2018 Annual Spring Conference Agenda – Ambitions Realized. Milestones Achieved.

Room Color Code RIM Track	Room: Magnolia	Room: Elm Track: RIM Fundamentals (A)	Room: Pecan Track: RIM Applied (B)	Room: Live Oak B Information Technology (C)	Room: Live Oak A Track: Vendor Spotlights and Exam Prep Workshops (D)

Day 1 – April 24th	
Time and Session Name	**Session Description**
8:00 am	**Registration Open**
8:45 am – 10:15 am	**KEYNOTE** **Helen Sharkey** ***"Low Man on the Totem Pole – How to Become a White-Collar Criminal"***
10:45 am – 12:00 pm Session 2	**Session 2**
"Habit 7 of a RIM Program: Sharpen the Saw" **Dave Foley** **ONEOK**	Habit 7 of a RIM Program: Sharpen The Saw.: Whether you began a records management program this year or have a long-running mature program, how do you ensure it remains relevant and sustainable? Measuring use and effectiveness can drive program improvements that may help an organization move towards compliance. From a practitioner's vantage point of view, we'll highlight resources and easy-to-use ways to measure a program holistically, as well as individual components. We'll close with a peek at how these measurements can help you gauge program compliance.
"Addressing GDRP: Challenges and Opportunities" **Howard Loos, CRM, IGP** **Brigham Young University**	The new General Data Protection Regulation (GDPR) has caught many organizations by surprise. What are these new requirements and will they impact your organization. During this session, you will gain a better understanding about this European Union requirement and how it may impact your organization. We will also discuss practical approaches one organization is taking to address GDPR requirements, as it relates to data privacy, access and retention.
"Rise of Artificial Intelligence and How It Applies to ECM" **Graham Sibley** **Collabware**	Dealing with the massive volume of content created and managed within organizations has become a monumental problem for information management teams. Until recently, the technology required to automatically process and analyze this massive volume of content has been unavailable to all but the largest internet companies in the world. In this session, you will learn how your organization can take advantage of the latest technology breakthroughs to address challenges in areas such as classification and information discovery. In addition, you'll learn how you can harness the future of A.I. and intelligent ECM to transform your organizations through new and deeper insights driven from the content you already possess.
Vendor Spot Light: **Access Sciences**	*"Braving the Rapids with Information Management: Mergers, Acquisitions, and Divestitures" (Access Sciences)*
12:00 pm – 1:45 pm	**Buffet Lunch / Visit the Exhibit Floor**
1:45 pm – 3:00 pm Session 3	**Session 3**
"Decoding the EDRM: Or How to Master the Identification Phase and Conquer the World" Todd L. Dietrich BDO USA, LLP	Mastering the identification phase of the EDRM can have dramatic impact on managing costs and implementing your litigation strategy. In this session we'll review what the E-Discovery Reference Model (EDRM) is, each of its components and how it is used across the information lifecycle and for E-Discovery. We will discuss how pre-planning, organization and utilizing Information Lifecycle Management principles
"Is this Your Year for Level 4? Why RIM Assessments Elevate Your Status as a Strategic Partner in the Organization and Promote Integration with Business Operations" **Claudette Lloyd and Lisa Cromwell** **Access Sciences**	Program maturity is a living thing. We believe assessments should always be in your toolkit to support program alignment and growth. As organizations navigate their information governance journey through business and regulatory changes, challenges and successes should be viewed through a holistic lens that considers roles, responsibilities, tools, policies, processes, behaviors, and attitudes. Assessments can be the key to elevate RIM to a strategic partner and advance your organization's understanding of itself and where it wants to go. An assessment is a powerful tool for continuous improvement that supports your ability to align your program with the organization's culture and goals. It will return rewards in ways that raise your visibility within the organization, promote your program's value, plan initiatives that solve real business problems, and make the case for RIM resources and funding. In this session, you will learn why holistic assessments will truly motivate and prepare your organization to take on the challenges of data and information governance, the 4 essentials for success, and hear illustrations from multiple organizations of various sizes and program maturity levels.
"Achieving Information Governance in the Microsoft Cloud" **Mike Alsup** **Gimmal**	Enterprise information governance has become much more challenging with advancements in Cloud computing, especially in Office 365 and Azure, and the increased use of collaboration technologies, because information policies need to be consistently applied in so many more repositories. Everyone recognizes the need for governance to be extended to these repositories, and many organizations are still looking for a single "ring of policy to rule them all";. Wrapping all of these environments into an enterprise information management solution is a competition between several alternative approaches marketed by Cloud-based file sharing vendors, the legacy ECM vendors, federation and search vendors and Microsoft. Mr. Alsup will discuss the pro's and con's of each approach. He will also focus on Microsoft's new retention labels approach, Advanced Data Governance, in both Office 365 and Azure. What will be its impact on traditional governance providers?
