DOCUMENT STRATEGY · FORUM

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YOUR TRANSACTIONAL CUSTOMER COMMUNICATION PERFORMANCE

MAY 13-15, 2014

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DOCUMENTstrategyForum.com

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Register online today at **DOCUMENTstrategyForum.com** or call 866.378.4991

EXCLUSIVE ANALYST DAY SEE PAGE 7

PETE BASILIERE RESEARCH VP
Gartner.

RON GLAZ PROGRAM DIRECTOR
IDC Analyze the Future

TJ KEITT SENIOR ANALYST
FORRESTER

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YOUR TRANSACTIONAL CUSTOMER COMMUNICATION PERFORMANCE

The ability to connect departments within the enterprise who have responsibilities directly related to the performance of transactional/customer communication documents is no longer a luxury—it's a priority! Understanding that is one thing, achieving it is a whole other challenge!

No worries, that's why we created DOCUMENT Strategy Forum. Our singular focus is on how to help you and your company Create, Produce, Deliver and Manage better performing transactional/customer communication documents.

And we've achieved this lofty goal by building a high-level, business-focused event dedicated to educating, engaging and serving the user, exclusively.

Should You Attend?

If you have involvement with any of these areas, than DOCUMENT Strategy Forum should be on your "Must-Attend" list!

- Project Management
- Document Strategy
- Multi-Channel Communication
- Forms Design & Processing
- Mobile Technologies
- Cloud Services
- Predictive Analytics
- Service Bureaus
- Big Data
- E-signatures
- Business Intelligence/BPM

- Imaging/Archiving
- SharePoint/Information Management
- IT Integration
- Customer Experience
- Document Processing
- ECM
- CRM
- Storage/Archival
- Collaboration/Social Platforms
- Process Metrics
- Document Engineering/Automation

Connect-IT

BFMA

THE POWER OF THREE!

Co-located with Connect-IT and the BFMA Annual Conference, attendees will have the opportunity to customize their learning experience by choosing from nine conference tracks and more than 65 sessions over three days that cover the entire transactional/customer communication life cycle.

D●CUMENT
S T R A T E G Y • F O R U M

re-learn

BY ATTENDING THE SINGLE GREATEST CONFERENCE EVER BUILT FOR ANYONE RESPONSIBLE FOR TRANSACTIONAL/CUSTOMER COMMUNICATION PERFORMANCE

DOCUMENT Strategy Forum offers three full days of unparalleled education all geared to helping you Create, Produce, Deliver and Manage a better performing transactional/customer communication document.

Sessions will range from intense 2-hour Power Sessions and Case Studies to Panel Discussions and Roundtables focused on providing you with tactical and mission-critical strategies you can incorporate the day you return to your office.

Connect-IT Conference
Where Business & IT Leadership Converge

Chaired by industry thought leaders Joe Shepley of Doculabs and Seth Earley of Earley & Associates, the Connect-IT Conference focuses on helping business leaders understand how to better manage new content and document management tools and capabilities that can help them solve their core operational challenges to drive higher revenue, lower costs and higher margins, as well as reduce operational and legal risk.

SETH EARLEY
CEO
EARLEY & ASSOCIATES

JOE SHEPLEY
VP & PRACTICE LEADER
DOCULABS

ANALYST DAY EXCLUSIVE!

The day known as Analyst Day has now become the crown jewel of the DOCUMENT Strategy Forum and Connect-IT Conference. Featuring the "Big 3" research firms, Forrester Research, Gartner and IDC, Analyst Day is designed to expose attendees to the tools and ideas that are driving growth and efficiency within the document industry. Each analyst will share unique insight that will help those charged with customer communication performance on how to take it to the next level.

Access an Analyst Speed Round

The last session of Analyst Day will feature an All-New "Access an Analyst Speed Round" component where attendees are broken into smaller groups and given a chance to meet with each analyst. This unique format will allow for a more intimate Q&A to take place and a chance for attendees to really get to know each of the analysts. Attendees will rotate to a new analyst every 20 minutes.

PETE BASILIERE
RESEARCH VICE PRESIDENT
GARTNER
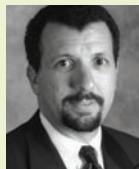
RON GLAZ
PROGRAM DIRECTOR
IDC

TJ KEITT
SENIOR ANALYST
FORRESTER

re-discover

THE BENEFIT OF NETWORKING WITH LIKE-MINDED PEERS

The value of attending the educational conference can't be disputed. But, the value of spending time with peers who do what you do for a living in a business social setting is priceless! Best of all, it's all included with your conference registration.

OPENING DAY KEYNOTE LUNCHEON
WEDNESDAY MAY 14 1:00pm – 2:30pm

The State of the Document Processing Services Industry in the "Age of the Customer"

CRAIG LE CLAIR • VICE PRESIDENT & PRINCIPAL ANALYST • FORRESTER RESEARCH

The presentation will provide the annual update of where the DPS industry is today and address the "digital disruption" affecting its development. Mobility, enterprise social platforms, big data, and analytics continue to transform the industry as paper and traditional content becomes more balanced with new forms of rapidly growing content types. The presentation will review recent research on customer communications management, support of more complete business processes with emerging "Smart Process Apps," and how the need for Business Agility has become critical.

BREAKFAST KEYNOTE   SPONSORED BY   PDF association
WEDNESDAY MAY 14 8:00am – 9:00am

PDF ISO Standards and How They Help Create Quality Documents

CARSTEN HEIERMANN • BOARD MEMBER • PDF ASSOCIATION

PDF documents are everywhere. They are convenient and seem to work just fine. Do they? Always? See some eye opening, inconspicuously looking contrary examples. And then take a tour through PDF ISO standards like ISO 32,000, PDF/A and PDF/UA and understand what their purposes are and how they can help your organization. Learn how PDF ISO standards and the PDF Association support you to maintain a high quality level for your documents – before sharing or archiving them.

PDFA will be hosting a special "PDF Association Come-Together" dinner on Tuesday, May 13. If you are interested in attending, please contact Thomas Zellmann at thomas.zellmann@pdfa.org.

CONNECT-IT CONFERENCE OPENING DAY KEYNOTE
TUESDAY MAY 13 8:00am – 9:00am

The 6 Magic Words of a Winning Digital Experiences

GIOVANNI PIAZZA • GLOBAL HEAD, INFORMATION & KNOWLEDGE MANAGEMENT • JOHNSON & JOHNSON

This keynote address will walk the audience through the six elements that characterize a winning digital experience: Identity, Awareness, Trust, Access, Design, Value, including insights on what must happen behind the scenes to create a success story. The various elements of a best practice digital experience will be discussed and analyzed, along with the organizational processes that must be put in place and the architectural elements that must be taken into account when building a company digital presence. Digital myths will be explored and debunked, and strategies will be illustrated to achieve the highest meaningful business benefits.

