# Conference At-A-Glance

## Tuesday, November 5

### Preconference Workshops

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<td>W2 • Riding the Current: Techniques for Knowledge Workers</td>
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<td>1:30 p.m. – 4:30 p.m.</td>
<td>W11 • Creating a KM Strategy</td>
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### Wednesday, November 6

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<td>W1 • Knowledge Sharing Around the Globe</td>
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<td>W2 • Empowering Knowledge Sharing Digital Workspace: The Future of Working</td>
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<td>9:45 a.m. – 10:15 a.m.</td>
<td>W10 • KM Renew &amp; Reset: Vision to Action</td>
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<td>10:15 a.m. – 11:45 a.m.</td>
<td>W12 • Knowledge Continuity &amp; Retention</td>
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<td>W13 • Strategy, Execution, &amp; KM Culture</td>
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<td>11:15 a.m. – 12:45 p.m.</td>
<td>W14 • Where the Workplace Meets Mobile &amp; Cloud</td>
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<td>W15 • Delivering Enterprise Mobility</td>
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<td>12:00 p.m. – 1:30 p.m.</td>
<td>W16 • Expediting Learning for Smarter Organizations</td>
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<td>W17 • Finding Solutions to Wicked Problems</td>
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<td>1:30 p.m. – 3:00 p.m.</td>
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<td>5:15 p.m. – 6:45 p.m.</td>
<td>W24 • VISUALIZING ONTOLOGIES AND METADATA</td>
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<td>6:00 p.m. – 7:30 p.m.</td>
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8:45 a.m. – 9:00 a.m.
KEYNOTE * Grand Ballroom North, Ballroom Level * Big Data vs Human Data * Dave Snowden

9:00 a.m. – 9:45 a.m.
• Big Data vs Human Data • Grand Ballroom North, Ballroom Level

9:45 a.m. – 10:00 a.m.
KEYNOTE * Grand Ballroom North, Ballroom Level * Enterprise Search in Virtual Environments * John Patzakis

10:00 a.m. – 10:45 a.m.
KM Techniques: Embedding, Revitalizing & Tools

10:45 a.m. – 11:45 a.m.
Connection, Collaboration, & Culture Change

12:00 p.m. – 12:45 p.m.
Social Enterprises for Knowledge Sharing

12:45 p.m. – 2:00 p.m.
Networked Worlds & Networked Enterprises

2:00 p.m. – 2:45 p.m.
Gamification for Compelling Intranets

3:00 p.m. – 3:45 p.m.
Intranet Showcase

3:45 p.m. – 4:15 p.m.
Knowledge Creation & Reuse

4:15 p.m. – 5:00 p.m.
Mobile User Experience Using BPM

8:45 a.m. – 9:00 a.m.
KEYNOTE * Grand Ballroom North, Ballroom Level * Transforming the Way We Collaborate * Carla O’Dea

9:00 a.m. – 9:45 a.m.
Enterprise Search in the Age of Big Data * Jeff Veis

9:45 a.m. – 10:00 a.m.
Never Fail: Learn & Change

10:00 a.m. – 10:45 a.m.
Energizing Organizational Learning & Strategic Communications

10:45 a.m. – 11:45 a.m.
Learning Organizations, KM & Learning From Failure

11:45 a.m. – 12:30 p.m.
CM Landscape: Tools & Practices

12:30 p.m. – 2:00 p.m.
Unlocking Open Source

2:00 p.m. – 2:45 p.m.
Facilitating Organizational Change: Four Keys for Success

3:00 p.m. – 3:45 p.m.
Building Smarter Networks

4:00 p.m. – 4:45 p.m.
CLOSING KEYNOTE * Grand Ballroom North, Ballroom Level * 10 Things KMers Can Learn From Angry Birds * Dan Roman

Friday, November 8

8:45 a.m. – 9:00 a.m.
KEYNOTE * Grand Ballroom North, Ballroom Level * Big Data vs Human Data * Dave Snowden

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Platinum Pass Attendees – Access to ALL sessions (TBC or Workshops)
Gold Pass Attendees – Access to all KM, ESS, and SPS sessions
KMWorld, Enterprise Search Summit, SharePoint Symposium, and Taxonomy Boot Camp Only Attendees – Access to registered conference only
Tuesday, November 5

Morning Workshops • 9:00 a.m. – 12:00 p.m.

W1 • KM 101
Stan Garfield, Community Evangelist, Deloitte Consulting LLC

W2 • Riding the Current: Techniques for Knowledge Workers
Madelyn Blair, President, Pelerei, Inc., & Author, Riding the Current

W3 • Change Management for Knowledge Managers
Gordon Vala-Webb, National Director, Innovation & Information, Dynamic Adaptation

W4 • Adding Semantics to Enterprise Search
Tom Reamy, Chief Knowledge Architect, KAPS Group

W5 • SharePoint Governance
Susan Hanley, President, Susan Hanley LLC

W6 • Annual Impact Reflection: Knowledge-Sharing Practice
Bridget Snell, Organizational Learning & Knowledge Manager, & Haneen Malallah, Knowledge & Learning Advisor, Oxfam America

W7 • Building an Effective Mentoring Program for Knowledge Transfer
Art Murray, CEO, Applied Knowledge Sciences, Inc.
Francesco Calabrese, CEO, ExMG, Inc

W8 • SharePoint 2013 KM Update
Ben Curry, Managing Partner, Summit 7 Systems, & Author, SharePoint 2013 Administrator’s Pocket Guide

W9 • Digital Workplace Strategies: Why & How
Jane McConnell, Strategic Advisor, Digital Workplaces

W10 • SharePoint: Shaping Information Architecture for Scale
Helen Bennett, Information Architect, Information Leadership

Workshops

W11 • Creating a KM Strategy
Dave Snowden, Founder & CSO, Cognitive Edge

W12 • Enterprise Social Networking Strategy in a Box
Gordon Vala-Webb, Knowledge Management, Dynamic Adaptation

W13 • Sparking Innovation: Creative KM
Art Murray, CEO, Applied Knowledge Sciences, Inc.

W14 • Cultivating Communities of Practice: The 2013 Upgrade
Susan Hanley, President, Susan Hanley LLC, & Author, Essential SharePoint 2013
Richard McDermott, President, McDermott Consulting, & Author, Cultivating Communities of Practice

W15 • Selecting the Right Digital Workplace Technologies
Tony Byrne, Founder and President, & Jarrod Gingras, Director, Real Story Group

W16 • The Human Side of KM: Strategies That Work
Michael Prevou, President & Chief of Knowledge Strategies & Innovation, Strategic Knowledge Solutions, Inc.

W17 • Transferring Specialized Knowledge to Accelerate Expertise Development
Holly Baxter, CEO, Strategic Knowledge Solutions, Inc.

W18 • Leveraging Knowledge From Failure to Success
Lynda Moulton, Consultant & Graduate School Lecturer, LWM Technology Services
Larry Chait, Managing Director & Graduate School Lecturer, Chait and Associates, Inc.

W19 • SharePoint Strategy & Roadmap
Meta Mair, Principal Consultant, Information Leadership

W20 • Developing an Enterprise Search Strategy
Martin White, Managing Director, Intranet Focus, & Author, The Intranet Handbook

Afternoon Workshops • 1:30 p.m. – 4:30 p.m.

Welcome Reception
Tuesday, November 5
6:00 p.m. – 7:00 p.m.
Congressional Hall, Ballroom Level
Enjoy a glass of wine and a selection of cheeses in a relaxed atmosphere as we kick off the start of this year’s program. Open to all conference attendees, speakers, and sponsors.

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- LEARN About Leading-Edge Knowledge-Sharing Practices
- GAIN Insights for Innovation & Digital Workspaces
- COLLABORATE With Experts & Colleagues
- EXPLORE Social Media & Networking for the Enterprise
- STREAMLINE Information & Knowledge Flows
- IMPROVE Taxonomies & Content Management

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2) Click on Internet browser to open log-in page
3) Enter password: infotoday

Welcome Reception
Tuesday, November 5 • 6:00 p.m. – 7:00 p.m.
Congressional Hall, Ballroom Level
Enjoy a glass of wine and a selection of cheeses in a relaxed atmosphere as we kick off the start of this year’s program. Open to all conference attendees, speakers, and sponsors.

Continental Breakfast & Breaks
A continental breakfast will be provided on the Ballroom Level each morning from 8:00 a.m. – 8:45 a.m. before the keynote sessions. Check your program for additional morning and afternoon break times and locations.

Attendee Luncheons
Lunch on Wednesday will be served in the Renaissance Ballroom located on the Ballroom Level. On Thursday and Friday, lunch will be served in the Enterprise Solutions Showcase.

Email Stations
Stations are available for attendee use during regular Showcase hours.

Showcase Hours
Wednesday, November 6 ..............................................5:00 p.m. – 7:00 p.m.
Grand Opening Reception
Thursday, November 7 ..................................................10:00 a.m. – 4:30 p.m.
Friday, November 8 .......................................................10:00 a.m. – 2:00 p.m.

Enterprise Solutions Showcase Grand Opening Reception
Wednesday, November 6 • 5:00 p.m. – 7:00 p.m. • Ballroom Level
Join us under the big top for the opening of the Enterprise Solutions Showcase. Featuring the top companies in the KM, CM, search, taxonomy, and intranets marketplace, the Showcase offers attendees an opportunity to explore the latest product and service solutions. If you are looking for a particular product, evaluating competing systems, or keeping up to date with the latest developments, be sure to visit the Enterprise Solutions Showcase.

KMWorld Bookstore
Wednesday, November 6 • 10:00 a.m. – 3:30 p.m. • Ballroom Level Foyer
Thursday, November 7 • 10:00 a.m. – 4:30 p.m. • Showcase
Friday, November 8 • 10:00 a.m. – 2:00 p.m. • Showcase

Communities of Interest
Friday, November 8 • 1:00 p.m. – 2:00 p.m. • Showcase
Building a Knowledge Base with Twitter & SenseMaker
Capture insights from KMWorld using Twitter (#KMWorld) and a new app from Cognitive Edge, called SenseMaker. Go to the app store and grab this free app and try the test question, “What do you hope to get out of KMWorld 2013?” and share your insights. Then join colleagues in the Showcase area after lunch on Friday for an informal debriefing.

Conference Presentations
Many speakers have made copies of their slides available for download from the conference website (www.kmworld.com/kmw13). Click on “PRESENTATIONS” and enter Username/Password: DC2013

Follow, Find, Connect
Twitter Tags • #KMWorld • @KMWorld
LinkedIn • http://ow.ly/dy08U
Wednesday, November 6

8:45 a.m. – 9:00 a.m.  •  WELCOME & KEYNOTE  •  Renaissance Ballroom, Ballroom Level  •  Building Collaborative Organizations  •  Nicco Mele

9:45 a.m. – 10:00 a.m.  •  KEYNOTE  •  Renaissance Ballroom, Ballroom Level  •  A New Search Architecture for the Big Data Era  •  Kamran Khan

10:15 a.m. – 11:00 a.m.  •  Track A  •  Congressional Hall A, Ballroom Level  •  KM Strategies & Practices

11:15 a.m. – 12:00 p.m.  •  Track B  •  Congressional Hall B, Ballroom Level  •  Digital Workspace: The Future of Working

12:00 p.m. – 1:15 p.m.  •  Attendeec Luncheon & Keynote  •  Renaissance Ballroom, Ballroom Level  •  File Sync/Share Is Not Endpoint Backup  •  Ann Feldman

1:15 p.m. – 2:00 p.m.  •  Knowledge Continuity & Retention

2:15 p.m. – 3:00 p.m.  •  Strategy, Execution, & KM Culture

3:00 p.m. – 3:15 p.m.  •  Making the Case & Getting Social

3:15 p.m. – 4:00 p.m.  •  Social Networking in the Digital Workspace

4:15 p.m. – 5:00 p.m.  •  Impact of the Digital Workspace on the Physical Workplace

4:45 p.m. – 5:00 p.m.  •  Balancing Scorecard Approach to Innovation

Thursday, November 7

8:45 a.m. – 9:00 a.m.  •  KMWorld & Intranet Innovation Awards  •  Grand Ballroom North, Ballroom Level

9:00 a.m. – 9:45 a.m.  •  Keynote  •  Grand Ballroom North, Ballroom Level  •  Big Data vs Human Data  •  Dave Snowden

9:45 a.m. – 10:00 a.m.  •  Keynote  •  Grand Ballroom North, Ballroom Level  •  Enterprise Search in Virtual Environments  •  John Patzakis

10:00 a.m. – 10:45 a.m.  •  Track A  •  Grand Ballroom North, Ballroom Level  •  KM Strategies & Practices

10:45 a.m. – 11:30 a.m.  •  Social Enterprises for Knowledge Sharing

12:00 p.m. – 1:00 p.m.  •  Networks Worlds & Networked Enterprises

12:45 p.m. – 2:00 p.m.  •  Knowledge Creation & Reuse

2:00 p.m. – 2:45 p.m.  •  Integrating KM Practices: Market Insights

3:00 p.m. – 3:45 p.m.  •  Intranet Showcase

3:45 p.m. – 4:15 p.m.  •  Working Virtually

4:15 p.m. – 5:00 p.m.  •  Balanced Scorecard Approach to Innovation

Friday, November 8

8:45 a.m. – 9:00 a.m.  •  Keynote  •  Grand Ballroom North, Ballroom Level  •  Transforming the Way We Collaborate  •  Carla O’Dell

9:45 a.m. – 10:00 a.m.  •  Keynote  •  Grand Ballroom North, Ballroom Level  •  Enterprise Search in the Age of Big Data  •  Jeff Veis

10:00 a.m. – 10:45 a.m.  •  Track A  •  Grand Ballroom North, Ballroom Level  •  Never Fail: Learn & Change

10:45 a.m. – 11:30 a.m.  •  Enterprise Content Management (ECM): Planning & Implementing

11:45 a.m. – 12:30 p.m.  •  Enterprise Collaboration Technology Market Overview

12:30 p.m. – 2:00 p.m.  •  Facilitating Organizational Change: Four Keys for Success

2:00 p.m. – 3:45 p.m.  •  Building a Collaborative Organization

3:45 p.m. – 4:45 p.m.  •  Building a Mobile User-Enabled Workflow

CLOSING KEYNOTE  •  Grand Ballroom North, Ballroom Level  •  10 Things KMers Can Learn From Angry Birds  •  Dan Rasmus
Continental Breakfast  8:00 a.m. – 8:45 a.m.

