

Schedule of Events

Conference education sessions are competency-based (see legend below) and categorized by domain. Get facilitator and session details at www.arma.org/conference. (All events held in the Las Vegas Convention Center unless otherwise indicated.)

	INFORMATION TECHNOLOGY	RIM PRACTICES	RISK MANAGEMENT (Sponsored By Thomson Elite)	BUSINESS FUNCTIONS	LEADERSHIP	COMMUNICATIONS & MARKETING	
Monday 10/20	7:30 a.m. – 5:00 p.m. Registration, Cyber Stations Open in Registration Lobby (Sponsored by Interwoven Inc.)						
	8:30 a.m. – 10:30 a.m. OPENING CEREMONIES – Keynote Speaker (Las Vegas Hilton)						
	11:00 a.m. – 4:30 p.m. Expo Hall Grand Opening, Cyber WiFi Stations Open in Expo Hall (Sponsored by Interwoven Inc.), Bookstore Open						
	11:30 a.m. – 1:00 p.m. Lunch with the Exhibitors (Expo Hall)						
	12:30 p.m. – 3:30 p.m. Legal Technologies Workshops (Expo Hall), Exclusively IT Sessions (Expo Hall)						
	12:30 p.m. – 4:00 p.m. Expert Advice Workshops (Expo Hall)						
	1:30 p.m. – 3:00 p.m. Education Sessions	Blogging in the Enterprise 4 Jesse Wilkins, CDIA	Reaching Your Goal: Marketing to Metrics 3 Karen Biskup, CRM Records Retention Requirements for Electronic Records, Part 1 2 Donald Skupsky, J.D., CRM, FAI	Emergency Preparedness for Everyone 2 Howard Lowell David Carmicheal Richard Boyden Jeffrey Kintop	Global Records Management – The P&G Story 3 Randy Moeller W. Ray Beecraft Mergers and Acquisitions – Threat or Opportunity? 3 Laurie Fischer	Mentoring, Motivating, and Managing People to Excel 4 Mark Langemo, Ed.D, CRM, FAI	Interaction Savvy – Communication Styles 3 Tera Ladner MaryAnne Fry
	3:00 p.m. – 3:30 p.m. Beverage Break (Expo Hall)						
	3:30 p.m. – 5:00 p.m. Education Sessions	Records Issues Regarding Portable Data Storage Devices 3 R. Scott Murchison, CRM	Evaluating RMS – 10 Things You Need to Know 3 Neil Simons Records Retention Requirements for Electronic Records, Part 2 2 Donald Skupsky, J.D., CRM, FAI	Wall Street's Million Dollar RIM Challenges 4 Fred Pulzello, CRM Susan Goodman, CRM Joseph Steffan, Esq. David Smythe	Gaining Executive Support 3 Ann Lewis Cheryl Young, CDIA+ Understanding Shadow IT Systems for the Non-IT Professional 3 Deborah Juhnke	Implementing Electronic Records Management Without Upsetting Users 3 James Havens Dennis Kampen	Power Talk – High-Impact Verbal Communication 1 Kenneth Neal
	5:30 p.m. – 8:00 p.m. Welcome Party (Expo Hall, Sponsored by CA Inc.)						
Tuesday 10/21	7:30 a.m. – 5:00 p.m. Registration, Cyber Stations Open in Registration Lobby (Sponsored by Interwoven Inc.)						
	8:00 a.m. – 9:30 a.m. Education Sessions	Electronic and Physical Records Software Technology Selection 2 John Phillips, CRM, CDIA+, FAI	Mock Trial – Records Management Programs Exposed II, Part 1 4 Martin Susec, J.D. Stephen Ferguson, J.D. Mike Purington, CRM, CDIA Preparing for the CRM Exam, Part I-V, Part 1 2 Steve Golden, CRM Donald Schewe, CRM, FAI	Protecting Your Hosted Records – Third-Party Due Diligence 3 Sheri Nystedt, CRM Stephanie McCutcheon	Big Buckets for Enterprise Records Management 3 Susan Cisco, Ph.D., CRM, FAI Sue Trombley Developing a GREAT Records Manager/Attorney Partnership 3 Susan Goodman, CRM	The Records Manager as Leader 4 Jeff Bridges	Developing Training that Meets Users' Needs 3 Mary Wilson, CRM
