

2019

ARMA Milwaukee Spring Seminar

May 2, 2019 7:30am to 4:00pm



Radisson Milwaukee West
2303 N. Mayfair Rd., Milwaukee WI 53226

What a great lineup of speakers!

Here are their bios and session descriptions:

Byron Franz – FBI



Byron Franz is a special agent for the Federal Bureau of Investigation (FBI) and has worked national security investigations for more than 17 years. Special Agent Franz currently serves as the strategic partnership coordinator for the FBI's Milwaukee Division, where his job is to form partnerships with corporations and academia to better protect intellectual property and trade secrets. Special Agent Franz has a B.A. in International Relations and Russian from the University of Wisconsin-Madison (UW-Madison) and a J.D. from the University of Wisconsin Law School.

Helping to Protect Wisconsin from the Cyber Threat

The theft of intellectual property or trade secret information costs the U.S. economy billions of dollars a year and may result in the net loss of millions of jobs. Therefore, the protection of business secrets is of great importance to our economy. This presentation will describe some of the cyber and insider threats to business secrets and suggest some possible mitigations. The presentation will also highlight the importance of working with the FBI and other law enforcement agencies to neutralize the threats to business and academia.

Laurie Fischer – HBR Consulting



Laurie Fischer, CRM, CIPM is the managing director of HBR Consulting's information governance consulting practice. With more than 25 years' experience, Laurie provides comprehensive information governance solutions for organizations of all sizes and types. Laurie has extensive expertise in the design, development, and implementation of information governance programs, bringing together the interests of the office of the general counsel, the CIO, the chief privacy officer, information security, and records and information management. Recognized as a thought leader in information governance, Laurie leads a team of professionals who provide innovative and creative solutions for today's increasingly complex legal, technical, and operational information governance challenges. Laurie is a frequent speaker at IG, legal, and IT industry events and conferences.

Craig Shogren – HBR Consulting



Craig Shogren has been a consultant, advocate, implementer, and analyst of information governance and content services technologies for nearly 20 years. He has successfully architected and implemented many content services programs with very high customer satisfaction and usage rates, using both strong technical and social skills. He is skilled in aligning information and content management practices and tools with business strategy. Craig has strong expertise with implementing, administering, and growing many products that deal with content management, report management, records management, collection, and capture across many different industry verticals, such as government, finance, energy, and pharma, among others. Craig is an AIIM SharePoint Master, Certified Information Professional, and Certified Document Imaging Architect, and has been helping organizations govern Office 365 components since its inception.

IG Solutions for Office 365

Session One

During this session, participants will navigate through the core components of Office 365 (Exchange Online, SharePoint, OneDrive for Business, Teams, Groups, Yammer, etc.), defining each and discussing core functionality, such as collaboration, authoring, and content management, and how each part fits within the whole of the O365 ecosystem.

Attendees will understand how content is created, where it is stored, how it is shared, and the related challenges for managing information in and across each of the core components of O365.

Session Two

Equipped with an understanding of the O365 components, their purpose and potential use for content creation and storage, Session Two will demonstrate "What can I do about it?" through the demonstration of several use cases. We will walk through governed lifecycles of:

- Office 365 Groups (including Teams, Yammer, Planner, and other components that rely on Groups)

Information Overload

- An email inbox and its items
- A document in OneDrive

Staying ahead in a cloud world is an increasingly difficult task. Keeping your methods durable will help avoid large overhauls and not impede future usage. As closing comments, we will discuss best practices for future-proofing your IG model methods.

Nick De Laurentis, CRM, IGP



Nick De Laurentis serves as strategist and lead business automation analyst supporting facilities management solutions for the enterprise. He is an active leader in the RIM profession and past president of ARMA International's board of directors, chairman of the ARMA International Educational Foundation's board of trustees, and most recently served as regent, applicant and member relations on the Institute of Certified Records Managers board of regents. He was awarded ARMA's Distinguished Service Award in 2014 and is a frequent speaker at ARMA. Nick holds an Information Governance Professional (IGP) certification, a Certified Records Manager (CRM) certification, is ITIL v3 Service Management Fundamentals certified, has completed IAPP Certification Foundation training, and holds a Senior Claim Law Associate (SCLA) designation.

Finding your Credential

Have you considered, or are you actively planning to pursue, a formal certification in the field of Records and Information Management (RIM)? Do you want to enhance your professional credentials and experience as you consider or continue your career in this important discipline? With an unprecedented amount of change affecting the entire world of Records and Information Management, there is no better time to consider a formal professional certification in this space.

Brent Gatewood – consultIG



Brent Gatewood, an internationally recognized expert in the field of information governance, has spent more than 20 years playing key roles in Big Data, RIM and IG implementations. Mr. Gatewood has worked with organizations of all sizes across multiple vertical industries. He is also a prolific writer and sought-after speaker on subjects related to information governance and records management. Brent has an M.B.A. from Marquette University and an undergraduate degree in Business from Iowa State University.

The Shift – RM to IG

Is there really a difference between records management and information governance? While there are foundational components to both that are similar, information governance is much broader, and more important, to your organization. In this session, we will review the current headlines driving information governance initiatives and will also look at successful strategies for starting smaller and gaining momentum as it relates to creating a plan and rolling out IG programs.

Information in the FOG

Where is your information? Really, where is it? We understand the perils and challenges of managing our content within our own systems - but what about the information on the edge of our systems? IoT has shown us that this may be the most fragile component of our eco-system. And FOG computing shows us that we may not even be aware of some of our own systems, let alone the information residing on them. We will review these technologies and the challenges they bring with them.

Networks
Digitization
Transparency
Microfilm
Integrity
Fiscal
Accountability
ARMA
Disposition
Availability
Membership
Governance
Requirements
Life-cycle
Association



Interactive Case Study Super Session!

With our Super Speakers, Laurie, Nick, Brent, and Craig!

A very interesting RIM case will be presented at this session. Attendees will analyze the scenario and provide their views and opinions. Our speakers will walk through the case with us and give feedback!

Time	Track I	Track II
7:30-8:00	Registration and Breakfast	
8:00-9:00	Keynote: Byron Franz of the FBI Helping to Protect Wisconsin from the Cyber Threat	
9:00-9:10	Break	
9:10-10:10	Information Governance Solutions for O365 Part I <i>By Laurie Fischer and Craig Shogren of HBR Consulting</i>	The Shift - Records Management to Information Governance <i>By Brent Gatewood of ConsultIG</i>
10:10-10:20	Break	
10:20-11:50	Interactive Case Study Super Session With our Super Speakers!	
11:50-1:00	Lunch and Speaker Panel	
1:00-2:00	Information Governance Solutions for O365 Part II <i>By Laurie Fischer and Craig Shogren of HBR Consulting</i>	Find Your Credential <i>By Nick DeLaurentis</i>
2:00-2:10	Break	
2:10-3:10	Information in the FOG <i>By Brent Gatewood of consultIG</i>	
3:10-3:30	Awards and Prize Drawings	

Breakfast and lunch are included.
Prize drawings and awards will be presented at the end of the conference.

Registration Fee: \$125.00