Vendor Spot: **Light Collabware**	*"How to Set Up SharePoint Records Management in 90 Days or Less" (Collabware)*
3:30 pm – 4:45 pm Session 4	**Session 4**
"Incorporating the Principles to Establish an Information Governance Program" **Robert O'Conner, CRM** **The Teacher Retirement System of Texas**	This session will share lessons learned through three case studies (Engineering & Construction Industry, Financial Services Industry, and State Government) and will share ways to incorporate the Principles to establish or enhance your organization's information governance programs.
"Disaster Planning and Recovery" **Kimberly DeCola, CRM** **City of Austin**	This session covers a comprehensive look at identifying, protecting and drafting a vital records plan and then feeding that Information into a disaster plan; how to do a complete risk assessment and various types of records that should be considered along with some that are easily overlooked. It also includes in-depth coverage of what should be in a complete DRP including tips for working with IT and business continuity groups. The session will review recovery information and how to set up triage and salvage areas. There is an emphasis on being prepared and doing regular testing and training because I think a lot of companies are lacking in this area.
"Data Mapping for Records Management and Compliance" **Dennis Kiker, KPMG; Mary Marquez, Frost Bank; and Zeeshan Mirza, KPMG**	The session will involve a combination of panel discussion and participant interaction as we explore the results of a recent data mapping project. We will start with an overview of the objectives and initial plan for the project, outline the actual implementation, and review lessons learned. We will also provide a demo of the data map itself. We will invite participant questions and contribution based on ours and their own experiences.
Vendor Spot Light: **MicroFocus**	*"Managing Cost, Complexity, and Risk Out of Your Business" (MicroFocus)*
4:45 pm – TBD	**Exhibit Hall for Door Prize Drawings** (must be present to win) – afterwards, proceed to the Hotel Sorella adjacent to Norris Conference Center the Networking Social! **Networking Social at the Monnalisa Lounge in Hotel Sorella** Sponsored in part by PacoTech

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Day 2 – April 25th	
8:00 am - 8:30 am	**Arrival / Continental Breakfast / Networking / Exhibit Floor Open**
8:45 am - 10:15 am Session 1	**Session 1**
"Policy Pie: What's Your Flavor?" **Ryan Zilm** **Andeavor Companies, Inc.**	In this session you will learn how to develop and implement a policy based on three specific areas: the core components (the crust), the organizational needs (the filling), and the communication and rollout plan (the serving). Learn how one organization modified the "filling" to meet the changing needs of its business - and how you can do the same.
"Getting the Value from your New Subscription to a Retention Rule Service" **Sarah Emes** **Solvay**	Short presentations of topics associated with moving to a subscription service for researching retention rules and information regulations – each section will include audience brainstorming on impacts: • Service features and jurisdictional coverage • Organizational considerations and stakeholder collaboration • Change Management for each role in the process (subject matter experts, legal reviewers, end users etc.) • New capabilities – annual or more frequent maintenance, publishing a multi-jurisdictional schedule, maintaining business unit file plans • Capitalizing on opportunities to communicate the change and grow interest in compliant record-keeping • Summary of value received and changes in the way of working
"Cover Your Assets: Conducting Essential Sensitive Data Cleanup" **John Frost, CRM, FAI** **Integro**	You know you have sensitive data (e.g., credit card numbers, driver's license images, social security numbers, etc.) in your enterprise, but do you know where that data is located? Is it protected for GDPR, or against hacking? Do you need to get your house in order? This case study session will take you through one company's efforts to maintain PCI compliance and the steps taken to plan, locate, and remediate sensitive data across the organization (structured and unstructured data sources). Attendees will learn about proven methods to obtain compliance and protect your most valuable information assets.