WELCOME & KEYNOTE

Building Collaborative Organizations
8:45 a.m. – 9:45 a.m.  Renaissance Ballroom, Ballroom Level
Eric Brassil, Outreach & Engagement Coordinator, Knowledge Leadership, Kennedy School, & Author, The End of Big Knowledge

Our ability to connect instantly, constantly, and globally is altering the exercise of power with dramatic speed. Governments, corporations, centers of knowledge, and expertise are eroding before the power of the individual. Based on ideas from his recent book, internet pioneer Mele provides insights and ideas for building collaborative organizations using revolutionary technology and more! Mele will be signing his new book exclusively from 10:00 – 11:00 a.m. in the KMWorld Bookstore.

KEYNOTE

A New Search Architecture for the Big Data Era
9:45 a.m. – 10:00 a.m.  Renaissance Ballroom, Ballroom Level
Kamran Khan, CEO, Search Technologies

Search engines, distributed processing and content processing pipelines are not new. However enabling technologies of mature search engines, powerful content processing pipelines and cheap distributed processing are coming together to empower a next generation of information access, analysis and presentation much closer to the holy grails of knowledge management. Hear from the founder of Search Technologies how modern search engines are currently being combined with powerful independent content processing pipelines and the distributed processing technologies from big data to form new and exciting enterprise search architecture, delivering results only available to the biggest companies with the deepest pockets in the past.

TRACK A  KM Strategies & Practices
Congressional Hall A, Ballroom Level

A101  Empowering Knowledge Sharing Around the Globe
10:15 a.m. – 11:00 a.m.
Bruce Burton, Senior Advisor, & Eric Brassil, Outreach & Engagement Coordinator, Knowledge Leadership Division, U.S. Department of State

A decade after its founding, the State Department’s Office of eDiplomacy has transformed a suite of social media tools into a vibrant KM program that enables a globally distributed workforce to find and contribute knowledge anywhere, anytime. By empowering Department employees to make knowledge sharing part of the daily workflow, eDiplomacy enables staff around the world to collaborate and communicate across geographic and organizational boundaries through the use of self-forming, self-managing online communities and provides them with fast, easy access to the knowledge resources and expertise they need to get their jobs done. Speakers discuss this award-winning and innovative program and share the components of State’s Knowledge Leadership strategy and plans to tap opportunities for integrating platforms to foster cross-boundary engagement that addresses real business challenges related to knowledge generation and sharing.

A102  KM Renew & Reset: Vision to Action
11:15 a.m. – 12:00 p.m.
Arno Boersma, & Neesham Spitzburg, Senior KM Officers, Sustainable Development Network, World Bank

LTC Dr. Jacob Aaronson, Chief, Knowledge Management, U.S. Army Medicine, & Neil Olonoff, U.S. Army Medicine Contr by Xtreme Solutions

World Bank speakers will discuss renewed KM momentum provided by a new World Bank president, including insights into their journey of becoming a “knowledge and solutions bank,” and specific initiatives such as the Knowlympics competition, internal KM benchmarking, social KM and external knowledge platforms. U.S. Army Medicine has learned many lessons and has been creative on its journey to create a new KM division for its 90,000 employee Army organization. They discuss the importance of governance and implementing a full governance structure; The KM “Footprint”—you can’t “do” KM for an entire 90,000-plus organization, so you have to engage those people who will carry the flag for you; managing the team, including mediating between violently opposed philosophies and personalities—type A scientific management types all the way to “kumbaya” collaborative share-a-holics and everyone in between.

A103  Knowledge Continuity & Retention
1:15 p.m. – 2:00 p.m.
Avi Kedem, Chief Knowledge Officer, IAI-Israel Aerospace Industries
Moria Levy, CEO, ROM Knowledgeware

Knowledge continuity (retention) is one of the most important assets contributing to employee’s success in work. Knowledge continuity management focuses on passing critical knowledge from exiting experts to their replacements and colleagues, shortening the learning-curve and making knowledge assets accessible when needed. Hear about this practical and structured process, 5–75% preserving 5% of the mapped knowledge which benefits 75% of employees. The process is led by a professional facilitator with a team of experts who are trained to continue the process by themselves. Like other organizations, IAI, is experiencing a large percentage of employees retiring in the current decade. This case study of IAI’s knowledge retention describes the process methodology, demonstrating examples and adding some tips learned within the process.

A104  Strategy, Execution, & KM Culture
2:15 p.m. – 3:00 p.m.
Jean-Claude Monney, Senior Director, KM, Microsoft

As a member of the office of the CTO, Monney is responsible for KM worldwide in the Microsoft Enterprise Services Group. The charter of the team is to accelerate the KM culture; shorten the time to decision making; reuse IP; and increase customer loyalty. Hear their strategies, and techniques and take home tips to use in your organization.

Coffee Break  3:00 p.m. – 3:15 p.m.

A105  Making the Case & Getting Social
3:15 p.m. – 4:00 p.m.
Robert L. Armacost, Global Head, Knowledge, KPMG LLP

This case study of the KPMG Hub, a new internal collaboration platform, shares the challenges of getting it in place—making the business case for social, getting the support and resources, and choosing a platform. It high-
lights how staff were engaged with the hub to work together across functional, industry and geographical borders, and discusses the difference the collaborative hub has made in its first 6 months of usage.

**A106 • KM Journeys & Impact**

4:15 p.m. – 5:00 p.m.

Heather M. Brammer & Roy K. Craik, IT Knowledge Managers, The Boeing Co.
Gary Bolinger, CAE, Indiana CPA Society
David Griffths, Founder, K3-Cubed Ltd.

This session describes two case studies where KM had an impact. The first, IT KM at Boeing, has evolved from a hard-copy format (in 3-ring notebooks!), to a Windows-based knowledge base, followed by an HTML-based unstructured long-form format, and finally to the current model, an article/case-based format. During the past 15 years, Boeing has grown from managing the site locally to an integrated service solution. This increased visibility within the enterprise and led to the development of a Knowledge Standards Board, a Knowledge Governance Model, and a regular report-out to the president of Boeing IT on industry-standard KPIs. Hear about the knowledge mentoring program, internal and external training, process improvement workshops, regular audits across all knowledge collections, and more. The IT KM team is highly collaborative and cross-functional and has evolved over this time into a model of industry standards. Learn their secrets for success! The second KM journey was toward resilience and the challenge of remaining relevant in a complex market. It talks about “doing” KM and developing a KM “solution” for a 8.5K membership organization where knowledge is viewed as a competitive advantage. Hear how, with the help of an expert, they tackled the challenge of connecting, developing, using and embedding competitive know-how through an award-winning solution from Switzerland.

**B101 • Digital Workplace Trends**

10:15 a.m. – 11:00 a.m.

Jane McConnell, Strategic Advisor for Digital Workplaces, NetStrategy/JMCA

Based on an extensive research study of several hundred organizations worldwide, the 8th annual such study, this session looks at what most organizations have that people use to do their jobs—digital applications, tools and intranets. Not all are equally mature in different enterprises and may include managed information processes, structured and social collaboration, and a mobile dimension. Many organizations are experimenting, but the early adopters are transforming the ways of working together with greater collaboration, open innovation, mobile and real-time interactivity. Get the latest trends as McConnell shares the results of her study, including social real-world experiences from practitioners as they adjust to current cultural and technological changes. Moderated by Martin White, Intranet Focus Ltd., and Jane McConnell, NetStrategy/JMCA

**B102 • Business Value With Social**

11:15 a.m. – 12:00 p.m.

Gloria Burke, Director, Knowledge & Collaboration Strategy & Governance, UNISYS Corporation
Ross Cavanaugh, VP, Internal Collaboration Consultant, Wells Fargo

Burke, recognized as second on the list of Top 10 Social Business Leaders from Information Week, discusses the socially enabled workplace. It developed fast at Unisys thanks to two key factors: a leadership-down adoption model with unprecedented leadership visibility, use and support of the social platform, and the implementation of social collaboration value-case development workshops that demonstrate the value of social collaboration tools and processes at an employee role-level and demonstrate how to effectively leverage these tools in everyday workflows. Burke illustrates how Unisys practiced a people approach to social collaboration, not technology. Wells Fargo has a commitment to assisting their customers to succeed financially, and that focus lends toward constant vigilance on strategic and tactical methods to build efficiency into how it works. As with most large companies, this company is home to a wide variety of networks and communities encompassing a full spectrum of topics and disciplines from diversity to project management to technology and many more. With a global company that employs almost 300,000 team members, communication and collaboration can be challenging. That has led to the natural introduction of social tools and systems to do far more than make Wells Fargo team members more engaged—it has elevated use of social to become a critical aspect of getting work done. Integration of those tools and systems into the thousands of other software products in use is also a strategic imperative.

** Attendee Luncheon & Keynote • 12:00 p.m. – 1:15 p.m.**

(See page 12 for complete description.)

**B103 • Where the Workplace Meets Mobile & Cloud**

1:15 p.m. – 2:00 p.m.

Jarrod Gingras, Director, Advisory Services, Real Story Group

This session reviews the newly emerging cloud file-sharing and collaboration marketplace. Gain an understanding of the benefits of cloud-based file-sharing tools; business scenarios, functional services, and technology services against which these can be evaluated; the current marketplace and its key players; and best practices for selecting the right solution.

**B104 • Delivering Enterprise Mobility**

2:15 p.m. – 3:00 p.m.

Rebecca Rodgers, Senior Consultant, Step Two Designs

The BYOD (bring your own device) movement is reaching a tipping point in organizations as workers want to use the devices they have at home. What should mobile enterprise solutions look like? And how do we deliver them? Although mobile devices are transforming how we work, there are definitely challenges. This practical discussion provides real-world insights into how to design and deliver a mobile enterprise. See many screenshots and examples from leading organizations and use these ideas to plan your own mobile projects.

**Coffee Break • 3:00 p.m. – 3:15 p.m.**

**B105 • Social Networking in the Digital Workplace**

3:15 p.m. – 4:00 p.m.

Monica Wiant, VP & Director, Internal Communications, U.S. Bank
Robert Peery, Director, Product Management, Moxie Software

This session looks at different strategies for dealing with people at different points along the adoption path. Change management is one of the biggest challenges of rolling out an enterprise social network. Wiant shares the story of how U.S. Bank followed the natural curve of adoption to communicate and drive adoption of its internal social network, US Book. She discusses how they overcame challenges including training, employee involvement, and resistance from social media skeptics. Enterprise social networks and online communities have become critical components of the digital transformation revolution, and it is nowhere more visible today than in collaborative Knowledge — the next generation of knowledge management. Peery shares case studies of organizations which focus on capturing collective knowledge, putting it into context and validating the right answer basically connecting the person asking a question with the person who has the answer.

**B106 • Impact of the Digital Workplace on the Physical Workplace**

4:15 p.m. – 5:00 p.m.

Franklin S. Bradley, Internal Communications Manager, Architect of the Capital Ryan Menke, Sr VP Sales and Marketing, DFS

This interactive and facilitated discussion begins with a short talk on how new physical workplaces are emerging in response to what digital workers require. Bradley shares the strategy and practices in bringing information and services to the workforce of Architect of the Capitol where 80% of the workforce is more likely to carry a hammer, rake, or paintbrush than to click a mouse during the
workday. These front-line employees maintain over 17 million square feet of buildings, including icons such as the U.S. Capitol, U.S. Supreme Court, and the Library of Congress. Buildings are spread over 460 acres of land and reach hundreds of feet into the air and below ground into a warren of passageways and utility tunnels. Many don’t have a fixed work location, and if they do, it’s often a workshop, not a desk. Menke talks about connecting people and spaces and how the dramatic shift in the type of furniture OSF sells is due to the spread of the digital workplace. He shares examples of how physical offices are evolving in the digital era.

