

# MER CONFERENCE



27th Annual MER CONFERENCE | MAY 20-22, 2019 | PRE-CONS MAY 19  
CHICAGO MARRIOTT DOWNTOWN

## Insight Delivered | Confidence Inspired

The MER Conference delivers the very latest insights to Information Governance decision-makers and influencers inspiring confidence to lead organizational change.

The signature MER Conference is a 2-½ day immersive event focused on the ever-changing LEGAL, TECHNICAL and OPERATIONAL aspects of Information Governance and management of electronic records. Carefully designed to be a collaborative learning experience, it regularly delivers on an intentional focus: empowering leaders with insights, connections, and resources to effectively impact Information Governance and eRIM initiatives that support business objectives.

### DIVERSE EXPERIENCES AND CONVERSATIONS CREATE SUCCESS

Three compelling keynote speakers will bring diverse perspectives to the most pressing Information Governance issues while illuminating potential solutions. Focused sessions on disruptive technologies such as artificial intelligence, IoT, social media, and machine learning will explore their effects on IG and related disciplines 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.

### THE MER CONFERENCE EXPERIENCE IS YEAR-ROUND

Because of its highly immersive, interactive and solution-oriented design, the MER Conference is renowned for delivering great impact to attendees and the businesses they support. The learning, collaboration, and problem solving never stop! The MER Conference experience continues throughout the year with **MER Sapient**, a suite of year-round, always relevant, sharply focused educational content.

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

MER Conference is approved by the ICRM for 13.5 Certified Maintenance Points (CMP)

10:00 am - 5:00 pm

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**T1 T1. Advancing Your Professional Education: Obtaining & Maintaining CRM Certification**

Nick DeLaurentis (ICRM) | Jean Ciura, Ph.D (JMC) | Adrienne Horrigan (Lincoln Park Zoo)

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**T2 IGP Prep Crash Course**

Robert Smallwood (Institute for Information Governance)

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**T3\* Information Governance Solutions for Office 365**

Laurie Fischer (HBR Consulting) | Reggie Pool, Esq. (HBR Consulting) | Craig Shogren (HBR Consulting)

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**T4\* Advancing to IG from RIM - Far More Than Just Changing an Acronym!**

Karen Knight (Cohasset Associates) | Carol Stainbrook (Cohasset Associates)

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**T5\* Evolving Data Analytics: From e-Discovery to Investigations to Compliance and Beyond**

Bill Hamilton, Esq. (University of Florida Levin College of Law)

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**T6\* Information Governance 101**

Mark Diamond (Contoural)

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**T7\* Leadership Development for Information Governance Professionals**

Debra Sabatini Hennelly (Resiliti) | Suri Surinder (CTR Factor) | Russ Cancilla (Resiliti)

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5:00 - 6:30 pm **Welcome Reception**

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\*Pre-Cons T3-T7 approved by the ICRM for 6.5 Certified Maintenance Points (CMP)



## CHICAGO MARRIOTT DOWNTOWN

The Chicago Marriott Downtown Magnificent Mile is the MER Conference host hotel.

Guest Rooms at the Marriott Downtown sell out quickly so book your room today!

