

MER CONFERENCE 2019

May 20th - 22nd, 2019

PRE-CONS | May 19

Chicago



The MER Conference delivers the very latest insights to eRIM decision-makers and influencers inspiring confidence to lead change in your organization.

The 27th annual MER Conference is a 2-½ day immersive event focused on the LEGAL, TECHNICAL and OPERATIONAL aspects of managing electronic records in an ever-changing environment. Carefully designed to be a collaborative learning experience, it regularly delivers on an intentional focus: empowering leaders with insights, connections and resources to effectively lead IG and eRIM solutions that support business objectives.

Diverse Experiences and Conversations Create Success

Compelling keynote speakers will bring diverse perspectives to your most pressing issues while illuminating potential solutions. Focused sessions on disruptive technologies such as blockchain, IoT, social media and machine learning will explore their effects on IG and the discipline of records management. Other sessions will examine GDPR, auto-classification, as well as the most relevant legal and technical challenges facing IG and eRim professionals today.

Who Attends

The MER Conference attracts progressive decision-makers and organizational influencers from companies large and small seeking solutions to their business's most pressing Information Governance challenges.

☆ 8:30 AM- 9:00 AM (30 Min)

2019 MER Conference Opening

☆ 9:00 AM- 10:15 AM (1 Hour, 15 Min)

K1. OPENING KEYNOTE Artificial Intelligence - Humanity at the Dawn of the Fourth Industrial Revolution

The presentation will address the transformative implications of the advent of artificial intelligence for society and its institutions, including the law.

The impending disruption is of such a magnitude that the World Economic Forum has characterized it as the Fourth Industrial Revolution. Like previous



Nicolas Economou
Chairman & CEO
HS
Keynote Speaker

☆ 10:45 AM- 12:00 PM (1 Hour, 15 Min)

K2. KEYNOTE Mission Impossible? How to Save Records Management as We Know it From the Existential Threat Posed by Self-Destructing and Ephemeral Messages

Just when email recordkeeping software has matured to the point where even the US government is now almost all "Capstone-compliant" in its archiving of email, dozens of new forms of electronic messaging applications are now widely available to end-users as a means of communication about official



Jason R. Baron, Esq.
Of Counsel
Drinker Biddle & Reath LLP
Keynote Speaker



1:15 PM- 2:15 PM (1 Hour)

1. ERM Case Law: The Annual MER Conference Update of the Latest News, Trends and Issues

Legal discovery and regulatory compliance continue to be significant drivers of Information Governance (IG). The decisions of courts and government agencies provide a legal framework for developing and implementing IG programs, real-life examples of IG in action, and occasionally some wake-up calls



Ken Withers, Esq.
Deputy Executive Direct...
The Sedona Conference
Presenter



Hon. Ron Hedges
Senior Counsel
Dentons
Presenter



1:15 PM- 2:15 PM (1 Hour)

2. The Arc of Digital Transformation: Its Impact and Benefits

Digital Transformation is more than the latest buzz-word and it is more than a concept of going paperless. Instead it is the innovative approach leading to major transformational efforts in how we interact with our clients and operate our businesses. It is driven by radical and new uses of technology to



Desh Urs
President & CEO
iBridge
Presenter



Steven Webber
Records and Informatio...
Northwestern Mutual
Presenter



1:15 PM- 2:15 PM (1 Hour)

3. Moving Beyond RIM: The Evolution of Information Governance Project Planning

In world where the volume of information created in the past five years exceeds the volume of information created by all of humankind prior to that, everyone talks about information governance as an obligation of leadership within a corporate or legal setting. But how many organizations have actually



Michael Quartararo
Managing Director
eDPM Advisory Services
Presenter



Sandra Serkes
CEO
Valora Technologies



2:30 PM- 3:30 PM (1 Hour)

4. A Global Privacy Review

We are now one year removed from the launch of GDPR. It and other privacy regulations (CCPA, LGPD etc.) from other international locations are driving a sharper focus on privacy and the protection of personal data.



Richard Hogg
Global Privacy Evangelist
IBM
Presenter



2:30 PM- 3:30 PM (1 Hour)

6. What's New In eDiscovery?

It's been many years since the practices and processes associated with eDiscovery began to affect organizations, but the landscape is ever changing. Hear from Litigation Counsel from three different organizations and learn what is new in the world of eDiscovery, from legal opinions to process and



Heather Kolasinsky,...
Senior Counsel
Humana
Presenter



Bobbi Basile
Managing Director
HBR Consulting LLC
Presenter



Jennifer Hamilton, E...
Senior Counsel
John Deere
Presenter



4:00 PM- 5:00 PM (1 Hour)

7. Privacy in the United States: A State by State Privacy Law Review

The past year has seen several new and expanded state regulations addressing privacy and data security, resulting in a daunting patchwork of duplicative, overlapping, and occasionally contradictory Information Governance (IG) obligations, ranging from the comprehensive California Consumer Privacy Act



Bob Cattanach, Esq.
Partner
Dorsey & Whitney LLP
Presenter



Martin Tully, Esq.
Founding Partner
Actuate Law LLC
Presenter



4:00 PM- 5:00 PM (1 Hour)

8. Creating a Modern, Compliant and Easier-to-Execute Records Retention Schedule

Many Records Retention Policies and Schedules are borne from older, legacy paper-based records programs. Yet today more than 95% of the documents organizations create or receive are created or received in digital format, using new and emerging technologies from a variety of sources



Mark Diamond
President & CEO
Contoural
Presenter



4:00 PM- 5:00 PM (1 Hour)

9. Automated Governance and Defensible Disposition: It's Never Been Easier

More information coming soon.



