



TC-ARMA Fall Conference Details

11/04/25

Venue

Pinstripes: 3849 Gallagher Dr, Edina, MN 55435

[Parking details here](#)

The TC-ARMA Fall Conference will cover a range of timely and relevant topics for information management professionals. The agenda includes sessions on the future of artificial intelligence, strategic records management from an executive perspective, managing unstructured data, and understanding the current content threat landscape.

Special Event:

Join us for a fun **Bowling Social Event** after the conference for further networking and fun!

Agenda

8:30-9:15 AM: Registration/Breakfast

9:15-10:15 AM: Tom Motzel - AI: What's Next

10:15-10:30 AM: Morning Break

10:30-11:30 AM: Panel Discussion - Strategic Records Management: Executive View of RIM

Panelists - Patty Zimmerman, Kaitlyn Williams, Sharon St. Peter

11:30-12:15 PM: Lunch

12:15-1:15 PM: Adam Herrmann - Unstructured Data, Workflow Process Automation

1:15-1:30 PM: Afternoon Break and Snack

1:30-2:30 PM: Kurt Roemer - The Content Threat Landscape

Session 1 AI: what's next

"The RIM Professional's Role in Architecting the AI-Ready Enterprise - From Reactive ...to Proactive." - This talk focuses on the evolving role of Records and Information Management (RIM) professionals. It aims to bridge the gap between traditional, risk-focused RIM and the proactive, value-driven world of AI-powered business strategy. The presentation will guide the audience through a practical roadmap for building a future where RIM professionals are indispensable partners in making safe and effective AI possible, starting with low-risk, high-impact tools for experiential learning.



With a career dedicated to optimizing how organizations leverage information, Tom Motzel has become a leading voice in the practical application of artificial intelligence for front-line professionals. Most recently serving as a Value Architect in Sales Enablement at Iron Mountain, he championed the use of accessible AI tools to solve everyday business challenges, freeing teams to focus on strategic, high-value work.

Drawing on over 25 years of experience—from leading sales teams to running a consulting practice that advised content and information management vendors, Tom has developed a unique perspective grounded in deep commercial acumen and information governance expertise. His recent work involves re-architecting Iron Mountain's global sales content ecosystem from static repositories into a dynamic, AI-enhanced platform built entirely through a seamless integration of Google platform tools, including Sites, Gemini, Notebook

LM, and AppSheet.

Tom is an AIIM Company of Fellows Inductee, holds an MS in Information Technology, and has certifications in Cloud Digital Leadership and Change Management.

Session 2 Panel: Strategic Records Management - Executive view of RIM

This panel discussion brings together three information management professionals to explore the strategic importance of records management from an executive perspective. The discussion will delve into how effective records management aligns with organizational goals, mitigates risks, and ensures compliance. Panelists will share insights on how to communicate the value of records management to executive leadership, secure buy-in for strategic initiatives, and demonstrate the return on investment for robust information governance programs. Attendees will gain a better understanding of how to position records management as a critical component of overall business strategy.



Patricia Zimmerman, Senior Director of Enterprise Records & Information Management at UnitedHealth Group, has over 35 years' experience advising and managing records and information. She leads a team overseeing operations for UnitedHealth Group, UnitedHealthcare, and Optum. Previously, she consulted in records management, mainly in the healthcare industry.



Kaitlyn Williams is the Director of Privacy and Information Management at Xcel Energy. Kaitlyn has over 20 years of experience working in records management, information governance, information protection, security, and privacy.



Sharon St. Peter is the Director of Global Records & Information Management at Cargill, where she leads the Records & Information Management Center of Expertise (RIM COE). Sharon holds a B.B.A. from the University of North Dakota, with majors in Information Management and Management, and is a Certified Records Manager (CRM). With over three decades of experience, she brings deep knowledge in information governance and enterprise records management.

Session 3 Unstructured Data, Workflow Process Automation

The session will be covering the paper to digital journey that organizations are going through today. This now includes AI readiness and more data assessments to automate processes and data. Discussing the changes around unstructured data and the use of AI and AI policies. Working with multi-system integrations and getting the most out of the data.



Adam Herrmann has over 15 years of experience in the electronic document management sales and services industry. He has spent more than a decade leading professional services teams focused on implementing process automation solutions, driving efficiency and innovation for clients across industries. Currently, Adam serves as the Chief Revenue and Operations Officer at DataBank IMX, where he oversees both sales and operations. In this role, he combines his deep expertise in solution delivery with strategic leadership to help organizations optimize information management and unlock digital transformation.

Session 4 The Content Threat Landscape

Join us for The Content Threat Landscape—a discussion-oriented, practical session designed for seasoned records management professionals.



As Chief Security Strategist for Box, Kurt Roemer serves as the voice of security. Partnering with the CISO and Box Security team, Roemer drives customer security enablement, strategic direction, security roadmap value prioritization and the continuous evolution of an enviable security culture.