OPENING DAY CONFERENCE NETWORKING RECEPTION

TUESDAY MAY 13 4:00pm – 5:00pm

Great way to cap off and unwind after a great day of learning! Located on the Regency Patio, this causal event begins right after the last session of the day. Enjoy a glass of wine and an assortment of hot and cold hors d'oeuvres. NOTE: This networking reception is exclusive to conference attendees only.

DINE & NETWORK AT THE WORLD-FAMOUS CARMINE'S RESTAURANT

TUESDAY MAY 13 6:00pm – 10:00pm

BACK BY POPULAR DEMAND! Following a great day of educational sessions, participating attendees will be shuttled to the local train station and board a train bound for Grand Central Station. From there, you'll take a short walk through Times Square and the Theatre District to the world-famous Carmine's restaurant. Carmine's serves every meal in the style of an Italian-American wedding feast, featuring extra large portions of home-style antipasto, pastas, seafood and meat entrees served on extra large platters designed for sharing. Carmine's is the perfect place to unwind and casually network with friends and colleagues over great food and wine.

NOTE: There is a separate fee to attend this event of $150. Includes transportation to and from the train station, round-trip train ticket and dinner. If you would like to attend, please check-off "Carmine's Trip" on the registration page.

OPENING NIGHT NETWORKING RECEPTION ON THE EXHIBIT FLOOR   SPONSORED BY render X

WEDNESDAY MAY 14 5:00pm – 6:30pm

Open to all, this on-floor reception lets you enjoy some great food and drink without missing the opportunity to network with our great exhibiting partners.

BITE & BIZ LUNCHEON ON THE EXHIBIT HALL FLOOR   SPONSORED BY DOCUMENT

THURSDAY MAY 15 12:00pm – 1:00pm

Don't worry about missing time away from the exhibit floor to grab lunch; we've got you covered thanks to our friends at *DOCUMENT* magazine.

re-aligned WITH TOP INDUSTRY PROFESSIONALS

Each year, we assemble a group of your peers to sit on our Conference Advisory Board and help us build a conference that is worthy of the time and money you invest. They play a huge role in identifying tactical and mission-critical content that we present and are a sounding board for new ideas we introduce.

ROGER COPE
PROGRAMS MANAGER, CUSTOMER COMMUNICATIONS - PRINT, WEB & DIGITAL CHANNELS
AMERICAN HONDA FINANCE CORPORATION

GERALD EDWARDS
DIRECTOR I/S CONTENT MANAGEMENT
EMBLEM HEALTH

MAUREEN GULICK
DIRECTOR, SERVICE
PRUDENTIAL FINANCIAL

DAN LOPEZ
EXECUTIVE DIRECTOR, PRINT PRODUCTION SERVICES
USAA

RICHARD LOSCH
PARTNER
R3D2 CONSULTING

CARMEN MAIDSTONE
COORDINATOR, RECORDS & INFORMATION MANAGEMENT
CITY OF AIRDRIE

DAVID MILLENER, AVP
CORPORATE ADMINISTRATION, ENTERPRISE DOCUMENT SOLUTIONS
MASSMUTUAL FINANCIAL GROUP

LYNNETTE SORENSEN
ASSISTANT DIRECTOR - ENTERPRISE SERVICES
STATE FARM

SHERRIE L. THURSTON
MANAGER, PRODUCT IMPLEMENTATION - DOCUMENT PUBLISHING INFRASTRUCTURE
AEGON FINANCIAL PARTNERS

VENDOR SHOWCASE SESSIONS

We are once again excited to be able to present a series of free educational sessions that will take place in our Applications Theatre. Open to everyone, the Vendor Showcase Sessions offer attendees a peak into product introductions, special industry announcements and other valuable information shared by industry leading companies.

2:45pm – 3:15pm **WEDNESDAY** MAY 14

The Changing Paradigm of Document Delivery

SPONSORED BY

PRESENTER: **DAVID DAY** • PRODUCT MARKETING MANAGER • CRAWFORD TECHNOLOGIES

Document content is evolving with the addition of transpromo and trans-relevance information, but that pales in terms of document delivery. Today's documents are migrating from monochrome to full color, and alternative delivery channels are gaining a foothold. How do you facilitate the changes required with tightening expense restraints? Join us as we show you how to jump into the evolving world of the document and why an automated output management system (e.g., workflow) is required.

3:30pm – 4:00pm **WEDNESDAY** MAY 14

Sneak Peek at Solimar Systems Latest Technology

SPONSORED BY

PRESENTER: **MARY ANN ROWAN** • CMO & VP • SOLIMAR SYSTEMS

Get a behind-the-scenes sneak peek of Solimar Systems' latest technology. Learn how their scalable and robust multi-channel delivery solutions drive operational efficiencies by enabling visibility, accessibility and mobility using a PDF-centric production platform. Discover how Solimar's command and control universal web dashboard can manage your document workflows using a real-time user interface, showing the current status of your organization's key production processes to enable informed decisions to be made at a glance.

4:15pm – 4:45pm **WEDNESDAY** MAY 14

GMC Software: The Legacy of Innovation Continues

SPONSORED BY

PRESENTER: **SCOTT DRAEGER** • CUSTOMER COMMUNICATION STRATEGIST • GMC SOFTWARE

GMC Software Technology delivers the most effective solutions on the market today in the field of Customer Communications Management (CCM). With unrivalled experience in the industry, GMC has consistently demonstrated the ability to help businesses increase customer engagement across all touch points, which has earned us an outstanding reputation during 20 years of successful customer communication implementations. Come see why analysts describe GMC with words like "leader," "disruptor" and "innovator." This session will show you award-winning technologies that provide businesses of all sizes with customer-facing and business user applications and a rapid return on investment.

5:00pm – 5:30pm **WEDNESDAY** MAY 14

Oracle in the Cloud: An Overview of the Different Cloud Models & Practical Considerations for CCM in the Cloud

SPONSORED BY

PRESENTER: **DAVID EWELL** • DIRECTOR, SALES CONSULTING • ORACLE

Cloud computing makes it possible to reduce the amount of resources spent on maintaining current systems and can actually help transform your business. During the session, we will discuss CCM applications in the cloud and some of the challenges and practical considerations around security, version control, multiple environment and design versus production across the various cloud models.