	9:00 a.m. – 5:30 p.m. Expo Open, Cyber WiFi Stations Open in Expo Hall (Sponsored by Interwoven Inc.), Bookstore Open						
	9:30 a.m. – 10:00 a.m. Beverage Break (Expo Hall)						
	9:30 a.m. – 3:30 p.m. Expert Advice Workshops (Expo Hall)						
	9:30 a.m. – 4:15 p.m. Legal Technologies Workshops (Expo Hall), Exclusively IT Sessions (Expo Hall)						
	10:00 a.m. – 11:30 a.m. Education Sessions	E-signatures – Business, Legal, and Technical Considerations 4 Michael Laurie	Mock Trial – Records Management Programs Exposed II, Part 2 4 Martin Susec, J.D. Stephen Ferguson, J.D. Mike Purington, CRM, CDIA Preparing for the CRM Exam, Part I-V, Part 2 2 Steve Golden, CRM Donald Schewe, CRM, FAI How to Develop a Big-Bucket Retention Schedule 3 Cheryl Smith, CRM Carol Brock, CRM		Managing Active Electronic Records 3 Donna Rose, CRM Mark Goodwin The High- and Low-Tech Roads to FRCP Compliance 2 Deborah Juhnke	RIM – A Career for Your Future 3 Margaret Russell, CRM	Writing Procedures People Will Read 2 Linda Long, CRM
	11:30 a.m. – 1:30 p.m. Lunch on your own (Available in Expo Hall)						
	12:00 p.m. – 1:15 p.m. Association General Meeting						
	1:00 p.m. – 3:30 p.m. Poster Sessions	Document Management – How to Streamline for Growth 4 Margaret Anderson, CRM	Operating Records Management Globally – The P&G Story 3 W. Ray Beecraft Randy Moeller	RIM Regulation Summary 4 Janie Wait, CRM	Developing a Records Management Training Program Model 3 Amy Ellis Strategic Planning for RIM Start-Ups 2 Lee Nemchek, CRM Working Together – Implementing an Electronic Document Management System 1 Kelly Stewart Barb McDonald		Six Starting Points for a Records Management Rookie 2 Richard Smith, CRM
1:30 p.m. – 3:00 p.m. Education Sessions	Lifecycle End – Retention, Archiving, and Disposition of E-Records 3 Brian Morris, CPA Laurie Gingrich, CRM Web 2.0 and the Records Manager 3 Robin Riat, CRM	Taxonomy Development and Deployment Methodology 2 Barbara Blackburn, CRM	Is Your Organization at RIM Risk? 3 April Dmytrenko, CRM, FAI Edward Nwachi, J.D., CRM Cindy Shea-Zuvich, CRM	Managing Records Program Continuity During Corporate Reorganization 3 Leslie Fisher	Leadership vs. Management – The Difference Is Vision 4 Gene Stavrou Sandra Gray	Communicating with IT 2 Timothy O'Keefe, Ph.D.	
1:30 p.m. – 5:00 p.m. The Sedona Conference Session							
3:00 p.m. – 3:30 p.m. Beverage Break (Expo Hall)							
3:30 p.m. – 5:30 p.m. Visit Expo Hall							
4:00 p.m. – 5:30 p.m. Cocktail Reception (Expo Hall)							
6:30 p.m. – 9:00 p.m. Awards Celebration (Las Vegas Hilton, Sponsored by Duff & Phelps and Recall)							
9:00 p.m. – 12:00 a.m. Canadian Party (Las Vegas Hilton Hotel)							