### RESERVATIONS

**Toll Free: 1-877-303-0104** reference MER Conference 2019

**Online: [MERconference.com](http://MERconference.com)**

**REGISTER NOW**

|   |  |
|---|--|
| 7:30 - 8:30 am                          | <b>Networking Breakfast</b>  |
| 8:30 - 9:00 am                          | <b>MER Conference 2019 Opening</b>   |
| 9:00 - 10:15 am                         | <b>K1. OPENING KEYNOTE Artificial Intelligence: Humanity at the Dawn of the Fourth Industrial Revolution</b> Nicolas Economou (H5)   |
| 10:15 - 10:45 am                        | <b>Networking Break</b>  |
| 10:45 am - 12:00 pm                     | <b>K2. KEYNOTE Mission Impossible? How to Save Records Management as We Know it From the Existential Threat Posed by Self-Destructing and Ephemeral Messages</b><br>Jason R. Baron, Esq. (Drinker Biddle & Reath LLP)  |
| 12:00 - 1:15 pm                         | <b>Networking Lunch</b>  |
| 1:15 - 2:15 pm<br>Choose 1, 2, or 3     | <ul style="list-style-type: none"> <li><b>L</b> 1. <b>ERM Case Law: The Annual MER Conference Update of the Latest News, Trends and Issues</b> Ken Withers, Esq. (The Sedona Conference®)   Hon. Ron Hedges (Dentons)</li> <li><b>T</b> 2. <b>The Arc of Digital Transformation: Its Impact and Benefits</b><br/>Desh Urs (iBridge)   Steven Webber (Northwestern Mutual)</li> <li><b>O</b> 3. <b>Moving Beyond RIM: The Evolution of Information Governance Project Planning</b><br/>Michael Quartararo (eDPM Advisory Services)   Sandra Serkes (Valora Technologies)</li> </ul>                           |
| 1:15 - 5:00 pm                          | <b>T1 Part 2. Advancing Your Professional Education: Obtaining &amp; Maintaining CRM Certification</b> Nick DeLaurentis (ICRM)   Jean Ciura, Ph.D (JMC)<br>Adrienne Horrigan (Lincoln Park Zoo)  |
| 2:15 - 2:30 pm                          | <b>Networking Break</b>  |
| 2:30 - 3:30 pm<br>Choose 4, 5, 6, or SS | <ul style="list-style-type: none"> <li><b>L</b> 4. <b>A Global Privacy Review</b> Richard Hogg (IBM)</li> <li><b>T</b> 5. <b>The Long and Winding Road of Information Governance in the Cloud: The Path Forward</b> Mike Alsup (Gimnal)   Ian Story (Microsoft)</li> <li><b>L</b> 6. <b>What's New In eDiscovery?</b> Heather Kolasinsky, Esq. (Humana)<br/>Bobbi Basile (HBR Consulting)   Jennifer Hamilton, Esq. (John Deere)</li> <li><b>S</b> SS. <b>TBA</b></li> </ul>   |
| 3:30 - 4:00 pm                          | <b>Networking Break</b>  |
| 4:00 - 5:00 pm<br>Choose 7, 8, or 9     | <ul style="list-style-type: none"> <li><b>L</b> 7. <b>Privacy in the United States: A State by State Privacy Law Review</b><br/>Bob Cattanach, Esq. (Dorsey &amp; Whitney LLP)   Martin Tully, Esq. (Actuate Law)</li> <li><b>O</b> 8. <b>Creating a Modern, Compliant and Easier-to-Execute Records Retention Schedule</b><br/>Mark Diamond (Contoural)</li> <li><b>O</b> 9. <b>Automated Governance and Defensible Disposition: It's Never Been Easier</b><br/>Ian Story (Microsoft)   John Isaza, Esq. (Information Governance Solutions)<br/>Todd Cawthron (Information Governance Solutions)</li> </ul> |
| 5:00 - 6:30 pm                          | <b>Networking Reception</b>  |

**L** LEGAL   **T** TECHNICAL   **O** OPERATIONAL   **S** SOLUTIONS

7:30 - 8:30 am

**Networking Breakfast**

8:30 - 9:45 am

**K3. TUESDAY KEYNOTE Respected, Connected, Protected: What Does This Have to Do With Me?** Oz Alashe (CybSafe)

9:45 - 10:15 am

**Networking Break**

10:15 - 11:00 am

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

Linda Sharp, Esq. (ZL Technologies)

Choose 10, 11, 12, or SS

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

Jason Stearns (BlackRock)

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

Darron Dickinson (Cohasset Associates)

**S SS. TBA**

11:00 - 11:15 am

**Networking Break**

11:15 am - 12:00 pm

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

Christopher King, Esq. (Redgrave LLP)

