that conversation, and we get the KM/knowledge services/knowledge strategy “buzz” going. It pays off all around.

There's more, of course. I only touched the surface when I was attempting to advise my friend about what to tell her colleague. Hopefully, she'll take what I've said and turn it into a dialogue, giving her colleague the information she needs.

In the meantime, there is another opportunity to learn more. Those of us working in knowledge-related fields – working as knowledge managers, information professionals, and training innovators – can use our KM and knowledge services skills to lead our employing organizations to higher levels of knowledge development and knowledge sharing. It's a topic that two colleagues and I will be speaking about at the AIIM Conference in April, when we share our thoughts about “Knowledge Strategy: Your Leadership Advantage.” Anne Kershaw and Shannon Spangler, Co-Owners and Managing Directors of Knowledge Strategy Solutions™, LLC, will join me in a panel discussion on Wednesday, April 2, 12-12.30 pm. This is a good opportunity for people working in the so-called “knowledge domain” to learn how to be part of the conversation. And to learn how we can use KM, knowledge services, and knowledge strategy to strengthen our leadership roles in the companies where we work.

Come to the AIIM Conference and hear what we have to say.



**(Panel Discussion)
Knowledge Strategy: Your
Leadership Advantage**

April 2 from 12:00 PM to
12:30 PM

Engage, Process, Control are all fundamental goals of a corporate knowledge strategy, supporting business objectives and significantly reducing costs and legal risks. This panel discussion links knowledge strategy to these goals and describes how an effective knowledge strategy leads to organizational effectiveness and mission-specific success, while helping to reduce legal risks such as e-discovery and privacy breach. Panelists will also describe how knowledge strategy development connects to career success for AIIM members.

Speakers:

- Anne Kershaw, Co-owner, Knowledge Strategy Solutions, LLC,
- Shannon Spangler, Co-owner, Knowledge Strategy Solutions, LLC,
- Guy St. Clair, Knowledge Services Evangelist, Columbia University





Designing Knowledge Networks for Impact

By Kate Puhg, Academic Director, Columbia University

Join Kate Puhg in Orlando for her AIIM 2014 session on April 3, The Frontiers of Engagement: Creating Employee Networks to Meet the Challenge of Innovation. She'll explain why you should care about networks: they yield lucrative innovation, coordination, local change, and even a refuge for the individual practitioner. Then, she'll discuss with you networks that improve an organization's agility.

"Knowledge networks (or Communities of Practice) are collections of people who harness the power of social platforms to do great things." Or, so it goes. In research Larry Prusak and I did for Bill & Melinda Gates foundation, "[Designing Effective Knowledge Networks](#)" (Sloan Management Review, Fall, 2013), we showed that, without leadership and intentional design, those platform-gazing groups just don't stick around. Members lose interest, content becomes stale, and we wonder why we started in the first place. By contrast, networks that are well designed and led get great results: innovation, cross-organization coordination, problem-solving, and transformational learning.

In looking at *leadership* in effective networks we didn't find a single charismatic guru. On the contrary, effective networks' leaders acted as a group; guiding, coordinating, and modeling the type of democratic processes they wanted to see throughout the network.

But, even the cohesive leadership teams didn't get those results without effort. They thought intentionally about design. Interviewing thought-leaders and practitioners, we found that it takes three types of design for a network to endure and prosper:

1. **Strategic dimensions** involve leaders' cohesiveness as a team; the visibility of the sponsor; the vocalization of a crisp and compelling purpose; an intentional balance of experts and learners; and, finally, clarity around target membership and member recruitment.
2. **Structural dimensions** involve the operating model or roles and responsibilities (and how those are framed in a charter); convening structures, such as meeting spaces, social media, and wikis; and facilitation practices for getting people engaged and helping them collaborate or produce. (Yes, the knowledge network *does* produce. Another learning in our research was that the networks that were most enduring were not just social clubs or lecture series. They could point to compelling outputs, like an event, an article, or successful petition.)
3. **Tactical dimensions** involve measuring the networks' accomplishments, incorporating lessons learned, and implementing some sort of reward system – be it intrinsic (e.g., social recognition) or extrinsic (virtual badges or award plaques).

Great leaders actually think about a logical flow from those design dimensions to outcomes. First, they see that good design results in dynamic structures, what we often call virtuous cycles ("I contribute to meetings because they feel



Kate Puhg

Katrina (Kate) Puhg is Academic Director of Columbia University's Information and Knowledge Strategy Masters program and president of AlignConsulting, specializing in knowledge-based transformation. Puhg is the author of a book on conversation for knowledge-sharing, *Sharing Hidden Know-How* (Jossey-Bass/Wiley, April 2011). She has published in the Harvard Business Review, Ivey Business Journal, NASA Ask Magazine, Journal of Digital Media Management, and The Review of Economics and Statistics.



productive, and my contribution keeps the productivity going”). Next, they think about how structures enable network members to behave, like sharing their connections and readily helping trouble shoot fellow members’ problems. Finally, they see how specific behaviors, like collaboration, result in the bonafide results, like members’ project cycles shortened, new partnerships, systematic incorporation of lessons learned, and faster response to industry and technology change.

Fifteen years ago, when we first imagined networks (we called them all “communities of practice”), we tried injecting our project management ideas and failed. We stamped out the tiny vestiges of creativity that our members had left after they’d clicked through our clunky, hyper-structured websites. Now, with social platforms, it seems that adding design would pierce the breezy, elegant simplicity of the experience. Not so. People crave substantial and transparent engagement. So many fly-by-night network “look-alikes” come at them – selling something or tricking them into doing their work – that they’ve starting to feel exploited. If we want our networks to live up to the promise of true, authentic collaboration, it’s time to design.

The Frontiers of Engagement: Creating Employee Networks to Meet the Challenge of Innovation

April 3 from 10:30 AM to 11:00 AM

Why should I care about networks? Good networks yield lucrative innovation, coordination, local change, and even a refuge for the individual practitioner. Drawing from a Gates study published in the MIT Sloan Management Review, we’ll discuss networks that improve our organization’s agility - its responsiveness to industry forces and technology change. Designing networks for impact requires understanding the messy topics of social capital, collaboration, and motivation - all which can flourish with the right facilitation.





Siri meets Component Authoring – A Productivity Marriage Made in Heaven

By Seth Earley, Chief Executive Officer, Earley & Associates



Seth Earley

A recent client of ours found through some joint analysis that their knowledge workers were spending up to 20% of a work-week researching answers. Little by little, they were racking up 8 hours of research and reading every week. Why? To find answers.

They had work planning systems, ERP systems, content management systems, technical notes, collaboration spaces. Sounds like they had it covered, right? Often, as we seek to solve a content/knowledge problem, isolated solutions pop up to leverage a new technology (Yammer, LinkedIn, SharePoint in the Cloud), and the content gets fractured. The knowledge workers are left to pull it together.

So, we create a search app, pull it all together, roll it out into the field to much acclaim, and, a few weeks later nothing's changed. Nice interface! Easy to use! No new productivity.

Reason? You could be missing the very idea that Siri has driven home – we want to ask our computers a question and get an answer. Trouble is, many content management or search app solutions are locked in the Stone Age. They may work, but it returns a long result set of documents and pages and bulletins to be read. So, the knowledge worker does a few searches and reads through the documents to find answers. And hours tick off the productivity clock... Nice interface... no productivity.

It's time to get out of the content stone age, take a page from the concept embedded in Siri, and let people ask natural questions and give them answers – not reading assignments. Search applications and content management solutions need three things to jump into the modern era and deliver higher productivity:

- **Context** - A solid taxonomy and metadata to give our search the context it needs to tag things. With the proper context, search apps behave better than Siri – ask a question and you're very likely going to find the right set of documents... more is needed...
- **Componentized Content** – Part of the problem is content is tagged and stored at the document level. To give people answers, we've got to find an easier way to create componentized content. Authoring tools based on DITA are opening up new possibilities, and allowing companies to quickly and easily create text-based content at the component level. Link those components to the right taxonomy and meta-data and you're well on your way to providing answers.

Seth Earley Chief Executive Officer, Earley & Associates, is a well-known expert in search, content, and knowledge management strategies. He has extensive practical knowledge of information architecture and has directed numerous IA engagements. Teams under Seth's direction have worked with many clients to develop enterprise-wide information architectures for both Fortune 1000 and dynamic mid-size companies, as well as for non-profits. Seth is a popular speaker and workshop leader at conferences throughout North America speaking on intranet design, knowledge management, content management systems and strategy, taxonomy development, and other related topics.



- **Beyond Generic Collaboration to the Process** – Last, if we can better understand the process that is using the content, we can design the content to support steps in the process. When we do this, we create a search-based application. The context of task gives the search even more information about the likely answers for the request, and we complete the picture to optimize productivity.

Sound too complicated? It really isn't. One of our clients, a Fortune 500 company, completed a solution like this deploying the first release in just four months from the start date. In my next blog, I'll dig into a bit more on better practices for quickly creating componentized content for the morass of whole documents you may have...

Serendipity. One of the best things about attending any conference is finding that one "A HA!" nugget that you spin into gold.

KM Finally Becomes a Reality Through Search-Based Applications

April 2 from 10:30 AM to 11:00 AM

Search-based applications provide a new approach for enabling the development and deployment of low-cost functionally-specific KM solutions. Using examples from financial services and manufacturing, Seth provides an overview of search-based applications, and discusses how to build a compelling business case that will engage business sponsors. In particular, we discuss how to leverage business resources to reduce costs and minimize demand on IT sponsors; and discuss approaches to ensuring a low TCO over the applications lifespan.





What Are the Keys to Getting Your Project Off the Ground and Making It Successful?

