



Information Management Symposium

Date: Wednesday September 15, 2010

Time: 8:30 AM - 4:00 PM

Place: Metro Toronto Convention Centre
255 Front Street West
Room 205

[Map/Directions >>](#)

2010 Program

Topic #1: Building a Compliant Records Program

by **Randolph Kahn** - Founder, Kahn Consulting, Inc.

This session explores how to build your Records Program in a way that will actually protect your institution. The Seven Steps of Compliant Records Management as addressed in this session are based on Mr. Kahn's recently released book, Second Edition, Information Nation: Seven Keys to Information Management Compliance. Having a Records Program is better than not having anything at all, but it may not be enough to protect you and your company. This session will help attendees build compliance in each aspect of their Records and Information Management program.

Randolph A. Kahn, ESQ. is an internationally acclaimed speaker, consultant and award winning author of dozens of published works including "Privacy Nation," "Information Nation Warrior," "Information Nation: Seven Keys to Information Management Compliance" and "E-Mail Rules". Based upon the success of "Information Nation: Seven Keys to Information Management Compliance", Mr. Kahn has now published the second edition of "Information Nation: Seven Keys to Information Management Compliance". Mr. Kahn was the recipient of the prestigious Britt Literary Award. He has been honoured with the Information Hero award by Hewlett Packard, an awarded bestowed upon a very select few. He is an internationally recognized authority on the legal, compliance, and policy issues of information technology and information, and trusted advisor and consultant to Fortune 500 companies, governmental agencies and court systems.

As founder of Kahn Consulting, Inc., Mr. Kahn leads a team of information management, regulatory, compliance and technology professionals who serve as consultants and advisors to major institutions around the globe. Each year Mr. Kahn speaks dozens of times around the globe to corporate and government institutions.

Keynote Address: E-mail Management & Privacy

by **Chantal Bernier** - Assistant Privacy Commissioner of Canada



With the explosion in modern computing power, personal information is being collected, processed and stored in unimaginably vast quantities. But each new data record heightens the risk that personal information will be lost, stolen, spilled or misused, sometimes with cataclysmic consequences. In a speech entitled "A Record Challenge: Protecting Privacy in the Era of Big Data," Chantal Bernier, Canada's Assistant Privacy Commissioner, will explore the privacy issues that are emerging in this frantically networked, data-hungry world, as well as the solutions we all need to embrace.

Chantal Bernier was appointed Assistant Privacy Commissioner of Canada with primary responsibility for the Privacy Act, the federal public sector privacy law. The appointment is effective December 8, 2008. Prior to this, Ms Bernier was Assistant Deputy Minister, Community Safety and Partnerships Branch, at Public Safety Canada. Previously, she had served as Assistant Deputy Minister, Socio-Economic Policy and Programs, at Indian and Northern Affairs Canada from 1999 to 2002 and Director of Operations, Machinery of Government Secretariat, at the Privy Council Office from 1998 to 1999. Ms. Bernier is a lawyer who specializes in public law. She started her career in the federal government in the Department of Justice Canada. She holds a Bachelor of Civil Law from the University of Sherbrooke and a Masters in Public International Law from the London School of Economics and Political Science.

Topic #3: eDiscovery & the Sedona Canada Principles

by **Christine Ardern**, CRM - Principal Consultant. The Information Management Specialists

As the Federal Rules of Civil Procedure have changed in the US and the Sedona Conference Canada guidelines have been adopted in Canada, eDiscovery has become a higher priority as organizations struggle to get a handle on electronically stored information. This session will provide an overview of the stages of eDiscovery, the Sedona Canada principles and how information managers can play a key role in eDiscovery, legal holds and "being ready".

Christine Ardern, CRM, is a records and information management consultant, based in Toronto. She has been involved in RIM for many years and both worked for and consulted to organizations in both the private and public sectors. She has developed and implemented archives, records and information management programs at the local and international levels. She is a past president and Fellow of ARMA International, a winner of the prestigious Emmett Leahy award and a regular speaker at ARMA seminars and workshops.