Choose 13, 14, 15, or SS

**O 14. Professional Skepticism and Unconscious Bias**

Debra Sabatini Hennelly (Resiliti) | Suri Surinder (CTR Factor)

**T 15. Incorporating IoT Data Into Your Information Governance Program**

Priya Keshav (Meru Data) | Jason R. Baron, Esq. (Drinker Biddle & Reath LLP)

**S SS. TBA**

12:00 - 1:00 pm

**Networking Lunch**

## WHAT ATTENDEES SAY

**1 in 2** attendees met an exhibitor they can do business with in the coming year.\*

95% of attendees gained information that can help with a **current** problem.\*

85% of attendees gained information that can help with a **potential** problem.\*

\* MER Conference 2018 post-conference attendee poll

1:00 - 1:45 pm

**O** 16. **How One Records Manager Built a Coalition to Drive His Information Governance Initiative** Ken Lownie (Everteam)

Choose 16, 17, or 18

**O** 17. **Privacy, Ethics and Trust: The Role of Information Governance**  
Susan Bennett, Esq. (Sibenco Legal & Advisory)

**T** 18. **Beyond the Hype of Machine-Learning and Artificial Intelligence**  
Scott Burt (Integro)

1:00 - 5:00 pm

**REGISTRATION  
REQUIRED**

**WS. WORKSHOP Information Governance Program Launch Workshop**

Robert Smallwood (Institute for Information Governance) | Baird Brueseke (iNetwork)  
Andrew Ysasi (Vital Records)

1:45 - 2:00 pm

**Networking Break**

2:00 - 3:00 pm

**O** 19. **Breach Response: File Analysis to the Rescue in a Top 10 Global Hack**

Dean Gonsowski, Esq. (Active Navigation) | Joe Ponder (InfoCycle) | Josh Rattan (PwC)

Choose 19, 20, or 21

**O** 20. **The Right to be Forgotten: How to Actually Find and Delete Personal Data**  
Kon Leong (ZL Technologies)

**T** 21. **CASE STUDY Box for Cloud Content Governance**  
John Frost (Box)

3:00 - 3:30 pm

**Networking Break**

3:30 - 4:30 pm

**O** 22. **Data Remediation: Getting it Done**

Bennett Borden, Esq. (Drinker Biddle & Reath, LLP)

Choose 22, 23, or 24

**L** 23. **The Push and Pull of Privacy vs Retention Compliance**

John Isaza, Esq. (Information Governance Solutions) | Jeffrey J. Beard, Esq.

**O** 24. **Making Records Intelligent: The Next Generation of Records Management**  
David Quackenbush (Gimmel)

4:30 - 4:45 pm

**Networking Break**

4:45 - 5:45 pm

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

Lane Severson (Doculabs) | Matt McClelland (Doculabs)

Choose 25, 26, or 27

**O** 26. **The United States Culture of Privacy**

Laurie Fischer (HBR Consulting)

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

Taylor Hoffman (Swiss Re) | Cameron Krieger, Esq. (CDW)

6:00 pm

**Networking Reception**

**REGISTER NOW**

**L** LEGAL **T** TECHNICAL **O** OPERATIONAL **S** SOLUTIONS

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|                  |   |
|------------------|---|
| 7:30 - 8:30 am   | <b>Networking Breakfast</b>   |
| 8:30 - 9:45 am   | <b>K4. WEDNESDAY KEYNOTE</b> <b>The End of Privacy</b> Michal Kosinski Ph.D (Stanford University)                         |
| 9:45 - 10:00 am  | <b>Networking Break</b>   |
| 10:00 - 11:00 am | <b>K5. PANEL DISCUSSION</b> <b>Information Authenticity and the Role of Information Governance as an Arbiter of Truth</b> |
| 11:00 am         | <b>MER Conference 2019 Closing Remarks</b>  |
| 12:00 - 4:30 pm  | <b>ARMA Chicago Chapter Spring Seminar and Lunch</b>  |

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**REGISTRATION  
REQUIRED**

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