



Pre-Conference Tutorials - Online at www.merconference.com/details/tutorials.php

| SUNDAY, May 22 | MONDAY, May 23 |
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| 10 am - 5 pm Choose one of the three limited enrollment tutorials that provide special focus on important ERM issues: T1, T2 or T3. | <p data-bbox="1438 625 1585 649">8:30 - 9:00 am</p> <h3 data-bbox="1438 690 1879 787">Conference Opening: MER 2011</h3> <h4 data-bbox="1438 820 1816 852">Overview and Logistics</h4> <p data-bbox="1438 868 1753 950">Christine Burns, Robert Williams and Richard (Dick) Fisher <i>Cohasset Associates</i></p> |
| <h3 data-bbox="157 576 1270 657">T1. Improving RIM Performance Using Assured Records Management (ARM) and GARP®</h3> <ul data-bbox="210 682 997 755" style="list-style-type: none">• Jackie Algon, Ph.D, Michael Haley and Marcia Zweerink – Cohasset Associates• Galina Datskovsky, Ph.D – Autonomy | |
| <h3 data-bbox="157 844 1197 925">T2. Implementing SharePoint 2010 Successfully – Meeting Your RIM Needs, Addressing Your File Shares Problem, & Avoiding Past Pitfalls</h3> <ul data-bbox="210 950 598 1063" style="list-style-type: none">• Jennifer Baker – Cohasset Associates• Ryan Duguid – Microsoft• John Holliday – SharePoint Architects | |
| <h3 data-bbox="157 1153 1155 1185">T3. AIIM Electronic Records Management Practitioner Certificate Program</h3> <ul data-bbox="210 1209 556 1234" style="list-style-type: none">• Jesse Wilkins – AIIM International | |

MONDAY, May 23

| Operational | Technical | Legal |
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| | | 9:00 - 10:00 am 1. KEYNOTE: The Action Imperative – Make Your “Everest” Sized Volume of Junk into a “Kilimanjaro” • Randolph Kahn, Esq. – Kahn Consulting |
| | 10:30 - 11:30 am 2. The Future of the SharePoint Journey: New Research Aimed to Help Achieve Users’ Evolving Needs • Ryan Duguid – Microsoft | |
| 12:00 – 1:00 pm 3. Making It Real: Getting Buy-In for Your RIM Vision, Budget, and Implementation • Jonathan Redgrave, Esq. – Redgrave LLP | | |
| 2:30 – 3:30 pm (choose #4, 5 or 6) | | |
| 4. Electronic Records Management Boot Camp • Laurie Fischer – Fischer Associates, LLC | 5. Enterprise Content Management, Information Governance, and the Future of RM • Julie Gable – Gable Consulting LLC | 6. A Talk with the Wolf – Before He Gets Into the Hen House: How I Would Attack Your Electronic Records Management Program in Discovery and Trial • William Butterfield, Esq. – Hausfeld, LLP |
| 4:00 – 5:00 pm (choose #7, 8 or 9) | | |
| 7. CASE STUDY: Applying Retention Schedules Successfully – To Both Paper AND Electronically Stored Information • Christine Burns – Cohasset Associates | 8. Managing “Stuff:” Technology & Management Options for Addressing ERM’s Largest Problem • Richard D. Fisher – Cohasset Associates • Panel: Cohasset Associates, Gimmel Group, IBM, & NextPage | 9. ERM Case Law: The Latest News, Trends, and Issues • Kenneth Withers, Esq. – The Sedona Conference® |