- 1: For entry-level RIM practitioner
 - 2: For RIM practitioner with prior RIM knowledge, skill sets, and experience
 - 3: For seasoned RIM practitioner with extensive knowledge of designing, creating, implementing, and managing a RIM program
 - 4: For executive-level RIM practitioner who partners with executive management and gives enterprise direction to RIM program
- * Schedule subject to change. Program details available at www.arma.org/conference

Risk Management track sponsored by



Schedule of Events Continued

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Wednesday 10/22

	INFORMATION TECHNOLOGY	RIM PRACTICES	RISK MANAGEMENT (Sponsored By Thomson Elite)	BUSINESS FUNCTIONS	LEADERSHIP	COMMUNICATIONS & MARKETING
7:30 a.m. – 5:00 p.m.	Registration, Cyber Stations Open in Registration Lobby (Co-sponsored by Interwoven, Inc.)					
8:00 a.m. – 9:30 a.m. Education Sessions	Enabling and Managing Wikis in the Enterprise 3 Jesse Wilkins, CDIA	Preparing for the CRM Exam, Part VI, Part 1 2 Debra Gearhart, CRM, FAI Juanita Skillman, CRM, FAI	ESI Las Vegas: Mock Meet and Confer, Part 1 3 John Isaza, Esq. John Jablonski, Esq. Long-Term Records Management – Effective Use of PDF/A 2 Mark McKinney Eugene Yang	Applying Lean Six Sigma to Records Management 3 Roger Hansen, CRM Chad Mockerman RIM Competencies from the Top Down 4 Patrick Cunningham, CRM	Records Are Easy...People Are HARD! 3 Carol Volle, CRM	Marketing Through Strategic Partnerships and Alliances 3 Laurie Carpenter, CRM
8:00 a.m. – 3:00 p.m.	Federal Government Day					
9:00 a.m. – 3:30 p.m.	Expo Open, Cyber WiFi Stations Open in Expo Hall (Sponsored by Interwoven Inc.), Bookstore Open					
9:30 a.m. – 10:00 a.m.	Beverage Break (Expo Hall)					
9:30 a.m. – 11:45 a.m.	Expert Advice Workshops (Expo Hall)					
9:30 a.m. – 2:00 p.m.	Industry Intelligence Sessions (Expo Hall)					
10:00 a.m. – 11:30 a.m. Education Sessions	Digital Asset Management Strategy 3 Maura Dunn, CRM, PMP Sarah Sartori Effectively Implementing and Managing Data Disposal and Destruction 3 Daniel Bayha	Metadata and Taxonomies – Tying the Two Together 1 Denise Bruno Preparing for the CRM Exam, Part VI, Part 2 2 Juanita Skillman, CRM, FAI Debra Gearhart, CRM, FAI	ESI Las Vegas: Mock Meet and Confer, Part 2 3 John Isaza, Esq. John Jablonski, Esq. You're Certifiable 4 Christopher Olsen, CRM Christina Ayiotis, Esq.	Leverage RIM to Drive Strategy and Reduce Litigation Risk 3 Anne Kershaw Lisa Marie Ghezzi Internal Audit Strategies for RIM Functions 1 Sharon MacDonald, CRM		A Simple Records Management Communication Plan 3 Richard Smith, CRM
11:30 a.m. – 1:30 p.m.	Lunch on your own (Available in Expo Hall)					
12:00 p.m. – 1:15 p.m.	Leadership Forum					
12:30 p.m. – 1:30 p.m.	Dessert Court (Expo Hall)					
1:30 p.m. – 3:00 p.m. Education Sessions	Mastering Master Data Management 3 Penny Quirk Classifications vs. Innovation on the 2.0 Desktop 3 Patricia Galloway	From Dry to Interesting – A Fresh Approach to RIM Training 2 Janice Francisco	Be Prepared for Your Rule 30(b)(6) Deposition 4 Peter Sloan, J.D. Developing and Implementing a Privacy and Personal Data Security Policy 3 Elizabeth Adkins, CA Keith Cheresko, J.D. Laurie Banducci, Klip	What's Electric About Electronic Discovery? 2 Don Swanson Lee McCallister, J.D. Developing an Information Management Program Model 3 Barbara Casey		Architecture-Centric Records Management 3 Michael Miller, CRM, CA, Ph.D. Reynolds Cahoon
3:00 p.m. – 3:30 p.m.	Beverage Break (Expo Hall)					
3:15 p.m.	Grand Prize Giveaway (Expo Hall, Booth 547)					
3:45 p.m. – 5:00 p.m.	Technology Spotlight Session (Las Vegas Hilton, Speakers Sponsored by CA Inc., IBM, Iron Mountain, and Oracle)					