By Anthony Peleska, CIO, Minnesota Housing Finance Agency

As the CIO at Minnesota Housing Finance Agency I have seen many projects successes and failures. I have even championed projects myself that have failed. What I have learned over the years is that the organizational structure and portfolio management is critical, alignment to the mission and vision of the organization must be communicated, and understanding that projects are strategic investments must be understood at all levels of the organization. There is no true recipe for success and every organization is different, but there are a few things to be aware of to help get that project off the ground and be successful.

- 1.) Understand that being a healthy functional organization is very important
 - a. Are there clear communication channels, do people work well with each other, does management value staff
 - b. Understand the difference between a smart organization and a healthy organization
- 2.) Create the Information Technology Business Partnerships
 - a. Formalize relationships across the organization
 - b. IT must be viewed as a trusted partner throughout the organization
- 3.) Develop or create an Information Technology Roadmap
 - a. Create a roadmap that integrates all projects and requests of the organization
 - b. Maintain realistic goals
 - c. Publish and evangelize the project and roadmap
- 4.) Manage projects as strategic investments for strategic alignment
 - a. All project should:
 - i. Increase top-line revenue
 - ii. Create bottom-line savings
 - iii. Mitigate risk
 - b. All other value driven projects should be managed very closely toward a common goal with very clear communication to values and mission



Anthony Peleska

Anthony (Tony) Peleska, CIO, Minnesota Housing Finance Agency, is a recognized technology leader known for his futuristic strategic vision to achieve business goals. Tony has more than 15 years of business-oriented technology experience in the legal, banking, and financial service industries. Tony has built a responsive IT organization that consistently delivers, making Minnesota Housing the premiere Housing Finance Agency in the United States. Tony also provides leadership and insight by serving on a variety of boards, councils and leadership organizations; including for AIIM.



- 5.) Create a framework and process to manage your projects
 - a. Create a Business Technology Investment Committee
 - b. Have a framework that manages requests and allows all people to have a voice
 - c. Publish and communicate the process to the organization

- 6.) Try and keep it simple
 - a. Don't make processes that are hard to follow
 - b. Have staff that are ready to help
 - c. Communicate, over communicate, and over communicate again

Overall, following these principles have helped my organization transition from a smart organization to a healthy organization. People feel that their voices are been heard, communication is clear, and we are managing to results. Please come to my session to learn more about how to get your project off the ground.

Are you leveraging your content assets as much as possible? Or are you just collecting them into a huge dragon-esque hoard? Learn why the first is good and the second is bad – very bad.



I'm not in a Position to Make that Decision

April 3 from 2:00 to 2:30 PM

You've got to ace the "why" question! Whether it's a document capture & recognition project or another initiative to automate processes, you must learn to reframe the value proposition in quantifiable business terms. Join Tony Peleska, Chief Information Officer at Minnesota Housing Finance Agency, as he shares winning talking points that will make each of your stakeholders care. From the CIO's perspective, he'll show you how to:

- ask permission to embark on your Capture/Imaging project
- overcome internal resistance
- be the champion, to get the right people involved and excited to move the project forward





PROCESS

Learning how to reduce the cost of content-intensive business processes.



Metadata Everywhere – And Why It Matters to You

By Jeffrey Lewis, RM Program Manager,
SOL Capital Management Company

Metadata is everywhere around us; and often makes our lives easier. Jeff provides a glimpse into the importance of metadata in this #AIIM14 sneak peek. Meet Jeff at AIIM 2014 on April 3 at 1:30 for his session: Metadata versus Big Data. Until then, here are some thoughts on making metadata a superhero in your organization.

In a recent Technology Steering Committee Meeting, I mentioned an OCR (optical character recognition) tool that I am looking to implement in 2014 for extracting metadata. Not long into my presentation the question was asked to me, “What is metadata?” Knowing that I had a time constraint, I gave the five-second elevator speech answer of “Metadata is data about data.” I had to use every last ounce of self-control to not say, “Why thank you for stepping into my wheelhouse, let me evangelize to you about the glories of metadata.” At AIIM 2014 I have been given that wheelhouse where I will be presenting on metadata and how it is essential to business processes. My session title is Metadata versus Big Data and not in the sense of David vs. Goliath (no pun intended), but with the intent of all the hype that surrounds big data it is crucial that we don’t undervalue metadata.

Everything has metadata. Metadata even has its own metadata and this is referred to as meta-metadata. Everyone is a user of metadata as everything has metadata associated with it. My first introduction to metadata came when I was in elementary school and perusing the card catalog at the library looking up information on books. The information such as author, publisher, publisher location, pages, publication, shelving location, subject, and other cataloging details is metadata for a book. Now all of that metadata is housed online in an Online Public Accessing Catalog (OPAC) and because our world is growing more and more digital, metadata is gaining prevalence in its uses and size.

Metadata is all around us and it has many different uses. If information is an organizational asset with value that can be leveraged for process efficiency and financial gain, than metadata is the driver behind information that increases its value. For example, my organization is an investment advisor and monthly our operations department reconciles custodial statements. This is a two-part process:

- 1) Confirming that we have all the statements that the SEC requires us to keep.
- 2) Verifying that the shares and values on the statement match our system.

The first part of the process was instituted years ago when my organization implemented an electronic records management system. The second part used to be a manual process that involved opening the PDF of each statement and comparing it to the system. I am in the process of automating this process by extracting the associated shares and values with the metadata so that instead of opening each PDF a spreadsheet can be inputted from both systems to compare metadata for both accounts; creating a more efficient process.



Jeffrey Lewis

Jeffrey Lewis, RM Program Mgr, SOL Capital Management Company, is a Certified Information Professional (CIP) from AIIM. He holds a graduate degree in Library Science with a Specialization in Special Collections from Indiana University. Currently he is employed as the records management program manager for SOL Capital Management Company. You can follow his research and writing on his blog “Information Is Currency” <http://infocurrency.wordpress.com/> and is an “Expert” blogger for AIIM on electronic records management. Past work experience includes database administration/ information management for a nonprofit and content management/requirements analysis for a private IT firm.

Follow Jeff on Twitter:

[@Info_Currency](https://twitter.com/Info_Currency)



If you ask ten different people for a definition of big data, you might end up with ten different answers. Metadata on the other hand, by definition is simpler and because it is so pervasive it is taken for granted. Due to the fact that metadata is omnipresent it has its own complexity. You don't believe me when I say metadata is omnipresent! Here are several examples:

- Metadata is in the air we breathe as exhibited by air quality data
- Metadata is in the food we eat and seen in the nutritional value (or lack there of)
- By its very nature, metadata is found in gig data.
 - If big data is Batman than metadata is his utility belt
 - If big data is Tony Stark than metadata is his Iron Man suit
 - If big data is Michael Knight (aka Knight Rider) than metadata is Kitt

In all of the above examples I only scratched the surface, but at AIIM 2014 I will dive into more details as well as where Hadoop fits into that superhero equation. Join me at AIIM 2014 to find out how metadata analysis can keep your data from turning dark and make your records, content, data, and information into a superhero.

Amaze your colleagues and the guy responsible for your raises. Return home with insights and knowledge from speakers on the leading edge of Information Management.

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Metadata Versus Big Data

April 3 from 1:30 PM to 2:00 PM

There are different flavors of metadata. Drawing from my experience as a content analyst, database manager, and records analyst I'll provide you with an overview of metadata and tips on metadata analysis. Then, let's get down to business and discuss how metadata is different than big data.





The Public Value of ECM

By Carah Koch, Manager, Document Management, Metropolitan Council

In addition to sharing some of the experiences my organization has had in this process, my presentation at the AIIM 2014 Conference in April will offer suggestions on how to make a link between internal benefits in a public organization you are striving for and the demonstration of value to the community. Any successful ECM initiative requires support from all levels of the organization, but in the public sector the ability to generate buy-in from our external stakeholders (the public) as well when necessary can mean the difference between an approved project budget and random ideas that go nowhere.

For those of us working in the public sector, the mantra to do more with less is very familiar. Our citizens rightfully expect real results for the taxes they pay to the government, and services that don't provide that immediate benefit or obvious outcome are often questioned. Internal initiatives (like enterprise content management, ECM) can face challenges in this environment as their value to the public is often not immediately visible, like a new park, improved roadway, or more police on the streets. Elected officials and public administrators choosing between competing expenditures and priorities might logically select the one with the obvious payback to the community.

Public sector ECM initiatives also face the challenges inherent in operating in a highly bureaucratic, structured, and regulated environment; all organizational characteristics that can hinder major change management activities. Anyone who has had experience implementing large-scale business process changes in an organization knows that extensive regulation and diverse stakeholder needs creates significant challenges. Add to this environment the varied nature of roles and responsibilities in a public organization (which can mirror some of the differences in defined preferences about expenditures from the public), and convincing government entities to take the leap (and commit the resources) to ECM may seem overwhelming.

Yet we shouldn't give up. ECM has significant benefits to the public sector that transcends beyond the common outcomes of improved efficiency, security, and compliance. All of these outcomes are of course important (and should be included in any ECM proposal) but the real purpose of government is to serve the people. Government officials pointing to, for example, increased efficiency as a benefit of an ECM project or initiative need to take the step beyond demonstrating improved efficiency internal to the organization. They need to show not only how improved efficiency translates to value gains to the community, but also why it makes sense for our elected representatives to approve the expenditure of scarce resources for this type of initiative over other public services.