Topic #4: How eDiscovery Requirements Can Drive Information Management – The new Ontario Rules of Civil Procedure

by **Bill Tolson** - Director of Product Marketing/Evangelism, Iron Mountain

Corporate litigation has become a major driver for information management requirements in organizations today. Courts now expect organizations to have control of their data assets in real-time. The evolving eDiscovery responsibilities now includes the ability to apply a litigation hold on potentially responsive data within minutes or hours, to be able to turn over just the responsive data that the opposing counsel is asking for and to ensure you are not turning over privileged records.



To ensure your organization can meet these responsibilities, your data infrastructure needs to be able to capture, index, manage and dispose of data in an intelligent and predictable manner.

This presentation will review the differences between the U.S. eDiscovery requirements and the Canadian requirements including the new Ontario Rules of Civil Procedure. We will also look at some worst case examples of where companies have made mistakes with their information management and also touch on several best practices for eDiscovery information management.

Bill Tolson has more than 17 years of experience in storage and archiving solutions product marketing and consulting. As Director of Product Marketing/Evangelism at Iron Mountain, Bill is responsible for the strategy and implementation of Iron Mountain's legal and regulatory archiving solutions. Bill has helped companies develop and execute global email archiving solutions and electronic document retention strategies, and he has been a featured speaker at several archiving events, including the Government Technology Conferences, ARMA, and the TechTarget Email Archiving Series. He spent several years as a principal consultant and practice manager leading the eDiscovery and compliance consulting business for Contoural, specializing in storage solutions and email archiving, enterprise content management, and information life-cycle management. Previously, Bill held management positions at Hewlett-Packard, Hitachi Data Systems, StorageTek, and Iomega. Bill has a Bachelor of Science degree in business management from California State University at Dominguez Hills.

Topic #5: Handling Explosive Data Growth

by **Grant Watt** – Director of Channels, Recommind Inc.

Enterprises of all sizes are drowning in data with enterprise information growth averaging 50% - 100% year over year and unstructured enterprise information alone growing at a rate of 100% - 200% per year. Furthermore, email archives only make the problem worse by providing yet another repository into which massive amounts of data are dumped with little or no organization or categorization. However, enterprises can alleviate this problem quickly and accurately by using sophisticated software that automates data classification. In this session, learn how powerful classification tools can reduce the time and effort needed to organize, route and distribute information while at the same time lower storage costs, data center costs and eDiscovery costs.

Grant Watt is Director of Channels at Recommind Inc., an enterprise search, e-discovery and e-mail management software company headquartered in San Francisco, CA. Prior to joining Recommind, Grant was with ZANTAZ an Autonomy Company, West Group/ Findlaw and Dialog where he focused on channel development/ marketing/ partnerships, market strategy and positioning, strategic alliances and distribution.

Topic #6: New & Emerging Trends in Records Management

by **Alex Benay** - Senior Strategist/Canadian Public Sector, Open Text Corporation

Balancing corporate compliance requirements with end user needs to use more collaborative online tools is a complex issue that is plaguing most organizations. On one hand, corporate



compliance is necessary, but often misunderstood by most end users. On the other hand, end users need more agile and cooperative corporate solutions which often do not take into consideration corporate compliance requirements such as record keeping, security, freedom of information, etc.

In this session, two specific case studies will be looked at: the G20 in Toronto and the International Standard Organization. Each will demonstrate how to achieve the balance between regulatory and corporate compliance, while providing end users with the most recent social media and collaborative capacities. It has been done, come see how.

Alex has acquired a vast range of experience in the information management and public sector management sectors, ranging from policy development and program management to solutions development and implementation. Having spent the first eight years of his career in the Canadian Federal Government as an executive in such organizations as Library and Archives Canada, Natural Resources Canada, the Department of Foreign Affairs & International Trade and the Canadian International Development Agency, Alex then proceeded to help establish Enterprise Content Management capacities in several small to medium sized enterprises in the Ottawa area. Currently, Alex is the Senior Strategist for the Canadian Public Sector within Open Text where he is responsible for setting strategic direction and policies for all three levels of government throughout Canada.