

**TWIN CITIES ARMA**



Register by mail or online at  
[www.TwinCitiesARMA.org](http://www.TwinCitiesARMA.org)

**2015  
Spring Conference**

*St. Catherine University  
April 8, 2015*

Join your fellow records & information  
management professionals for a day of  
education, networking and vendor exhibits.

**Great Information Governance requires Good Records Management**

# SCHEDULE OF EVENTS

8:00 Registration, Light Breakfast & Vendor Exhibits

8:30 Welcome

8:45 Keynote: Network Drive Cleanup: The Project with No End Date *Patti Zimmerman*

9:45 Break: Networking & Vendor Exhibits

10:00 Education Sessions

Session 1: Using Unstructured Data Analysis to Optimize Content Marketing *Jason Vioicich*

Session 2: Behind the Wheel: When Records Management, Information Governance and e-Discovery Intersect *Heidi Fessler*

Session 3: International Privacy Considerations in Cross-Border Document Transfers  
*Peggy Kubicz Hall*

11:15 Lunch, Networking & Vendor Exhibits

12:15 General Session: *A Case Study: Advance your Organization...Transition to Information Governance from Records and Information Management* *Karen Knight*

1:15 Break: Networking & Vendor Exhibits

1:30 Education Sessions

Session 4: *A Blueprint (Part 1): Advance your Organization* *Karen Knight*

Session 5: Better Records Management Through Project Management *Maura Dunn*

Session 6: Relativity Information Governance - Legal Holds *Nik Balepur*

2:45 Break: Announcements, Vendor Bingo Drawing, Raffle Prizes Posted

3:15 Education Sessions

Session 7: RIM Program Awareness - Reinvigorating Your Marketing Campaign *Rudy Mayer & Lara Carlson*

Session 8: *A Blueprint (Part 2): Advance your Organization* *Karen Knight*

4:30 Adjourn

# THANK YOU!

Please join us in thanking our Sponsors and Vendors who helped make this event possible

**RICOH**  
imagine. change.

Morning Break is  
brought to you by Ricoh

**pwc**

Rudy Mayer &  
Lara Carlson are brought  
to you by PWC

**BDRS**  
Business Data Record Services

Afternoon Break is  
brought to you by BDRS

## Vendor EXPO

- ❑ ARC Document Solutions
- ❑ AMI Imaging Systems, Inc.
- ❑ BDRS
- ❑ Iron Mountain
- ❑ Larson Records Management
- ❑ NightOwl Discovery
- ❑ Ricoh
- ❑ Shepherd Data Services
- ❑ Shred Right
- ❑ Tab Products Co. LLC
- ❑ Varonis
- ❑ *And More to Come!*

***Be sure to visit the many vendors that support this conference!***

# Keynote

## *Managing Retention on Network File Shares*

From a lessons learned perspective, the first one for the Enterprise Records & Information Management team of UnitedHealth Group was that labeling our network drive cleanup initiative as a project was not an accurate representation of the effort. Sometimes it's helpful to hear about a journey that had twists and turns that proved to be beneficial in shaping a strategy that may just work.

**Patti Zimmerman, CRM**, is the Senior Director for Enterprise Records & Information Management (ERIM) for UnitedHealth Group, a fortune 25 company headquartered in MN. In addition to the overarching RM policy and records retention schedule, the ERIM team is responsible for initiatives to apply retention controls to electronically stored information primarily in email, network drives and SharePoint. Patricia is the chair of the ERIM Governance

Board which includes representation from senior leaders in areas of Legal, Compliance, Privacy, Human Capital, Info. Security and IT. She also serves on the Database Controls Governance Board, Enterprise Decommissioning Leadership Team and the EU Customer Data Steering Committee.

8:45 -  
9:45

## *A Case Study: Advance your Organization... Transition to Information Governance from Records and Information Management*

It's time to move from Records and Information Management to Information Governance. Learn how to build a case for information governance – from someone who's repeatedly “been there, done that”. Focus will be given to the most prevalent obstacles, and how to “make the case” and “lead the charge”.