How do we take the first steps in this process? Obtain that internal support and develop a vision about where you want to go. This can be easier said than done; many public organizations, due to their focus on defined public services, may find it difficult to focus on a unified, internal project. In my experience, focusing scarce resources (time and people) on how we manage information may not initially be a priority for staff, but sitting down and actually talking about how much time they are spending each day looking for or managing their records can lead to those critical "aha" moments. You also gain that initial look at the



Carah Koch

Carah Koch, Manager, Document Management, Metropolitan Council, has worked with local government entities for over 15 years in a variety of positions, including as an elected official. With a background in policy analysis and public administration, she became involved in ECM in recent years as part of a drive to improve overall organizational efficiency and public/customer service. Carah is currently managing an ECM initiative at the Metropolitan Council, a regional, public sector organization in the Minneapolis-St Paul area. She has a Masters degree in Public and Non-Profit Administration, and is also a Certified Information Professional (CIP) and ECM Specialist.



business process that will be useful later on as you are identifying projects and establishing priorities, and hopefully acquire some interesting data that you can use to support your business case. While large-scale change projects (which ECM initiatives essentially are) can be pushed without stakeholder buy-in, you can make the process much more palatable, and successful, if you have taken the time to show individuals how it will benefit them personally.

Talking with internal stakeholders can also help you define your vision of the future state of your initiative. ECM is a broad concept, and its implementation will mean different things to different organizations, not only from an outcomes perspective, but also in the time and resources necessary to make it happen. There is a big difference between, for example, a goal of finding a solution that will help you eliminate file cabinets and get rid of paper, to looking at a system and initiative that manages content throughout its lifecycle and changes business processes across the organization. The current state and business needs of your organization will help you define this, but be sure this long-term vision is also understood not only by your executive sponsors, but by staff who will be directly impacted by the changes.

I look forward to sharing these perspectives with you in Orlando, and discussing your experiences as well!

Learn from your peers and other smart people who, like you, are turning their Information Chaos into Information Opportunity.

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Rethinking the Value Equation for Content Management: A Case Study

April 3 from 2:00 PM to 2:30 PM

Enterprise Content Management (ECM) is commonly valued for its gains in efficiency and the impact this has on the bottom line (profit). For public sector organizations, where profit is not the objective, investing limited resources in an ECM project during a time when spending is continually scrutinized demands a re-examination of how we measure value. Identifying the value of ECM outcomes for the organization, and from a public perspective as well, will help public entities continually improve their business process and their service to communities.





Pre-Conference Sessions

Full-day, in-depth courses that will provide you what you need to know about enterprise content management, information governance, and managing records in SharePoint 2013.



Information Governance: Time to Change Your Perspective

by Pamela Doyle, Director, Fujitsu Computer Products of America

You've heard about information governance, but you're not quite sure what it is yet. Join Pam Doyle as she presents a one-day AIIM14 pre-governance session covering the ins and outs of information governance.

We live in an era that is experiencing exponential growth of information. According to EMC's most recent Digital Universe Study, they estimate that during the next six years the amount of digital data produced will exceed 40 zettabytes (the equivalent of 5,200 gigabytes for every man, woman, and child on the face of the earth). Another study by IDC predicts by 2020 the amount of digital information will grow by a factor of 20, the number of files by a factor of 60 and the number of IT professionals only by a factor of 1.4.

Digital content is being generated in office application suites, in email, and in critical line-of-business applications. There are new sources of digital content including social and instant messages. Some organizations have large volumes of audio and video and a significant percentage of organizations report they are still dealing with large volumes of paper. Both the analysts firms IDC and InfoTrends estimate that about 50% of business documents remain on paper.

The net result is information chaos. I would define information chaos as the contradiction between the volume, variety, and velocity of information and the need today for corporate agility and corporate profitability.

A new term has emerged called "information governance". There are many definitions but the one I think best describes it is from IBM: "a holistic approach to managing and leveraging information for business benefits and encompasses information quality, information protection and information lifecycle management."

First and foremost every organization today must change their perspective from simply how do we manage all this information to how do we leverage it. Managing information helps organizations address legal and compliance concerns and significant cost savings can be achieved by reducing storage and infrastructure requirements, reducing the risks of fines and penalties and can eliminate reliance on expensive third parties to assist with eDiscovery requests. Organizations' who broaden their perspective to include leveraging information will recognize the value of taking control of all of their unstructured content so that it can be mined and analyzed in support of predictive insights and better business intelligence.

Most industry analysts including AIIM, Forrester and Gartner agree that information governance is about three things – reducing costs, managing risks and optimizing the value of information.



Pamela Doyle

Pamela Doyle, Director, Fujitsu Computer Products of America, is responsible for forming and driving key imaging industry relationships as the worldwide spokesperson for Fujitsu. In her capacity as Fujitsu's industry luminary, she frequently shares her imaging experience at numerous events, including global conferences such as AIIM, JIIMA, and ARMA. AIIM has awarded Doyle with its "Education" and "Distinguished Service" awards and she was recently inducted into the AIIM Company of Fellows. These awards recognize Doyle's vision and commitment to the advancement of the ECM industry.

Follow Pam on Twitter:
[@PamKDoyle](https://twitter.com/PamKDoyle)



Developing an information governance program involves carefully assessing your organization's information asset, identifying policies and procedures, creating roles and responsibilities and deploying the right technology to execute.

The newly launched AIIM Information Governance training program provides practical guidance from industry experts and is based on best practices that will provide you with a systematic approach to developing an information governance program to manage and leverage your information asset. The information provided is applicable across all industries and is independent of any technology or vendor solution. The course is ideal for IT, compliance officers, records management personnel, legal, consultants, or other information professionals that are looking to establish or to enhance their information governance program.

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Information Governance Pre-Conference Session

March 31 from 9:00 AM to
5:00 PM

Create an information accountability framework that reduces costs, manages risk, and optimizes value. Short on time and budget? Register today for AIIM's one-day accelerated training courses and get skills development for the industry's most in-demand skills. Earn your certificate in a day for IGp and we'll give you the knowledge to get your critical projects underway.





Taking the Lead in ECM

by Bob Larrivee, Director of Custom Content, AIIM

As information professional, you and your organization are faced with many challenges. You must deal with information of all types stored in many locations throughout your enterprise. You must address the need to better manage your information assets in ways that enable findability, productivity, collaboration, and discovery. You must find a way to eliminate duplication, reduce storage costs, and adhere to compliance requirements. You must assess and include mobile, social, and cloud as part of your infrastructure mix. As information professional, you are expected to wear many hats and take the lead in moving your organization forward.

In ECM, there are five key elements to moving your organization forward in managing your business information and maximizing its value. You can take the lead by addressing these five key elements of ECM.

Capture – the ability to identify and bring information that is of business value into a corporate knowledge base.

Manage – once the information is capture, you need a consistent way to manage it properly so it can be found when needed.

Store – elimination of information silos is one of the goals of ECM, so the ability to properly store your information in a secure yet accessible environment

Preserve - ensuring that your information remains available throughout its lifecycle by updating your storage media, updating file formats, and checking for media degradation.

Deliver – presenting information in ways that are conducive to your target audience and accounting for variable access methods like the Web, tablets, and smartphones.

Technology Isn't the Answer

When dealing with ECM, technology alone is not the complete answer. There are three areas you need to address in addition to technology. These are people, process, and governance. All of these, when addressed properly and combined with technology, provide you with a strong ECM environment.

People

The people side of ECM seems obvious but it is also the most overlooked. Change management is a large part of ECM for without user adoption, your project will fail, or most certainly fall short of your expectations. User engagement is vital early in the project. Ask the users for their input about how things are done and how they could be done. Ask them about the content they use and the content they would use if they had access.

Process

Content and process are tightly related. If you change something in a process, you will likely have changed the way content is access, stored, or managed. If you change the way you manage content, you have inherently changed they way people work with it. Look at your processes and determine what content is needed, how it enters the process and how it exits.



Bob Larrivee

Bob, AIIM's Director of Custom Content, is an internationally recognized Subject Matter Expert and thought leader with over thirty years of experience in Document Imaging, Enterprise Content Management, Process Improvement and Automation, Records Management, and the application of advanced technologies to solve business problems. Prior to his current position, Bob has held positions within the vendor community, as a Consultant/Analyst with iMerge Consulting, Kinetic Information and BIS Strategic Decisions. In the reseller distribution channel, Bob led Tech Data's Knowledge Management Unit where, he set the strategic and tactical directions for the distribution of advanced and emerging technology products through Tech Data's distribution channel. Bob entered the emerging technologies' industry with Wang Laboratories where he focused on imaging, workflow, and digital annotation and voice recognition systems.

Follow Bob on Twitter:
[@BobLarrivee](https://twitter.com/BobLarrivee)



Governance

The rules of how you work, what content is kept, where it is kept, and who is responsible for it are all part of good governance. This is not to say you have to create great number of rules, but you do need to set guidelines in place to get control and consistency over your content and processes. This in turn not only helps with content management, it also supports risk management in that you can prove consistent practices through a well planned, implemented, and monitored governance program.

The challenges you face in dealing with the capture, management, storage, preservation, and delivery of content can seem daunting at times. Today content is not only textual information, it includes graphics, digital photos, audio files, video files and under the overarching umbrella of ECM, physical items as well. How much paper do you have? Are you in an industry where physical samples, like geological or biological samples are kept as a business record? All of this needs to be managed properly and you are the person now holding this responsibility. There is hope. There is AIIM.

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Enterprise Content Management Pre-Conference Session

March 31 from 9:00 AM to 5:00 PM

Learn how to manage content to improve customer and staff engagement, ensure compliance, and automate business processes. Short on time and budget? Register today for AIIM's one-day accelerated training courses and get skills development for the industry's most in-demand skills. Earn your certificate in a day for ECMP and we'll give you the knowledge to get your critical projects underway.