11:30am – 12:00pm **THURSDAY** MAY 15

Doxee Introduces Cloud-ready Customer Communication Application for Banking & Finance

SPONSORED BY

PRESENTER: **KASHIF MAHBUB** • VICE PRESIDENT MARKETING & SALES • DOXEE

Employing its Cloud-based, SaaS-ready Customer Communication Management (CCM) platform, Doxee will present specialized applications for Banking and Financial sectors. These applications are geared for the business user with highly intuitive and simplified user experience, and they bridge the gap between the needs of multichannel marketing campaign management and technical requirements of high-volume print and digital output production. Doxee Cloud CCM applications also come ready for integration with marketing automation and CRM systems to improve customer engagement.

ANALYST Day

An unprecedented stage for innovative thinkers, modern visionaries and cutting-edge strategists, with the leading analysts from the top research companies in the Document Management Market.

ANALYST DAY	THURSDAY **MAY 15**
AD100: Now's the Time to Embrace Cloud Collaboration Technology — PRESENTED BY TJ KEITT • SENIOR ANALYST • FORRESTER RESEARCH	
AD200: Can CCM Evolve in a World of Big Data, Social, Mobile & Cloud? — PRESENTED BY PETE BASILIERE • RESEARCH VP • GARTNER	
AD300: Low Visibility, Big Impact: What Document & Information Management Can Do for Your Organization — PRESENTED BY RON GLAZ • PROGRAM DIRECTOR • IDC	
AD400: ROUNDTABLE: Access an Analyst Speed Round	

Times (left column): 8:00 – 8:50am / 9:00 – 9:50am / 10:00 – 10:50am / 1:15 – 2:30pm

8:00am – 8:50am **THURSDAY** MAY 15 – **ANALYST DAY**

Now's the Time to Embrace Cloud Collaboration Technology

PRESENTED BY: **TJ KEITT** • SENIOR ANALYST • FORRESTER RESEARCH

Box, Google Apps and Microsoft Office 365 are a few examples of cloud technologies that have piqued the curiosity of enterprise technology decision makers. But the question still remains: Are these tools ready for the enterprise market? The answer is an emphatic yes. In this session, we will explore: • The inherent benefits of cloud collaboration tools • How organizations are evaluating and using them • How Forrester expects them to evolve over time

9:00am – 9:50am **THURSDAY** MAY 15

Can CCM Evolve in a World of Big Data, Social, Mobile and Cloud?

PRESENTED BY: **PETE BASILIERE** • RESEARCH VICE PRESIDENT • GARTNER

Customer communication management (CCM) software came to the market two decades ago. CCM software providers offered a platform to replace custom applications, minimize programming, improve stability and increase performance. CCM software tools have always facilitated print output. In the beginning, that was pretty much all that you were doing. But the providers added the ability to publish to digital media as your needs changed over time. Today, your customers demand dynamic, context-enriched communications on their terms. Learn whether the CCM software tools have evolved to help you publish today's multimedia communications and if on-premise or cloud-hosted tools are appropriate for you.

10:00am – 10:50am **THURSDAY** MAY 15

Low Visibility, Big Impact: What Document and Information Management Can Do for Your Organization

PRESENTED BY: **RON GLAZ** • PROGRAM DIRECTOR • IDC

Organizations are increasing cost savings, enhancing productivity, driving innovation and even gaining competitive advantage by streamlining and optimizing print and document infrastructure and by streamlining document-intensive business process workflows. This session will look at how cloud-based applications, mobile devices, the increasing socialization of business applications and other forces are creating both opportunities and pain points related to document and content management. We will consider content life cycle; content security; finding, sharing and managing information; as well as some specific document-intensive business process workflows.

1:15pm – 2:30am **THURSDAY** MAY 15

ROUNDTABLE: Access an Analyst Speed Round

PANELISTS: **TJ KEITT** • FORRESTER RESEARCH • **PETE BASILIERE** • GARTNER • **RON GLAZ** • IDC

Each analyst will hold court in a separate meeting room, allowing a small group of attendees to interact directly with one of the Big Three. Every 20 minutes, attendees will rotate to another analyst's room. It's the perfect setting to ask questions directly related to your specific situation.

DOCUMENT Strategy Forum Conference

NOTE: Registration includes conference crossover privileges to Connect-IT and BFMA Annual Conferences

RE-INVENT: DOCUMENT STRATEGY (D)
How to turn old-school document strategies into customer-centric communications. Learn how to redesign long-term strategies from top to bottom: guidelines, technology and measurements.

RE-ALIGN: PROCESS AUTOMATION & MISSION-CRITICAL GOALS (P)
How to achieve efficiencies without losing your way. Learn how to balance business demand, IT integration and the mission-critical goal.

RE-IMAGINE: MULTI-CHANNEL COMMUNICATION (M)
How to engage customers with your company as a whole, not as separate channels. Learn how to build a seamless experience across ALL channels, touchpoints and applications.

	RE-INVENT DOCUMENT STRATEGY	RE-ALIGN PROCESS AUTOMATION	RE-IMAGINE MULTI-CHANNEL COMMUNICATION
	TUESDAY **MAY 13**	TUESDAY **MAY 13**	TUESDAY **MAY 13**
10:00 – 10:50am	**DPM101** **MEGA SESSION:** Opening Panel & Networking		
11:00 – 11:50am	**D102** **POWER SESSION:** Building a Communications Strategy for a Seamless Customer Experience: How to Connect the Dots – Part 1	**P202** **POWER SESSION:** Building Your Converging Content Future Today: The Matrix of Processes, Technologies and Your Data Assets – Part 1	**M302** **POWER SESSION:** What Does Your Cloud Look Like: An A to Z Guide for Enterprise Infrastructure – Part 1
12:00 – 12:50pm	**D103** **POWER SESSION:** Building a Communications Strategy for a Seamless Customer Experience: How to Connect the Dots – Part 2	**P203** **POWER SESSION:** Building Your Converging Content Future Today: The Matrix of Processes, Technologies and Your Data Assets – Part 2	**M303** **POWER SESSION:** What Does Your Cloud Look Like: An A to Z Guide for Enterprise Infrastructure – Part 2
2:00 – 2:50pm	**D104** **POWER SESSION:** Understanding the Customer Experience: Measuring the Effects of Your Document Improvements – Part 1	**P204** **POWER SESSION:** Taking Automation a Step Further: Process Innovation & Advanced Paperless Technology – Part 1	**M304** **POWER SESSION:** The Next Chapter: Creating a Seamless Multi-Channel Communications Approach that Really Works – Part 1
3:00 – 3:50pm	**D105** **POWER SESSION:** Understanding the Customer Experience: Measuring the Effects of Your Document Improvements – Part 2	**P205** **POWER SESSION:** Taking Automation a Step Further: Process Innovation & Advanced Paperless Technology – Part 2	**M305** **POWER SESSION:** The Next Chapter: Creating a Seamless Multi-Channel Communications Approach that Really Works – Part 2
	WEDNESDAY **MAY 14**	WEDNESDAY **MAY 14**	WEDNESDAY **MAY 14**
9:00 – 9:50am	**D106** **CASE STUDY:** How TIAA-CREF Made the Case for Investment in their Customer Communications Infrastructure	**P206** **CASE STUDY:** The Making of Cigna's Center of Excellence: Putting People, Process and Platforms First	**M306** To be announced
10:00 – 10:50am	**D107** **CASE STUDY:** Is Less Worth More? What Merrill Lynch Learned by Simplifying and Streamlining Its Communication Systems, Content and Documents	**P207** **CASE STUDY:** How RR Donnelley's Transactional Print Centers Quantified Standardization & Automation Value from PDF-Based Production Workflows	**M307** Upgrading Your Communications: Moving from Projects to a Portfolio
11:00 – 11:50am	**D108** "It's Complicated:" The Relationship Status You Don't Want with Your Customers	**P208** **CASE STUDY:** How a P&C Insurance Company Redesigned and Streamlined Their Customer Communications	**M308** **CASE STUDY:** Where We Were, Where We Are, Where We're Going: Transforming GENEX's Medical Claim Processing Operations Using Omni-Channel Document Processing
12:00 – 12:50pm	**DPM109** **MEGA SESSION: Closing End-User Panel**		