**TRACK C • KM Issues & Challenges**

Renaissance Ballroom, Ballroom Level

This series of discussions with a roomful of colleagues at roundtables focuses on topics of interest to KM practitioners. Led by KM pros, the interactive sessions examine everything from how “good” KM looks, to expediting learning & building smarter organizations, to solving wicked problems and encouraging knowledge sharing behaviors.

*Moderated by Donna Scheeder, Congressional Research Service*

**C101 • I Say KM, You Say KS: What’s in a Name?**

10:15 a.m. – 11:00 a.m.

*Stan Garfield, Community Evangelist, Deloitte Consulting LLC*

The field of knowledge management is broad, and continues to evolve in parallel with related fields such as learning, information management, and social media. Organizations use a variety of terms to describe their efforts, including knowledge management, knowledge sharing, knowledge enablement, social learning, social business, and Enterprise 2.0—and many other terms are also in use. Our veteran practitioner surveys the current landscape and shares terms, specialties, and disciplines he considers important to organizations under the KM umbrella. Share your perspectives, experiences, and predictions in this interactive session.

**C102 • Encouraging Knowledge-Sharing Behaviors**

11:15 a.m. – 12:00 p.m.

*Denise Bedford, Goodyear Professor of KM, Kent State University*

Knowledge societies and knowledge economies thrive in environments where communication is open, collaboration and sharing are encouraged, leadership rather than control is the norm, innovation and ideas flow, and everyone is valued for their potential. Behavioral change is at the heart of any knowledge-friendly environment. To change behavior, we have to change organizational culture—no small challenge. Behavioral change is easier to achieve if we have a positive example on which to model our changed behavior. This session is grounded on the idea that strong role models and positive archetypes of good knowledge behavior are important tools for shifting the culture of knowledge organizations. Based on Patrick Lambe’s 20 archetypes of typical knowledge behavior, this interactive session has the audience work together to describe and label positive archetypes and to learn how to use the results in their organizations.

**C103 • Expediting Learning for Smarter Organizations**

1:15 p.m. – 2:00 p.m.

*Sandra Montanino, Director of Professional Development, Goodmans LLP*

Uses facilitation techniques that are based on complexity science, this interactive session helps you find ways to work out if a problem is complicated—or wicked—because if it is, there is no right answer, and we need to experiment with safe-to-fail solutions. Get a template and heuristics for creating wicked problem interventions and use “ritual dissent” to temper/test the proposals so that they will stand up. Try these out and take home a set of simple techniques to use in your organization to collectively find new solutions to complex problems.

Coffee Break • 3:00 p.m. – 3:15 p.m.

**C104 • Finding Solutions to Wicked Problems**

2:15 p.m. – 3:00 p.m.

*Dave Snowden, Founder & Chief Scientific Officer, Cognitive Edge*

Using facilitation techniques that are based on complexity science, this interactive session helps you find ways to work out if a problem is complicated—or wicked—because if it is, there is no right answer, and we need to experiment with safe-to-fail solutions. Get a template and heuristics for creating wicked problem interventions and use “ritual dissent” to temper/test the proposals so that they will stand up. Try these out and take home a set of simple techniques to use in your organization to collectively find new solutions to complex problems.

**C105 • Building Smarter Organizations**

3:15 p.m. – 4:00 p.m.

*Gordon Vala-Webb, KM, Dynamic Adaption*

To survive in today’s world, our organizations need to be smart—and that means a lot more than organizing knowledge to make it easy to find. This interactive session crowdsources answers from participants to three key questions: What is a smart organization? What are the barriers to organizations being smarter? What have you seen that worked to make an organization smarter? Join this highly engaging session and leave with a better understanding of the issues and opportunities for your organization.

**C106 • Making the Case & Getting Support**

4:15 p.m. – 5:00 p.m.

*Jim Lee, KM Senior Advisor, APOC*

Too often, KM professionals do not have a background in quality management, process management, or even project management. Only their ability to “make things happen” is what keeps their influence and KM programs alive. This is what keeps KM from having a seat at the table. Integrating the various KM approaches into the entire toolbox of improvement-speaking organizational improvement language using organizational improvement tools is the way to keep KM relevant. When leadership has already embraced improvement methods other than KM (and most often they will already have), it’s only logical that KM associate itself with those methods and not become a standalone program. How does KM become an equal partner at the table? Through its own mission: collaboration. This facilitated discussion centers around strategies and techniques for making the case and getting support for KM initiatives, technologies, and change in any organization. Bring your stories—the successes and the failures! Guaranteed to provide insights and ideas to try in your organization.

**Enterprise Solutions Showcase Grand Opening Reception**

WEDNESDAY, NOVEMBER 6
5:00 p.m. – 7:00 p.m.

Join us under the big top for the opening of the Enterprise Solutions Showcase. Featuring the top companies in the KM, CM, search, taxonomy, and intranets marketplace, the Showcase offers attendees an opportunity to explore the latest products and service solutions. If you are looking for a particular product, evaluating competing systems, or keeping up to date with the latest developments, be sure to visit the Enterprise Solutions Showcase.
Continental Breakfast  •  8:00 a.m. – 8:45 a.m.

**KMWorld & Intranet Innovation Awards**
8:45 a.m. – 9:00 a.m. • Grand Ballroom North, Ballroom Level

KMWorld magazine is proud to sponsor the **KMWorld 2013 Reality & Promise Awards** which are designed to celebrate the success stories of knowledge management.

The global **Intranet Innovation Awards**, run by Step Two Designs, uncover and share leading edge intranets. Focusing on individual enhancements that demonstrate business value, the Intranet Innovation Awards help every team deliver a better site. Winning organization are featured later today in session B204 Intranet Showcase, and share their ideas, insights and intranet designs.

**KEYNOTE**

**Big Data vs Human Data**
9:00 a.m. – 9:45 a.m. • Grand Ballroom North, Ballroom Level

Dave Snowden, Founder & Chief Scientific Officer, Cognitive Edge

Will information come from the misty mountains of the internet or the cloud with no human engagement as Big Data suggests? Don’t we need human sensors to share knowledge? Our popular and provocative speaker discusses the cycles of techno-fetishism that try and ignore the importance of human intelligence, seeking to create the great algorithm which will answer the questions of life, the universe, and everything else. Big Data is important, but it’s only the start of the journey, and savvy organizations realize they need a synthesis of machine and human intelligence. Get lots of insights and ideas to take home to your organization.

**Enterprise Search in Virtual Environments**
9:45 a.m. – 10:00 a.m. • Grand Ballroom North, Ballroom Level

John Patzakis, President and CEO, X1

Virtualized data centers, cloud infrastructures, and virtual desktop environments are gaining critical mass in the enterprise. While there are many compelling benefits associated with this trend, one emerging and serious challenge is the search and retrieval of large datasets residing in enterprise private clouds and other virtual environments. Hear how organizations are solving these challenges and driving revenues for their organizations.

**Coffee Break** • In the Enterprise Solutions Showcase
10:00 a.m. – 10:45 a.m.

**TRACK A** • KM Strategies & Practices

**Grand Ballroom North, Ballroom Level**

Hear from KM savvy organizations and practitioners as they share their strategies for building collaborative cultures, knowledge creation and reuse, clever thinking, and more.

Moderated by Daniel Lee, PWC Canada

**A201** • KM Techniques: Embedding, Revitalizing, & Tools
10:45 a.m. – 11:45 a.m.

Suzanne Wingfield, KM Technologist, Rolls Royce plc
Anne Rogers, Director, Research & Knowledge Services, Cargill
Donna Hendrix, KM Lead, CPF, Shell Canada

Hear about the business impact of the Rolls Royce KM 2-day global event to engage with employees company-wide in learning and sharing how to improve efficiency and/or effectiveness through KM. Rogers shares her story of overhauling Cargill’s vintage research and development document system to meet the needs of a new, KM 2.0 world. The stakes are high to protect intellectual property, and at the same time, corporations emphasize collaboration and knowledge sharing, and practitioners expect “Google-like” search. Hear how Cargill used advanced technical capabilities such as search and workflow and the adaptation of an old-fashioned hierarchical thesaurus to support search. Hendrix discusses the tools, processes, and behaviors needed to have a successful implementation of KM on a mega project. She shares successes and challenges in using SharePoint for knowledge sharing, communication and collaboration, in the After Action Review process, Lessons Learned, Site Visits, and more.

**A202** • Connection, Collaboration, & Culture Change
12:00 p.m. – 12:45 p.m.

Gloria Burke, CKO & Global Practice Portfolio Leader, Unified Social Business, Unisys

Learn how Unisys is leveraging social tools and processes to improve connection and workplace collaboration among its 22,000 employees, drive operational efficiency, streamline innovation processes, and increase marketplace agility. Working with a global virtual team of 30 colleagues, Burke is responsible for transforming how employees connect, share knowledge, and collaborate across the enterprise. Learn how Unisys made social collaboration an intrinsic part of its culture by integrating social collaboration tools into the daily workflow of its employees and how it governs its new social environment; what methods Unisys used to achieve a 91% employee adoption rate of social tools within an 18-month period and what techniques it is using today to shape and sustain desired employee behaviors; why Unisys has positioned “Communities” as the hub of its knowledge-sharing environment and the best practices it uses to enable, evolve, and mature communities to deliver maximum value; and what type of metrics Unisys captures to measure the success of its Knowledge & Collaboration Initiative and the value it is delivering to the business.

**A203** • Knowledge Creation & Reuse
2:00 p.m. – 2:45 p.m.

Gary Borella, Senior Manager, KM, Cisco Systems

To remain competitive, Cisco Services continues to avidly participate in KM practices to ensure new and refreshed knowledge is available. A strategic approach, KM3, has been put in place to drive knowledge creation and reuse across this organization. It leverages executive sponsorship to hold employees accountable for creating and reusing knowledge, recognizes employees for outstanding knowledge activities through monetary and peer recognition, and shares metrics and reporting through a knowledge dashboard allowing executives, managers and employees to track their contribution and reuse activities. The overall results from the program have been very impressive, with more than 50,000 knowledge contributions and 21,000 hours of productivity saved in FY’12. Learn from their experience and take home tips and techniques for increasing overall knowledge creation and reuse success rates.

**A204** • Integrating KM Practices: Case Studies
3:00 p.m. – 3:45 p.m.

Craig Malley, Founder & CEO, Bloomfire
Diane Berry, SVP, Marketing & Communication, Coveo
Mike Verital, President & CEO, Rivet Logic

Malley talks about surfing the knowledge wave as he shares a case study about a surf-inspired fitness company, SURFSET, that is using Bloomfire, a people-driven knowledge base, to provide the latest information, training, and programming to their worldwide network of studio owners, instructors and individuals. Learn how they brought their training course virtual, enabling them to quickly expand and maintain quality control, as well as foster engagement and healthy communication among their community of providers. Berry explains how companies including Harris Corporation, KeyBank, L’Oreal and Tokyo Electron are radically transforming by leveraging knowledge to become more relevant and responsive to their customers. She explains how search
Coffee Break • In the Enterprise Solutions Showcase 3:45 p.m. – 4:15 p.m.

A205 • Mobile User Experience Using BPM 4:15 p.m. – 5:00 p.m.
Craig Bennett, Software Development Manager, Bechtel Corp.
Marti Colwell, VP Marketing, BP Logix
As one of the world’s largest engineering, procurement, and construction companies, Bechtel Corp. operates through five global business units and 140 countries. With a mobile global workforce and concurrent mega-projects, Bechtel’s IT team needed a more user-enabled infrastructure to support the automation, maintenance, and execution of its business processes and workflows. This session covers the use cases and challenges the company faced as it transitioned from an in-house developed form and workflow tool to a full-featured commercial business process management tool. It addresses the challenges faced including user awareness, user acceptance, business acceptance, and rollout. Bennett shares both the best and worst practices that were encountered during the transition to a more efficient, effective, and “mobile user-enabled” system. He shares how Bechtel is deploying BPM technology to improve its business processes and knowledge sharing, gaining greater visibility and insight into those business processes and subsequently optimizing them.

TRACK B • Digital Workspace: Mobile, Social, & Extended
Congressional Hall B, Ballroom Level
Workspaces are definitely different. They are flexible, changeable, and can exist anywhere an internet connection is found. Hear how these spaces are becoming more mobile, social, and extended. Learn about the platforms, processes, and human factors that are making them successful. Moderated by Martin White, Intranet Focus

B201 • Social Enterprises for Knowledge Sharing 10:45 a.m. – 11:45 a.m.
Stan Garfield, Community Evangelist, Deloitte Consulting, LLC
Gordon Vla-Webb, Knowledge Management, Dynamic Adaptation
Microblogging platforms as knowledge-sharing conduits are having much success in building social organizations. Hear from two practitioners who have participated in large-scale global implementations of Jive and Yammer. They share strategies for getting buy-in and choosing a tool, provide tips and techniques for implementation and adoption, demonstrate the capability, and discuss challenges and learnings from their experiences.