**Karen Knight, CCEP** is a Senior Consultant with *Cohasset Associates*. Her experience as a Chief Compliance Officer for over 20 years informs her consulting engagements. Ms. Knight's design of compliant and sustainable Information Governance Programs includes governance policies and standards, legal hold processes, retention schedules, training and education, and technology enablers. Mitigating the regulatory and legal risks of governing information, Ms. Knight integrates and aligns records management and information governance disciplines, addressing privacy, information security, ethics and compliance, contract and procurement, and data breach prevention.

# General Session

12:15 -  
1:15



## *Using Unstructured Data Analysis to Optimize Content Marketing*



Content marketing has become an important tool for marketers to more deeply engage audiences. But how do you evaluate how well that content is resonating with your target audience? Traditional metrics (e.g. click-throughs and time-on-site) play a role, but they are discrete measures of an unstructured, rich media environment. Human reviewers can be used, but it is difficult to overcome issues with intercoder reliability. Using an automated, thesaurus-based analysis tool to compare its unstructured content with similar content from media outlets. The resulting analysis helped refine strategy and improve results. **Jason Voicich**, VP Marketing, Research and Analytics, is responsible for aligning Logic PD's products and services with market needs. Jason has more than 15 years of experience in marketing intelligence and research, specializing in competitive intelligence, new venture strategy, brand valuation and business modeling. Prior to joining Logic PD, Jason founded Ecra Creative Group, a Minneapolis-based marketing intelligence and brand development agency. His clients included Target Corp, Blue Cross/Blue Shield, Guidant (Boston Scientific) and Michael Foods along with dozens of firms. Jason also acts as an advisor to the UW Eau Claire's Entrepreneur Program and serves on its communication and Journalism curriculum review Committee.



## *Behind the Wheel: When Records Management, Information Governance and E-Discovery Intersect*

Navigating the traffic snarl of big data, retention, new data, and the world of eDiscovery. Understanding the impact of records management and information governance on risk management and litigation. **Heidi Fessler** leads Briggs and Morgan's E-Discover and Information Governance Practice Group. She is also a member of the Business Litigation Section and practices principally in the areas of Electronic Discovery, Information Governance, Data Privacy and Information Security. Heidi has created and delivered more than 1,500 seminars focusing on the changing landscape in e-discovery, litigation hold policies, and information governance standards. She was a part of the Seventh Circuit E-Discovery Pilot Program where she was a pivotal leader in the creation of the court's education offering to drive understand of e-discovery.

## *International Privacy Considerations in Cross -Border Documents Transfers*



Ms. Kubicz Hall will discuss European and other country privacy laws, compare them to the approach in the US, and discuss strategies and best practices for the cross-border transfer of documents needed to meet corporate investigation needs while still respecting and complying with local privacy laws. **Peggy Kubicz Hall**, focuses her practice on international law matters including the Foreign Corrupt Practices Act, due diligence and internal investigations, and antitrust and competition law issues. She joined Greene Espel after serving 3M Company as Assistant General Counsel and general counsel to 3M's Display and Graphics Business. In addition to investigating potential misconduct and due diligence, Peggy assists clients with the full range of issues associated with compliance matters. Peggy brings substantial "real world" corporate experience to Greene Espel's business litigation practice. Peggy graduated from University of Texas School of Law in 1984, was awarded a diploma in European Competition Law from the University of London-Kings College of Law in 1997, and clerked for the US Court of Appeals for the fifth Circuit in 1984-1986.



# EDUCATIONAL SESSIONS

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## *A Blueprint (Part 1): Advance your Organization... Transition to Information Governance from Records and Information Management*

Attend the first of two sessions hosted by **Karen Knight**, so you can “make the case” for aligning your organization’s IG disciplines with existing RIM program functions. Examine organizational readiness for IG, learn the mechanics of a transition strategy, outline the transition processes, and sustain the transition’s momentum

