



Wednesday, May 4, 2016

8:30 – 4:30

Conference Chicago at University Center - Loop

525 South State Street Chicago

Chicago, IL 60605

Spring Seminar Conference Agenda, Speakers, and Sponsors

7:30-8:30 AM Registration and Continental Breakfast

8:30 – 9:45 **Keynote: Information Governance is Not a Fad: Why the “Keep Everything Forever” Approach Won’t Work by Robert Smallwood, leading IG author, blogger, trainer, author of the pioneering text [Information Governance: Concepts, Strategies, and Best Practices](#)**

Have you ever wondered what exactly Information Governance is? This session will help you understand key activities, tasks and best practices, know where IG is positioned in the overall governance landscape; and help you speak to the dangers of over-retention and the business rationale for IG.

9:45 – 10:15 Snack break, vendor display

10:15 – 11:30 Session A: **Ethics and Information Governance: Melissa Smart, Litigation Manager and Senior Counsel, ARDC**

Ms. Smart will discuss the ethical pitfalls and potential dilemmas faced by information management professionals, particularly as they relate to the legal field. She will present as a “case study” the ARDC’s experience in creating and maintaining paperless and e-discovery procedures from the litigation side of the spectrum, and will discuss the efforts of the IT and Records Management professionals at implementation of electronic records as the official records of the organization.

10:15 – 11:30 Session B: **IG for Social, Mobile and Cloud - Robert Smallwood, Managing Director, Institute for Information Governance**

Exploring issues for IG in non-traditional media.

11:30 – 1:00 Lunch – Private Dining Room overlooking State Street. Vendor display.

1:00 – 2:15 Session A: **Dealing with the Old Stuff: IG for Archiving and Decommissioning - Tina Torres, Advisory Director, PricewaterhouseCoopers**

Is your old data gathering dust in outdated systems? Does your organization own archaic systems and applications that need to be kept running because of the data that’s kept within? Learn about decommissioning old systems – turning the lights off and saving cost or reducing risks. Understand the risks for keeping archaic systems and data beyond their required limits. Find out approaches to archiving and extraction of data required for retention while setting sunset dates for archaic applications and obsolete data. A clean, complaint data footprint can be very refreshing!

1:00 – 2:15 Session B: **Measuring and Selling Your Program: IG Metrics and ROI Development** -

Mark Diamond, CEO, Contoural

Before committing to Information Governance programs, many senior executives want to know the bottom-line impact: If we invest in this program how much will we save? How can we measure progress? What's the overall return on investment, and how long will it take to achieve it? How can we find short-term savings to invest in longer-term ROI? Develop effective Information Governance programs and credible ROI to help sell your program. Using metrics and ROI increasingly companies are finding that Information Governance is not only something they have to do, but also these programs they want to do as these programs can save money.

2:15 – 3:45 Snack, vendor display, raffle

3:45 – 4:30 **The Reality of Governance - Practitioners share challenges and success** - panel discussion led by **Kimberly Giertz, CIO, Marshall, Gerstein & Borun LLP**

Panelists from various industries share their stories. Records Management/IG – what's the difference? Is it an evolution or a revolution? Practical advice on what worked and other lessons learned.

4:30 Grand Prize Raffle

4:30 – 5:30 Networking Reception: Outdoor Terrace

Presenters

Robert F. Smallwood is a leading information governance (IG) author, blogger, and trainer. Mr. Smallwood is author of the pioneering text **Information Governance: Concepts, Strategies, and Best Practices** (Wiley, 2014) and four other books on IG. He is a founding partner of IMERGE Consulting and heads up the Institute for Information Governance. Mr. Smallwood has over 25 years of experience in the information technology industry and holds an MBA from Loyola University of New Orleans. He has been recognized as one of the Top 10 Contributors to the IG Industry by the 2014 Information Governance Conference. In addition to teaching IG courses, he consults with Fortune 500 companies and governments to assist them in making technology decisions and implementations. We are very happy to welcome him to Chicago for his first major presentation here.

Mark Diamond is one of the industry thought leaders in information governance including records and information management, control of privacy and other sensitive information as well as litigation readiness. His company, Contoural, has helped 30% of the Fortune 500 plus many mid-sized and smaller organizations as well as public sector entities. As a trusted advisor he and his company help bridge legal, compliance and business needs and policies with effective legal and IT strategies and processes. Mark is a frequent industry speaker, presenting at numerous Legal and IT industry conferences as well as online venues. Additionally, Mark addresses more than one hundred internal corporate audiences each year. Mark is founder, President & CEO of Contoural, Inc. Under his leadership, Contoural has grown to be the largest independent provider of information governance consulting services. Mark has a Bachelor's degree in Computer Science from the University of California San Diego.

Melissa A. Smart is Litigation Group Manager and Senior Counsel at the Illinois Attorney Registration and Disciplinary Commission of the Supreme Court of Illinois (ARDC) where she supervises a group of litigation attorneys and staff, investigates charges of lawyer misconduct and prosecutes disciplinary cases. Ms. Smart obtained her B.A. in Liberal Arts and Sciences from the University of Illinois at Urbana-Champaign. She received her law degree from The John Marshall Law School, graduating *cum laude*. Ms. Smart began working at the ARDC as a law clerk in 1997 and became Counsel for the Administrator in 1999. In addition to her duties as a supervisor and litigator, Ms. Smart has been instrumental in creating and maintaining paperless and e-discovery procedures and policies for Commission staff.

Tina Torres is a Director in PricewaterhouseCoopers' Information Risk Management practice. Tina joined PwC San Francisco in 2015, backed by more than 18 years of expertise in Information Governance (IG), Records Management and eDiscovery. Tina has experience lies in both strategic and hands-on solutions, such as designing, managing, planning, and implementing fullcycle IG and records management programs, developing metrics and benchmarking, and integrating these programs into global businesses to support security, risk management and litigation support. She was instrumental in developing records management policy features in technology solutions such as Microsoft Exchange and SharePoint in her role as Global Records Director at Microsoft. She draws much of her industry experience from her previous roles working closely with Pharmaceutical, Manufacturing, High Tech, Legal, Financial Services, Banking, Health Care and Energy companies in the US and Europe.

Kimberly Giertz is the Chief Information Officer at Marshall, Gerstein & Borun. She manages all aspects of the firm's leading edge technology portfolio and infrastructure including information governance. She is member of the firm's technology committee and collaborates with them and various practice groups, staff and clients about strategy and operations to best leverage technology to support high quality service. In the past few years, she has been highly focused on information governance operations and policy, specifically working electronically without physical files. She is the current president of ARMA Chicago and an active member of the International Legal Technology Association.

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