B202 • Networked Worlds & Networked Enterprises 12:00 p.m. – 12:45 p.m.
Lee Rainie, Director, Pew Research Center’s Internet & American Life Project & Co-Author, Networked: The New Social Operating System
Rainie shows how the large, loosely knit social circles of networked individuals expand opportunities for learning, problem solving, decision making, and personal interaction. The new social operating system of “networked individualism” requires us to develop networking skills and strategies, work on maintaining ties, and balance multiple overlapping networks. The “triple revolution” that has brought on this transformation: the rise of social networking, the capacity of the internet to empower individuals, and the always-on connectivity of mobile devices. Drawing on extensive evidence, Rainie examines how the move to networked individualism has driven changes in organizational structure, job performance criteria, and the way people interact in workplaces. He presents a glimpse of the new networked enterprise and way of working.

Attendee Luncheon • In the Enterprise Solutions Showcase 12:45 p.m. – 2:00 p.m.

B203 • Gamification for Compelling Intranets 2:00 p.m. – 2:45 p.m.
Rebecca Rodgers, Senior Consultant, Step Two Designs
Compelling, creative, addictive, and a key tool in improving employee engagement. This isn’t the way most intranet managers would describe their sites. But that could change. This session looks at how other organizations are using gamification to increase intranet capability. Discover the links between staff engagement and basic principles of reward, recognition, direction, learning, and progression. Get lots of tips and tricks for use in your organization.
Breathing new life into the innovation process

Johns Hopkins Applied Physics Laboratory (APL)
Linda Hummel, Katarina Pugh

What’s under the hood in the enterprise intranet? This informative session lets you peek behind the firewall of leading-edge intranets from a number of different industries and includes award-winning sites from the 2013 Intranet Innovation Awards. These case studies of successful, active intranets provide ideas and insights to apply in your organization.

B205 • Working Virtually
4:15 p.m. – 5:00 p.m.
Martin White, Managing Director, Intranet Focus Ltd.
Virtual teams are commonplace these days, with one or more members working in a different location, time zone or country. Using his global experience in working with many organizations, White discusses working effectively with audio, web, and video conferencing; how to build, manage, and motivate virtual teams and communities; and how to address issues related to language and cultural differences.

TRACK C • Innovation
Congressional Hall A, Ballroom Level

Competitive advantage often comes from organizational flexibility and innovation. Gain some practical techniques to help innovation in your organization and hear what other organizations are doing to ignite innovation with social media and communities, and measure it’s value using the balanced scorecard approach.

C201 • Innovation Techniques
10:45 a.m. – 11:45 a.m.
Jeffrey Phillips, VP & Lead Consultant, Ovo Innovation, & Author, Make Us More Innovative
From brainstorming to other idea-generation tools to tips for changing internal enterprise culture (the biggest barrier to innovation), this session is filled with insights and ideas for ramping up innovation in any organization. Innovation does require determination and commitment, working to discover new needs, and creating change in a safe, comfortable environment. Our innovation expert shares lots of techniques for you to try in your organization.

C202 • Igniting Innovation with Community, Social Media & Findability
12:00 p.m. – 12:45 p.m.
Judith Theodori, Service Manager, & Ashley Conaway, Knowledge Manager, Johns Hopkins Applied Physics Laboratory (APL)
Linda Hummel, Chief Knowledge Officer, Fifth Third Bank
Katarina Pugh, Academic Director, Columbia University Info & Knowledge Strategy Masters Program
JHU/APL’s Knowledge Sharing and Innovation Initiative has been integral in moving forward an expanded innovation program. Focused on the goal of increasing innovation through small, funded exploration projects and increased sharing of technical knowledge, the initiative implemented changes to processes, technologies, and culture. The results are a community-driven program to fund project ideas proposed using social media, an enhanced community of practice program, and a program to develop and share videos that share technical knowledge and capabilities. In the second presentation, learn how a findability strategy can be extended to an innovation strategy. Users need to find people, rich content and just-in-time answers. Advancements in technology are helping us to get there, by providing a multitude of ways to access those resources, even serendipitously. Innovation is about bridging the content of findability and serendipity with changes in the markets or competitive environment, activities of the firm, and technology. That bridging is the work of the skilled convener. This session covers key aspects of findability, serendipity and innovation in our ever-changing competitive and collaborative competitive landscape. Grab the strategies and techniques and hear about lessons learned and tips for developing, promoting and supporting an enterprise innovation program in your organization.

Attendee Luncheon • In the Enterprise Solutions Showcase
12:45 p.m. – 2:00 p.m.
C203 • Communities for Innovation
2:00 p.m. – 2:45 p.m.
Jeanne Holm, Evangelist, Data.gov, General Services Administration
The U.S. government’s open data site, Data.gov, has blazed a trail for openness, transparency, and innovation. With more than 400,000 datasets from 180 agencies and many U.S. cities and states, the U.S. open data platform provides a wealth of information for citizens, researchers, and entrepreneurs. However, at the heart of Data.gov is a blend of data, information, and KM principles and practices that provides a platform for innovation. The expression of this is the Data.gov communities—17 topical areas focused around national priorities such as energy, health, and education. These communities (including Safety.Data.gov) allow collaboration amongst citizens, developers, analysts, data journalists, government officials, and business owners to get data into the hands of citizens to help them make better informed decisions.

C204 • Clever Thinking & Organizational Success
3:00 p.m. – 3:45 p.m.
Jeff Slapper, Vice President, MWH
Richard McDermott, President, McDermott Consulting
This talk describes how MWH, a global leader in wet infrastructure, uses “clever thinking” to distinguish itself with customers and separate itself from competitors in a rapidly changing business environment. It describes how individuals can distinguish themselves through clever thinking, which research on innovation suggests isn’t inherent talent. It can be developed through discipline and practice. Drawing on this research and interviews with managers and technical experts from a variety of fields, this talk describes the mechanisms of individual and organizational clever thinking: increased situational awareness, deeply understanding the science and principles that underlie the diagnosis and decisions, and generating unusual “just right” solutions. Using practical, hands-on examples, speakers share the “thinking tools and techniques” that improve the clever application of knowledge not by setting standards or best practices, but by guiding good thinking.

Coffee Break • In the Enterprise Solutions Showcase
3:45 p.m. – 4:15 p.m.
C205 • Balanced Scorecard Approach to Innovation
4:15 p.m. – 5:00 p.m.
John Gutierrez, Partner, Kalypso
Companies in every industry try to create environments that foster breakthrough new products and services, but few can evaluate the overall effectiveness of their innovation process. Faced with numerous business and operational challenges—from innovation objectives poorly aligned to corporate strategy to disconnected innovation data management—companies are too often making decisions about innovation based on incomplete and disparate information. Companies that focus on “running innovation like a business”—using a balanced scorecard approach—are more likely to drive real, measurable value for their shareholders. Gutierrez outlines the most effective strategies he’s found to institutionalize a more integrated innovation approach, from the front-end of innovation through in-market results.

Communities of Interest

—they foster innovative thinking and the development of new ideas and initiatives. These communities are focused on specific topics and provide a platform for knowledge sharing and collaboration. Each community has its own set of goals and objectives, and members are encouraged to participate actively in their respective communities.

Jeffrey Phillips, VP & Lead Consultant, Ovo Innovation, & Author, Make Us More Innovative
Continental Breakfast  8:00 a.m. – 8:45 a.m.

KEYNOTE

Transforming the Way We Collaborate
8:45 a.m. – 9:45 a.m.  * Grand Ballroom North, Ballroom Level

Carla O’Dell, CEO, APQC

External forces are transforming how knowledge managers formulate strategies and value propositions for their programs. New technologies and disciplines are constantly influencing the portfolio, use, and value of available KM approaches. Based on 20 years of KM leadership by APQC, O’Dell discusses how to harness these forces while also dealing with the consumerization of IT, how and when to apply social media tools to collaborative work, and how to use analytics to set the KM agenda.

Coffee Break  In the Enterprise Solutions Showcase
10:00 a.m. – 10:45 a.m.

TRACK A  Never Fail: Learn & Change

Grand Ballroom North, Ballroom Level

Organizations where mistakes are rewarded as learning events have high innovation and are highly adaptable. Is yours? Does yours make large investments in learning? Hear from our practitioners about how to create faster, more flexible learning organizations and also key strategies for bringing change to any enterprise.

Moderated by Jacqueline Halupka, Deloitte

A301  Energizing Organizational Learning & Strategic Communications
10:45 a.m. – 11:30 a.m.

Madelyn Blair, President, Pelerei, Inc., & Author; Riding the Current
Denise Lee, Director, PricewaterhouseCoopers

Narrative intelligence is a critical tool that helps a learning organization to strengthen its organizational vision, enhance strategic communications, capture and transfer organizational knowledge, externalize and internalize tacit knowledge, encourage innovation, build communities, and develop effective training, mentoring and learning strategies. These are the critical elements of a KM program. Turning experience into a story is considered by many as a fundamental mode of sense-making. The narrative weaves together stories of a KM program. Across organizations, the narrative of organizational learning energizes how people learn, the way they learn, and how they communicate. The narrative weaves an organizational story that can energize organizational learning in sustainable ways.

A302  Learning Organizations, KM & Learning From Failure
11:45 a.m. – 12:30 p.m.

Lip Kee Lee, Branch Head, Logistics Inspection Branch, Air Force 
Inspectorate, Republic of Singapore Air Force (RSAF)

Monika Weber-Fahr, Director Knowledge-Learning-Results, Sustainable Development, World Bank

Hear from practitioners about how they are building learning organizations and learning from failure. Hear from the RSAF about how they built a learning organization around safety management. Then learn about the changes new World Bank President Jim Yong Kim has brought and how the organization is stepping up its efforts to learn from failure and challenge a risk-averse culture, all in the name of ending global poverty.

Attendee Luncheon & Communities of Interest
12:30 p.m. – 2:00 p.m.  In the Enterprise Solutions Showcase

KEYNOTE

Enterprise Search in the Age of Big Data
9:45 a.m. – 10:00 a.m.  * Grand Ballroom North, Ballroom Level

Jeff Veis, Vice President of Marketing, HP Autonomy

Is the search solution you are using today solving yesterday’s problems? As knowledge workers rely more on mobile, social, and cloud technologies to perform their jobs, the boundaries between personal and professional data are becoming blurred. Unstructured data, including video and other rich media, now forms a large portion of an enterprise’s information assets. How do these trends affect your enterprise search requirements? Find out what you can do to succeed in today’s information age.

A303  Facilitating Organizational Change: Four Keys for Success
2:00 p.m. – 2:45 p.m.

Michael Grigsby, IT Manager, Kansas City Police Department

Organizational change can be slow and frustrating. Tackling the added demands of reshaping an organization’s culture can seem doubly challenging. However, with the proper approach, realistic goal-setting, and a unified commitment, the benefits can lead to dramatic improvements of organizational performance, efficiency, and sustainability, as well as personal and professional value for those involved. Change is often short-lived because of a failure in one or more of four distinct areas: acknowledgment, assessment, planning, or commitment. This session identifies key components within each of these areas and lays a foundation for both immediate and long-term results. The scalability of these strategies allows them to be universally successful.

A304  Building Smarter Networks
3:00 p.m. – 3:45 p.m.

Jeffrey Stemke, President, Stemke Consulting Group, & former Knowledge Strategist, Chevron

Expert knowledge is struggling to sustain continual performance improvement as work grows and the new generation workforce is less-motivated to spend years of concentrated practice to replace retiring thought leaders. As described in David Weinberger’s book Too Big to Know, collaborative networks harnessing their members’ diverse skills and experience are emerging as an important problem-solving and decision-making resource. KM practitioners have developed effective methods to create these networks. Their next challenge is finding ways to help network members become smarter—learning how to “think” as well as how to “do.” Learn about several smarter network systems including a SharePoint social learning system based on an expert’s mental model that cuts time to competency while enhancing the network’s performance capability.

TRACK B  Enterprise Content Management (ECM)

Congressional Hall B, Ballroom Level

The volume and types of content are growing so quickly, it is difficult to manage and find the content you require in your daily work. This track looks at the ECM landscape, the tools and practices, how to plan and implement ECM, and more!

Moderated by Claude Malaisson, Emergenceweb

B301  CM Landscape: Tools & Practices
10:45 a.m. – 11:30 a.m.

Jarrod Gingras, Director, Advisory Services & Theresa Regli, Principal DAM Analyst & Advisor, Real Story Group

Different types of content require special technology and techniques to manage it effectively. Meanwhile, the content technology marketplace continues to evolve, with emerging technologies featuring different business models (such as SaaS and open source) challenging the biggest technology vendors.
Friday, November 8

All the while, many niche vendors are continuing to thrive. This session looks at the enterprise content management landscape, the evolving best practices about how and where to store information, and the applications today's digital workplaces need to empower digital workers to succeed.

**B302 • Video Content & KM**
11:45 a.m. – 12:30 p.m.

*Nate Treloar, Vice President & General Manager, Enterprise, RAMP*

*Brett Lovelace, Digital Media Entertainment, DSA*

Video is becoming a key method of capturing and sharing knowledge and information residing in organizations. Practitioners share strategies and practices with video for capturing knowledge assets. Treloar illustrates how technology can assist in finding and distributing video content to the enterprise.