How to Create a File Plan in SharePoint 2013

By Jesse Wilkins, Director, Research and Development, AIIM

The file plan is one of the foundations of an effective records program. It is used to classify and categorize records based on unique retention and disposition requirements and, in many cases, security requirements as well. File plans are generally hierarchical and based on the functions and activities of the department or organization.

Before you begin

So how do you create a file plan in SharePoint 2013? There are a couple of important steps that need to happen before even opening SharePoint. First, you have to create a business classification scheme. This documents the activities of the organization at the function/activity/task level as well as the documents that are created or captured as part of them.

Next, you need to conduct an information inventory. In many organizations this is limited to the records of the organization, but non-records need to be managed effectively as well. The inventory will help identify what records and documents are managed effectively, where redundant or outdated information is stored, and where gaps exist as to what should be being created or captured but isn't.

The last piece of the puzzle is to identify retention requirements. These are typically developed enterprise-wide as part of a comprehensive records program. Retention requirements identify how long particular types of records should be kept and what happens to the records when their retention periods expire. For the file plan, the retention period and triggering dates/events are more important than the ultimate disposition.

Creating the File Plan in SharePoint 2013

There are two main approaches for building a file plan in SharePoint 2013: using folders and using libraries. In either case we're building hierarchical structures based on the function/activity/record type levels we identified earlier; the difference is first one of scale and second one of user acceptance. Let's look at each of these in more detail.

Folder-based file plans. These are much more familiar to users and work particularly well for relatively smaller collections of records. Folders can have retention set at the folder level such that when records are added to the folder they automatically inherit that retention. Folders can be set up with very deep and complex hierarchies – though this may be a drawback as much as a benefit. It does require planning to ensure the organization is not replicating other poorly designed folder structures like those found in the typical network shared drive. And folder structures can be so complex as to run into file path limits – file paths longer than 259 characters cause significant issues in SharePoint.

Library-based file plans. In this approach each library serves as its own records type/records series in SharePoint. Since sites support multiple libraries, the required hierarchical structures can still be developed and users can access



Jesse Wilkins

Jesse Wilkins, CIP, CRM, is the Director, Research and Development for AIIM International. He has worked in the information management industry for sixteen years as an end user, vendor, and consultant. His areas of expertise include electronic records management, digital preservation, email management, and social business processes and technologies. He is also the co-author of the AIIM Social Business Roadmap and led the development of the AIIM Email Management Certificate Program, the 2009 update to the AIIM ERM Certificate Program, and the AIIM Social Media Governance Certificate Program. He also manages the Certified Information Professional certification program.

Follow Jesse on Twitter:
@jessewilkins



records across those libraries subject to access controls. Content types can be developed and assigned to libraries for the creation of new records in a standardized way, and retention can be either based on content types or assigned at the library level for everything in the library. The biggest issue with the library-based file plans is that users may not make the connection between the library and records as intuitively; another issue has to deal with adding multiple documents with the same name to the same library. This is not as much an issue with folders because we can always create folders or subfolders if required.

So which model is right for your organization? Use folders for relatively smaller collections of records where users are more comfortable with that model. Use libraries for larger collections of records and where you can leverage content types for automation. Whichever model you choose, the actual implementation of the file plan in SharePoint 2013 becomes a fairly simple exercise of creating the libraries or folders, setting permissions, and setting up retention policies.

Share this ebook



Managing Records in SharePoint 2013 Pre-Conference Session

March 31 from 9:00 AM to 5:00 PM

Manage records, ensure compliance, and prepare for civil litigation requests. Short on time and budget? Register today for AIIM's one-day accelerated training courses and get skills development for the industry's most in-demand skills. Earn your certificate in a day for MRSHp and we'll give you the knowledge to get your critical projects underway.





#AIIM14 #InfoChaos Hot Seat

On the #AIIM14 #InfoChaos Hot Seat

As we start to think about #AIIM14, we thought we would ask a number of our sponsors a few identical questions and put them on a bit of a hot seat with regards to how they see the future – and let attendees start thinking about your own questions to ask them in Orlando. Here are the three questions:

- What are the three most important business problems related to Information Chaos facing YOUR customers?
- What do you see as the three most important trends related to Information Chaos facing organizations over the next 18-24 months? What will be different in our industry two years from now?
- What are the three most important things attendees should know about your company?

Turn the page for their responses.



Variety: The Spice of Information Chaos

By Erik Baklid, CEO, VirtualWorks

Information Chaos means that our customers are constantly asked to do more with less. Provide more services, more value, more insights – but with smaller budgets, reduced headcount, and tighter timeframes. They have burgeoning infrastructures, impatient end users, and a need to provide demonstrative value. Faced with such complexity, or chaos, their overarching problems revolve around:

- Adoption – users have to not just adopt but embrace the ever-changing applications, systems and interdependencies in the enterprise
- Adaption – get the most out of what you have: resources, assets, time
- Access – data needs to quickly translate into insights. Without access to the data, the insights are flawed.

Over the next 18 months or so, we see a few trends that really translate into huge opportunity for our customers. The first is the acceleration of big data's role. Along with velocity and volume, we think the third V, variety, will be at the forefront with the Internet of Things and social feeds going from fringe to mainstream. The second trend is for cloud computing to continue on the path of being a hybrid cloud of both private and public data silos, and the resulting issues and opportunities that entails. And the third trend we see is the reemergence of the enterprise portal. While these fell out of favor the last decade, corporations are coming back to the intranet as a means of collaboration and to satisfy user demand for increased personal access to information and participation in the community à la Facebook and other social networking platforms.

As far as the most important things to know about VirtualWorks, I'd say they are 1) our simplicity – we provide a product not a never-ending project that needs to be managed; 2) our ability to provide ROI in days not months; and 3) VirtualWorks is a real world company. In the real world you have data stored across your enterprise, in multiple locations, created by a variety of applications, and saved in an assortment of formats – in other words – Chaos. We provide order and calm to the chaotic situation by enabling aggregated search. With ViaWorks, you find what you need, when you need it.



Erik Baklid

VirtualWorks indexing and search software lets businesses easily and securely access information no matter where it resides. Aggregating multiple data and application sources, improves worker productivity, and corporate decision-making.





Your Content NEEDS to be Available!

By Frankie Basso, Vice President of Marketing, Systemware

What are the three most important business problems related to Information Chaos facing YOUR customers?

As we discuss content management solutions with some of the biggest names in American business, we hear over and over again about the need to address four distinct challenges:

1. Create operational efficiencies. Corporations are looking to eliminate the multiple silos of content that remain all too common. They want to move away from multiple content repositories toward one comprehensive solution that stores and manages content from any platform to any platform, streamlining processes and reducing costs. And they need to make certain their solutions will be able to address the growth of content volumes.
2. Reduce costs of mainframe operations. Many corporations are considering a blended platform deployment allowing them to optimize mainframe applications. By doing so, they will address the:
 - Cost of DASD
 - Cost of MIPS consumption
 - Cost of latency related to retrieval of content.
3. Lower costs of disaster recovery. A large bank can spend in excess of a million dollars a year on disaster-recovery software it hopes never to use. That is a “luxury” to which fewer and fewer corporations want to devote precious resources. Compliance considerations dictate the need for effective disaster recovery, yet many corporations lack failover capabilities for content.
4. Address content availability issues. Consumers are no longer satisfied to have a mere six months of basic account information available online. They not only want more and more information immediately available. They expect anywhere, anytime access. Corporations need to move content closer to consumers as well as to their own users and employees to improve internal processes and customer service.

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

Trends over the next 18-24 months

1. The proliferation of content will continue to be a significant challenge. Managing the volume, variety, and velocity of information and content will add to the chaos.



Frankie Basso

Systemware enterprise content management (ECM) software solutions capture, organize, manage and deliver actionable information when you need it, all within the context of your business.



2. Consumerism is driving the adoption of technologies and tools outside of the control of IT. This only creates more chaos as content is created, consumed, and stored in multiple systems across the enterprise.
3. The role of IT continues to evolve. IT is quickly losing the battle for control and influence within the enterprise today. They need to transform their role from one of a gatekeeper to a trusted service provider.

What will be different? A true mobile strategy that leads to capabilities will be table-stakes in two years. Social/collaborative work environment will increasingly predominant requiring technologies and tools to support this way of work. Increasing volumes of enterprise content will be stored in both private and public cloud infrastructure.

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

ECM Is Our Sole Focus. Systemware is an ECM software company. Since 1981, we have been committed to providing the very best ECM products available anywhere. No one offers better, more scalable solutions for high-volume capture, indexing, management, storage, and presentation of enterprise information. That's why many of the biggest corporations depend on us every day to help them manage volume, variety, and velocity of information and content.

We Build What We Sell. All Systemware products and components are designed and developed by our employees in the United States. And since all products are developed by Systemware, they are designed to integrate seamlessly and work together. So there's no crossing your fingers and hoping it works. Another benefit of developing all our products is that they are much easier to support.

Customer-Centric Approach. Since Systemware is privately held, its leadership is able to make decisions based on the best interests of our customers. We are able to be more quickly adjust to changes in customer requirements and the marketplace. Systemware treats its customers as partners and is committed to addressing customer needs quickly and completely. When a customer calls into our help desk, his or her call is answered by a person, not a machine. Our support staffers have been with Systemware for an average of eight years. That kind of longevity allows our support staff to develop successful working relationships with customers.





Working Anywhere, On Anything

By Jack Berlin, President, Accusoft

What are the three most important business problems related to Information Chaos facing YOUR customers?