## *Better Records Management Through Project Management*

While Records management (RM) has a bad reputation. People hear ‘RM’ and think about paper. Not just paper. They think about old paper in crushed boxes in dusty records centers (most likely in the basement). Out of sight, out of mind – and certainly not a place they would trust anything important. The way RM programs usually develop does not help this reputation. We talk about retention and disposition: “Make sure you don’t get rid of anything too soon!” (We often add, “...and don’t keep it too long,” but no one really hears us.) Everything we do takes years. Maintaining the RRS means reviewing all the record categories and citations every 2 years or every time something changes (new law, new regulation, new line of business). Destroying inactive records means waiting several years after they have outlived their initial purpose. Implementing an enterprise content management solution typically takes 2+ years and converting all the legacy information can take 5+ years (or, more likely, never be completed). Some of this timing is driven by the nature of RM. It is a program; it supports the business and touches every aspect of it. It is the job of the RM program to maintain the history of the company. However, we can better manage – and present to our customers – the many building blocks of a RM program – by leveraging basic project management (PM) methods and tools. This session discusses the key components of PM (based on industry-standard Project Management Institute concepts), explores a case study leveraging basic PM methods and tools, and discusses the benefits to the RM program and the organization gained by bringing these two valuable disciplines together. **Maura Dunn, CRM**, is President of TrailBlazer Consulting, LLC. Ms. Dunn brings more than 25 years’ experience consulting in records RIM for the public and private sectors, both in the US and abroad. Her experience spans the full lifecycle of RM program implementations including assessment, strategy, policy development, technology implementations, training and operations.

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## *Relativity Information Governance*

This hour will focus on identifying and managing employee data using holds and notices workflows in Relativity. Whether you’re issuing a legal hold, ensuring compliance on an updated company policy, or seeking information about a cross-functional project, this system can help you manage and track all communications with employees. Tracking all of this information in one location helps foster easier governance of various data types, and a single source of truth for these types of communications. **Nikhilesh Blaepur** has 10 years of experience managing legal and technology projects. Nik is well versed in maximizing operational effectiveness for e-discovery. He holds an MBA, and helps Relativity users better understand how to make the most of the platform. Areas of focus include; Legal Hold, Collection and Review .

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## *RIM Program Awareness - Reinvigorating Your Marketing Campaign*

Do you have a well established RIM program or are you just starting out? How will you get the word out to employees that records management can be positive and fun? This session will use case studies to demonstrate effective techniques to increase engagement in your company's RIM program, including program branding, participation incentives, and increased visibility to your RIM team. With little to no budget, these quick hit marketing methods generate buzz, increase employee engagement and result in increased compliance. **Rudy Mayer**, is a Director with PwC and has 18 years of experience advising clients on strategy and governance, specializing in working with legal departments on designing, implementing and aligning strategy and operations. Rudy has extensive capabilities in the areas of information and knowledge management, eDiscovery readiness planning, technology, and process improvement. He assists clients in performing strategy and maturity assessments, and developing and implementing roadmaps to deliver change. Rudy has extensive **Lara Carlson** works in the PwC Midwest Forensics Services practice and specializes in Information and Risk (IRM) assisting her clients with various aspects of records management and eDiscovery. Lara's primary areas of focus include generating and updating records retention schedules, policies, and procedures. She specialized in creating records retention schedules that are intuitive to employees, making them easier to implement within the organization and IT applications.

## *A Blueprint (Part 2): Advance your Organization... Transition to Information Governance from Records and Information Management*