**Attendee Luncheon & Communities of Interest**
12:30 p.m. – 2:00 p.m.  •  In the Enterprise Solutions Showcase

**B303 • Enterprise Content Management (ECM): Planning & Implementing**
2:00 p.m. – 2:45 p.m.

*Ben Curry, Managing Partner, Summit 7 Systems*

Come see how to create an ECM plan that supports and aligns with your social, collaboration, and business process automation. This session discusses discovering actionable requirements: technical, cultural, and functional. It includes real-world examples of different architecture choices and how governance controls affect the implementation of SharePoint Server 2010/2013 and Office 365 ECM. It also addresses hybrid information architecture between an on-premise SharePoint environment and Office 365.

**B304 • Content Challenges & Opportunities**
3:00 p.m. – 3:45 p.m.

*Meghan Walsh, Senior Director, eCommerce Platform System Management, Marriott International*

*Sam Carson, Director, Knowledge Management, PPC*

*Jay Liebowitz, University of Maryland University College & Author, Big Data and Business Analytics*

Marriott International’s web and mobile products generated more than $8B in revenue for the company in 2012. The complexity of data needed to support the company’s evolving number of sites, languages, and digital products is magnified by reliance on traditional approaches to web content management and publishing. Partnering with PPC, Marriott looked at data requirements across digital products through extensive interviewing, data mapping, and data visualization. Hear about their strategies, lessons learned, impact of the change, how visualization played a role, and next steps. Long-time KM practitioner and author, Liebowitz, then discusses the challenges and opportunities for KM with big data and analytics.

**TRACK C • Collaboration & Communities**

**Congressional Hall A, Ballroom Level**

Collaboration and knowledge sharing in communities and organizations is key to making enterprises more productive and successful. Grab strategies and techniques for improving the situation in your organization.

*Moderated by Anne Rogers, Cargill*

**C301 • Creating a Connected & Collaborative Organization: Top Tips**
10:45 a.m. – 11:30 a.m.

*Dan Pontefract, Head, Learning & Collaboration, TELUS, & Author, Flat Army*

Our experienced practitioner and author shares top tips and real-world examples for creating a connected and engaged organization—“a Mecca of collaboration; a culture that fosters innovation, creativity, teamwork and friendship.” He discusses leadership, incorporating collaboration practices, new learning models, and methods of engagement to build teamwork and positive bottom-line results in any organization. Take home great tips to make your organization more productive!

**C302 • Enterprise Collaboration Technology Market Overview**
11:45 a.m. – 12:30 p.m.

*Tony Byrne, President, Real Story Group*

To date, technology analysts have quite properly focused on the social and business aspects of social collaboration technologies. And yet, social collaboration tools, including collaboration suites, pure-play blog/wiki/social-networking products, and revamped portal products from major vendors, differ quite substantially in maturity, approach, and support. This session shares customer research from a noted evaluation firm on leading enterprise collaboration technologies and provides a framework for customers to evaluate the marketplace based on their own needs.

**Attendee Luncheon & Communities of Interest**
12:30 p.m. – 2:00 p.m.  •  In the Enterprise Solutions Showcase

**C303 • Building a Collaborative Organization**
2:00 p.m. – 2:45 p.m.

*Judith Theodori, & Karen Higgins, Service Managers; Ann Kedia, Program Manager, Knowledge Sharing & Collaboration; Angelina Boampong, Project Manager, Johns Hopkins Applied Physics Laboratory (APL)*

Building a collaborative organization is no small task, especially for a large, diverse organization like the Johns Hopkins APL. Building a truly collaborative organization involves not only buy-in from upper management and the introduction of new technologies, but also participation from the grass roots and a fundamental shift of organizational culture and policies. Hear about APL’s knowledge sharing program, its critical success factors for collective success. They discuss enterprise search: bringing experts and content to light in SharePoint, moving team collaboration to the next level of innovation and community, tapping into the creative spirit, metrics, and measuring business performance.

**C304 • Connecting People to People**
3:00 p.m. – 3:45 p.m.

*Sarosial Torres, KM Change Management Manager, & Donna Snaidt, Senior Associate, Grant Thornton LLP*

*Thomas Gilmartin, Senior Manager, & Eric Ziegler, Enterprise 2.0 Program Manager, Vanguard*

*Melinda Bickerstaff, Principal, Accenture*

Many companies realize the value of internally connecting employees through KM practices and technology, not only to match the right skills and experience with existing and potential clients, but to increase knowledge sharing and encourage teamwork and collaboration. This fast-paced session looks at three different examples. Torres demos the firm’s custom-designed people search capability to collaborate across departments and find the best talent for a given client or project, a key strategic driver for Grant Thornton. Vanguard speakers share how communities of practice and their platform are empowering a growing global company by connecting people to people, people to content, and content to content. Bickerstaff shares results from third-generation KM efforts that focus on connecting people and facilitating collaboration, including the game-changing societal shifts that helped shape the efforts.

**CLOSING KEYNOTE**

*10 Things KMers Can Learn From Angry Birds*  
4:00 p.m. – 4:45 p.m.  •  Grand Ballroom North, Ballroom Level

*Dan Rasmus, Owner/Principal Analyst, danielwrasmus.com, & Author, Listening to the Future and Management by Design*

Colorful and fun, our closing keynote speaker and futurist discusses lessons learned from various activities. He then uses scenario-based work and other research to discuss what the future of KM could be under different social, economic, political, and technological circumstances. Be prepared to hear why good ideas don’t become viral, and be inspired to think of KM in new and different ways.

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LEARN ABOUT:

- Managing and growing a taxonomy
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- Working collaboratively with your content and stakeholders
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- Creating and implementing successful taxonomies
- Case studies, lessons learned, and best practices

Bringing It All Together
Content and information are increasing exponentially within and outside your organization. Do you have the right tools and policies in place to help make sense of the increasingly confusing world around you? Come to the 9th annual Taxonomy Boot Camp to learn about the latest advances in organizing, managing, and integrating information and data from internal and external sources.

Taxonomy Boot Camp brings together practitioners and experts in taxonomy, vendors who have created tools to help manage your taxonomies, and novices who are starting out in the world of information management. Two parallel tracks on the first day provide those new to the field with the nuts and bolts they need to get up-to-speed, and expert practitioners with insights into how other professionals have made their organizations more successful through better use of taxonomies. On the second day of the Boot Camp, everyone shares in case studies, practical sessions on taxonomy tools and their use, and cutting-edge developments in the field. Don’t miss this unique opportunity to learn about tools and techniques you can use to bring your information clouds together, and meet the people who can help you be successful in your efforts.

Conference Chair
Michael Crandall
University of Washington

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Complimentary Wi-Fi is available in all meeting rooms.
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Visit with our conference sponsors to find out more about their products and services. Tabletops are located just outside the session rooms.

WELCOME RECEPTION
Tuesday, November 5 • 6:00 p.m. – 7:00 p.m.
Congressional Hall, Ballroom Level
Enjoy a glass of wine and a selection of cheeses in a relaxed atmosphere as we kick off the start of this year’s program. Open to all conference attendees, speakers, and sponsors.

CONTINENTAL BREAKFAST & BREAKS
A continental breakfast will be provided on the Ballroom Level each morning starting at 8:00 a.m. before the keynote sessions. Check your program for additional morning and afternoon break times and locations.

ATTENDEE LUNCHEONS
Lunch on Tuesday will be served in Grand Ballroom North on the Ballroom Level. Lunch on Wednesday will be served in the Renaissance Ballroom Foyer on the Ballroom Level.

ENTERPRISE SOLUTIONS SHOWCASE GRAND OPENING RECEPTION
Wednesday, November 6 • 5:00 p.m. – 7:00 p.m. • Ballroom Level
Join us under the big top for the opening of the Enterprise Solutions Showcase. Featuring the top companies in the KM, CM, search, taxonomy, and intranets marketplace, the Showcase offers attendees an opportunity to explore the latest product and service solutions. If you are looking for a particular product, evaluating competing systems, or keeping up to date with the latest developments, be sure to visit the Enterprise Solutions Showcase.

KMWORLD BOOKSTORE
Wednesday, November 6 • 10:00 a.m. – 3:30 p.m. • Ballroom Level Foyer
5:00 p.m. – 7:00 p.m. • Showcase

CONFERENCE PRESENTATIONS
Many speakers have made copies of their slides available for download from the conference website (www.taxonomybootcamp.com). Click on “PRESENTATIONS” and enter Username/Password: DC2013

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TUESDAY • NOVEMBER 5, 2013

CONTINENTAL BREAKFAST

WELCOME & KEYNOTE • Grand Ballroom Central, Ballroom Level • Taxonomy Is Power: Bringing It All Together • Bob Boiko

COFFEE BREAK

Track 1 • Grand Ballroom Central, Ballroom Level

Getting Started

Taxonomy Fundamentals Workshop • Hlava

ATTENDEE LUNCHEON • Grand Ballroom North, Ballroom Level

Taxonomies: From Idea to Reality
- MODERATOR: Cardon
- PANELISTS: Maislin, Tamlyn, & Hert

TAXONOMIES IN SHAREPOINT

How Evolving SharePoint Functionality Requires an Enterprise View of Taxonomy • Early
Managed Metadata & Taxonomies in SharePoint • McNulty

COFFEE BREAK

COMMUNICATING WITH STAKEHOLDERS

Explaining Metadata: Tools You Can Use • Gotz
Machines vs. Humans: Selling Both! • Mayer
Taxonomy: Science or Whimsy? • Upton

PANEL: The Curious Lives of Full-Time Taxonomists
- MODERATOR: Wahl
- PANELISTS: Lehnert, Benevento, & Segal

WELCOME RECEPTION • Congressional Hall, Ballroom Level

WEDNESDAY • NOVEMBER 6, 2013

CONTINENTAL BREAKFAST

KEYNOTE • Renaissance Ballroom, Ballroom Level • Building Collaborative Organizations • Nicco Mele

KEYNOTE • Renaissance Ballroom, Ballroom Level • A New Search Architecture for Big Data Era • Kamran Khan

TRUE TALES OF TAXONOMY USE

Corporate Folkonomy for Collaborative Teams • du Hommet & Cacace
Creating a Unified Front: Taxonomy Automatic Indexing • Faith
User Experience Testing for Content Types & Retention Rules for Records & Econtent • Stannert

AUTO-CATEGORIZATION: MACHINES VS. HUMANS IN BIG DATA

Pattern Analysis & Categorization: Big Metadata Toolkits • Busch & Bliss
Using Example-Based Auto-Categorization to Tame Big Data • Felahi

MACHINES vs. HUMANS in Taxonomies

ATTENDEE LUNCHEON & KEYNOTE • Renaissance Ballroom, Ballroom Level • File Sync/Share Is Not Endpoint Backup • Ann Feldman

INDEXING IMAGES

Practical Aspects of Natural Language Processing • Vasicek & Brown
Image Indexing (IF-Indexing Images) • Kasenchak
Taxonomy Meet Art, Art Meet Taxonomy • Clarke

USER EXPERIENCE (UX) IN TAXONOMY DESIGN

Benefits of Integrated UX-IM Design • Rudy
Ensuring Consistent & Accurate Tagging • Ličnič
Applying User Research to Designing Info Models • Wessel

COFFEE BREAK

SEMANTIC SEARCH

Utilizing Ontologies for Taxonomy & Content Organization • Rhein
Enhancing Searches With Taxonomies & Semantic Tech • DuCharme
Developing a Semantic Search Application • Reamy

VISUALIZING ONTOLOGIES AND METADATA

Visualization Illuminates Data & Convinces Stakeholders • Carroll
Ontology Diagrams for Successful Knowledge Capture & Transfer • Olson
Ontology-Driven Search and Information Access: How Abstractions Become Actionable • Earley

GRAND OPENING RECEPTION in the Enterprise Solutions Showcase, Ballroom Level (800) 300-9868 • www.TaxonomyBootCamp.com

All sessions will take place in the Grand Ballroom North, Ballroom Level unless otherwise noted.
Tuesday, November 5

Continental Breakfast 8:00 a.m. – 9:00 a.m.

KEYNOTE

Taxonomy Is Power: Bringing It All Together
9:00 a.m. – 10:00 a.m. • Grand Ballroom Central, Ballroom Level
Bob Boiko, Founder & CEO, Metatatorial Services, Senior Lecturer, University of Washington Information School, & Author, The Content Management Bible, Laughing at the CIO, & the upcoming The Structure of Information

Taxonomy is controlling information by naming and organizing it. Boiko dives into the depths of taxonomy to talk about what, at its essence, it is and does. He describes the usual and potential position of the taxonomist in projects and how the skills and methods of the taxonomist can be one of leadership in the teams, departments, and organizations you live in. Hear how taxonomy fits into the structure of information and the crucial role it plays in bringing people, information, and technology together.

Coffee Break 10:00 a.m. – 10:15 a.m.

Track I • Getting Started
Grand Ballroom Central, Ballroom Level
Moderated by Hannah Rubin, Congressional Research Service

Taxonomy Fundamentals Workshop
10:15 a.m. – 12:00 p.m.
Marjorie M.K. Hlava, President & Chairman, Access Innovations, Inc.