In order, 1) Integration, 2) Integration, and 3) Integration. Your “information chaos” concept is fallout from fragmentation caused by the intrusion of big data, social networking data, and mobile devices into the stream and the proliferation of content file types and platforms. Our customers come to us for help with getting their arms around building a cohesive, rational IT infrastructure that seamlessly incorporates their legacy ECM, their employees’ and customers’ mobile and home devices and the social networking flow, and empowering everybody to be productive there. We show them how to build a secure, scalable viewing layer that enables everybody to read, search, comment on or redact any type of content, from anywhere it’s stored, and do it through any device. To work on anything, from anywhere, securely. That’s what employees and consumers are demanding, and that’s where chaos ends.

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

Everyone is focused on the disruption caused by bring-your-own-device [BYOD], but really we’ve almost licked that problem. The disruptor over the next two years is the Cloud, especially as more and more customers move to SharePoint 2013, Office 365, and other maturing SAAS solutions. Pretty much everybody knows the Cloud is where we’re all headed, the vendors surely have sold that message, but customers are still dangling their toes in the water. In the next 18 to 24 months you will see successful companies move through understanding the Cloud to exploiting the Cloud, to finding competitive advantage in being ahead of the pack when it comes to implementation of efficient cloud services. The third I’d say was privacy. Consumer concern over identity theft and emerging regulations pertaining to personally identifiable information will continually raise the bar for DRM controls, host/site security, redaction and other technologies for keeping private data private.

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

Accusoft is a full-service shop offering SDKs, applications, cloud services, and even mobile apps.

Our products address our customers’ information chaos challenges through patented innovations in digital imaging, tools for optimizing ECM investments and reducing operating costs, viewing tools that facilitate collaboration and DRM, and industry-leading development tools for adding superior barcode, forms-processing, OCR/ICR, image editing, and other functions to applications for multiple environments.

We are proud to name some of the world’s most successful, and most IT-savvy, companies as our long-time customers and partners.

Share this ebook



Jack Berlin

Accusoft provides solutions for capturing, processing and viewing images and documents, including zero footprint viewing, barcode recognition, image compression, forms processing, OCR and scanning.





Reshaping the Way of Work

By Robin Daniels, Senior Director of Product Marketing, Box

What are the three most important business problems related to Information Chaos facing YOUR customers?

Mobile and Cloud are reshaping the way our users and businesses work, leading to three major business problems related to information chaos for our customers:

New Workplace: Users are now working across multiple workplaces whether it's across a geographically dispersed business, at their home, or at the airport on a mobile device or tablet. Businesses need to get work done wherever they are and as information flows faster than before, at a faster and expanded pace.

New Products: Products are now being created that fundamentally redefine their industry through technology and information flows.

New IT: IT's role has fundamentally changed within the business and become more pervasive than ever, enabling users to access, create, and make decisions on their information from anywhere

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

We are moving to an Information Economy and moving away from traditional brick and mortar business. This has led to a change in how businesses build, sell, and market products and services to their customers.

IT is moving away from a role of aiding in value creation to truly defining the products and business strategy of the entire company.

IT's role is now about putting it's users first versus putting the technology first. By creating a view of "user-centric IT," IT will define the business over the next 18-24 months.

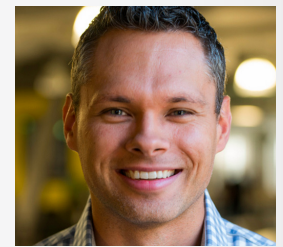
In two years from now, the delivery mechanism of goods and services will have changed. We've already seen signs of this with companies like Borders, Blockbuster, and Kodak who have gone out of business and so were replaced by Amazon, Netflix, and Apple. The role of information in our business becomes more imperative than ever and the ability to harness and access that information will be the key differentiation for businesses in the future.

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

Box lets you get the most of your business information by making businesses more productive, collaborative and competitive by connecting people and their information.

Box is used worldwide with businesses of all sizes and industries. Over 225k businesses, 25M users, and 99% of fortune 500 currently use Box with customers such as McAfee, Toyota, or Nationwide Insurance.

Box is the key leader with top analysts, including a Leader In the Forrester Sync & Share report (July 2013), Strong Positive in Gartner's Enterprise File and Synchronization Sharing (February 2013), Champion in Info Tech's Cloud File Sharing (September 2013) report.



Robin Daniels

Box is a secure and ridiculously easy way for companies of all sizes to share content and collaborate on any device.





Cloud, Cloud, and MORE Cloud

By Nishan DeSilva, Senior Director, Information Governance, Microsoft

What are the three most important business problems related to Information Chaos facing YOUR customers?

The move towards the consumerization of IT. As employees expect to bring their own devices into the workplace, they expect to be able to access their work products anywhere, from any device. This trend poses some obvious issues when it comes to compliance and information management. Many CIOs continue to believe that they can exercise a level of control that has become impossible, since their users simply go around policies and leverage consumer-facing tools to gain quick access to their documents. Once your users start mailing documents to their personal email account or using consumer cloud offerings to access documents anywhere, your enterprise has lost control.

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

The three most important trends are cloud, cloud, and more CLOUD. Cloud computing is not a fad—the service is too valuable to fade away. Given that employees are already leveraging consumer-focused cloud services, more and more IT organizations will enable their employees to work in the same way they've become accustomed to play – anywhere, from any device. As IT organizations move infrastructure support to the cloud, they will free up resources that can be used to focus on larger strategic issues for their organizations. And those organizations that fail to evolve will find that they've lost control of their data.

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

At Microsoft, the security of our customers' computers and networks is a top priority. We are committed to building software and services that help protect our customers and their industry. Three core elements guide the work and focus of security at Microsoft.

1. Fundamentals - We focus on security fundamentals, including making online activities, software, and services safer.
2. Threat and Vulnerability Mitigation – We strive to deliver a comprehensive and integrated portfolio of software and technologies that provide a centralized visibility and control of risk, reduce exposure to threats, and provide seamless integration with existing IT systems
3. Identity & Access Control – We focus on innovation and integration to help ensure that users are trustworthy, access policy management that dictates what resources each user has access to, and information protection that helps protect information permanently, regardless of where it's stored.



Nishan DeSilva

Microsoft. Our mission is to help people and businesses throughout the world realize their full potential. We are committed to our customers and partners and have a passion for technology.





Usable Products Can Help Conquer Information Chaos

By Bill Galusha, Principal Product Marketing Manager, EMC

What are the three most important business problems related to Information Chaos facing YOUR customers?

1. Increase productivity. Content management systems have lots bells and whistles, but unless users buy in those systems will have little impact when it comes to eliminating information chaos. The focus needs to shift to usability, integrating content management directly into business processes, and ensuring that user productivity is enhanced, rather than hindered, when they search for information or handle documents.
2. Improve collaboration. Collaboration is no longer confined to the workgroup behind a firewall, using a single collaboration tool. Increasingly, business processes require frequent interaction and information sharing that spans multiple organizations and operating environments, including mobile workers. Extending collaboration beyond the walls of a single organization, while maintaining adequate control is a huge challenge.

Assure governance in the cloud. Just as collaboration is bursting through the seams of the discrete organization, so too are its data and content. Conventional approaches to information discovery, security, retention management, and disposition can no longer keep up with the rapid growth of information and its proliferation in the cloud.

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

1. EMC is a leader in ECM for the past decade and half, providing solutions that connect content, process, and collaboration. We continue to enhance our portfolio with such things as the recent launch of InfoArchive – a first to market with the ability to archive structured and unstructured data within a unified archive w/real-time secure access to the data.
2. We have a Mobile first strategy and continue to innovate to meet customers' demand for technologies that work seamlessly in mobile cloud environments, i.e., move from leader in 2nd platform era to lead content-based solutions in 3rd platform (cloud, mobile, social, big data) era.
3. More than a vendor that provides a platform – we provide solutions that connect the front office with the back office.



Bill Galusha

The EMC Information Intelligence Group is the leading provider of software and cloud solutions that connect information to work.



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

1. Smart Process Applications. The next wave of productivity will come from flexible applications that orchestrate business processes in the context of all relevant information to ensure that decisions are fast and accurate. These applications will truly break down the silos that separate transactional, analytic, and content management systems.
2. Vertical SaaS. Cloud-based applications will continue to challenge on-premise IT architectures, offering faster adoption and lower cost of ownership. Applications will become more specialized and attuned to the specific needs of different industries.
3. Mobile/ECM Convergence. The demand to make information available on multiple devices will require new ways of managing and publishing content. Mobile access to enterprise information will become a feature of enterprise content management, with the mature security and governance policies of the content repository extended to mobile frameworks. But mobile apps will have their own styles of interaction, building from sync-and-share to more sophisticated forms of collaboration.





Unmanaged Content Can Cripple You

By Rod Hughes, General Manager, Kodak Alaris Software and Solutions

What are the three most important business problems related to Information Chaos facing YOUR customers?

Information Chaos is a very real issue facing our customers. One area where we see them facing this issue is in customer communications. Businesses today are interacting with customers across a very wide variety of channels, ranging from email or Twitter to texting and social media. Once the customer has reached out and made contact, they expect an instant response and don't want to wait a day or a week to have their issue or inquiry resolved. Managing all of those incoming channels presents a significant challenge for businesses, and they need a way to handle the exploding volumes of unstructured information that is arriving daily. While much of that interaction takes place through manual processes, businesses are increasingly looking for solutions to better manage or automate customer interaction and ensure timely responses.

Another area where we see the impact of Information Chaos is in process automation. Contemporary business processes are dynamic and difficult to define, so companies struggle to continually modify those processes and keep up with the changes. Rules-based automation is a natural approach, and one that certainly helps organizations deal with the flurry of incoming information. Unfortunately, businesses that are unable to keep up with process requirements often find it impossible to successfully manage complex information management projects. In today's fast-paced business environment, a firm that understands its own business processes is rare, but being able to evolve those processes easily will be critical to long-term success.