10:00am – 10:50am **TUESDAY** MAY 13

MEGA SESSION: Build Your Case: The Team Race

Our Conference begins with a bang! Bring your best creative ideas and your competitive spirit to this interactive Mega Session. To kick things into high gear right off the bat, attendees will be presented with a business problem and then broken down into small teams according to industry. Each team will have 20 minutes to solve the presented problem and then present their solution to our panel of judges. Our panel will select the best solution, and the winning team will each win a $50 Hyatt Gift Card for use during their stay.

11:00am – 11:50am **TUESDAY** MAY 13

POWER SESSION: Building a Communications Strategy for a Seamless Customer Experience: How to Connect the Dots – Part I

PRESENTER: **STEPHANIE PIERUCCINI** • INFOTRENDS

You are juggling the challenges of communicating with customers through more channels, ensuring a seamless customer experience and developing deeper customer insights with limited resources. So, how do you make sure you don't drop the ball? This power session will review how the changing customer communications landscape will test your traditional processes, examine how you can address the challenges when developing a contemporary communications strategy and highlight what to look for when selecting the right technology to address these needs.

POWER SESSION: Building Your Converging Content Future Today: The Matrix of Processes, Technologies and Your Data Assets – Part I

PRESENTER: **STEVEN SCHNOLL** • SCHNOLL MEDIA CONSULTING

Your company is demanding fresh content all the time. To achieve success, it's about the right message, to the right person, at the right time with the right medium. This begins with collecting good data, but how to effectively leverage that data often creates some internal controversy. This interactive Power Session will delve into how the convergence of commerce between traditional delivery and online is forcing content to be relevant but platform agnostic, how you can leverage traditional forms of print with some new twists and how to demystify the "The Four Rights" of content delivery.

POWER SESSION: What Does Your Cloud Look Like: An A to Z Guide for Enterprise Infrastructure – Part I

PRESENTER: **JIM MINIHAN** • IMERGE CONSULTING

Cloud computing comes in as many shapes as the puffy pillows in the sky. So, how do you know which one is right for you, your company and your services? This Power Session will examine the variants in the market today and those to come. From complete infrastructures to narrowly defined service components, like Identity as a Service, each comes with its own issues, challenges and benefits. This in-depth discussion offers you the right questions to ask and the requirements you should consider.

DEDICATED, NON-COMPETE EXHIBIT HOURS	WEDNESDAY MAY 14	THURSDAY MAY 15	WIN up to **$4,000!**
	2:30pm – 6:30pm	11:00am – 1:00pm	Wednesday, May 14 & Thursday, May 15
	Opening Night Reception 5:00pm – 6:30pm	**Exhibit Floor Lunch** 12:00pm – 1:00pm	**All registered attendees are eligible to win!**

12:00pm – 12:50pm **TUESDAY** MAY 13

POWER SESSION: Building a Communications Strategy for a Seamless Customer Experience: How to Connect the Dots – Part 2

PRESENTER: **STEPHANIE PIERUCCINI** • INFOTRENDS

Our Power Session continues with Ms. Pieruccini leading an intensive discussion on how the changing customer communications landscape will test your traditional processes, how you can address the challenges when developing a contemporary communications strategy and what to look for when selecting the right technology to address these needs.

POWER SESSION: Building Your Converging Content Future Today: The Matrix of Processes, Technologies and Your Data Assets – Part 2

PRESENTER: **STEVEN SCHNOLL** • SCHNOLL MEDIA CONSULTING

Our Power Session continues with Mr. Schnoll's talk on how you can leverage your data with a unique convergence of your hardware and software assets. This roundtable discussion covers smart cross-channel technology vehicles that successfully link content convergence with personality, details analytic tools that measure whether you moved the needle and outlines the fundamentals of building a cohesive, new information-age content plan.

POWER SESSION: What Does Your Cloud Look Like: An A to Z Guide for Enterprise Infrastructure – Part 2

PRESENTER: **JIM MINIHAN** • IMERGE CONSULTING

Our Power Session continues with its step-by-step evaluation of cloud computing choices available to you today. Mr. Minihan will also look at the legal issues of data ownership and what attributes your contract with a service provider should address, along with the security challenges that exist for your company. You will walk away with a clear idea of when a cloud computing technology makes sense for your organization.

2:00pm – 2:50pm **TUESDAY** MAY 13

POWER SESSION: Understanding the Customer Experience: Measuring the Effects of Your Document Improvements – Part I

PRESENTER: **SCOTT WATKINSON** • THE BETTER DOCUMENTS COMPANY

How do your customers feel about doing business with you? If you don't know, you should. But, more importantly, how do you measure which strategies are working and which have missed the mark? This Power Session takes you a step beyond your strategy and will push you to understand the types of customer behavior you can influence through your documents, align your document strategy with your overall business strategy and objectives and create documents that drive the customer behavior you're looking for.

POWER SESSION: Taking Automation a Step Further: Process Innovation & Advanced Paperless Technology – Part I

PRESENTER: **GEORGE DUNN** • CRE8 INDEPENDENT CONSULTANTS

How can you take your current automation strategies to the next level? What happens when you combine process innovation and paperless technology? Projects become funded, are successfully implemented and show measurable gains. This Power Session shows you how to harness the best process improvement tools, from LEAN, Six Sigma, total quality management and re-engineering, to identify the what, where, when and how of successful planning for process gains and technology.