This interactive session starts by building a solid conceptual foundation for taxonomy creation and reinforces those concepts through audience participation. Starting with the basics, Hlava quickly advances to where and how to leverage taxonomies. This gives beginning and intermediate practitioners a good overview of the foundational knowledge for the more advanced sessions throughout the conference. Leveraging the taxonomy standards for the key components of a thesaurus, Hlava explores how those elements support the information needs of users from multiple perspectives and examines illustrative sites and behind-the-scenes solutions to see how a well-constructed taxonomy with a rich interplay of terms and synonyms leads to better information access. The workshop discusses developing a taxonomy that serves users, respecting their needs for specialized vocabularies. With hands-on activities, attendees gain insight into how a subject area can be viewed, described, and structured. This hands-on session provides basic knowledge to create a taxonomy that suits your needs.

Attendee Luncheon • Grand Ballroom Central, Ballroom Level
12:00 p.m. – 1:00 p.m.

Taxonomies: From Idea to Reality
1:00 p.m. – 2:00 p.m.
MODERATOR: Gary Carlson, Principal, Factor
Seth Maislin, Taxonomy Practice Lead, Earley & Associates
Ralph Tamlyn, Chief Taxonomist, Enterprise Solutions & Web Enablement, IBM
Carol Hert, Senior Consultant, Factor

There are many challenges in managing different types of taxonomies. Taxonomies can range in size from less than 10 terms to more than a million, be in one language or 20, and have a simple hierarchy or complex ontological structure. It’s also important to remember that taxonomy is not a panacea to solve content management issues. It’s a critical step, but successful solutions go far beyond just taxonomy; if you’re not planning for LAT (“life after taxonomy”), then you might find that you’ve invested a great deal of time and money for a system that’s not ready to perform. This panel brings together experts who have tackled different taxonomies from a range of organizations. They discuss the unique challenges, different approaches, and expectations that can be helpful when working on different taxonomies, including how to transform your taxonomy from an academic exercise to a full-fledged vehicle for content management; how to design a taxonomy that meets real user needs; the relationship of taxonomy and metadata; the rigors of taxonomy governance; editorial guidelines and tagging strategy; and post-implementation tasks, analysis, and adjustments. Creating your taxonomy is merely the beginning; by the end of this session, you will have learned what it takes to cross the finish line.

TAXONOMIES IN SHAREPOINT
2:15 p.m. – 3:00 p.m.
How Evolving SharePoint Functionality Requires an Enterprise View of Taxonomy
Seth Earley, CEO, Earley & Associates

SharePoint has evolved through the years in the level of sophistication around functionality driven by metadata and taxonomies. Metadata has always been important, but the product has evolved in very significant ways. The implication: Taxonomy derivation and thoughtful application are no longer nice to have but are now critical to the effective use of the platform. Earley reviews recent advances as well as outlines all the ways that taxonomy is leveraged in foundational reference architectures. He provides a clear set of use cases and business justification for taxonomy development programs.

Double Tag! Managed Metadata & Taxonomies in SharePoint
Chris McNulty, SharePoint CTO, Dell

Information architecture finally gets a helping hand with the second edition of Managed Metadata Service in SharePoint 2013. Our expert reviews all the traditional uses for the term store and social tags. He begins with a hands-on review of SharePoint 2013’s managed metadata services for taxonomies, folksonomies, hashtags, site policies, and content types. He concludes by looking at how metadata navigation comes together to create a dynamic information catalog to collect far-flung content united only by common metadata tags.

Coffee Break • 3:00 p.m. – 3:15 p.m.

COMMUNICATING WITH STAKEHOLDERS
3:15 p.m. – 4:00 p.m.
Explaining Metadata: Tools You Can Use
Ruven Gotz, Director, Collaboration, Avanade

This meta-presentation improves your understanding of metadata, but more importantly, it gives you the tools and techniques to help you explain metadata and taxonomy to your stakeholders in terms they can understand. Through the use of metaphors and interactive tools (that are provided), you will be able to excite your stakeholders and get them engaged in the process of defining metadata for their business area.

Machines vs Humans: Selling Both!
Daniel Mayer, VP Corporate Marketing, TEMIS

Both in taxonomy development and in content tagging, there is a long-standing information management debate between the human element of quality and the automation-driven efficiency. A well-built thesaurus supports automated content annotation, while effective semantic enrichment supports taxonomy maintenance, successfully leveraging human input. This session showcases the benefits of a connected architecture where taxonomy (or ontology) management and semantic enrichment, along with human operators, work as a team to support a cohesive information lifecycle.

Taxonomy: Science or Whimsy?
John Matthew Upton, Principal Consultant, ByteManagers, Inc.

Categorization is an intensely personal exercise: each group of objects – whether physical or digital – can be grouped according to myriad organizational methods. When justification for wholesale change to taxonomy structures is based on personal opinion instead of data, the categorization scheme breaks down and taxonomy becomes ineffective. This session takes taxonomy out of the academic vacuum: using “jars of whimsy” – a small mason jar filled with seemingly random odds and ends – and shares a brief sorting exercise that illustrates the type of categorization analysis that must be performed on a regular basis in order to maintain a high-functioning taxonomy.

Discussion, Questions, & Answers
This popular session facilitates a conversation with a panel of full-time taxonomists from the public and private sectors and the consulting world. The taxonomists discuss their career path, daily activities, and noted trends in the industry. The audience has the opportunity to ask questions, with answers and different perspectives provided from each panelist.

**BUILDING LARGE TAXONOMIES & THESAURUS**

10:15 a.m. – 11:00 a.m.

**Taxonomy Development**
Ahren Lehnert, Taxonomy & Search Analyst, FMC Technologies, Inc.
Kim Glover, Manager of Knowledge Management, FMC Technologies, Inc.

Developing a taxonomy from existing sources of information is a good way to ensure your vocabulary is accurately reflecting the content you are classifying. Additional sources of content, however, can change the scope of the vocabulary and potentially create conflicts with the existing structure. How do you plan for what you don’t know? Are there tactics for developing a taxonomy that can grow and adapt to new information without causing a partial or complete overhaul of what you already have built? This session includes a real-world taxonomy development case study as well as helpful suggestions and best practices for designing a taxonomy able to adapt to new information sources.

**Building a Multidisciplinary Thesaurus**
Nancy Murray, Associate Director, Metadata, ITHAKA/JSTOR

JSTOR is a digital library of more than 1,500 academic journals, books, and primary sources. These holdings comprise a wide range of topics from the humanities to the sciences. Today, no one single thesaurus holds the terms to cover all these subjects. Known for quality metadata and quality images, JSTOR’s goal is to have a thesaurus provide high-quality enhancement of its content. Hear about the steps and the issues involved in creating this thesaurus.

**Tilling the Fields: Growing Old Taxonomies to Fit New Content**
John Magee, Director, Indexing & Vocabulary Services, and Maureen McClarnon, Metadata Archivist, Cengage Learning

What does one do when one has 100-plus decade-old taxonomies that need to be repurposed? What if the taxonomies in question are highly idiosyncratic in both content and organization, but now need to play nicely in a wider, standards-driven environment? Education and reference publisher Cengage Learning confronted this issue in 2011, when the metadata team needed to harvest previously untended fields of course-syllabus-based taxonomies to feed new content and products. The crop yield from the legacy taxonomies wasn’t enough to implement this new indexing workflow in production systems and products. Would Cengage Learning practice slash-and-burn agriculture, or could it use the seeds of previous efforts to cultivate bountiful new fields? Members of Cengage Learning’s Metadata Standards and Services team take you through how they identified problems with their existing taxonomies, analyzed the problems and opportunities, and ultimately merged the old taxonomies into improved, discipline-based taxonomies. They share tips on taxonomy cultivation, and keep you from buying the farm.

**TAXONOMY MANAGEMENT**

11:15 a.m. – 12:00 p.m.

Taxonomy & Classification Metadata Management: Best Practices
Ralph Tamlyn, Chief Taxonomist, Enterprise Solutions & Web Enablement, IBM
Organizing and delivering relevant information to people inside and outside organizations is an evermore complex challenge as the volume of information grows. Among the critical components underlying the solution is the classification of information through high-quality metadata. The metadata in turn depends on high-quality taxonomies and ontologies. The metadata is used to classify, manage, organize, and integrate information, including web content. IBM has undertaken a multi-year effort to improve the integration and delivery of information and web content by improving the management of classification metadata and taxonomies. This effort is building on best practices for managing classification metadata and managing taxonomies and the processes implementing these practices through enterprise tools and enhancements to the myriad systems managing information and content. Tamlyn led the development of those best practices and the design of those tools, using metrics and governance to complete the solution. In this session, he focuses on the graceful evolution of existing systems to implement such practices.

Successfully Managing Multilingual Taxonomies: 3 Approaches
Jim Sweeney, Product Manager, Synaptica LLC

This talk covers three different approaches to managing multilingual taxonomies, their terms, and translations. All three methods are discussed in detail as well as the pros and cons of each strategy.

Assessing Management Needs: Using a Vocabulary Governance Maturity Model
Richard Iams, Senior Analyst, Project Performance Company (PPC)

Information exchange, between systems and users, is vital in today’s knowledge/edge-based business environment. Effective governance across information systems, taxonomies, and data yields stable and predictable results as changes are applied in response to business needs. However, the gold-standard plan may not always be achievable on tight budgets. Iams discusses a vocabulary governance maturity model. The model provides a framework for comparing current vocabulary governance to best practices. It defines specific success measurements that can be used to prioritize vocabulary management activities which are likely to provide the most value when implemented. An example scorecard for a vocabulary management application is shared.

**TAXONOMY EVALUATION AND TESTING**

1:00 p.m. – 2:00 p.m.

**Evaluating Taxonomies**
Joseph Busch, Principal, Taxonomy Strategies
Vivian Bliss, Senior Consultant, Taxonomy Strategies

Taxonomies are developed in communities and evolve across time. From the outset, there is a need to evaluate existing schemes for organizing content and questions about whether to build or buy them. Once built out and implemented, taxonomies require ongoing revisions and periodic evaluation to keep them current and structurally consistent. Taxonomy evaluation includes the following dimensions that are discussed: 1) editorial evaluation, including depth and breadth, comprehensiveness, currency, relationships, polyhierarchy (is it applied appropriately?), and naming conventions; 2) collection analysis, including category usage analytics (is distribution of categories appropriate?), completeness and consistency, and query log/content usage analysis; 3) market analysis, including industry standards/leaders, user surveys, card sorting, and task-based usability. Examples are provided from clients in B2B and B2C ecommerce, intranets, and public websites in the public, nonprofit, and commercial sectors.

Testing Taxonomies
Heather Hadden, Taxonomy Consultant, Hadden Information Management

Just because you have a taxonomy, it’s not safe to assume that it will function as well as it could. An important part of any taxonomy development or redesign project is testing the taxonomy. The session includes an overview and examples of different types of tests that can be used on taxonomies, including card sorting, use/use case testing, and A/B testing, tells what tools or methods can be used, and explains when each is most appropriate. This presentation also discusses the difference between testing and evaluating a taxonomy and when each should be done. Finally, taxonomies testing and evaluation are compared with general website design testing and evaluation.

**Discussion, Questions, & Answers**
STANDARDS UPDATE
2:15 p.m. – 3:00 p.m.

Taxonomy Interoperability Standard
Marjorie Hlava, President, Access Innovations, Inc.

Taxonomies at last have a standard to support interoperability between taxonomies and other controlled vocabularies. The linking, multilingual, or interoperability of standards has been a holy grail for many years. With the passage of the ISO 25964 Part Two in 2013, the groundwork has been laid for further development in these areas. A brief overview of the standard and its relation to other current standards such as ISO 25964 Part One, revisions to C239.19 and the updated British standard BS 8723 Parts 1–5 is provided. In addition, the ISO terminology standards used by the computer science community are discussed.

Taxonomy Modeling’s New Guard—SKOS-XL Concepts
Jim Sweeney, Product Manager, Synaptica LLC

This talk examines concept/label taxonomy design as represented by SKOS-XL (Extended Language) modeling, compared to traditional taxonomy design. It explores the differences between the two models and how each is able to handle specific design requirements, such as managing multilingual instances, synonymy, and distinct attributes. Relation to OWL and its variations and the use of “term ID” and its pros and cons within these standards are also discussed.

Discussion, Questions, & Answers
Coffee Break  3:00 p.m. – 3:15 p.m.

ENTERPRISE TAXONOMIES
3:15 p.m. – 5:00 p.m.

Building Enterprise Taxonomies: Lessons Learned
Seth Earley, CEO, Earley & Associates

After almost 2 decades of building taxonomies for a variety of industries, applications, tools and organizations, there are many lessons to be learned and applied to today’s highly distributed and loosely connected information environments. Internal versus external applications, departmental versus business unit versus enterprise, application to structured versus unstructured, text versus rich media, back end versus front end, machine-applied versus human indexing, and a range of other variables for the derivation, application, and maintenance of taxonomies provide a rich backdrop for lessons learned.