Thursday 10/23

7:30 a.m. – 12:00 p.m.	Registration Open, Cyber Stations Open in Registration Lobby (Sponsored by Interwoven Inc.)					
8:00 a.m. – 9:30 a.m. Education Sessions	RIM Procedures for Structured Data 3 Scott Procter Lindsay Fraser	Capturing Websites – Insight From Experience, Looking Toward Tomorrow 3 Larry Conrad	Workshop for Developing Litigation Holds, Part 1 2 John Isaza, Esq. John Jablonski, Esq.	From ISO to Implementation: A Framework for ECM Implementation 3 George Broadbent Litigation Readiness Program – Implementation Experience from the Trenches 2 Laurie Weiss (moderator) Keith Angle, J.D. Patricia Manning Melissa Cozart	The Forgotten Component in Compliance: E-Records Management 4 Kerry Anderson	Reporting on Records Management to Your Board of Directors 4 Lenore Greenberg, CRM Bhavna Sethi
9:30 a.m. – 10:00 a.m.	Beverage Break					
10:00 a.m. – 11:30 a.m. Education Sessions	Electronic Records Management – Making the Case 2 Carol Stainbrook RM Implementation – Ready, Set and Go 2 Michyle LaPedis Gabriel Martinez	10 Steps to Creating a Records Management Program 2 Debra Korty Eric Stene Karon Teague	Workshop for Developing Litigation Holds, Part 2 2 John Isaza, Esq. John Jablonski, Esq. Federal Requirements for Personal Information Protection 3 Virginia Jones, CRM, FAI	Strategic Alignment and RIM 4 Alan Andolsen, CRM		Creative Ideas for Marketing Your Records Program 3 Robin Riat, CRM
11:45 a.m. – 12:30 p.m.	Association Lunch (Las Vegas Hilton)					
12:30 p.m. – 2:00 p.m.	CLOSING GENERAL SESSION – Keynote Speaker (Las Vegas Hilton)					
2:00 p.m.	CONFERENCE ADJOURNS					

- 1: For entry-level RIM practitioner
 - 2: For RIM practitioner with prior RIM knowledge, skill sets, and experience
 - 3: For seasoned RIM practitioner with extensive knowledge of designing, creating, implementing, and managing a RIM program
 - 4: For executive-level RIM practitioner who partners with executive management and gives enterprise direction to RIM program
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Risk Management track sponsored by



Expo Hall Educational Sessions: Focus on Education

All badged attendees welcome. Events held in the Las Vegas Convention Center, Expo Hall Central 3.

NEW! Legal Technologies Symposium

Monday, October 20 – Tuesday, October 21

Every legal, compliance, and discovery process starts with a record. ARMA International's Legal Technologies Symposium focuses on the collaboration of legal technologies and records management. **Located in the Mezzanine section of the Expo Hall**, there will be two session rooms – one featuring Exclusively IT Sessions and the other Hands-on Legal Technologies Workshops. Here, ARMA International brings together today's leading experts to assist attendees concerned about electronic stored information and mitigating risk within their organization.