"Recognizing Biometric Obligations" **Judy Sitton, CRM, FAI, Kinder-Morgan**	Biometrics records obligations are headline news. Come talk about why the Illinois Biometric Information Privacy Act (BIPA) was brought up 90 minutes into Mark Zuckerberg's testimony before Congress on April 10th. Find out what else impacts our obligation to protect this sensitive information
9:45 am – 10:15 am	**Break / Visit the Exhibit Floor**
10:15 am – 11:30 am Session 2	**Session 2**
"Headlines: A Year's Worth of Information Governance Failures" **Christian Liipfert** **Scharf Banks Marmor LLC**	Information Governance is hard. From auto makers fudging mileage statistics to the Equifax hack, the news is full of stories in the past year where organizations have failed to meet the information governance requirements. Who can forget the Apple engineer who was fired after his daughter posted a pre-release YouTube video of the new iPhone? What about the indictment of several KPMG partners for a conspiracy to steal confidential government information? This session is a review of information governance failures in the news over the past year. Mistakes are a powerful learning tool. Study where other organizations have failed to avoid making those same mistakes yourself.
"Auditing Your Records Program" **Glen Sanderson and Gus Dahu** **Calpine**	This session focuses on developing a relationship with Audit to assist in getting senior level support. • Discuss the audit phases • Types of audits focused or broad audit • What will impact the audit (regulations, technology) • Process audit - does the process reflect reality? • Who should audit? • Audit Results and reporting findings
"Using the Data Associated with Project Records in the Cloud to Drive Quicker Outcomes and Anticipate Problems" **Phillip Woodrow and Keith Hutto** **McLaren**	As every Records Manager knows, the data associated with records and live documents can be used for more than providing an audit history or for easy document retrieval. However, this has been taken to the next level in the construction and engineering industry where, by combining Placeholder information with cloud technology it is allowing new uses for such data – driving projects forward and foreseeing problems before they occur. Anticipating the unexpected will have a profound impact on delivery milestones, profitability and incentives, as well as commercial risk and penalty. The ability to foresee issues before they occur requires forethought and a little investment in time, an effort that will pay huge dividends throughout the project lifecycle. In this session, Opidis Software (name will change prior to conference because of rebranding) will explain how these benefits can be achieved and some of the problems which need to be solved along the way.
CRM Exam – "*The Past and the Present*"	**Ellie Maier, CRM, CBCP Citgo Petroleum Corporation**
11:30 am – 1:00 pm (Session 3)	**Lunch Meeting** **Cecilia Rose, MCC, Next Door Strategies** ***"Communicating Effectively with People Is Your Pathway to Success"***
1:30 pm – 2:30 pm Session 4	**Session 4**
"Confessions of a Document Controller" **Jessica Bianchessi** **Kinsman Group**	Through this session, we will discover why most Document Controllers are not actually in Control – as their title would portray. We will explore the unique challenges of document control, and discuss why implementing a document control system won't solve these challenges alone. Moreover, we will unveil the most important element of the Document Control discipline, and it may not be what you think. Beneficial for anyone involved with Document Control, Project and Operational Management and more.
"It's Gotta Be 5 O'Clock Somewhere…Do You Know What Shape Your Program Is In?" **Earl Johnson, Jr. CRM** **Willis Towers Watson**	The primary objectives of auditing a records management program will include: • Understanding current practices • Assessing areas that are at risk of not meeting operational, legal and regulatory requirements • Identifying gaps between the current state of your program and compliance with where you want it to be, and • Determining methodologies for remediating existing gaps in your program This session is designed to help you address current practices and processes for your organization's operational functions, and assess records life cycle management-from creation, through final disposition. Conducting a records management audit will help you figure out what compliance requirements and goals you want—and need to meet, and how to develop a game plan to get there.
"Nuts and Bolts of Blockchain Technology: What RIM Professionals Need to Know" **Susan Trombly** **Iron Mountain**	The program will feature a PowerPoint presentation with considerable time given to use cases: pilots underway across industries along with actual implementations (45 – 50 minutes). To make the session interactive, questions and observations will be solicited from the audience. I will also describe a handful of potential use cases where the audience can decide if the business problem can be solved by blockchain or not (15 – 20 minutes). To close, I'll share resources that the audience can use to further their understanding of blockchain and to share with colleagues and stakeholders at their organizations (5 minutes).
IGP Exam Prep Workshop	**Sandy Miller, CRM, CIP, IGP, Cheniere Energy**
2:30 pm – 2:45 pm	**Break / Visit the Exhibit Floor (Exhibit Floor Closes at 2:45 pm)**
2:45 pm – 4:00 pm Closing Session	**CLOSING SESSION: Information Governance Energy Industry Panel** Joe Shepley (Moderator), Doculabs; Sandy Miller, Cheniere; Glen Sanderson, Calpine; Murthy Cijjapu, Southern California Edison, and Travis Osborne, Apache
4:00 pm – 5:30 pm	**ENERGY ROUND TABLE** Dave Foley, ONEOK and Susan Cisco, Ph.D., CRM, FAI, Gimmal