7 Steps to EIM Taxonomy Success
Myles Miller, CEO & Founder, SuccessHQ

The proliferation of information channels, sources, and delivery platforms makes managing information a complex business challenge. Compounding this issue is the fact that, due to the increasing speed of business, information is growing at a rate that far surpasses standard institutional frameworks and controls. Information continues to be recognized as a key source of competitive advantage, and there is an increasing need for the business worker to access relevant information in a timely manner. The key to managing this information is to develop a way to identify, classify, and categorize enterprise information. This categorization allows for effective management of content throughout the information life cycle: capture, storage, retrieval, archival, and disposal. A systematic approach to taxonomy development goes a long way to ensure that the finished product, the corporate taxonomy, is relevant, usable, and provides value to the business.

Taxonomies for Program Management
Joseph Busch, Principal, Taxonomy Strategies
Vivian Bliss, Senior Consultant, Taxonomy Strategies

Common information management practices are needed for creating and storing resources so information can be easily found and shared later. These practices range from simple file and folder naming conventions to more robust metadata schemas and tagging vocabularies. These taxonomies need to be readily understandable to employees without much, if any, training; they must be “natural” and “universal.” In some organizations, creating, tagging, finding, and presenting information assets is a natural part of everyone’s daily routine, as natural as searching for a website or shopping for products in an online store. While taxonomies are typically built to solve an information management problem such as browsing for content on a website, this presentation discusses how taxonomies are being used to 1) reflect the overall program goals of an organization; 2) be the framework for organizing, finding, and presenting assets from disparate systems; and 3) provide a common way to measure and report on organizational performance. Examples are provided from organizations that are using taxonomies to meet today’s program management challenges.

Enhancing Information Infrastructure Enterprise Taxonomy
Christy Stachura, Product Specialist & Ann Marie Jacklin, Senior Product Analyst, Deloitte Touche Tohmatsu Limited

Speakers walk through five aspects of developing complex enterprise taxonomies. 1) Scalability—a successful taxonomy is recognized for its dynamic nature and is integrated into a standard business workflow that accommodates business organizations, both internal and external areas of focus, geographies—regional and global differences, cultures—philosophical as well as geo-political differences among business organizational areas, and IT systems—providing integration points that are broadly consumable. 2) Inputs—use cases (requirements), lessons learned, and best practices. 3) Critical risks and success factors. 4) Data and information architecture—designing front-end data structure to facilitate downstream consumption with custom connectors, web services, indexing service for web-based tools, and reports with specified criteria. 5) Implement enterprise taxonomy as a management tool—aggregate like terms from diverse groups into consolidated lists that can be leveraged by the majority of consumers; using a confluence of filters and enhanced relationship management, deliver specialized taxonomy views to groups requesting taxonomy integration.

Challenges of Multipurpose Enterprise Taxonomy
Branka Kosovac, Founder and Primary Consultant, dotWit Consulting

An enterprise taxonomy is intended to be used by multiple groups within a company and to bring all the benefits and efficiencies associated with standardization across the enterprise. Meeting needs of diverse groups and synchronizing different conceptualizations and terminologies are known and often discussed challenges with a more-or-less established arsenal of solutions. This talk presents challenges faced by a large company with huge amounts of information and generally decentralized information management that has seen work on shared vocabularies in different organizational units since the late ‘90s. Three major efforts which have survived through 15 or so years of coping with organizational restructuring, staff fluctuation, changing strategies, technologies, and budget priorities have recently converged, and options for integration are currently being explored. These three sets of controlled vocabularies have substantial overlaps and an increasing number of shared stakeholders, but they have been developed for essentially different purposes, come from different communities, and follow different global standards and governance approaches.

Integrating Enterprise Taxonomies With Local Variations
Tom Reamy, Chief Knowledge Architect, KAPS Group

Balancing the need for a standard taxonomy for the entire enterprise and the desire to support local variations is one of the basic problems of enterprise taxonomy development. In addition to taxonomy structure issues, there is a large change management component. Trying to impose the same standard vocabulary on every group, while often attractive to enterprise taxonomists, fails to adequately reflect real local needs. This talk is based on a recent project at a large international financial institution which dealt with a somewhat fragmented environment using an enterprise taxonomy implemented with a text analytics tool, a secondary enterprise structure, a special topic taxonomy, and multiple knowledge management taxonomies managed by several KM networks.

Discussion, Questions, & Answers

Welcome Reception
Tuesday, November 5  • 6:00 p.m. – 7:00 p.m.
Congressional Hall, Ballroom Level

Enjoy a glass of wine and a selection of cheeses in a relaxed atmosphere as we kick off the start of this year’s program. Open to all conference attendees, speakers, and sponsors.
WELCOME & KEYNOTE

Building Collaborative Organizations
8:45 a.m. – 9:45 a.m. • Renaissance Ballroom, Ballroom Level
Nico Mele, Co-Founder, EchoDitto; Faculty, Harvard Kennedy School, & Author, The End of Big
See page 12 for complete description. Mele will be signing his new book exclusively from 10:00 – 11:00 a.m in the KMWorld Bookstore.

A New Search Architecture for the Big Data Era
9:45 a.m. – 10:00 a.m. • Renaissance Ballroom, Ballroom Level
Kamran Khan, CEO, Search Technologies
See page 12 for complete description.

KEYNOTE

A New Search Architecture for the Big Data Era
9:45 a.m. – 10:00 a.m. • Renaissance Ballroom, Ballroom Level
Kamran Khan, CEO, Search Technologies
See page 12 for complete description.

TRUE TALES OF TAXONOMY USE

10:15 a.m. – 11:00 a.m.

Corporate Folksonomy for Collaborative Teams
Joanne de Hommet, Knowledge Manager, & Beatrice Cacace, Knowledge Manager, Ubisoft Entertainment
At Ubisoft, collaboration and sharing are key factors to successfully creating great games. On this journey to success, expertise recognition and knowledge sharing can become major challenges. To facilitate knowledge accessibility and discovery, Ubisoft teams implemented a common referential of keywords, usable on collaborative platforms and internal applications. What is the vision the folksonomy will help to achieve? How does the tag system connect and interact with Ubisoft’s other internal applications? These are described along with how Ubisoft handled this mix of folksonomy and taxonomy, the interactions with other KM tools, and the governance behind the Ubisoft tag system.

Constructing a Focused Taxonomy
Ashleigh Faith, Taxonomy & Document Indexing Manager, SAE International

SAE International uses automatic indexing software. Before its project was under way, “use” of the software was loosely applied at best and the taxonomy was in a poor state for automatic indexing. SAE created its own taxonomy, based on engineering mobility and science terminology, from scratch. Developing a cohesive taxonomy that would also facilitate automatic indexing on content reaching more than 136,000 pages (and growing) across eight different content types was a challenge. Faith discusses the process that SAE used to establish a taxonomy to capture content and create the bedrock in which the indexing software could be trained, as well as the trials and iterations of training the software and validating the assignments. SAE improved its taxonomy assignment of content by 95%, well above the typically accepted 75% accuracy rate of automatic indexing, and established a repeatable process that can be used as the taxonomy grows.

User Experience Testing for Content Types & Retention Rules for Records & Econtent
Kyle Stannert, Public Records Manager, City of Bellevue

As the City of Bellevue embarked on implementing new technologies and compliance requirements, it faced a challenge. With a retention schedule made up of more than 6,000 records series, the ability to support emerging business and technology requirements seemed next to impossible. The city’s records management program took on this challenge and refined the agency retention schedule into a format that would work for users and could be implemented in systems including email archiving, instant messaging, and SharePoint 2010/Gimmel Compliance Suite. This talk shares lessons learned in developing retention rules and a content type framework that is as easy to navigate as a visit to Disneyland. Learn how to consider the value of a functional retention schedule in your organization; connect the value of a simplified schedule in implementing email archiving, unified communication and/or ECM technologies; and apply multiple ideas to simplify your retention schedule at your place of work when you get back to the office.

AUTO-CATEGORIZATION: MACHINES VS. HUMANS IN BIG DATA

11:15 a.m. – 11:45 a.m.

Pattern Analysis & Categorization: Big Metadata Toolkits
Joseph Busch, Principal, Taxonomy Strategies

Vivian Bliss, Senior Consultant, Taxonomy Strategies

Among the challenges of managing massive datasets are gathering, validating, preserving, analyzing, and maintaining linkages from those analyses to the source dataset. Identifying patterns in datasets using information retrieval methods and writing out the results as metadata are well-established information management processes that should be adopted by organizations working with today’s Big Data sets. This presentation provides an overview of pattern analysis and categorization methods, including keyword and regular expression matching, business rules, pattern categorizers, entity extraction, and trained categorizers that are the key building blocks of analytics toolkits for big metadata applications.

Using Example-Based Auto-Categorization to Tame Big Data
John Felahi, Senior VP, Products, Content Analyst Corp.

There are at least two schools of thought regarding Big Data. Part of the organization wants to take advantage of it. The other part views it as “Dark Data”—undiscovered, unanalyzed, and unreachable without the proper analysis tools and skills. It’s both. Concept-based auto-categorization, which automatically categorizes documents based on their actual content, not keywords or terms, is the fastest, easiest, and most repeatable way to pinpoint only the most important documents and emails among libraries spanning millions of files and messages. It is an established standard in legal e-discovery and U.S. Intelligence, having proved defensible and highly scalable. Learn how companies are beginning to step up to big data analytics using example-based auto-categorization in order to take advantage of all their data, no matter where—or how—it resides. Analytics for Big Data can bring great value to many business applications—social media, market analysis, internal information analysis.

ATTENDEE LUNCHEON & KEYNOTE

File Sync/Share Is Not Endpoint Backup
12:15 p.m. – 12:30 p.m. • Renaissance Ballroom, Ballroom Level
Ann Fellman, Director, Product Marketing, Code42 Software
See page 12 for complete description.

INDEXING IMAGES

1:15 p.m. – 2:00 p.m.

Practical Aspects of Natural Language Processing
Daniel Vasiczek, Programmer, Access Innovations

Kathryn Brown, Editor, Access Innovations

Recognizing data in medical records includes forming a regular expression and using it to extract a list of tags from the data. You probably need to do several iterations of this process to tune the regular expression(s). The next two steps involve classifying the tags into useful groups (recognizing context) and extracting the data to build your database. Vasiczek presents a case study and
This presentation focuses on the design and implementation of ontologies and shows how this process could be used to index images from those records.

Image Indexing (UF=Indexing Images)
Bob Kasenbach, Project Manager/Taxonomist, Access Innovations, Inc.
Many corporations, publishers, content providers, and other organizations have large stores of images: photographs, graphs, tables, pictures, diagrams. It is useful to be able to find and retrieve these images on demand without browsing through pages and volumes of documents and files. How can we index an image? Until optical recognition software is far more advanced, indexing an image itself is not practical. We can, however, examine and extract concepts from the text associated with an image using a thesaurus and indexing software to tag the image with metadata. How much text should be captured and indexed without generating too much noise, rendering the search meaningless? Get some answers here!

Taxonomy Meet Art, Art Meet Taxonomy
Dave Clarke, CEO, Symaptica
The vast majority of taxonomy development discussion and effort is applied toward accessing textual data. This talk focuses on how taxonomy may be used to enhance access to visual data. It discusses current research into relevant technologies, illustrates examples using stunning high-definition imagery of masterpiece works of art, and concludes with a summary of taxonomy’s untapped potential to come to the aid of information access for visual data.

USER EXPERIENCE (UX) IN TAXONOMY DESIGN
2:15 p.m. – 3:00 p.m.

Benefits of Integrated UX-IM Design
Michael Rudy, VP, Business Development, Factor
Customers today face market-driven design challenges that span multiple content formats and sources, multiple application platforms, and multiple user platforms. These challenges often require the services of two types of designers: user experience (UX) designers and the information modelers (IM) of taxonomies and metadata. When approaching the overall design with a collaborative team, the project can have a common methodology and shorter design cycles.

Ensuring Consistent & Accurate Tagging: Interface Design & Metadata Application
Ben Lucciardi, Analyst, Project Performance Company (PPC)
As taxonomists, we spend a lot of energy designing vocabularies that are browsable and user-friendly, but we often overlook the system interfaces that tags use to access and apply taxonomy terms to objects. Even the best vocabulary is of little value if a poorly designed tagging interface impedes a user from tagging consistently and accurately. This presentation looks at how tagging interfaces impact the metadata application process, exploring examples from content management systems, product information management systems, and crowdsourcing sites from around the web. It discusses how interface design can influence the long-term viability of a taxonomy project.

Applying User Research to Designing Info Models
Bram Wessel, Principal, Factor
User experience design isn’t the only practice that can benefit from user research. Exploring the way users natively organize information in their minds gives taxonomists a means to precisely identify and define information structures, as well as a powerful guiding mechanism for difficult information model design decisions. This talk demonstrates how to construct an effective research plan that blends quantitative and qualitative methods to explore and analyze user mental models and how to transform research insights into viable, flexible, and sustainable information models.

Coffee Break • 3:00 p.m. – 3:15 p.m.

SEMANTIC SEARCH
3:15 p.m. – 4:00 p.m.

