

The 25th Year of Delivering Premier
Electronic Records Management Education

MER 2017

MER CONFERENCE | MARRIOT DOWNTOWN CHICAGO
MAY 8-10, 2017

PRE-CONS | MAY 7, 2017

PRESENTING THE 25TH CONSECUTIVE NATIONAL CONFERENCE ON MANAGING ELECTRONIC RECORDS (MER)

The MER is the nation's foremost educational conference specializing in addressing the growing and future challenges of electronic records management (ERM) from the **LEGAL, TECHNICAL, AND OPERATIONAL** perspectives.

Sometimes called the *Gold Standard*, the MER offers engaging contact with prominent thought and industry leaders and is punctuated with a dozen real-world case studies. Attendees say they would recommend the conference to colleagues, citing the practicality of what they learn through the networking that occurs between attendees, speakers, and solution providers.

WWW.MERCONFERENCE.COM

PRESENTED BY: **CohassetAssociates** Education & Thought Leadership

MER '17 BRINGS YOU:

31 SESSIONS addressing everything from **Preparing a Winning IG Budget** to **Defending Your Company's IG Assets from "Bad Actors"**, from the **Disposition of Thousands of Back-up Tapes** to nearly a full day on **Understanding the Cloud**. As always, we include the legal, operational and technical perspectives.

7 PRE-CONS to meet a variety of your needs from **Leadership, Professional Certification** to **Implementation**. All are in-depth and highly interactive. Facilitated by industry thought-leaders, these hands-on work sessions have become a hallmark of the MER; equipping attendees with actionable knowledge and skills they can immediately apply in their workplace.

DOZENS OF EXHIBITORS MER Solution Providers offer **answers and results** to meet the demands of your ERM challenges. (See the list of MER '17 Exhibitors on page 6)

Register anytime at merconference.com

REGISTER NOW

Click on a session title for more information

SUNDAY | MAY 7, 2017 | PRE-CONS

10:00 am - 5:00 pm

- T1** **Certified Records Manager (CRM): Preparing for the Examination**
 Nick DeLaurentis (ICRM) | Kiersten Ward (Special Counsel) | Debra Gearhart (Lansing Community College)
- T3** **Protecting and Ensuring Access to Your Organization's Long-Term Digital Information Assets**
 Lori Ashley (Tournesol Consulting) | Patricia M. Morris (eArchive Science LLC) | Mike Quinn (Preservica)
- T4** **Strategies for Creating Effective Information Governance for the Cloud**
 Carol Stainbrook | Darron Dickinson | Karen Knight (Cohasset Associates)
- T5** **Change Management: Fundamentals and Application for Information Governance Success**
 Karen Ball (Prosci)
- T6** **Enhancing Your Leadership Skills: How to Be a Strategic Partner While Helping Your Organization Implement Better Information Governance**
 Debra Sabatini Hennelly, Esq. | Laurie Bodine (Compliance and Ethics Solutions, LLP)
- T7** **Accelerating Information Governance By Better Managing Electronically Stored Information (ESI)**
 Jesse Wilkins (AIIM International)

