

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](http://WWW.MERCONFERENCE.COM)

PRESENTED BY: **Cohasset Associates** 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](http://merconference.com)

**REGISTER NOW**



**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)
- T2**      **How The New Federal Rules of Civil Procedure (FRCP) Are Impacting Information Governance (IG) Case Law**  
 Barclay T. Blair (Information Governance Initiative) | Bennett Borden, Esq. (Drinker Biddle & Reath, LLP)
- 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

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

## TUESDAY MORNING | MAY 9, 2017

7:00 - 8:30 am

### Breakfast

8:30 - 9:30 am

Choose 12, 13, or 14

- O** 12. **CASE STUDY: RIM and IG, Together in Harmony – Learning From One Organization’s Experience in Tackling a Large-Scale IG Project**  
Rich Hale (Active Navigation) | Pete Baumann (Active Navigation)
- 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)
- S** SS1. **SOLUTION SHOWCASE: IBM**  
Richard Hogg (IBM) | Susan Whitmire (IBM) | Skip Hayford (HDR)

9:30 - 10:00 am

### Break

10:00 am - 12:00 pm

Choose 15, 16, or 17

- O** 15. **CASE STUDY: Justifying the eArchive Investment: Two Sides of the Disposition Coin**  
Lori Ashley (Tournesol Consulting) | Patricia Morris (eArchive Science LLC)
- 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. **SOLUTION SHOWCASE: Microsoft**  
Nishan DeSilva (IBM)

11:00 - 11:15 am

### Break

11:15 am - 12:15 pm

Choose 18, 19, or 20

- 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**  
Jonathan Redgrave (Redgrave LLP)
- S** SS3. **SOLUTION SHOWCASE: Hewlett-Packard Enterprise**  
Michelle Phillips (HPE) | Gary Allen (HPE)

12:15 - 1:30 pm

### Lunch



**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.

96% OF  
ATTENDEES WOULD  
**RECOMMEND  
TO OTHERS**

## TUESDAY AFTERNOON | MAY 9, 2017

1:30 - 2:30 pm

- O** 21. **IG Case Study: Data Storage for the Long Haul – Achieving Compliance While Archiving Large Scale Data Stores**

Henry Zhang (Amazon Glacier)

Choose 21, 22, or 23

- 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. **SOLUTION SHOWCASE**

2:30 - 2:45 pm

**Break**

2:45 - 3:45 pm

Choose 24, 25, or 26

- 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 (ZIA Consulting)

- L** 26. **CASE STUDY: Approaches Taken to Assist with the Disposition of Thousands of Backup Tapes**

John Isaza, Esq. (Rimon, PC)

- S** SS5. **SOLUTION SHOWCASE: ZL Solutions**

Kon Leong (ZL Solutions)

3:45 - 4:15 pm

**Break**

4:15 - 5:00 pm

Choose 27, 28, or 29

- 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: Active Navigation**

Patrick Cardiello (Active Navigation)

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

7:00 - 8:30 am

**Breakfast**

8:30 - 9:30 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 (Redgrave LLP)

9:30 - 10:00 am

**Break**

10:00 - 11:00 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)

11:00 am

**MER 2017 Adjourns**

## MER 2017 SOLUTION PROVIDERS

PLATINUM



GOLD



**Hewlett Packard  
Enterprise**



SILVER



**Cohasset Associates**



**Preservica**  
Digital Preservation

**ZASIO**

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