The third area where Information Chaos is having an impact today is in customer satisfaction and loyalty. Customers' expectations are high and loyalty can be fickle, so companies work very hard to keep existing customers while trying to attract new ones. A true, 360-degree view of all customer activity is required, which means mining and learning from a variety of information that is captured actively through the course of customer relationship management.

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


There is no doubt that information chaos will continue to be a significant issue for companies and will continue to increase over the next few years. Enabled by so many new digital communications channels, unstructured information is growing exponentially and can be crippling if not managed appropriately. On the positive side, businesses that figure out how to deal with and leverage this unprecedented availability of information will prosper and strengthen their own processes. Customers need to feel as though they are heard and valued, and that requires businesses to stay on top of the information flow.

The industry is exploring and developing advanced classification techniques that will open new opportunities for the automation of complex business applications.



Rod Hughes

Kodak Alaris intelligently delivers the solutions that enterprises need, automating business processes, enhancing customer experience management; utilizing our scanners; capture software, information management platforms, professional services, and service & support.



The ability to replace manual processes with automated ones frees up time for companies to focus on other, perhaps more important tasks that focus on long-term growth and success.

Over the next 18-24 months, we expect content management and customer experience management solutions to converge. As this trend evolves, ECM solutions will be judged as successful if they are able to provide an enhanced customer experience through automated business transactions. Those activities that make it easier for customers to keep doing business with a company help to ensure loyalty from the existing base and growth from among key prospect groups. Companies that have taken steps to tightly integrate their customer interaction workflows with their back-office processes will develop a true 360-degree view of customer relationships and further enhance customer loyalty.

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

Kodak Alaris is an imaging company specializing in document scanning and information management. Our goal is to enable customers to efficiently capture information from documents and digital information, consolidate all input channels, route it to the right people within an organization, understand its meaning, and extract more value from its content. Kodak Alaris solutions are designed to help customers address and manage the Information Chaos that characterizes business today.

Product and solution offerings from Kodak Alaris include award-winning scanners and capture and information management software platforms, an expanding range of professional services, and industry-leading service and support

With innovative solutions to meet the needs of customers ranging from small offices to global operations, the Kodak Alaris Document Imaging business delivers superior systems and solutions for the enterprise that automate business processes, enhance customer interactions and enable better business decisions.





Connect Content and Process

By Nick Loy Managing Director, Document Management Portfolio,
BancTec

What are the three most important business problems related to Information Chaos facing YOUR customers?

Information governance, managing the volumes and variety of information flowing into the organization.

COST EFFECTIVE automated data classification. The cost to acquire, deploy and effectively manage data classification tools continues to force clients to more manual or traditional forms of data classification, document type identification.

Collaboration or knowledge sharing. Connecting systems and data to allow for more effective business intelligence, data mining to improve decision-making.

What do you see as the three most important trends related to Information Chaos facing organizations over the next 18-24 months?

The maturity of enterprise information management

The maturity and affordability of Image or Glyph based technology as an alternative or enhancement to OCR/ICR technology for data classification. Also the potential for growth or expansion of vertically focused OCR/Doc Type/Image ID as a Service as a revenue growth opportunity for bpo providers.

Increased adoption of digital signatures technology will continue to drive down the volume of paper and need for paper capture and increase the adoption of ad-hoc or content-driven BPA tools. Also a potential expansion or revenue growth opportunity for BPO providers who are not currently offering a vertically focused BPA as a service model.

What will be different in our industry two years from now?

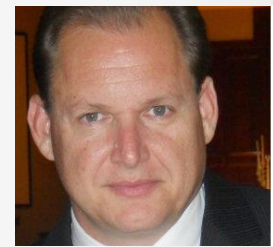
The alignment and maturity of EIM and big data, will become a primary business driver or focus of traditional document management and ECM Initiatives. EIM to manage the risk of poor information governance and the volume of data flowing into organizations. Big data to drive the reward of mining business intelligence within unstructured data that has become structured as a part of an ECM strategy.

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

BancTec has been designing, optimizing, and deploying best of breed document-centric technology and services for over 40 years.

BancTec invests more than a million dollars a year in research and development, to improve, enhance, and innovate BancTec proprietary document management, business process automation, document capture technology.

BancTec has over 24 locations worldwide, converting over 2 billion images annually.



Nick Loy

BancTec is a global leader in business process outsourcing (BPO), providing financial transaction automation and document management services for organizations seeking to drive efficiency in their financial and back-office processes.





The Danger of Casual Capturers

By Dan Lucarini, CMO, ibml

What are the three most important business problems related to Information Chaos facing YOUR customers?

1. Exceptions are out of control. The recent move to bypass reliable, centralized capture centers and integrate remote capture systems directly into business process management (aka “case management”) has had a nasty side effect. The errors made by “casual capturers” during the remote capture process are now passed immediately to the most expensive workers in the loop. One example is the missing or incomplete paperwork in a loan origination scenario. Why should the underwriter be bogged down with handling these exceptions?
2. Paper just won't go away and it is squeezing the budgets. Many in our industry sit around worrying about the use of paper declining. But by focusing on that, they miss the real pain point that the customer knows all too well. Our customers are rapidly expand the use of digital document input channels (email, mobile, social, etc.) but still for most processes the paper document remains a large part. Customers cannot afford to take their eye off the scanning ball anytime soon, but are also faced with the challenge of having the same budget to manage all the new channels.
3. The tension between the velocity and the veracity of information. The volumes of information coming into an organization are expanding at an insane rate, while simultaneously the time available to capture and process that information is shrinking. Legacy capture systems cannot keep up with both requirements and often force the customer to choose between velocity and data accuracy.

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

1. There will be resurgence in the use of professional capture centers of excellence within companies, as customers realize that their cost of exception handling has far exceeded any temporary savings from going “remote” and pushing capture out to the least qualified workers. In parallel, the industry will move beyond the obsolete distinction between “distributed” and centralized capture, and admit that there was always something centralized in every remote capture operation.
2. Multi-channel capture systems will become the norm for companies, replacing legacy scanning software. These new systems will include advanced document recognition and classification as standard features that are deployed as close to the point of document capture as possible.



Dan Lucarini

ibml provides intelligent scanning and capture solutions that drive business process improvements from the Point of Entry™. Combining hardware and software, ibml's comprehensive solutions automate the most demanding document applications.



3. Capture solutions that are built both for velocity AND accuracy will replace older legacy capture systems. Customers will expect scalability when and where they need.

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

1. ibml has evolved from a manufacture of ultra high volume scanners into a one-stop shopping provider of complete capture systems, with an end to end suite of capture software to complement our legendary high-performance scanners.
2. With our new DS capture solutions, we're now able to offer our special brand of intelligent document capture into the mid-volume production marketplace.
3. We deliver an exceptional customer experience by including special benefits such as Factory Acceptance Testing where customers can come to our facilities, test drive and configure their new solution with help from our experts before it even ships. We even offer ibml-certified computers with preloaded and configured software, making even the most complex capture installations a simple matter of plug and play.





The Best of Both Content Worlds Is Coming

By Mike Mahon, CEO, Zia Consulting

What are the three most important business problems related to Information Chaos facing YOUR customers?

- 1) Costs associated with existing document-centric business processes.
- 2) Lack of user adoption and ease of use with existing ECM systems.
- 3) Content Governance: compliance, control, and records management.

What do you see as the three most important trends related to Information Chaos facing organizations over the next 18-24 months?

- 1) The Consumerization of ECM systems – simple collaboration meets Enterprise IT.
- 2) Achieving the benefits of Cloud while mitigating risks.
- 3) Addressing the cost of paper/manual document processes.

What will be different in our industry two years from now?

Enterprise document & records management systems will be as easy as consumer cloud technologies like Dropbox, but with the power of traditional ECM technologies. The best of both worlds will be a reality.

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

- 1) Zia is the leading worldwide partner for both Alfresco & Ephesoft – and can migrate you to both.
- 2) We save you money through Automation Systems with Rapid ROI.
- 3) We help you manage Information Chaos with EasyECM solutions – increasing adoption of ECM.



Mike Mahon

Zia understands the importance of content to your success – with a focus on where your content comes from and, more importantly, where you need it to be. We recognize that these requirements may be unique to your industry, which is why we have established Zia Public Sector Solutions, Zia Solutions for Financial Services, and other vertical-focused practice groups.





Are Your Rules Enforced?

By Darrell Mervau, CEO, FileTrail

What are the three most important business problems related to Information Chaos facing YOUR customers?

1) What exists, 2) where is it, and 3) what is its exposure and/or its value? Our customers face the challenge of having their information-both physical and electronic-in various repositories and physical locations. Access, visibility, and effectively applying policy are all hurdles faced by the majority of our clients.

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

Chaos is still caused by lack of structure and enforcement of rules. Tools that help structure organizations information and that support and help execute information policy are what are needed. Over the next 18-24 months we see a trend in more effectively applying policies across all information within the organization. This challenge has been brought to the forefront in recent years due to increased litigation. We have also started to see a trend towards a more unified approach to information management.

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

Our solution is relevant to the biggest problems organizations face today. We deliver a product that helps structure an organization's information, deploy policy, and enforce compliance. Customers are telling us that we have addressed the need in the market for an enterprise system that can bring information policy and lifecycle management to an actionable enforceable event. We cover all bases in terms of ease of use, flexibility, and functionality and lower cost of deployment (ownership) with a focus on working with clients to make their policies actionable and increasing the value that their staff can provide to an organization.



Darrell Mervau

FileTrail is the leader in information intelligence, making physical and electronic records management simple and accurate by understanding our customers' needs.





Control and Sharing in a BYOD World

By Ali Moinuddin, Workshare CMO

What are the three most important business problems related to Information Chaos facing YOUR customers?