2:00pm – 2:50pm **TUESDAY** MAY 13

POWER SESSION: The Next Chapter: Creating a Seamless
Multi-Channel Communications Approach that Really Works – Part I

PRESENTER: **TOM ROBERTS** • DOCULABS, INC

Are you giving your customers the right opportunities to communicate with you? Are you oversaturating them with marketing, billing and service communications? Or are they feeling completely ignored and undervalued? The percentage of your customers owning multiple devices is driving a change in the way you need to communicate with your customers. So what are you going to do about it? This Power Session will help you define a framework for a seamless communications approach.

3:00pm – 3:50pm **TUESDAY** MAY 13

POWER SESSION: Understanding the Customer Experience:
Measuring the Effects of Your Document Improvements – Part 2

PRESENTER: **SCOTT WATKINSON** • THE BETTER DOCUMENTS COMPANY

Our interactive and thought-provoking Power Session continues as Mr. Watkinson shares new perspectives on how to track your success, how to choose the right metrics, how to set a baseline and how to measure improvement. Those attending this session will leave with practical tools and information on measuring customer experience—not only as it relates to their documents, but to their organizations as a whole.

POWER SESSION: Taking Automation a Step Further:
Process Innovation & Advanced Paperless Technology – Part 2

PRESENTER: **GEORGE DUNN** • CRE8 INDEPENDENT CONSULTANTS

Our Power Session continues with an in-depth breakdown of process automation as Mr. Dunn shares how to scope, approach and conduct process improvement; how to properly conduct an application design; document return on investment; and how to oversee implementation. Warning: This session could make you highly successful in your job.

POWER SESSION: The Next Chapter: Creating a Seamless
Multi-Channel Communications Approach that Really Works – Part 2

PRESENTER: **TOM ROBERTS** • DOCULABS, INC

According to Forrester, only 17% of online consumers in the US and the UK found it easy to switch between different channels for either action or information. Our Power Session continues to look at how you can create channels that provide unified engagement across all your touchpoints. Mr. Roberts shares how to finally implement a 360 profile of your customer, break down your information silos and build a seamless communications approach.

9:00am – 9:50am **WEDNESDAY** MAY 14

CASE STUDY: How TIAA-CREF Made the Case for Investment
in their Customer Communications Infrastructuree

PRESENTER: **ELLEN PEDERSEN** • TIAA-CREF

Please visit DOCUMENTstrategyForum.com for session details.

9:00am – 9:50am **WEDNESDAY** MAY 14

CASE STUDY: The Making of Cigna's Center of Excellence: Putting People, Process and Platforms First

PRESENTER: **RON GOGLIA** • CIGNA CORPORATION

Cigna's dedicated Center of Excellence (COE) is based on the 3 Ps: people, process and platforms. Assistant Vice President Ron Goglia outlines the process that Cigna Corporation embarked upon for its award-winning Cigna Output Distribution Services capability. Learn how their COE supports hundreds of communications applications, gives its business users unparalleled access to control and manage their own content, scales on-demand to meet business units' needs and drives double-digit ROI.

M306: CASE STUDY: TBA

PRESENTER TBA

10:00am – 10:50am **WEDNESDAY** MAY 14

CASE STUDY: Is Less Worth More? What Merrill Lynch Learned by Simplifying and Streamlining Its Communication Systems, Content and Documents

PRESENTERS: **CHARLENE HAYKEL** • THE HAYKEL GROUP & **ROBERT FRUMP** • MORGAN STANLEY

This seminal project for Merrill Lynch, now a division of Bank of America, follows how one of the world's premier providers of wealth management, securities trading and sales reduced its content, simplified its processes, improved communications and cuts costs.

CASE STUDY: How RR Donnelley's Transactional Print Centers Have Achieved Standardization & Automation Value from PDF-Based Production Workflows

PRESENTERS: **MARK MCCALL** • RR DONNELLEY & INTRODUCED BY **MARY ANN ROWAN** • SOLIMAR SYSTEMS

R.R. Donnelley (RRD), a global provider of integrated communications, will share how they transformed costly manual operations within transactional print centers into streamlined efficient production operations. Discover how RRD drove standardization and automation by implementing production PDF workflow solutions that significantly reduced costs. Learn why workflow process and data standardization are important, how to best leverage software automation and why PDF-based production workflows are now considered the gold standard.

Upgrading Your Communications: Moving from Projects to a Portfolio

PRESENTER: **SCOTT DRAEGER** • GMC SOFTWARE TECHNOLOGY

What you communicate to your customers, when you communicate it, why you communicate it and, most recently, where you communicate it represents some of the most valuable intellectual property within your business. This session will help you turn disconnected communication projects into a cohesive portfolio. Attendees will leave with insights and strategies they can immediately use to inventory current communications, map ownership of projects, identify areas to improve, deliver some quick wins, create a strategy and manage your communications as a cohesive strategy that spans departments, destroys silos and boosts critical KPIs.

11:00am – 11:50am **WEDNESDAY** MAY 14

"It's Complicated:" The Relationship Status You Don't Want with Your Customers

PRESENTER: **AVI GREENFIELD** • HEWLETT PACKARD

Do you understand and respect how your customers want to receive communications? It is critical for you to find a balance between privacy and value. This session shows you how to use technology to foster better customer engagement and deliver a significantly better overall experience. Mr. Greenfield will share best practices for capturing and updating customer preferences and behaviors, how to make sense of and actively track marketing opt-in/opt-out lists and preferences for e-delivery of statements, as well as other transactional communications at a granular level.

CASE STUDY: How a P&C Insurance Company Redesigned and Streamlined Their Customer Communications

PRESENTER: **LAURIEANN MILLER** • THE CO-OPERATORS

The Co-operators Group, a leading Canadian multi-product insurance and financial services organization, shares their story on how they improved the design, efficiency and productivity in their customer communications by adopting a buy vs. build approach. This exciting case study details how The Co-operators developed their document center of excellence; standardized how client documents are created, maintained and delivered; and how they empowered business users to develop and control content, letting them quickly change documents directly.

CASE STUDY: Where We Were, Where We Are, Where We're Going: Transforming GENEX's Medical Claim Processing Operations Using Omni-Channel Document Processing

PRESENTERS: **KEITH SIEGFRIED** • GENEX SERVICES, INC & INTRODUCED BY **WARREN LEDERER** • EDM AMERICAS

Keith Siegfried of GENEX Services, Inc., a workers' compensation & disability management solutions company, shares how GENEX uses omni-channel document processing to achieve powerful efficiencies in medical claims processing. Learn how they transformed to a paperless environment, streamlined data intake and automated workflow processes, providing a uniform, superior customer experience.