MEETINGS WITH EXHIBITORS

TUESDAY, May 24

| Operational | Technical | Legal |
|--|---|---|
| 8:30 – 9:30 am (choose #10, 11 or 12) | | |
| <p>10. CASE STUDY: Records Management Embedded into Business-as-Usual Operations</p> <ul style="list-style-type: none"> • Angela Amrine – Discount Tire Company • Carol Stainbrook – Cohasset Associates | <p>11. SharePoint Success – It’s All About the Users!</p> <ul style="list-style-type: none"> • Karen V. Strong – Gimmel Group | <p>12. Separating Fact from Fear: What the “Spoliation” Cases Really Mean</p> <ul style="list-style-type: none"> • Kenneth Withers, Esq. – The Sedona Conference® |
| 10:00 – 11:00 am (choose #13, 14, or 15) | | |
| <p>13. Information Management Architecture</p> <ul style="list-style-type: none"> • Jim Coulson – Huron Consulting Group | <p>14. CASE STUDY: “Manage in Place” – Information Governance Strategy for Taming the Wild West</p> <ul style="list-style-type: none"> • Darren Lee – NextPage • Teresa Drabenstadt – CUNA Mutual | <p>15. SharePoint: From Unmanaged to Managed – How to Get There</p> <ul style="list-style-type: none"> • Jennifer Baker – Cohasset Associates • John Holliday – SharePoint Architects |
| 11:30 am – 12:30 pm (choose #16, 17 or 18) | | |
| <p>16. Cloud Control: Achieving the Right Level of Information Governance</p> <ul style="list-style-type: none"> • Galina Datskovsky, Ph.D – Autonomy • Marcia M. Zweerink, Ph.D – Cohasset Associates • Hon. Ronald J. Hedges – Ronald J. Hedges, LLC | <p>17. CASE STUDY: Take it to the Vault: Building an RM Foundation at the US Department of the Treasury</p> <ul style="list-style-type: none"> • Jennifer Baker – Cohasset Associates • Marcus Smallwood – US Department of the Treasury | <p>18. Managing Personal Data in International Retention Schedules, Discovery & Transfers</p> <ul style="list-style-type: none"> • M. James Daley, Esq. – Daley & Fey LLP • Stephen C. Bennett, Esq. – Jones Day LLP |
| 2:00 – 3:00 pm (choose #19, 20 or 21) | | |
| <p>19. A Practical Approach to Managing Social Media Content as Records</p> <ul style="list-style-type: none"> • Jesse Wilkins – AIIM International • Sara Meaney – Comet Branding | <p>20. CASE STUDY: 3M Company’s Enterprise Email and Records Management Solution – Reducing the ECM Landfill!</p> <ul style="list-style-type: none"> • Laura McKenzie – 3M • Scott Burt – Integro | <p>21. Mock Hearing on the Disposition of Computer Tapes – You Render the Verdict – American Idol Style!</p> <ul style="list-style-type: none"> • Hon. James Francis IV, United States Magistrate Judge, U.S. District Court for the Southern District of New York • Anne KershawA. Kershaw PC//Attorneys & Consultants • Stephen Teppler – Edelson McGuire • David Lewis, Ph.D – David D. Lewis Consulting, LLC |

MEETINGS WITH EXHIBITORS

TUESDAY, May 24

| Operational | Technical | Legal | MEETINGS WITH EXHIBITORS |
|--|--|--|--------------------------|
| 3:30 – 5:00 pm (choose #22, 23 or 24) | | | |
| <p>22. What's the Use? Managing Records of Social Media</p> <ul style="list-style-type: none"> Ken Thibodeau, Ph.D | <p>23. CASE STUDY: Towards the Future – City of Toronto Digital Preservation Initiative</p> <ul style="list-style-type: none"> William Ballard – City of Toronto Lori Ashley – Tournesol Consulting | <p>24. The Big Organizational Void: Why RIM Programs Will Continue To Fail – Until We Rethink Who Is Really Responsible for Corporate Governance</p> <ul style="list-style-type: none"> Barclay T. Blair – ViaLumina Group | |

WEDNESDAY, May 25

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| <p>8:30 – 9:30 am</p> <p>25. Utilizing Marginal Utility to Assess Legacy Data Sets</p> <ul style="list-style-type: none"> John Jessen – Jessen and Associates | <p>10:00 – 11:45 am</p> <p>26. KEYNOTE: The Disposition of “Stuff” – Three Judicial Perspectives</p> <ul style="list-style-type: none"> Hon. Paul Grimm, United States Magistrate Judge, U.S. District Court for Maryland Hon. David Waxse, United States Magistrate Judge, U.S. District Court for the District of Kansas Hon. James Francis IV, United States Magistrate Judge, U.S. District Court for the Southern District of New York Kenneth Withers, Esq. – The Sedona Conference® | | MEETINGS WITH EXHIBITORS |
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