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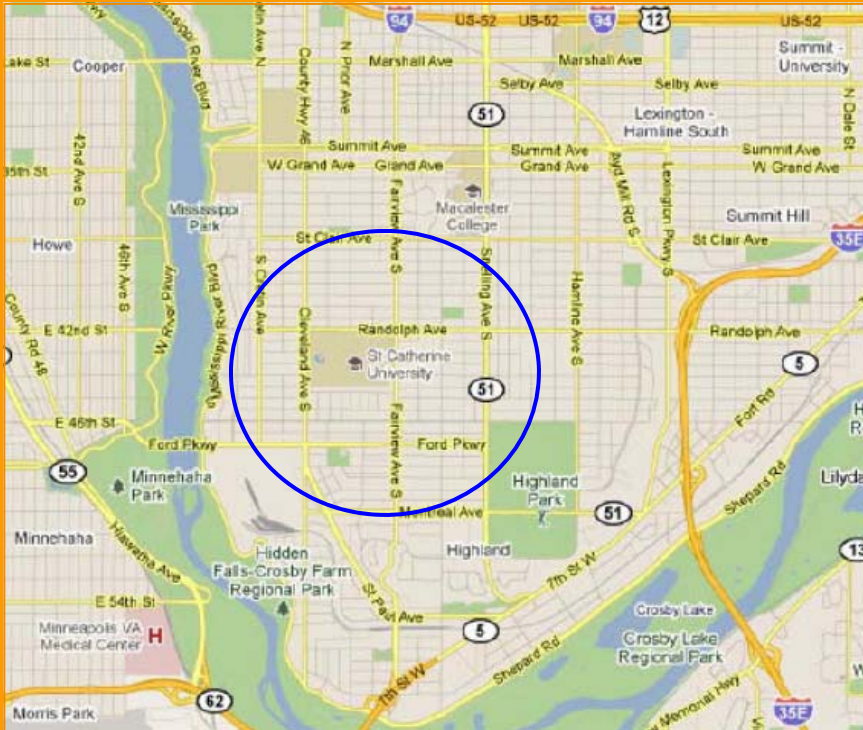
Attend the second of two sessions hosted by **Karen Knight**, so you can “make the case” for aligning your organization's IG disciplines with existing RIM program functions. Examine organizational readiness for IG, learn the mechanics of a transition strategy, outline the transition processes, and sustain the transition's momentum

# CONFERENCE DETAILS

## Conference Location

*St. Catherine University*

Coeur de Catherine Building,  
Reuenhorst Ballroom (3rd Floor)  
2004 Randolph Ave,  
St. Paul, MN 55105



## Accommodations

### Holiday Inn

175 West 7th St., St. Paul, MN 55402  
Phone: 651-225-1515

## Parking on Campus

Conference attendees should enter the campus at Gate 4 (on Fairview Ave). Parking is available in the O'Shaughnessy / Event Parking lot. Allow 5 to 7 minutes to walk from the parking lot to the Coeur de Catherine Building.

## Twin Cities ARMA

continues to minimize our impact on the environment....

### Before the conference:

- ARMA distributed promotional material electronically
- ARMA provides registered attendees access to session handouts via the internet

### Day of the conference:

- Reduced registration handouts
- Limited session handouts
- No Bags (bring your own bag)



# REGISTRATION DETAILS

## Register Online

**Visit:** [www.TwinCitiesARMA.org](http://www.TwinCitiesARMA.org). Convenient pay options of credit card or check are available.

**Registration or Cancellation Questions?**  
Contact Kaitlyn Williams at 612-330-5637

## Register by Mail

Detach, complete and mail this registration page, along with payment to: *(please make checks payable to Twin Cities ARMA)*  
Kaitlyn Williams  
414 Nicollet Mall  
8th Floor  
Minneapolis, MN 55401

## Cancellation Policy

Registrations can be transferred to another person at your company at any time, up to and including April 8th. If you are unable to attend or transfer your registration, notify the Twin Cities ARMA Chapter no later than April 3. Cancellations made prior to the April 3 deadline will be refunded less a \$75.00 processing Fee. Registrations cannot be refunded after April 2nd. No shows and late cancellations will be invoiced.

## Registration Fees

	Before April 3rd	After April 3rd
All Attendees	\$125	\$175
Student (full time)	\$50	\$50
Lunch & Networking Only	\$50	\$50

**Name:** \_\_\_\_\_

**Organization:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City, State, Zip:** \_\_\_\_\_

**Phone Number:** \_\_\_\_\_

**Email Address:** \_\_\_\_\_

**Are you a CRM?**      **Yes**                      **No**

**Special Needs (Dietary, hearing impaired, etc):** \_\_\_\_\_

## Session Selection

Indicate the sessions you are attending.  
*Circle one for each time.*

10:00-11:15    Session 1    Session 2    Session 3

1:30 - 2:45    Session 4    Session 5    Session 6

3:15 - 4:30    Session 7    Session 8

**Pre-Approved for 10 ICRM Certification Maintenance Points (CMP).** Certificate of Attendance will be given at conference.