12:00pm – 12:50pm **WEDNESDAY** MAY 14

MEGA SESSION: Tweet a Minute: End-User Q&A Panel

To cap off our regular Conference Program, we're bringing everyone together for the ultimate, quick-fire Q&A with your peers. That's right: All conference attendees will have a chance to ask our end-user panel all the questions they want. Submit your questions now, at the event, even during the panel by tweeting us @DOCStratForum, posting on our Facebook page or visiting the DOCUMENT Strategy Forum LinkedIn page or Connect-IT Conference page. The quicker the better, so our panelists will only have 1 minute to answer each question. Join us for this lively discussion!

| **DEDICATED, NON-COMPETE EXHIBIT HOURS** | **WEDNESDAY MAY 14** 2:30pm – 6:30pm | **THURSDAY MAY 15** 11:00am – 1:00pm | **WIN** up to **$4,000!** Wednesday, May 14 & Thursday, May 15 |
| | **Opening Night Reception** 5:00pm – 6:30pm | **Exhibit Floor Lunch** 12:00pm – 1:00pm | **All registered attendees are eligible to win!** |

Connect-IT Conference

NOTE: Registration includes conference crossover privileges to DOCUMENT Strategy Forum and BFMA Annual Conference.

TRANSFORM: DIGITAL PROCESSES & THE CUSTOMER JOURNEY (T)

PRODUCED BY **EARLEY & ASSOCIATES**

Create the right digital presence for your company. Learn how to choreograph content, documents and data to come together at the right moment in time for a smooth, seamless experience. This track will focus on the four must-have aspects of the customer journey for any business: digital transformation and organizational processes; customer analytics, customer metrics and the quality of the customer experience; customer provisioning, self-service and self-help; and developing a cross-channel and multi-channel strategy.

EXECUTE: ORGANIZATIONAL CHANGE & INFORMATION MANAGEMENT (E)

PRODUCED BY **DOCULABS**

Connect the value of your enterprise assets to how you use them. Learn how putting an effective information management program in place is critical to not only getting the most out of your technology investments but to achieving tangible, meaningful business benefits. This track will focus on five areas key to building a successful information management program: program design and development; information life cycle governance; getting results from strategy; delivering business value; and building the business case.

	TRANSFORM: DIGITAL PROCESSES & THE CUSTOMER JOURNEY	EXECUTE: ORGANIZATIONAL CHANGE & INFORMATION MANAGEMENT
	TUESDAY MAY 13	**TUESDAY MAY 13**
10:00 – 10:50am	**TE401 KEYNOTE** - The 6 Magic Words of a Winning Digital Experience - **GIOVANNI PIAZZA** • GLOBAL HEAD, INFORMATION & KNOWLEDGE MANAGEMENT • **JOHNSON & JOHNSON**	
11:00 – 11:50am	**T402 CASE STUDY:** Customer Analytics & Reducing Attrition: How Customer Behaviors Can Predict Outcomes **ALLEN THOMPSON** • BANK OF AMERICA	**E502 PEER PANEL:** Making Bricks without Straw: Building an Effective Information Management Program without Technology PANELISTS: **BRAD FELSKE** • OWENS ILLINOIS, **STAN ABSHER** • BLUECROSS BLUESHIELD OF NC & **JOE SHEPLEY** • DOCULABS
12:00 – 12:50pm	**T403** Reinventing the Intersection of Marketing & IT: What C-Suite Executives Need to Know **SCOTT BRINKER** • ION INTERACTIVE	**E503** Compliance Pays: The Economics of a Successful ILG Program PANELISTS: **TOM SEVERN** • STATE STREET, **LAURENCE HART**, • ALFRESCO
2:00 – 2:50pm	**T404 PEER PANEL:** Information Management and Digital Transformation: Changing Tools, Changing Cultures PANELISTS: **TROY JOSLIN** • AARP, **DALE HITE** • NATIONAL GOVERNMENT SERVICES & **GREGORY S. NEMETH** • ERNST & YOUNG LLP	**E504 PEER PANEL:** A Means to an End: Getting Real Business Value from Enterprise Content Management PANELISTS: **JACKSON CHIN** • WELLS FARGO **DAVE HANNA** • OPPENHEIMERFUNDS
3:00 – 3:50pm	**T405 CASE STUDY:** Request to Resolution: How the Enterprise Needs to Mobilize for End-to-End Processes **SUZANNE CASON** • PHILIPS HEALTHCARE	**E505 PEER PANEL:** High-Hanging Fruit: Building a Successful Business Case for What Comes after the Easy Stuff PANELISTS: **JENNIFER FRENCH** • RBC **ANKUR LAROIA** • OPENTEXT
	WEDNESDAY MAY 14	**WEDNESDAY MAY 14**
9:00 – 9:50am	**T406/E506 MEGA SESSION - CASE STUDY:** Search and Information Access to Support Call Centers: Lessons Learned (Hint: It's Not About the Technology...) **TOM GILMARTIN** • VANGUARD	
10:00 – 10:50am	**T407** Measuring Information Engagement: The Key to Program Support and Resourcing **PAUL WLODARCZYK** • EARLEY & ASSOCIATES	**E507 PEER PANEL:** From Managing Records to Governing Information: The New Face of Information Compliance PANELISTS: **CHERYL GRAY** • TIAA-CREF, **JAMES WATSON** • DOCULABS, **GENIFER GRAFF** • IBM
11:00 – 11:50am	**T408** Information Strategy and Digital Transformation **JEFF CARR** • EARLEY & ASSOCIATES	**E508 CASE STUDY:** From the Ground Up: How to Take Your ILG Program from 0 to 60 **DAVID SMYTHE** • CREDIT SUISSE
12:00 – 12:50pm	**T409/E509 MEGA SESSION: Tweet a Minute: End-User Q&A Panel**	

10:00am – 10:50am **TUESDAY** MAY 13

KEYNOTE: The 6 Magic Words of a Winning Digital Experience

PRESENTED BY: **GIOVANNI PIAZZA** • GLOBAL HEAD, INFORMATION & KNOWLEDGE MANAGEMENT • JOHNSON & JOHNSON

This keynote address will walk the audience through the six elements that characterize a winning digital experience: Identity, Awareness, Trust, Access, Design, Value, including insights on what must happen behind the scenes to create a success story. The various elements of a best practice digital experience will be discussed and analyzed, along with the organizational processes that must be put in place and the architectural elements that must be taken into account when building a company digital presence. Digital myths will be explored and debunked, and strategies will be illustrated to achieve the highest meaningful business benefits.

