

The cloud and other digital information innovations are changing the way that people create, access, use and interact with content. Users can gain access to their applications from anywhere, at any time, through their connected devices. Understanding the potential impacts on records management practices and outcomes is critical to preparing to meet the new challenges, expectations, risks and rewards of these evolving technologies.

The seminar has been designed to enhance knowledge and understanding of cloud computing technologies and services as well as deliver practical advice for how to maximize benefits and minimize records-related risks associated with on-demand computing resources.

Fluno Center • Madison, Wisconsin

April 19, 2011



e-Records and Information Management **2011 Forecast: Cloudy with a Chance of Clearing**



This seminar will:

- Demystify cloud computing to business and records managers
- Identify technologies, issues, challenges and benefits of cloud computing through use cases, presentations and demonstrations
- Stimulate dialogue among cloud providers and RIM professionals about impacts on records management and how to meet evolving requirements
- Help to make the essentials of addressing records management 'in the cloud' understandable and doable
- Support attendees in making informed decisions about cloud-based computing services

Co-sponsored by:

Wisconsin Public Records Board (PRB)

UW-Madison School of Library & Information Studies (SLIS)

This seminar has been pre-approved for 6.0 hours of ICRM Certification Maintenance Program (CMP) credit.

Program Agenda

- 7:00 – 7:55 am Registration, Exhibition & Continental Breakfast
- 8:00 – 8:30 am Welcome & Introductions
- 8:30 – 9:45 am **Session 1: Cloud Basics**
- 10:00 – 10:30 am Break & Exhibition
- 10:30 – 12:15 pm **Session 2: Business and Technical Requirements for Cloud-based Strategies: How to Get it Right**
- 12:15 – 1:30 pm Lunch & Exhibition
- 1:30 – 3:00 pm **Session 3: Storm Chasing**
- 3:00 – 3:15 pm Break
- 3:15 – 4:30 pm **Session 4: Buyer Beware: Shopping Smart in the Cloud**
- 4:30 – 4:45 pm Wrap-up

The cloud
makes data and applications
available from any place
on any device at any time.



Audience

*Program and project managers • Technology vendors and implementors
Executive and senior managers • Records managers • CIO's • Management consultants
IT managers and technologists • Legal and compliance experts • Business analysts*

Exhibition & Vendor Sponsorship

A Records and Information Management (RIM) Product & Service Exhibition will be held in conjunction with the 2011 ARMA Madison Spring Seminar. Representatives from a variety of companies will be on hand to demonstrate their offerings and participate in the day's networking and discussions.

Companies interested in exhibiting or sponsorship opportunities should contact Priscilla Jarona at (920) 210 1443 or pjconsultsvcs@sbcglobal.net.



Session Details

Session 1

Cloud Basics

Brent Gatewood

The seminar will kick-off with a definition and broad overview of cloud computing and the types of shared resources, software and on-demand services that are being offered today over the Internet. Common characteristics of cloud computing models will be discussed, and a variety of service and deployment models defined. The presentation will also explore how ARMA's Generally Accepted Recordkeeping Principles® (GARP) can be applied by organizations of all sizes to their assessment of cloud computing solutions.

Session 2

Business and Technical Requirements for Cloud-based Strategies:

How to Get it Right

Brent Gatewood

Cloud computing is in its early stages and has the potential to dramatically change the way that information management and technology services are delivered to users in government and the private sector. This session will explore the benefits and risks of current software, infrastructure and platform computing service offerings with a particular focus on implications for lifecycle management of information and records. Brent will review tools and resources from the newly published ARMA standard for outsourcing records storage and identify key strategies for defining the business and technical requirements you will need if your organization "goes to the cloud."

Session 3

Storm Chasing

Alan Pelz-Sharpe

This presentation features an analysis of the cloud computing industry and the forces that are driving its rapid adoption by government and private industry. A series of use cases will explore business and economic drivers. This session will scatter the hype about the cloud marketplace and deliver practical advice on how to buy secure, reliable and portable computing resources (e.g., networks, servers, storage, applications, and services) that meet your organization's needs and requirements.

Alan will also offer a vision for where "Pay-as-you-go" services for storage, management and distribution of your organization's data are headed over the next five years.

