

DOCULABS LIVE

Located in the AIIM Booth - 436

Information, education, and entertainment on the Info AIIM Expo show floor! Doculabs, the leader in enterprise content management (ECM) consulting, provides an opportunity to hear from best-in-class users of ECM technology as well as the providers of the technology we all need to use to manage our information. Interactive panel discussions allow attendees to interact with the front line of ECM. Learn about both the benefits and the pitfalls of the technologies that organizations have deployed or are considering investing in and leverage the lessons learned from other companies' ECM experiences.

Schedule at a Glance

	March 31	April 1	April 2
10 :30	State of the ECM Industry -- John Mancini Q&A	AIIM Chairman's Expo A to Z	AIIM Chairman's Expo A to Z
11:30	AIIM Chairman's Expo A to Z	Benchmarking your ECM Maturity	Content Management Interoperability Services (CMIS)
12:30	Deploying ECM Programs for the Enterprise: Best Practices and Pitfalls (Panel)	How Can I Show RETURN on My ECM Investment? (Panel)	Building Compliance and Discovery Programs Before the Lawsuit (Panel)
1:30	Collaboration Tools: Improving Content Management or Adding Complexity? (Panel)	Good Information In= Good Information Out: Best Practices in Search (Panel)	Business Process Management: Are we making the most of content drive processes?
2 :30	Building Compliance and Discovery Programs Before the Lawsuit (Panel)	Collaboration: The ECM Silver Bullet for Driving Adoption? (Panel)	All sessions are scheduled to last 45 - 50 minutes
3 :30	Enterprise 2.0 – The Next Big Thing?	AIIM EMTAG Panel (Emerging Technology Advisory Group)	

Detailed Schedule

Tuesday, March 31

10:30 – State of the ECM Industry – Q&A

After the keynote sessions join John Mancini and James Watson for an interactive discussion around the key trends and findings from AIIM's President. This session will allow attendees to answer questions about how the topics that John discussed will impact your decisions in 2009.

Presenters: John Mancini, AIIM International
James Watson, Doculabs

11:30 – AIIM Expo Floor Guide A to Z

Sit down, relax and see the a preview of the entire AIIM Expo while you enjoy your morning coffee - spend an hour with AIIM Board Chairman, Bob Zagami as he reviews every exhibitor on the show floor; all in 60 minutes! Bob's insight will provides a glimpse of the products, service and application solutions that may be just right for you. Bob will also highlight new product introductions, new technologies that attendees may not be aware of, and new vendors that are making their first appearance at AIIM Expo.

Presenter: Bob Zagami, DataBank, AIIM International Board Chairman

12:30 - Deploying ECM Programs for the Enterprise: Best Practices and Pitfalls

As ECM establishes itself as an IT foundation, leading companies are using the tools to benefit a wide range of business applications. This panel of veterans in ECM will highlight best practices on how they have been successful in deploying Centers of Excellence, Taxonomies, and Shared Services organizations. Attendees can expect to walk away with areas they can enhance in their own programs and goals to have as their deployments mature.

Moderator: James Watson, Doculabs
Panelists: Denise Blankenship, Church Pension Group
Chris White, Allstate
Karuana Gatimu, Skechers

Discussion Questions: What are three most important best practices (words of wisdom) you've learned (even if later than you'd prefer)? What are the three most dangerous pitfalls you've walked into – or avoided? What factors are usually misjudged – e.g. underestimated or overestimated? What do you measure? (E.g. utilization, user satisfaction, tracking of per-document and per-user cost targets...?) How did you design your organizational structure for governance and operations? Have you put in place any policies, procedures, and guidelines for your ECM program?

1:30 - Collaboration Tools: Improving Content Management or Adding Complexity?

“What we need is a tool so that I can better work with my team and be able to access my documents wherever I am.” Most people in the business would say this is not an ECM problem, but they might be wrong. Tools that provide collaboration and access to information by their very nature are document management tools; as such, they require governance and foresight into their deployment. Attendees can expect to walk away with recommendations for how to effectively use collaboration tools to drive ECM deployments in the organization and how to use these tools so they're more than just cool apps.

Moderator: Rich Medina, Doculabs
Panelists: Matt Bowdy, Humana
David Kratz, Allstate
Linda Bayer, Amway

Discussion Questions: How does your organization define collaboration, what functionality is included? What is the “division of labor” between your existing ECM tools and newer capabilities marketed specifically for collaboration? Who support collaboration tools? Where do you see the market going in the next three years?

2:30 – Building Compliance and Discovery Programs Before the Lawsuit

As regulation, compliance, and discovery continue to drive ECM investments, many organizations are facing a crisis: How do we make the proper investments in tools to balance the offensive (records/email management) and defensive tactics (discovery)? Mostly these investments are driven from necessity and sometimes from due diligence. Attendees can expect to walk away with approaches for delivering a top-tier compliance and litigation management infrastructure using ECM tools.

Moderator: Richard Medina, Doculabs
Panelists: Kay Bross, Procter & Gamble
T.K. Train, Gambro

Discussion Questions: How has your organization's position relative to compliance and discovery changed over the past two years? Have you been able to quantify the potential savings of using ECM to support compliance and e-discovery processes? Where has your firm been able to get “quick wins”? What is the most problematic aspect of a compliance and e-discovery program?

3:30 – Enterprise 2.0 – The Next Big Thing?