- **Identity:** More than branding
- **Awareness:** Content is king
- **Trust:** Removing organizational barriers
- **Access:** User experience above everything else
- **Design:** More than a pretty face
- **Value:** How value is more than dollars

11:00am – 11:50am **TUESDAY** MAY 13

CASE STUDY: Customer Analytics & Reducing Attrition: How Customer Behaviors Can Predict Outcomes

PRESENTED BY: **ALLEN THOMPSON** • BANK OF AMERICA

Customers don't simply leave banking relationships with no warning. Changing a banking relationship is not trivial, especially with online bill payment and automated fund transfers. Certain behaviors and activities can be identified that will lead customers to leave the bank. By identifying these patterns and providing a clear plan for intervention, attrition can be reduced by reaching out to customers who are about to move on. Mr. Thompson will discuss a successful program at Bank of America that predicted defections and reduced attrition with specific remediation activities.

PEER PANEL: Making Bricks without Straw: Building an Effective Information Management Program without Technology

PANELISTS: **BRAD FELSKE** • OWENS ILLINOIS • **STAN ABSHER** • BLUECROSS BLUESHIELD OF NC • **JOE SHEPLEY** • DOCULABS

Technology is a critical part of a successful information management program, but what happens when you don't get the funding for technology? In this session, learn how you can move your information management program forward and achieve results—even without technology in place.

12:00pm – 12:50pm **TUESDAY** MAY 13

Reinventing the Intersection of Marketing & IT: What C-Suite Executives Need to Know

PRESENTED BY **SCOTT BRINKER** • ION INTERACTIVE

Marketing is being reinvented as a technology-powered discipline. From new, brand-defining customer experiences to more efficient marketing operations, software is changing what's possible. It's also changing the relationship between marketing and IT, which needs to be deeper and more collaborative than ever. We will examine the evolving marketing technology landscape that both CIOs and CMOs need to understand; discuss a framework for establishing a coherent marketing technology strategy and roadmap; and explore patterns of collaboration between marketing and IT, such as cross-functional hybrid roles ("marketing technologists") and cross-departmental agile management.

Compliance Pays: The Economics of a Successful ILG Program

PANELISTS: **TOM SERVEN** • STATE STREET • **LAURENCE HART** • ALFRESCO

Even though compliance is a must-do at organizations, securing the funding needed can be difficult without a strong business case. In this session, learn how you can get beyond "thou shalt" approaches to compliance and articulate its true business value.

2:00pm – 2:50pm **TUESDAY** MAY 13

PEER PANEL: Information Management and Digital Transformation: Changing Tools, Changing Culture

PANELISTS: **TROY JOSLIN** • AARP • **DALE HITE** • NATIONAL GOVERNMENT SERVICES • **GREGORY S. NEMETH** • ERNST & YOUNG LLP

You can upgrade technology, but unfortunately, you can't upgrade your users. Actually, today's users are savvier and have higher expectations due to the sophistication of consumer technology applications. Digital transformation efforts need to tap into trends around consumerization of IT and stay ahead of the "shadow IT organization" that is the bane of the CIO. In this session, our panel will discuss how the IT organization needs to adapt to a shifting landscape of tools, delivery mechanisms and user expectations while optimizing the digital experience across the proliferation of channels, touch points and devices.

PEER PANEL: A Means to an End: Getting Real Business Value from Enterprise Content Management

PANELISTS: **JACKSON CHIN** • WELLS FARGO • **DAVE HANNA** • OPPENHEIMERFUNDS

Doing enterprise content management (ECM) properly requires a tremendous effort—so much so, that it's easy to forget that it's not an end in itself: It must contribute to larger organizational goals. In this session, learn how to stop doing ECM for ECM's sake and, instead, drive tangible business results.

3:00pm – 3:50pm **TUESDAY** MAY 13

CASE STUDY: Request to Resolution: How the Enterprise Needs to Mobilize for End-to-End Processes

PRESENTED BY: **SUZANNE CASON** • PHILIPS HEALTHCARE

It's all about the customer, right? But what if your view of what the customer needs depends on where you're sitting? Having grown both organically and through acquisitions, Philips Healthcare was challenged with making sure that service technical information was consistently accessible and available to service engineers, even as business models and customer expectations change. Join us in a practical discussion of how one company drove alignment among multiple business units, applying best practices in knowledge and technology along the way.

High-Hanging Fruit: Building a Successful Business Case for What Comes after the Easy Stuff

PANELISTS: **JENNIFER FRENCH** • RBC • **ANKUR LAROIA** • OPENTEXT

For most organizations, starting out on the path to better information management, there are many "low-hanging fruit" opportunities to address, but what happens once they're done? In this session, learn how to deliver business value that goes beyond the quick wins and build a business case to support it.

9:00am – 9:50am **WEDNESDAY** MAY 14

MEGA SESSION – CASE STUDY: Search & Information Access to Support Call Centers: Lessons Learned (Hint: It's Not About the Technology...)

PRESENTED BY: **TOM GILMARTIN** • VANGUARD

How quickly do your call center representatives (CSRs) get to the right answer to assist customers in doing business with your organization? Be part of the discussion in this session where we will explore how Vanguard has built out a collaborative workplace that leverages social technologies and concepts (SharePoint, Communities of Practice, etc.) to provide access to the data required to support their call centers. Our solutions not only involve introducing new technology to our crew but managing the change behavior required for effective crew adoption of our solution.

10:00am – 10:50am **WEDNESDAY** MAY 14

Measuring Information Engagement:
The Key to Program Support and Resourcing

PRESENTED BY: **PAUL WLODARCZYK** • EARLEY & ASSOCIATES

Unlike customer-facing content publishers, groups that publish to internal audiences typically measure outcomes in "content manufacturing" terms: quality, cost and delivery. But do the internal customers who rely on our content actually use it and benefit from it? Does our content impact revenue, growth, share? Do we measure their customer experience? All too often, we can't say. How do we connect the dots between enterprise publishing, knowledge worker performance and business outcomes? We'll share approaches for measuring information engagement to drive the content development agenda, including review of a search-based application utilized by Allstate agents.

PEER PANEL: From Managing Records to Governing Information:
The New Face of Information Compliance

PANELISTS: **CHERYL GRAY** • TIAA-CREF • **JAMES WATSON** • DOCULABS • **GENIFER GRAFF** • IBM

The hottest trend in records management is the shift from managing corporate records to governing business information. In this session, learn what the differences between records management and information life cycle governance are, as well as what's driving this evolution.

11:00am – 11:50am **WEDNESDAY** MAY 14

Information Strategy and Digital Transformation

PRESENTED BY: **JEFF CARR** • EARLEY & ASSOCIATES

Enterprises need to get their houses in order to support digital transformation initiatives. From data analytics, to content processes, search to e-commerce, knowledge management to collaboration, enterprises deal with dozens of tools and applications that need to share and exchange data and content and get the correct information properly contextualized. In many cases, this is put onto the shoulders of the IT organization, but business has a significant role in these processes. Learn how this role is becoming more critical to success in many areas across the customer experience continuum.