John Isaza, Esq.
CEO
Information Governanc...



Cynthia Alsup
VP Sales & Marketing
Information Governanc...



Ian Story
Principal Program Mana...
Microsoft

8:30 AM- 9:45 AM (1 Hour, 15 Min)

K3. KEYNOTE Respected, Connected, Protected: What Does This Have to Do With Me?

Oz Alashe MBE has a unique and impactful perspective regarding the importance of technology, trust, leadership and responsibility in the 21st century. In a candid and moving talk Oz engages audiences through a series of ideas and stories that delight and inform.



Oz Alashe
CEO & Founder
CybSafe
Keynote Speaker



10:15 AM- 11:00 AM (45 Min)

10. Penny Wise/Pound Foolish: eDiscovery Cost Reduction Through Effective Records Cleanup

Organizations struggle to keep up with the costs of eDiscovery by arguing with service providers for cheaper rates. The reality is that cheaper rates are NOT going to fix the problem. Until organizations get control over their data issues and the sheer volume of data they are storing, and implement viable



Linda Sharp, Esq.
Associate General Counsel
ZL Technologies



10:15 AM- 11:00 AM (45 Min)

11. Information Governance: Best Practices and the Importance of Collaboration

Information Governance is a 'super-discipline' with Information Management at the center. IG success is dependent not only on recognized best practices, but on collaboration across 'sub-disciplines.' Navigating these relationships to implement needed change is essential to IG programs and initiatives. This



Jason Stearns
Director, Information Governance
BlackRock
Presenter



10:15 AM- 11:00 AM (45 Min)

12. Blockchains: Can't Know How Without Knowing What!

It's impossible to know how blockchains will impact your IG Program when you don't understand them. The typical commentary after a blockchain presentation is "I just don't get it." It's like someone is speaking a foreign language and forgot to bring a translator. For many of you, this is probably not



Darron Dickinson
Principal Consultant
Cohasset Associates
Presenter



11:15 AM- 12:00 PM (45 Min)

13. Defensible Disposition Toolkit: Keys to Designing a Successful Plan

Other speakers cover the business case for implementing a defensible disposition plan. But how do you actually design a disposition plan that is defensible? We will discuss the legal framework by which a disposition plan will be judged and discuss the specific examples of what an organization can



Christopher King, Esq.
Partner
Redgrave LLP
Presenter



11:15 AM- 12:00 PM (45 Min)

14. Professional Skepticism and Unconscious Bias

Psychological research shows that our perceptions and desires powerfully influence the way we interpret information, even when we intend to be objective and impartial. When we are motivated to reach a particular conclusion, we often do.



Debra Sabatini ("De...)
Founder & President
Resiliti LLC
Presenter



Suri Surinder
Founder & CEO
CTR Factor
Presenter



11:15 AM- 12:00 PM (45 Min)

15. Incorporating IoT Data Into Your Information Governance Program

The Internet of Things, or IoT, is transforming how we interface with the world. As companies unlock the potential of IoT, the number of IoT devices is expected to exponentially grow across most industries. Managing data from IoT is a looming challenge for information governance professionals. The



Priya Keshav
CEO
Meru Data
Presenter



Jason R. Baron, Esq.
Of Counsel
Drinker Biddle & Reath...
Presenter

1:00 PM- 1:45 PM (45 Min)

16. How One Records Manager Built a Coalition to Drive His Information Governance Initiative

An IG initiative cannot be successful without a group of committed and participative stakeholders representing the business, the security team, IT and the compliance and legal teams. Using a case study approach, this session will describe the approach one organization took to build a strong group of



Ken Lownie
Senior VP of the Americas
Everteam
Presenter

1:00 PM- 1:45 PM (45 Min)

17. Privacy, Ethics and Trust: The Role of Information Governance

This presentation explains how an ethically based approach can be used in data impact assessments to increase trust and transparency with customers and, in the case of government, citizens. The presentation will look at what 'trust' means in the digital age and why it matters. The challenges of effectively



Susan Bennett, Esq.
Principal
Sibenco Legal & Advisory
Presenter

1:00 PM- 1:45 PM (45 Min)

18. Beyond the Hype of Machine-Learning and Artificial Intelligence

A deep dive discussion on the leading cloud providers and their offerings for natural language processing, machine-learning, and Artificial Intelligence for Information Governance of documents and records. This is not a sales presentation, but, rather, a matter-of-fact review of what is



Scott Burt
President & CEO
Integro
Presenter



2:00 PM- 3:00 PM (1 Hour)

19. Breach Response: File Analysis to the Rescue in a Top-Ten Global Hack

When a company's data breach spawns front page news, FBI investigations and congressional hearings, three questions immediate crop up: how did this happen, what did we lose and what is our liability?