5:00 - 6:30 pm **Welcome Reception**



MONDAY | MAY 8, 2017

7:30 - 8:30 am	Breakfast
8:30 - 9:00 am	MER 2017 Conference Opening
9:00 - 10:15 am	1. OPENING KEYNOTE: Cybersecurity In the Age of Espionage Eric O'Neil (Former FBI Operative)
10:15 - 10:45 am	Break
10:45 am - 12:00 pm	2. Understanding the Cloud: Who's Who & What's What Jim Coulson (Morae Legal) Barclay T. Blair (Information Governance Initiative) James Watson, PhD (Doculabs) Mike Alsup (Gimmal)
12:00 - 1:15 pm	Lunch
1:15 - 2:15 pm Choose 3, 4, or 5	O 3. CASE STUDY: Information Governance Duke Alden (Aon) T 4. Understanding Your Cloud Options, Part A: Infrastructure Barclay T. Blair (Information Governance Initiative) Miles Ward (Google) Microsoft TBA L 5. ERM Case Law: The Annual MER Update of the Latest News, Trends, & Issues Ken Withers, Esq. (The Sedona Conference) Hon. Mary Rowlands (United States Magistrate)
2:15 - 2:45 pm	Break
2:45 - 3:45 pm Choose 6, 7, or 8	O 6. CASE STUDY: Spicing Up Information Governance (IG) – McCormick's Journey Aaron Murphy (McCormick) T 7. Understanding Your Cloud Options, Part B: Content Management Mike Alsup (Gimmal) Stephen Ludlow (OpenText) David Gould (HPE) Nishan deSilva (Microsoft) Richard Hogg (IBM) L 8. Turning the 2015 Federal Rules of Civil Procedure Amendments into an Operational Plan for eDiscovery Response Ken Withers, Esq. (The Sedona Conference)
3:45 - 4:00 pm	Break
4:00 - 5:00 pm Choose 9, 10, or 11	O 9. How to Ask for Funding for an Information Governance Program Mark Diamond (Contoural) T 10. Understanding Your Cloud Options, Part C: Analytics James Watson, PhD (Doculabs) Chris Hoesly (Varonis Systems) James Zinn (K-Cura) Debra Jensen (IBM) L 11. Privacy: The New IG Imperative Jeffrey Sharer, Esq. (Akerman LLP) Robyn Eckerling, Esq. (Allscripts)
5:00 - 6:30 pm	IBM-Sponsored Networking Reception

TUESDAY MORNING | MAY 9, 2017

7:30 - 8:30 am

IBM-Sponsored Breakfast

8:30 - 9:30 am

Choose 12, 13, 14, or SS1

- O** 12. **CASE STUDY: Implementing a Data Classification & Records Retention Program: Three Years Later**
Peter Baumann (Active Navigation) | Doug Meier (Pandora Media)
- T** 13. **Don't Talk to Me About Content Management, I Want to Talk Results**
Stephen Ludlow (OpenText)
- L** 14. **Evidentiary Path Forward or Potholes Ahead? What ER Managers Can Learn from Electronic Health Record Management**
Steven Tepler, Esq. (Abbott Law Group) | Hon. John Facciola (retired U.S. Magistrate Judge)
Colleen Kenney, Esq. (Sidley Austin LLP) | Ken Withers, Esq. (The Sedona Conference)
- S** SS1. **IBM SOLUTION SHOWCASE**
Richard Hogg (IBM) | Susan Whitmire (IBM) | Skip Hayford (HDR)

9:30 - 10:00 am

Break

10:00 - 11:00 am

Choose 15, 16, 17, or SS2

- O** 15. **CASE STUDY: Justifying the eArchive Investment: Two Sides of the Disposition Coin**
Lori Ashley (Tournesol Consulting) | Patricia Morris (eArchive Science)
- T** 16. **An Integration Approach to Information Management and Information Security**
James Watson, PhD (Doculabs)
- L** 17. **CASE STUDY: Leveraging Analytics for Litigation and Beyond**
Bennett Borden, Esq. (Drinker Biddle & Reath, LLP)
- S** SS2. **Microsoft SOLUTION SHOWCASE**
Nishan DeSilva (Microsoft)

11:00 - 11:15 am

Break

11:15 am - 12:15 pm

Choose 18, 19, 20, or SS3

- O** 18. **Developing IG Program Metrics to Demonstrate Improving Maturity**
Steven Stein (KPMG LLP) | Megan Hertzler (PG&E)
- T** 19. **Privacy Versus IoT: Can Governance Answer Both?**
Kon Leong (ZL Technologies) | Robert Smallwood (IMERGE Consulting)
- L** 20. **Understanding Contracts With Vendors in the IG Space**
Tamara Karel, Esq. (Redgrave LLP)
- S** SS3. **Hewlett-Packard Enterprise SOLUTION SHOWCASE: Connecting Governance and Security to Drive Your Information**
Richard Lauwers (HPE)

12:15 - 1:30 pm

Lunch

This is the absolute best 3 days of education awareness and inspiration for the field of information management.