Security. The volume of documents being shared electronically is increasing, and with it, so are the security risks. With data arguably now the organizations' most important asset, when sharing a document it is important to ensure that the document is protected and that the IT department are able to track what is happening to that data at every stage of the sharing process.

Productivity. While IT must remain aware of what is happening to a document for security reasons, users must keep track of document versions. Email and consumer file sharing applications are proving difficult to manage when it comes to document versioning and effective collaboration. Conversations around a document in email trails are often disjointed and are not properly contextualized. As such the collaborative process is convoluted and time consuming, restricting productivity and efficiency.

Mobility. More and more knowledge workers have a requirement to work outside the traditional confines of the office on a mobile device. The problem is that they're sharing in a range of different ways, creating silos of data across devices. For example, someone may send corporate Intellectual Property to their mobile device via a personal email account or file sharing app, and once sent, that data has left the control of the organization forever, with no way of tracking its lifecycle.

With the increased volume and velocity of information sharing, the business problems our customers are coming to us with are issues around how and where documents are shared, how important information can be located quickly and easily and who has ownership of documents. The bottom line is that they are worried about compliance and the commercial risk posed by not having control over data.

What do you see as the three most important trends related to Information Chaos facing organizations over the next 18-24 months?

Bring Your Own Device: There is a new breed of tech-savvy users who are installing and using simple consumer-grade file sharing applications for work and this is a real problem. It becomes IT's problem when they lose control of what is shared and with whom. This has a direct impact on compliance, but also on the ability to have an audit trail – two of the basic tenets of any secure document-sharing process.

Collaboration will become more digital, as dispersed global teams are provided with a centralized and secure environment to collaborate on. Instead of the diverse islands of applications that are currently being used, more holistic solutions are emerging. This ties in with the third trend; the rise of the Chief Digital Officer. Chief digital officers are increasingly being appointed in large organizations to bring into effect this change and manage the digital age of the prosumer.



Ali Moinuddin

Since 1999, Workshare has been trusted with the world's most valuable and sensitive documents. With the return of Workshare's visionary founder Barrie Hadfield as our CTO and the amazing new team led by CEO Anthony Foy we have set out on a simple but exciting mission... To create useful software that people LOVE.



What will be different in our industry two years from now?

The main difference will be a transition to the cloud for highly regulated industries who historically have been slow to adopt this technology. Accepted workflows and processes are changing, and with more choice and control over how and where data is stored, these organizations will increasingly deploy cloud-based models, responding to the trends we have previously discussed.

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

- Workshare mitigates the risk associated with sharing valuable and sensitive information for regulated and semi-regulated industries, ensuring that they meet international compliance and regulatory mandates at all stages of the document lifecycle.
- Workshare improves employee productivity by providing an agnostic and centralized hub of collaboration for employees, eliminating inefficient working practices.
- Workshare knows about collaboration, and we have been helping people manage information chaos by making the complex simple for over 14 years.





Legacy Solutions Aren't Solving #InfoChaos

By Sean Nathaniel, VP of Technology at Upland Software and General Manager of FileBound by Upland



Sean Nathaniel

What are the three most important business problems related to Information Chaos facing YOUR customers?

1. The legacy solutions are not solving the content chaos, they are contributing to it. When software is hard to use or not made accessible to everyone in the organization, users will work around it.
2. Content chaos can only be controlled by strong, flexible, and agile workflow to process the content. Our customers not only want superior workflow functionality to ensure process consistency and efficiency, they also need to be able to react quickly to market changes or changes in how the business operates. And they need this robust capability to be elegantly simple.
3. The changing workforce requires proven cloud solutions to manage the content chaos. It's not about Millennials vs. The Rest of Us. We see clear trends such as geographically dispersed and mobile workforces, cross-departmental collaboration, and an increased amount of work done by contractors. Our customers address these challenges by building cloud solutions that are easily accessed from anywhere and any device and require minimal training.

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

1. Transforming how work gets done will require Cloud-native solutions with proven security, scalability and availability. As cloud solutions continue to gain acceptance and increase market share, it will become clear which solutions are truly built to deliver enterprise functionality and performance in the Cloud. Legacy solutions that jumped on the Cloud bandwagon won't survive this shift.
2. The way work gets done is changing, and mobile capabilities from native mobile applications and responsive Web applications that work on any device, anywhere are critical. BYOD is here and users will not tolerate having to go through separate steps to accommodate all of the devices in the enterprise.
3. Managing the content is the past; the future is about freeing content through solutions that enable content process automation. Users aren't focusing on "document processing;" they want to know how they are going to get their work done. The companies in our industry that will thrive two years from now are the ones that make it easy for users to see what needs to be done – and do it. At the same time, management

FileBound by Upland's innovative cloud-based and mobile process automation and document management solutions improve efficiency by connecting users with business-critical information and analytics.



will require easy-to-use analytical tools that don't require a SQL DBA to see how the business is doing.

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

1. FileBound is a Cloud-native process automation solution and has a large base of companies from the small to mid-size enterprise to companies in the Fortune 50 using FileBound Cloud.
2. FileBound is completely focused on workflow process automation that enables companies to eliminate the content chaos.
3. FileBound's strength is delivering robust capability through simple elegance, which is why enterprises large and small are implementing FileBound, often replacing outdated or complicated legacy solutions. Whether it's document management, workflow process automation, business analytics, intelligent forms or system integration, FileBound is the right solution for the enterprise and delivers immediate ROI.





Cloud and Process

By John Newton, President, Alfresco

What are the three most important business problems related to Information Chaos facing YOUR customers?

How do we control information flowing out of the business into Internet sites?

How do we modernize and replace our old proprietary vendor stack?

How do we securely on-board employees with their mobile devices, particularly BYOD?

What do you see as the three most important trends related to Information Chaos facing organizations over the next 18-24 months?

What will be different in our industry two years from now?

The role that Cloud and online services will play in business processes that go beyond the enterprise.

An increasing portion of enterprise information and content will be consumed on mobile devices, which will require new security models.

Regulatory and legal issues will hold back adoption of some important processes that need to be in the Cloud.

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

I know it's four, but I had a hard time choosing:

- Alfresco brings simplicity in use and smart processing to the complex business of managing business-critical processes and document management.
- Alfresco is a modern ECM platform that is open source and open standards, which prevents lock in of data and vendor relationship.
- Alfresco is the only true hybrid content management platform that allows you to manage and integrate sensitive information on-premise with business-to-business collaboration in the Cloud.
- Alfresco is in mission-critical applications due to openness and extensibility in thousands of government agencies, financial services organizations, and high-tech manufacturing companies.

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John Newton

Alfresco simply unlocks the power of your business content and corporate memory to collaborate across boundaries, making smarter, faster and more informed enterprise content management decisions.





Is Your Data Leaking?

By Hormazd Romer, Senior Director of Product Marketing, Accellion

What are the three most important business problems related to Information Chaos facing YOUR customers?

I think the biggest issue that organizations are facing, in relation to Information Chaos, is the sprawl of enterprise content that continues to grow as employees and executives put new data into a variety of content management solutions. Organizations are overwhelmed by the amount of information they're both producing and receiving. This then leads to two other very serious problems: leaking data and redundancy.

Leaking data is obviously a huge security risk for any business, that gets more crucial the larger an enterprise. The advent of mobile devices and a remote workforce mean that data now gets replicated onto any number of cloud storage sites and devices. This lack of security and control over sensitive business information is a problem that companies across a number of industries are working to address.

The final issue is that of redundancy. When workers are inundated by thousands of files, folders, and emails, it makes organizing information, or searching for and finding a specific piece of information, nearly impossible. This means that workers at different office sites are creating the same kinds of files, and employees in all departments are spending nearly a fifth of their time searching for and gathering information, according to a report from McKinsey.

These issues are a growing problem, because the influx of information continues to grow at an exponential rate, and employees and enterprises alike are unable to keep up.

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

The growth of BYOD, consumerization of IT, and integration between new software and established infrastructure are the three trends I see affecting organizational information the most over the next two years.

Companies are still struggling with how to enable user productivity on mobile devices, without losing control of the growing amount of data they need to access for work. They are loath to just provide access to any and all information to an employee-owned mobile device, but with the consumerization of IT, employees are just finding their own solutions, which are often unsecure, if their own organization doesn't provide a sanctioned alternative.

The integration element stems from enterprises refusing to give in completely to SaaS solutions, and insisting that they retain established infrastructure solutions like Microsoft SharePoint. At the same time, smart enterprises recognize the need to allow their users to access these established solutions, and the information they hold, outside of the office.

Two years from now, I still expect companies to be grappling with these issues, but I see a complete acceptance of mobile devices in the workplace. I think that organizations will instead be focusing on how to integrate mobile access into



Hormazd Romer

Accellion provides mobile solutions to enterprises to enable increased business productivity while ensuring compliance. The leading provider of private cloud solutions for secure mobile file sharing, Accellion offers organizations the scalability, flexibility, and control to support a mobile workforce with the tools they need to work securely, wherever.



their enterprise content stores, and other established infrastructure technologies, as well as focused on keeping unsecure, consumer solutions out of their network.

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

Our newest solution, kiteworks by Accellion, helps IT teams and end users in three main ways:

Mobile-First UX: Rather than taking a PC-based design and pasting it onto a mobile app, kiteworks was designed for mobile first, so that the user's experience is seamless across all devices from smartphone to tablet to laptop to desktop. Even the admin functionality is available on the smallest mobile devices. The UX is icon-based with the mobile user in mind, and includes innovative, industry-first features such as the kiteworks Move Tray, which streamlines the way people share files via mobile devices.