Legal Technologies Workshops

The new hands-on Legal Technologies Workshops are facilitated by individual vendor experts focused on some of the latest technologies for managing electronically stored information. These are technology-focused, not product-focused, interactive workshops.

Monday, October 20

12:30 p.m. – 1:45 p.m.

How to Manage the Risks Associated with Historical and Orphan Backup Tapes

Presented by Robert Little, Vice President of Marketing, Renew Data Corp.

2:15 p.m. – 3:30 p.m.

How to Proactively Approach Information Risk Management

Presented by Simon Cole, Product Manager, Autonomy

Tuesday, October 21

9:30 a.m. – 10:45 a.m.

How to Integrate IT and RIM: The Changing Roles of the CIO and Records Manager

Presented by John Jamison, Vice President Consulting Services, Iron Mountain

11:15 a.m. – 12:30 p.m.

How to Minimize the Risk of Being Saddled with the Wrong Solution

Be armed with the hard questions to ask your e-mail archiving vendors.

Presented by Kon Leong, President & CEO, ZL Technologies

1:30 p.m. – 2:45 p.m.

The Legal Issues Associated with Managing Electronic Records

Presented by Dan O'Day, Senior Director Product Management, Thomson Elite

3:00 p.m. – 4:15 p.m.

The Key Elements Every Information Manager Needs to Ensure Response to Discovery

How the U.S. Federal Rules of Civil Procedure affect organizations.

Presented by Pete Pepiton, Director of Technical Sales, CA Inc.

Exclusively IT

In these popular moderated panel discussions vendors engage in a lively debate over current topics and issues. **Attend these sessions for a chance to win \$100 Visa Gift Card at the end of each session (must be present to win).**

Monday, October 20

12:30 p.m. – 1:45 p.m.

Privacy and Information Management in a Digital Age

What are organizations doing to address this devastating issue and what tools are available for safeguarding sensitive data?

Presented by Jim Cuff, Vice President Strategy, Iron Mountain Digital; Steve Smarsh, CEO, Smarsh Archiving and Compliance Solutions; Moderated by Laura DuBois, IDC

2:15 p.m. – 3:30 p.m.

Analyst Panel: Future Trends of Discovery

Presented by Brian Hill, Forrester; Ken Chin, Gartner and Laura DuBois, IDC; Moderated by Prashant Dubey, Senior Vice President, Fios Inc.

Sponsored by Fios Inc.

Tuesday, October 21

9:30 p.m. – 10:45 p.m.

The Role of Services-Oriented Architecture in Managing Electronically Stored Information. Learn more about federated versus centralized records storage and the strategic role SOA plays in ESI technology implementation.

Presented by Reed Irvin, Vice President, Product Management, CA Inc.; Fiona Schrader, Principle Product Manager, EMC; and Bill Forquer, Executive Vice President Marketing, Open Text; Moderated by Ken Chin, Gartner

11:15 p.m. – 12:30 p.m.

Search Tools for Legal Discovery

What are the solutions, their advantages and disadvantages?

Presented by Keith Lipman, Director, Legal Services, Interwoven; and Marty Takessian, Senior Product Manager, eDiscovery & Data Restoration Iron Mountain; Morgan McReynolds, Vice President, Field Operations and Professional Services, StoredIQ; Moderated by Brian Hill, Forrester

1:30 p.m. – 2:45 p.m.

Holistic Approach to Compliance

Can RIM, IT, and Legal Work in Tandem?

Presented by Bobby Balachandran, President & CEO, Exterro, Inc.; Eric Raper, Vice President Strategic Services, Paragon Solutions; Conrad Jacoby, Consultant, Litigation Systems, Inc (LSI); Moderated by Brian Hill, Forrester

3:00 p.m. – 4:25 p.m.

New Technologies in Litigation Support

What should the key players in IT, Legal, and RIM be on the watch for?