AIIM research have found that a many organizations recognize Enterprise 2.0 as critical to the success of their business goals and objectives, but that most do not have a clear understanding of what Enterprise 2.0 is. Talk of Enterprise 2.0 has been building since the spring of 2006, when Harvard Professor Andrew McAfee first the coined the term as a parallel (but distinct) term from Web 2.0. [This presentation summarizes AIIMs research from all perspectives including technology, business drivers and market dynamics.](#)

Presenter: Atle Skjekkeland, AIIM

Wednesday, April 1

Breakfast Networking Meeting

7:00-8:30

Philadelphia Marriott Downtown, 1201 Market Street, Independence Room 1

Meet your peers, trade contact information, enjoy breakfast

10:30 – AIIM Expo Floor Guide A to Z

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Presenter: Bob Zagami, DataBank, AIIM International Board Chairman

11:30 – Benchmarking Your ECM Maturity

While many firms have been aggressive in their use of content management capabilities, remaining a leader requires focus on continuous improvement. This session will review industry “best and worst” practices cultivated by studies from a number of leading organizations to improve their overall ECM capability maturity levels. Doculabs will provide an overview of a new industry peer group benchmarking assessment service they are launching with AIIM to assist organizations with **improving their ECM operations.**

Presenter: James Watson, Doculabs

12:30 - How Can I Show RETURN on My ECM Investment?

An ECM program is built on the need of the business, not the size of the organization. But how do companies measure the investment required to develop and maintain an effective ECM program? Everyone knows times are tight, but even when they are not and ECM investment is a major undertaking, costs and returns need to be addressed. Attendees can expect to hear about metrics and techniques that they can apply to measuring their own ECM programs.

Moderator: James Watson, Doculabs

Panelists: Kay Harris, Wells Fargo/Wachovia
Mel Ohl, Medco

Discussion Questions: Can you share some thoughts on the original business case for ECM at your firm, what were the key categories of savings you anticipated? How do you continue to fund investments in ECM? What factors do you measure/report on a periodic basis? Have costs in aggregate decreased or increased?

1:30 - Good Information In = Good Information Out: Best Practices in Search

It's often difficult to find the right piece of information just when it's needed. How do you get started? What are some of the best practices to ensure that you will be able to FIND the information your employees need in order to make effective business decisions? We'll give away the first best practice now: “Get moving; start small and expand over time.” Learn this and plenty of other best practices for ensuring that content, wherever it resides in your organization, can be found. Attendees can expect to walk away with recommendations for how to develop effective techniques for improving their organization's search program.

Moderator: Richard Medina, Doculabs

Panelists: Bill Zybach, District of Columbia
Michael Grimes, Northwestern Mutual
Martin Michalosky, U.S. Army

Discussion Questions: What are the key business requirements for search within your enterprise (provide some application examples if possible)? Do internal business users understand the complexity of search? What do you anticipate the incremental cost to implement enterprise search to be? What should an organization do to prepare effectively for the use of search capabilities?

2:30 – Collaboration Tools: Improving Content Management or Adding Complexity?

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their deployment. Attendees can expect to walk away with recommendations for how to effectively use collaboration tools to drive ECM deployments in the organization and how to use these tools so they're more than just cool apps.

Moderator: Richard Medina, Doculabs
Panelists: Shawn Ivey, Grant Thornton
Les Stewart, MassMutual

Discussion Questions: How does your organization define collaboration, what functionality is included? What is the "division of labor" between your existing ECM tools and newer capabilities marketed specifically for collaboration? Who support collaboration tools? Where do you see the market going in the next three years?

3:30 – AIIM EMTAG Panel (Emerging Technology Advisory Group)

AIIM's Emerging Technologies (EmTAG) group will host a spirited debate on the key issues for the industry. EmTAG features some of the industry's leading analysts and end users. This year, EmTAG will debate the following topics: ECM Software As A Service (SaaS), Open Source, traditional vendors vs. Microsoft SharePoint, and speculate on what will be the biggest business driver for ECM and RM in 2009. Watch as industry pundits square off to present their arguments and join with the moderator to ask your own questions!

Panelists: Dan Elam, Gimmel Group
Mike Alsup, Gimmel Group
Carl Frappalo, Information Architected

Thursday, April 2

10:30 – AIIM Expo Floor Guide A to Z

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Presenter: Bob Zagami, DataBank, AIIM International Board Chairman

11:30 - Content Management Interoperability Services (CMIS)

Today's businesses can no longer afford to have essential business content trapped in separate, incompatible repositories. Furthermore, developing and maintaining an application for different repository environments is very costly. A platform-agnostic interoperable interface that can be easily layered on top of most content repositories is therefore a necessity to bring the content management industry to maturity, in a manner similar to what SQL did for the data management industry. Backed by major content management vendors, CMIS is an OASIS effort to define such a standard. This presentation gives a quick overview of CMIS, including its motivations, design points, and current status.

Presenter: David Choy, OASIS CMIS Technical Committee Chair.

12:30 - Building Compliance and Discovery Programs Before the Lawsuit

As regulation, compliance, and discovery continue to drive ECM investments, many organizations are facing a crisis: How do we make the proper investments in tools to balance the offensive (records/email management) and defensive tactics (discovery)? Mostly these investments are driven from necessity and sometimes from due diligence. Attendees can expect to walk away with approaches for delivering a top-tier compliance and litigation management infrastructure using ECM tools.

Moderator: Richard Medina, Doculabs

1:30 – Business Process Management, are we making the most of content-driven processes

The second stage DM productivity benefits of electronic workflow are now being harvested, but how many are optimizing and re-engineering their processes as an ongoing improvement, and are they including other departments and external partners? What are the architecture issues involved in doing so? The presenter will present best practices, but also provide an overview of technologies to manage content-driven processes.

Presenter: Bob Larrivee, AIIM