Secure Connectivity to ECM Systems: With kiteworks mobile users have universal access to enterprise content stores including secure, native integration with two new ECMs – Documentum and SharePoint Online – in addition to file shares previously supported, including Microsoft SharePoint 2007, 2010 and 2013 as well as Windows File Shares. This means that kiteworks users can access, edit and share files from different enterprise content sources, with internal and external users, through one seamless universal interface that honors all ECM access permissions.

Three-Tier Architecture: With kiteworks Accellion introduces the industry's first three-tier architecture for private cloud file sharing and collaboration with separate Web, application and data layers for defense in depth, extreme scalability and flexibility. The separate layers offer new deployment options for enhanced security, such as putting the Web layer in the DMZ for external users, while keeping the application and data layers behind the firewall to reduce the risk of data breaches. Organizations concerned with data sovereignty, can specify where data is stored based on user geography, access rights, or type of content.





People at the Center of Content

By Cengiz Satir, Program Director in IBM Enterprise Content Management

What are the three most important business problems related to Information Chaos facing YOUR customers?

1. How to engage all employees in the decision-making processes to gain better business outcomes.
2. How to better manage the ever-increasing volumes of content that being generated today.
3. How to make unstructured information more accessible and actionable via the cloud, Web, desktop, and smart devices.

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

1. How can organizations reduce their support overhead without risking information leaks? Now more than ever companies are looking toward technology solutions centered around cloud to leverage cost savings, efficiency and ubiquitous accessibility. The key questions companies are asking is should they go on premise or use a hosted environment and what are the risks and rewards associated with both.
2. Many companies are looking to reduce their information exposure, there are big trends in organizations looking deeper into how long information should stay active and how do you effectively manage information life cycles.
3. Lastly companies are trending away from email and shared drives; instead they are looking for ways to maximize the talent, knowledge, and expertise of all employees. Arming businesses with social and mobile applications that are an integral part of (not an after thought) their broader corporate content systems will ultimately drive better outcomes by connecting people, as well as their knowledge and expertise to not just content, but "your content."

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

1. IBM's approach to reducing information chaos is to bring a people-centric approach to enterprise content. Content that understands social concepts such as tagging, liking, rating, commenting, and activity streams enables businesses to quickly discover and act on information in the context of their work.



Cengiz Satir

IBM. We help companies unlock the value of content for better insight and outcomes by putting content in motion: capturing, activating, socializing, analyzing, and governing it.



2. IBM has also made Content Analytics an integral part of the content experience – this also contributes to reducing information chaos. Content that is presented in a contextual manner and is instantly actionable translates to rapid discovery of the right information. The result is better decision making and improved response times.
3. IBM has also understood there is a need to both access and manage information & content 24x7. Mobile and tablet devices have quickly become the preferred way to interact with content and people, both inside and outside the organization. So by making content more accessible, actionable and contextual via social and mobile tools, businesses can ensure mission-critical information reaches its destination whenever and wherever it's needed.

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Dark Data Strains IT Budgets – for no good reason

By Michael Shufeldt, Director, Recall Crystal

What are the three most important business problems related to Information Chaos facing YOUR customers?

I would say that the three problems regarding information chaos that we encounter at Recall are lack of visibility, rising costs of managing information and, finally, the myriad of different systems where information is stored which causes many different challenges. This cannot be overcome by a single repository.

A proper program should provide visibility over multiple repositories and the relevance of the data contained in those repositories should increase with enforcement of policies and procedures. This umbrella effect can significantly increase the overall value of organizational data. In addition to giving users the most relevant data possible, BI (business intelligence) tools also benefit from having the best input possible. This effects strategic business decisions at every level of the organization.

Pristine data also lessens the opportunity cost of searching for wanted information such as the latest version of a contract, an important email and much more. The cost of storing “dark data” or irrelevant data is a tremendous strain on IT budgets today. To the extent that this redundant, obsolete and trivial information can be remediated, value can be brought forward to the organization as a whole.

Today most organizations use a myriad of disparate systems to manage their information. Many functional areas such as HR, accounting, legal and IT all use different ways to store and communicate data. When litigation, information requests or audits occur, how do these organizations know that they are fully complying with requirements when data is distributed? One of the functions of Information Governance is to provide unified visibility of these holdings, whether a record or non-record. Note that this assumes IG is not limited to a repository-based philosophy that is generally assumed to be a thing of the past.

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

First, we are on the verge of the emergence of information governance as a major factor in corporate strategy. Organizations are seeing the tremendous value an IG initiative can have on their bottom line. This is transformative in many ways, from cost control to the value of the data itself.

Second, we will see an even stronger decline in the practice of repository-based retention. It is simply not feasible to try and store all information in a single system. Specialist systems in HR, AP, legal, sales, and many others cannot be captured with a simple document management philosophy.



Michael Shufeldt

Recall helps businesses meet the challenges associated with document management, data protection, and document destruction with smart, strategic solutions and proven expertise.



Finally, we will see organizations start to view information as an asset rather than a challenge. With a proper solution in place, information can become of strategic value rather than just a drain on IT systems. This is also where we'll see our industry headed over the next 18-24 months. By showing that the problem can also be an opportunity, Recall and other industry leaders will be able to tell a very different story of information and its use as a business tool.

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

While Recall is renowned globally for protecting our clients' physical information assets, we are also a digital information management company. We provide a full range of Information Governance services that are unparalleled in the industry.

Recall gives organizations complete control over their information with an integrated approach to securely manage physical and digital assets, wherever it resides, with one information management partner.

Recall provides customized, complex software solutions for enterprise content management and the knowledge and support to oversee a seamless transition.

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Capture Changes Coming

By Frank Tiedt, CSO, I.R.I.S. AG, Germany

What are the three most important business problems related to Information Chaos facing YOUR customers?

Time spent re-keying data. It's an unnecessary manual work that is tedious, time consuming and generates arthritis.

Inaccurate and incomplete data conversion from incoming paper based or email based information to back-office ERP business processes.

Redundant and double handling of documents. 90% of all incoming information only needs to be archived electronically. This can be done without manual intervention.

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

Faster response to customers. Customer relationship management will be more efficient and to better serve the needs of the customers completely.

Automated order processing. Order processing will be done automatically with capturing systems as done for invoice processing today.

Internet-based business process solutions. All automated business process solutions will move from on premise intranet base to a distributed Internet base. With this electronic process each person involved in the process is part of it – all over the world and at any time.

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

IRIS offers content-to-process technologies by bridging the media gap between incoming information to back-office business processes

IRIS is the capturing expert, increasing the business process efficiency and accuracy in a tremendous way to let the customers focus on their core competencies.

IRIS is the technology partner for business process outsourcers (BPO) and shared services centers (SSC) providing high scalable professional technology paired with multi-application and multi-tenancy functionality.

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Frank Tiedt

I.R.I.S. a leading provider of 'Content to Process' technologies. With their solutions for document classification and data extraction business processes are optimized – thanks to automated document and information management.





Keep It Simple

By David Vidlicka, International Channel Manager, Gradient

What are the three most important business problems related to Information Chaos facing YOUR customers?

1. Document Capture – how to get documents easily into SharePoint Libraries
2. Capturing Device Availability – how to connect all available capture devices into one location
3. Human error while typing – users can make many mistakes when indexing document through manual typing

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

1. Technology goes mobile: tablets, mobile phones, etc.
2. Build on services and quality, not products and quantity. Organizations will look for technologies that will allow them to pay as they grow.
3. “Keep it simple”: organizations will have clear and detailed plans on how to deal with Information Chaos

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

1. App availability to anyone. No client installation required. Available in 23 languages.
2. Capture, Index, and Release. From any capturing device, Index quickly without faults and Upload to the library, instantly. All without leaving SharePoint.
3. State-of-the-art Imaging technology delivers high-quality images with dramatically decreased file sizes.



David Vidlicka

GRADIENT is one of the TOP Microsoft ISV partners for Enterprise content management in SharePoint. Whether you need to scan large batches of mixed documents types with SharePoint or Office 365, or acquire documents from mobile, MFP, or other sources, GScan Online provides flexible document sourcing. Superior imaging improves document quality, and the OCR speed up indexing.





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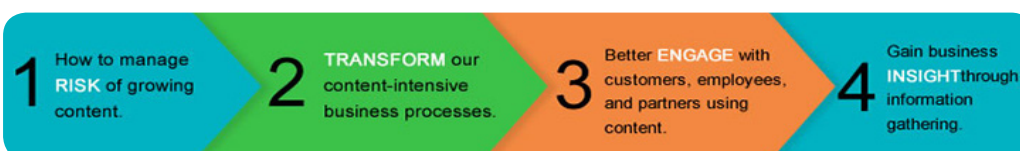
Information Opportunity
VS Information Chaos



About the AIIM Conference 2014

What you've seen is just a glimpse behind the curtain of the AIIM Conference 2014. If you enjoyed what you read, I implore you to join these and dozens of other thought leaders in Orlando, FL April 1-3 for the premier gathering of our industry.

At the AIIM Conference 2014, you will not be a passive attendee but an active participant in some of the most critical conversations our industry will have this year. Come together with hundreds of your peers to share experiences and wisdom. When you return to your office, you will be armed with practical solutions to your most pressing information management challenges.



Need more convincing?

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About AIIM

AIIM (www.aiim.org) has been an advocate and supporter of information professionals for nearly 70 years. The association’s mission is to ensure that information professionals understand the current and future challenges of managing information assets in an era of social, mobile, cloud, and big data. Founded in 1943, AIIM builds on a strong heritage of research and member service. Today, AIIM is a global, non-profit organization that provides independent research, education, and certification programs to information professionals. AIIM represents the entire information management community, with programs and content for practitioners, technology suppliers, integrators, and consultants.



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