Presented by Bill Key, Product Marketing Manager, Google Inc.; and Simon Wieczner, Founder & CEO, Snowbound Software; Morgan McReynolds, Vice President, Field Operations and Professional Services, StoredIQ; Moderated by Brian Hill, Forrester



Expo Hall Educational Sessions: Focus on Education

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Expert Advice: RIM How-to Workshops

You asked for it, you got it! These sessions offer expert advice to anyone seeking a hands-on experience in a workshop setting. You'll get real solutions and first-hand experience that you can use now. All workshops will be held in the Expo Hall.

Monday, October 20 12:30 p.m. – 1:30 p.m.

How to Plan for and Survive Records Emergencies and Disasters

Presented by Steve Nottingham, Senior Vice President, Iron Mountain

1:45 p.m. – 2:45 p.m.

How to Implement an RFID System into Your Records Management Workflow

Presented by Chip Benson, Director Business Development, Infolinx System Solutions

Tuesday, October 21

9:30 a.m. – 10:30 p.m.

How to Automate Imaging for Records Management with Intelligence – Get Better Information Sooner

Presented by Robert Applebaum, Vice President of Worldwide Product Marketing, Imaging Business Machines LLC

10:45 a.m. – 11:45 a.m.

Challenges and Solutions to Disparate Policies, Retention Schedules, and Practices

Presented by Dan Beard, Certified Electronic Records Management Master, Recall

1:00 p.m. – 2:00 p.m.

How to Develop and Implement a Legally Valid Records Retention Program

Presented by Connie Christensen, Founding Partner, a.k.a by Synercon

2:30 p.m. – 3:30 p.m.

How to Implement Records and Document Management Without the High Cost and Complexity of Installed Software

Presented by Chris Ryan, Vice President of Marketing, SpringCM

Wednesday, October 22 10:45 p.m. – 11:45 p.m.

How to Identify and Classify E-Messages as Records

Brought to you by Open Text; Presented by Bonnie McClinton, RIM Global Operations Manager for Halliburton

Industry Intelligence Sessions

Wednesday, October 22

These vendor-sponsored sessions answer the most grueling and intricate questions you have about information and records management. You'll get the straight answers from top vendors in the industry about current and future trends.

10:00 a.m. – 11:00 p.m.

Federated Retention Policy, Enterprise Problem, Practical Solution

Presented by Art Bellis, Vice President of Sales and Compliance, OmniRIM Solutions; Susan Cisco, Director, Enterprise Content Management Services, Gimmal Group

11:15 a.m. – 12:015 p.m.

Decisions, Decisions, Decisions: How Long, What Format, How to Let Go

Presented by Elizabeth Trumbell, Managing Director, Document Processing Solutions, Pitney Bowes

TECHNOLOGY IN THE SPOTLIGHT

WEDNESDAY, OCTOBER 22

3:45 P.M. – 5:00 P.M.

LAS VEGAS HILTON BALLROOM

Electronically Stored Information can be a compliance dream or nightmare – depending on how you manage it. Hear the industry's top experts discuss today's information management realities, strategies for surviving and thriving, and tools that can make it easier and less costly. Facilitated by Vivian Tero, an industry analyst from IDC, this session will explore the management of ESI – spotlighting policy, process, legal, operational, and technical considerations. The focus is on trends and solutions (not product features) making this session a winner for anyone involved in managing electronically stored information.

Presented by:

- **Reed Irvin**, Vice President, Product Management Information Governance, **CA Inc.**
- **Craig Rhinehart**, Director, ECM Product Strategy - Compliance & Discovery, **IBM**
- **Jim Cuff**, Vice President, Strategy, **Iron Mountain Digital**
- **Andrew MacMillan**, Vice-President, Product Management, Enterprise Content Management, **Oracle**

Moderated by **Vivian Tero**, IDC

Attend this session for an opportunity to win a
\$250 gift card

Four winners will be drawn at the end of the session.