11:00am – 11:50am **WEDNESDAY** MAY 14

CASE STUDY: From the Ground Up: How to Take Your
ILG Program from 0 to 60

PRESENTED BY: **DAVID SMYTHE** • CREDIT SUISSE

Everyone knows that information life cycle governance (ILG) is important, but many organizations fail to manage their information properly simply because developing a successful ILG program is so daunting. In this session, learn how to tackle ILG program design and development one step at a time for success.

12:00pm – 12:50pm **WEDNESDAY** MAY 14

MEGA SESSION :Tweet a Minute: End-User Q&A Panel

To cap off our regular Conference Program, we're bringing everyone together for the ultimate, quick-fire Q&A with your peers. That's right: All conference attendees will have a chance to ask our end user panel all the questions they want. Submit your questions now, at the event, even during the panel by tweeting us @DOCStratForum, posting on our Facebook page or visiting the DOCUMENT Strategy Forum LinkedIn page or Connect-IT Conference page. The quicker the better, so our panelists will only have 1 minute to answer each question. Join us for this lively discussion!

BFMA Annual Conference

NOTE: Registration includes conference crossover privileges to DOCUMENT Strategy Forum and Connect-IT Conference.

FORMS MANAGEMENT (F) Forms management principles involve work skills consisting of cost benefit analysis, consultation, project management, and environmental and safety awareness. Forms administration involve version control, identification systems, filing systems, software distribution, warehousing, standards, tracking, operating procedures, obsolescence, forms libraries, business continuity, procurement and inventory management.

DATA COLLECTION / WORKFLOW (W) Process and workflow consists of assessment of objectives and project scope, fact finding, data organization, data collection, analysis, solution development, recommendations, implementation and follow-up and evaluation.

TECHNOLOGY / MOBILE SOLUTIONS (M) Technology principles include electronic technologies involving digital demand imaging, recognition systems, post processing, data merge printing and production principles. This also includes systems architecture involving hardware, operating system, networks, communication systems and applications software. Mobile technology and solutions include store, access, create, allow to modify, organize or otherwise manipulate data in various forms from a location without being required to be tethered to any particular location.

|	FORMS MANAGEMENT	DATA COLLECTION / WORKFLOW	TECHNOLOGY / MOBILE SOLUTIONS
	TUESDAY MAY 13	**TUESDAY MAY 13**	**TUESDAY MAY 13**
10:00 – 10:50am	**F501** Best Practices in Forms Management	**W601** Developing Forms Using SharePoint and InfoPath	**S701** Self-Service Applications to Address Business Processes and Problems
11:00 – 11:50am	**F502** Conducting an Organization-Wide Forms Review	**W602** Using SharePoint Designer to Develop Workflows	**S702** To be announced
12:00 – 12:50pm	**F503** FATCA Entity Classification: Developing a Guideline for the Canadian Insurance Industry	**W603** Holistic Customer Communications; Eliminating Silos of Technology to Achieve Excellence in Customer Communications	**S703** To be announced
2:00 – 2:50pm	**F504** Translating the Document Vision into Reality	**W604** eForms and Business Process Management on Mobile Platforms	**S704** **Product Session:** OBRIEN Collaboration & Customer Engagement through Dynamic Forms Management
3:00 – 3:50pm	**F505** Using Social Media for Professional Development	**W605** Forget Scanning, Faxing, and Data Entry—Use a Digital Pen	**S705** **Product Session:** Versivo
	WEDNESDAY MAY 14	**WEDNESDAY MAY 14**	**WEDNESDAY MAY 14**
9:00 – 9:50am	**F506** **Product Session:** Cerenade Enterprise Forms Management	**W606** Information Management	**S706** To be announced
10:00 – 10:50am	**F507** **Product Session:** Essociates	**W607** Mobile Forms vs. Mobile Apps	**S707** Developing HTML forms with Adobe Designer
11:00 – 11:50am	**F508** Educating Your Staff and Clients in Forms Management – Part 1	**W608** How to Collect PDF Forms with Digital Signatures from iPads into Popular Databases	**S708** **Product Session:** Efficient Technologies
12:00 – 12:50pm	**F509** Educating Your Staff and Clients in Forms Management – Part 2	**W609** Information Management Case Study: Replacing Management Systems	**S709** Customer Communications Management
	THURSDAY MAY 15	**THURSDAY MAY 15**	**THURSDAY MAY 15**
8:00 – 8:50am	**F510** The Forms Eco System	**W610** Using ALFRED: A Forms Management Database	**S7110** e-Signatures for Forms
9:00 – 9:50am	**F511** Repeat Session: Conducting an Organization-Wide Forms Review	**W611** Making Your Forms Work Smarter	**S711** Mobile Workflow Just Got Easier: The Power of Voice for eForms
10:00 – 10:50am	**F512** **Closing Keynote Session:** Breaking Good: Forms as Your Company's Gateway Drug		
1:15 – 2:00pm	**F513** Marketing in Forms Management Program	**W613** Policies, Procedures and Process: How Forms Fit In	**S713** Repeat Session: How to Collect PDF Forms with Digital Signatures from iPads into Popular Databases

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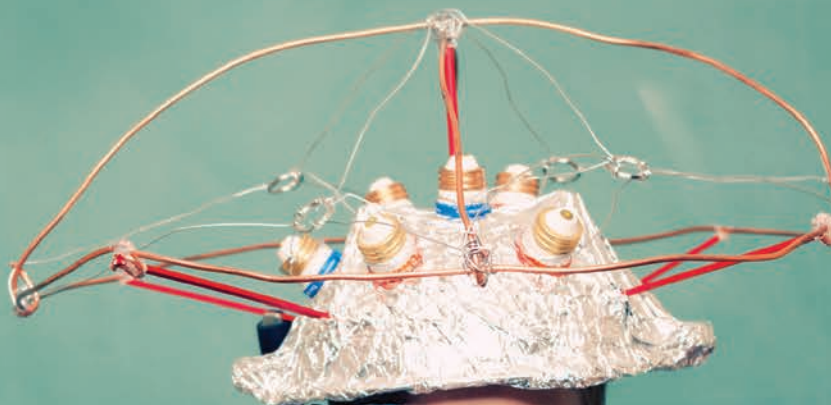
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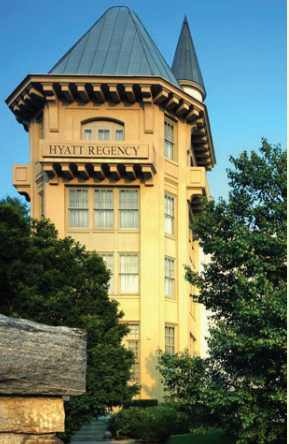
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