Dean Gonsowski, E...
Chief Revenue Officer
Active Navigation
Presenter



Joe Ponder
Owner
InfoCycle
Presenter



Josh Rattan
Partner
PwC
Presenter



2:00 PM- 3:00 PM (1 Hour)

20. The Right to be Forgotten: How to Actually Find and Delete Personal Data

There's a lot of talk about the "Right to be Forgotten," granted by GDPR, CCPA and other privacy regulations that require companies to find and delete a subject's personal data upon request. But what does a search for a particular individual's personal data actually entail? Personal data is not always easily



Kon Leong
CEO
ZL Technologies, Inc.
Presenter



2:00 PM- 3:00 PM (1 Hour)

21. Case Study: Box for Cloud Content Governance

As content management systems become more accessible, governance is more important than ever. Cloud technologies and the various platforms on the market today present unique challenges to the effective management and governance of information. In this session you will hear from Box and



John Frost
Senior Information Governance Specialist
Box
Presenter



3:30 PM- 4:30 PM (1 Hour)

22. Data Remediation: Getting it Done

Every company has too much data, but figuring out how to keep what you need and getting rid of the rest is a challenging task. In this session we will discuss practical approaches to data remediation, how to set up and carry out a remediation project, how to get it funded, and how to convince people to



Bennett Borden, Esq.
Chief Data Scientist
Drinker Biddle & Reath, LLP
Presenter



3:30 PM- 4:30 PM (1 Hour)

23. The Push and Pull of Privacy vs Retention Compliance

Since the passage of GDPR and most recently California's Consumer Privacy Act, organizations are facing conflicting edicts from privacy compliance regulations and records retention compliance. For instance, how long should an organization keep personnel records containing personal



John Isaza, Esq.
CEO
Information Governanc...
Presenter



Jeffrey J. Beard, Esq.
JJ Beard
Presenter



3:30 PM- 4:30 PM (1 Hour)

24. Making Records Intelligent - The Next Generation of Records Management

Robotic Process Automation (RPA) has made waves across countless industries and disciplines over the past few years, meaning a boon in efficiency and intelligent decision-making. It is time to apply these principles to records management, so that records managers can stop monitoring minutiae and start



David Quackenbush
President and CEO
Gimmel LLC



4:45 PM- 5:45 PM (1 Hour)

25. The Top 10 Critical Success Factors for an Information Risk Governance Slam Dunk

Many organizations are undertaking efforts to discover, clean up, and potentially migrate their content. Whether it's a move to Office 365, some adverse trigger event, or a need to develop a data map considering evolving privacy regulations, these initiatives are often critical to the future success of an



Jim Polka
Principal Consultant
Doculabs
Presenter



Matt McClelland
Principal Consultant
Doculabs
Presenter



4:45 PM- 5:45 PM (1 Hour)

26. The United States Culture of Privacy

Almost every organization covered by the General Data Protection Regulation (GDPR) has been on high alert to come into compliance with the new law since the GDPR allows for significant fines and penalties for non-compliance.



Laurie Fischer
Managing Director
HBR Consulting LLC
Presenter



4:45 PM- 5:45 PM (1 Hour)

27. Cross-Border Data Transfer Within Organizations - Issues and Strategies

In 2018, the General Data Protection Regulation (GDPR) went into effect in the EU. Several South American countries are considering similar legislation, and many Asian countries – including the enormous economies of India and China – have begun constructing their own regulatory framework.



Taylor Hoffman
Global Head of eDiscov...
Swiss Re
Presenter



Cameron Krieger, E...
Senior Privacy Counsel
CDW
Presenter

10:00 AM



10:00 AM- 11:00 AM (1 Hour)

K5. PANEL DISCUSSION Information Authenticity and the Role of IG as an Arbiter of Truth

11:00 AM



11:00 AM- 11:30 AM (30 Min)

2019 MER Conference Closing Remarks

12:00 PM



12:00 PM- 1:00 PM (1 Hour)

ARMA Chicago Chapter Spring Seminar Lunch - Separate Registration Required

ARMA Chicago Chapter Spring Seminar Lunch is part of the ARMA Chicago Chapter Spring Seminar Wednesday Afternoon Add On.

Available when you register for the MER Conference

1:00 PM



1:00 PM- 4:30 PM (3 Hours, 30 Min)

ARMA Chicago Chapter Spring Seminar - Separate Registration Required.

Let your conference experience continue Wednesday afternoon with the ARMA Chicago Chapter Spring Seminar at the MER Conference Add-on. Includes lunch and the opportunity to join more than 100 Chicago and Midwest area ARMA members, records managers and IG professionals participating in this