Session 4

Buyer Beware: Shopping Smart in the Cloud

Alan Pelz-Sharpe

If your organization is going to use Internet-based services, you'll have to negotiate terms and service level agreements (SLA's) that can ensure the security, reliability and interoperability of your organization's data. There are things you'll want to demand of your cloud providers to ensure they become trusted third party repositories for and managers of your organization's electronic information assets.

In this point-counterpoint session, Alan will be joined by a leading vendor to challenge the promises, performance, dependencies, strengths and risks associated with third party data centers and cloud computing services.

Cloud computing is a model for enabling convenient, on-demand network access to a shared pool of configurable computing resources (e.g., networks, servers, storage, applications, and services) that can be rapidly provisioned and released with minimal management effort or service provider interaction.*

**Definition of Cloud Computing, National Institute of Standards and Technology (NIST), Version 15, 10-07-09).*



Speakers



Brent Gatewood is Project Manager and Director of Technology Operations for PelliGroup, Inc., a records management consulting firm. Since joining PelliGroup (www.pelligroup.com) in 2004, he has assumed project management responsibilities while working on engagements for

a broad range of energy, insurance, financial services, law, technology and manufacturing clients. He advises clients on the use and importance of enterprise information and helps them to utilize their resources more effectively and efficiently. Brent takes a lead role in expanding PelliGroup's technology and services delivery tool set and monitors the offerings and performance of records management and related technology vendors.

After receiving his MBA, Brent spent two years with Pitney Bowes before moving on to TAB Products, a major national provider of hard goods, soft goods and professional services in the records management discipline. His responsibilities at TAB started in sales, progressed to sales management and then expanded into professional services delivery and management. While at TAB, Mr. Gatewood helped to re-engineer the focus, structure and product portfolio of the professional services group. He managed staff and contract consultants and expanded TAB's relationship with other consultants to deliver a more comprehensive set of services to clients.

Mr. Gatewood is a member of ARMA and AIIM and recently contributed to the development of ARMA's *Guideline for Outsourcing Records Storage to the Cloud* (2010).

Alan Pelz-Sharpe is a Principal with The Real Story Group (www.realstorygroup.com), advising on Document & Records Management technologies and practices. Founded in 2001 as "CMS Watch" The Real Story Group is an analyst company that publishes independent content management vendor evaluations and advises technology buyers on suitable solutions.



Alan has delivered dozens of keynotes on six continents over the past decade. In addition to his "big picture" insight, his 20+ years in the information management industry and career start as a records and document manager enable him to incorporate both first-hand insight and seasoned experience into his research, consulting, and presentations.

Prior to joining The Real Story Group in 2006, Alan was a Strategist at Wipro and VP North America for the Industry Analyst firm Ovum. He has recently advised clients such as The US Federal Reserve, Chemical Abstract Service, CPPIB, Mayo Clinic and Nokia on their change and information management challenges.

Parking

The Fluno Center parking lot, located under the building, opens at 7:00 am. Enter the lot from Frances Street. The attendant will have a list of all ARMA Madison Spring Seminar registrants so please provide your name and event at the entrance.

Accommodations

If you require overnight accommodations, please call the Fluno Center directly at 877-77-FLUNO or 608-441-7117.



Registration

Includes the full day of sessions, continental breakfast, lunch, vendor fair, on-site parking, and seminar handouts. To reserve your spot, register by April 13, 2011.

Please submit complete information on the form below to register.



Mail by Friday, April 8, 2011

Mail your reservation, with payment (payable to ARMA Madison) to the address below.

**Diane Vultaggio
ARMA Madison Chapter
P. O. Box 8863
Madison, WI 53708**



Telephone (register and arrange to forward payment)

Call Diane Vultaggio at (608) 266-5578



E-mail (register and arrange to forward payment)

Send e-mail to Diane Vultaggio at diane.vultaggio@etf.state.wi.us



Online Registration

ARMA Madison offers online registration and PayPal service as a payment option. Go to our website to register online. www.armamadison.org/seminar/registration/

Registration Fee

- ARMA Member \$ 125
- Non-member \$ 150
- Full-time student \$ 50
- 3 or more from same company/agency \$ 100 per person
- New member \$ 275
(Event + \$175 annual ARMA membership fee and a free 1-year ARMA-Madison membership)

Please submit one form per person. Thank you.

Last Name, First Name

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E-mail Address (confirmation will be sent, if provided)

Check here to indicate permission for ARMA Madison to share your contact information with other attendees or vendors.