L LEGAL **T** TECHNICAL **O** OPERATIONAL **S** SOLUTIONS

NEW VENUE LOCATION | **CHICAGO MARRIOTT DOWNTOWN**

HOTEL
REGISTRATION

DON'T FORGET TO BOOK YOUR HOTEL!

Each year MER Experience hotels sell out.
Register before April 15 to lock-in your special MER rate.

TUESDAY AFTERNOON | MAY 9, 2017

1:30 - 2:30 pm

Choose 21, 22, 23, or SS4

- O** 21. **IG Case Study: Data Storage for the Long Haul – Achieving Compliance While Archiving Large Scale Data Stores**
Henry Zhang (Amazon Glacier)
- T** 22. **Tech Tools: Can't Live With them, Can't Live Without Them**
Donna Read (DL Read LLC)
- L** 23. **Defending Your Company's Information From Bad Actors**
Lawrence Wolfenden (The Sylint Group) | Steven Teppler, Esq. (Abbott Law Group)
- S** SS4. **Active Navigation SOLUTION SHOWCASE: Value, Risk, Compliance: Measure Your IG Success**
Patrick Cardiello (Active Navigation)

2:30 - 2:45 pm

Break

2:45 - 3:45 pm

Choose 24, 25, 26, or SS5

- O** 24. **CASE STUDY: RIM & Data Protection: Partners in Preventing Crime**
Gabe Martinez (Cisco Systems)
- T** 25. **Share Drives Must Die**
Brendan Reid (TAB) | Faron Lyons
- L** 26. **CASE STUDY: Approaches Taken to Assist with the Disposition of Thousands of Backup Tapes**
John Isaza, Esq. (Rimon, PC)
- S** SS5. **ZL Technologies SOLUTION SHOWCASE Finding Privacy by Rediscovering RIM**
Kon Leong (ZL Technologies)

3:45 - 4:15 pm

Break

4:15 - 5:15 pm

Choose 27, 28, 29, or SS6

- O** 27. **Information Governance for the Social Enterprise**
Robert Cruz (Actiance)
- T** 28. **Six years In: Where Are We With Microsoft SharePoint?**
Bruce Miller (RIMtech Consulting)
- L** 29. **Amazingly, The Question Continues: Can Original Paper Records Be Destroyed After Being Imaged?**
John Isaza, Esq. (Rimon, PC)
- S** SS6. **SOLUTION SHOWCASE CASE STUDY: A Modernized Approach to Record Schedules and Remediation**
Bennett Borden, Esq. (Drinker, Biddle, and Reath, LLP)
Neil Cole (Les Schwab Tire Company)

6:00 pm

Networking Reception at the Chicago Yacht Club

L LEGAL **T** TECHNICAL **O** OPERATIONAL **S** SOLUTIONS

MER 2017 CONFERENCE PROGRAM

WEDNESDAY | MAY 10, 2017

7:30 - 8:30 am

Breakfast

8:30 - 9:45 am

30. Who am I? Understanding That Success Tomorrow as a RIM/IG Professional Involves Reinventing Yourself Today

Randy Kahn, Esq. (Kahn Consulting) | Jonathan Redgrave, Esq. (Redgrave LLP)

9:45 - 10:00 am

Break

10:00 - 11:15 am

31. CLOSING KEYNOTE: Learn What the Chicago Cubs, Legos, and 'Embracing the Target' All Have To Do With Achieving Your IG Goals

Laurie Fischer (HBR Consulting) | Jesse Wilkins (AIIM) | Gabe Martinez (Cisco) | Maryanne Siek (VMware)

11:15 am

MER 2017 Adjourns

MER 2017 SOLUTION PROVIDERS

PLATINUM



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