Utilizing Ontologies for Taxonomy & Content Organization
Anthony Rhem, CEO/Chief Scientist, Tacit Ware, Inc.
This presentation focuses on the design and implementation of ontologies and how they are leveraged to implement taxonomies and provide better content organization. Case studies illustrate how this approach to content organization has improved “findability” and reuse of content and knowledge in several organizations. Along with examples of ontology and taxonomy adoption, an underlying view of the card sort results, keyword, and controlled vocabulary building used to meet the business expectations of the KM solution are shared.

Enhancing Searches With Taxonomies & Semantic Tech
Bob DuCharme, Solution Architect, TopQuadrant, Inc.
We’ve all seen how the major search engines sometimes second-guess—often correctly—what we meant to search for; taxonomies using standards-based semantic technology can help your own applications do this and more. While semantic technologies rarely try to store the complete meanings of words, data about the relationships of words and phrases to other words and phrases (for example, “broader than” or “alternative label”) can often store enough semantics to automate search enhancement. When this data is stored using the W3C SKOS standard, it can more easily be aggregated, queried, and used by a variety of tools. Because SKOS is based on RDF, the growing amount of publicly available RDF data about terms and term relationships can be an especially big help to drive improved searches with your own systems.

Developing a Semantic Search Application: A Pharma Case Study
Tom Reamy, Chief Knowledge Architect, KAPS Group
Adding semantics to search can be a daunting task since it involves dealing with language and relatively new technologies such as text analytics. Given the complexity and uncertainty of developing semantic search, it usually makes sense to start with a small, focused pilot or POC. This is what one pharmaceutical company decided to do. This talk describes an initial pilot carried out by a varied and diverse team using three different search and text analytics products. It discusses the pluses and problems and the key issues and approaches that were needed for success.

Visualization Illuminates Data & Convinces Stakeholders
Suzanne Carroll, Taxonomist, XGroup
Most people’s eyes glaze over at the mention of organizing information, metadata, or taxonomies. Show off a graphic illustrating how the organization fits together, and watch how people are automatically drawn in, finding how they fit in the big picture and asking questions. Put it up by your desk, and they’ll stop by and ask you what it is and—bingo!—instant connection and conversation on your terms. Visualizations are eye-catching conversation starters. This session shares several types of visualizations and discusses which ones work for showing off taxonomies and metadata.

Ontology Diagrams for Successful Knowledge Capture & Transfer
Brandon Olson, Associate Professor/Graduate Program Director, College of St. Scholastica
Knowledge rarely resides in a single location. It may be embedded within hundreds or thousands of documents throughout the organization. While many knowledge management approaches seek to quickly locate individual knowledge artifacts or facilitate collaboration across knowledge holders, these methods are limited by the number of documents or collaborators involved. This presentation describes the use of ontology diagrams as means to capture knowledge from across many sources and to depict the knowledge in a manner that is easily managed and communicated.

Ontology-Driven Search and Information Access: How Abstractions Become Actionable
Seth Earley, CEO, Earley & Associates
Today, ontologies form the underpinning of unified information access and search-based application development. In this final session of the conference, we see how all of these pieces can come together with examples from the areas of finance, healthcare, and media/entertainment. The applications may look very different, but the end result is the same: getting users to the content and information they need in the context of their processes, helping to reveal knowledge structures and relationships, and allowing on-the-fly synthesis of structured data and unstructured content. We end the conference by providing the ammunition needed to make this case at the highest levels in your company.

Enterprise Solutions Showcase Grand Opening Reception • 5:00 p.m. – 7:00 p.m.
Maximize your search investment.
Find value in technology.
Optimize search experiences.
Strategize discovery techniques.
Innovate with analytics.

Swap tips & techniques.
Enter the cloud.
Discuss search improvements.
Go mobile.
Deal effectively with your data.

Discovering Answers to the Search Puzzle

WWW.ENTERPRISESEARCHSUMMIT.COM/FALL

SEARCH • DISCOVER • INFORM • DELIVER • CONNECT

NOVEMBER 6–8, 2013

RENAISSANCE WASHINGTON DC DOWNTOWN HOTEL
Enterprise Search Summit Fall

Discovering Answers to the Search Puzzle

Enterprise search remains a gigantic puzzle for many people. Both in IT and line-of-business departments, the task is to assemble all the pieces to enable real progress. The search function should facilitate knowledge sharing, effective information delivery, customer satisfaction, and business operations improvement. E-discovery is gaining in importance. What enterprises need from search is changing. Technologies are changing. Yesterday’s answers may not fit today’s questions.

This year’s Fall Enterprise Search Summit combines reports of real-world, practical, internal search services with reviews of some of the latest developments on the part of search companies. Case studies anchor the 3 days of presentations and discussion. Learn from your peers about how to hit the moving targets that affect your organization’s environment.

People’s search experience outside of work raises their expectations of what they can quickly and effortlessly locate on the job. Successful enterprise search is the key to satisfied employees and customers. It enables them to be more productive, perform their jobs better, make informed decisions, and pick out the salient information they need.

Conference presentations cover issues of findability, open source, cloud search, best practices, and other topics of concern to search practitioners. Enterprise Search Summit is where you will learn strategies, explore solutions, and build the skill sets you need to make your organization’s content easily searchable and delivered in an actionable format. What you learn here will enable your organization to get the best value for its search initiatives.

Wireless Internet
Complimentary Wi-Fi is available in all meeting rooms.
1) Connect to: Renaissance_CONF
2) Click on Internet browser to open log-in page
3) Enter password: infotoday

Market Insight Panels
Enterprise Search Summit Fall is embedded with four special “market insight” sessions that examine specific, search-based business solutions that are currently provided in the marketplace to explain the business application challenges these solutions are designed to address.

Welcome Reception
Tuesday, November 5 • 6:00 p.m. – 7:00 p.m.
Congressional Hall, Ballroom Level
Enjoy a glass of wine and a selection of cheeses in a relaxed atmosphere as we kick off the start of this year’s program. Open to all conference attendees, speakers, and sponsors.

Continental Breakfast & Breaks
A continental breakfast will be provided on the Ballroom Level each morning from 8:00 a.m. – 8:45 a.m. before the keynote sessions. Check your program for additional morning and afternoon break times and locations.

Attendee Luncheons
Lunch on Wednesday will be served in the Renaissance Ballroom located on the Ballroom Level. On Thursday and Friday, lunch will be served in the Enterprise Solutions Showcase.

Email Stations
Sponsored by Bloomfire
Stations are available for attendee use during regular Showcase hours.

Showcase Hours
Wednesday, November 6 ........................................ 5:00 p.m. – 7:00 p.m.
Grand Opening Reception
Thursday, November 7 .......................................... 10:00 a.m. – 4:30 p.m.
Friday, November 8 ............................................... 10:00 a.m. – 2:00 p.m.

Enterprise Solutions Showcase Grand Opening Reception
Wednesday, November 6 • 5:00 p.m. – 7:00 p.m. • Ballroom Level
Join us under the big top for the opening of the Enterprise Solutions Showcase. Featuring the top companies in the KM, CM, search, taxonomy, and intranets marketplace the Showcase offers attendees an opportunity to explore the latest product and service solutions. If you are looking for a particular product, evaluating competing systems, or keeping up to date with the latest developments, be sure to visit the Enterprise Solutions Showcase.

KMWORLD Bookstore
Wednesday, November 6 • 10:00 a.m. – 3:30 p.m. • Ballroom Level Foyer
5:00 p.m. – 7:00 p.m. • Showcase
Thursday, November 7 • 10:00 a.m. – 4:30 p.m. • Showcase
Friday, November 8 • 10:00 a.m. – 2:00 p.m. • Showcase

Conference Presentations
Many speakers have made copies of their slides available for download from the conference website (www.enterprisesearchsummit.com). Click on “PRESENTATIONS” and enter Username/Password: DC2013

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(800) 300-9868 • www.EnterpriseSearchSummit.com/Fall
## Conference Overview

### WEDNESDAY, NOVEMBER 6

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<td>8:00 a.m.</td>
<td>CONTINENTAL BREAKFAST ● Ballroom Level</td>
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<tr>
<td>8:45 a.m.</td>
<td>WELCOME &amp; KEYNOTE ● Renaissance Ballroom, Ballroom Level ● Building Collaborative Organizations ● Nicco Mele</td>
</tr>
<tr>
<td>10:15 a.m.</td>
<td>Information Wayfinding: The Future of Search ● Tyler Tate</td>
</tr>
<tr>
<td>11:15 a.m.</td>
<td>Search is the Ultimate Decision Support Application ● Martin White</td>
</tr>
<tr>
<td>12:00 p.m.</td>
<td>ATTENDEE LUNCHEON &amp; KEYNOTE ● Renaissance Ballroom, Ballroom Level ● File Sync/Share Is Not Endpoint Backup ● Ann Feldman</td>
</tr>
<tr>
<td>1:15 p.m.</td>
<td>The Road to Superior Search Results ● Mark Ryan &amp; Bess Lauer</td>
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<tr>
<td>2:15 p.m.</td>
<td>Search Semantics ● Chris McKinzie &amp; Bryan Bell</td>
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<tr>
<td>3:00 p.m.</td>
<td>COFFEE BREAK ● Ballroom Level</td>
</tr>
<tr>
<td>3:15 p.m.</td>
<td>Market Insights: Creating Successful Search</td>
</tr>
<tr>
<td>4:15 p.m.</td>
<td>Open Source Platform at the Library of Congress ● Tammie Nelson &amp; Mike Nibeck</td>
</tr>
<tr>
<td>5:00 p.m.</td>
<td>GRAND OPENING RECEPTION in the Enterprise Solutions Showcase, Ballroom Level</td>
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### THURSDAY, NOVEMBER 7

<table>
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<tr>
<th>Time</th>
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<tr>
<td>8:00 a.m.</td>
<td>CONTINENTAL BREAKFAST ● Ballroom Level</td>
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<tr>
<td>8:45 a.m.</td>
<td>KMWORLD &amp; INTRANET INNOVATION AWARDS ● Grand Ballroom North, Ballroom Level</td>
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<tr>
<td>9:00 a.m.</td>
<td>KEYNOTE ● Grand Ballroom North, Ballroom Level ● Big Data vs. Human Data ● Dave Snowden</td>
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<tr>
<td>9:45 a.m.</td>
<td>KEYNOTE ● Grand Ballroom North, Ballroom Level ● Enterprise Search in Virtual Environments ● John Patzakis</td>
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<tr>
<td>10:00 a.m.</td>
<td>COFFEE BREAK in the Enterprise Solutions Showcase, Ballroom Level</td>
</tr>
<tr>
<td>10:45 a.m.</td>
<td>Improving the Search User Experience ● Beatrice Cacace &amp; John Herzer</td>
</tr>
<tr>
<td>12:00 p.m.</td>
<td>Market Insights: Search Optimization and Preparation</td>
</tr>
<tr>
<td>12:45 p.m.</td>
<td>ATTENDEE LUNCHEON in the Enterprise Solutions Showcase, Ballroom Level</td>
</tr>
<tr>
<td>2:00 p.m.</td>
<td>Applying Market Research Methods to Search ● Ed Dale</td>
</tr>
<tr>
<td>3:00 p.m.</td>
<td>Market Insights: Unlocking the Potential of Enterprise Search</td>
</tr>
<tr>
<td>3:45 p.m.</td>
<td>COFFEE BREAK in the Enterprise Solutions Showcase, Ballroom Level</td>
</tr>
<tr>
<td>4:15 p.m.</td>
<td>Configuring Enterprise Search for Success ● Marianne Sweeney &amp; Dan Beder</td>
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### FRIDAY, NOVEMBER 8

<table>
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<tr>
<th>Time</th>
<th>Session</th>
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<tbody>
<tr>
<td>8:00 a.m.</td>
<td>CONTINENTAL BREAKFAST ● Ballroom Level</td>
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<tr>
<td>8:45 a.m.</td>
<td>KEYNOTE ● Grand Ballroom North, Ballroom Level ● Transforming the Way We Collaborate ● Carla O’Dell</td>
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<tr>
<td>10:00 a.m.</td>
<td>COFFEE BREAK in the Enterprise Solutions Showcase, Ballroom Level</td>
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<tr>
<td>10:45 a.m.</td>
<td>Unlocking Open Source ● Miles Kehoe &amp; Stephen E. Arnold</td>
</tr>
<tr>
<td>11:45 a.m.</td>
<td>Market Insights: Scaling and Managing Search for the Large Enterprise</td>
</tr>
<tr>
<td>12:30 p.m.</td>
<td>ATTENDEE LUNCHEON in the Enterprise Solutions Showcase, Ballroom Level</td>
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<tr>
<td>2:00 p.m.</td>
<td>Found! The Needle in the Haystack ● Sarah Berndt &amp; David Meza</td>
</tr>
<tr>
<td>3:00 p.m.</td>
<td>Designing Search Experiences With the Language of Discovery ● Joe Lamantia</td>
</tr>
<tr>
<td>4:00 p.m.</td>
<td>CLOSING KEYNOTE ● Grand Ballroom North, Ballroom Level ● 10 Things KMers Can Learn From Angry Birds ● Dan Rasmus</td>
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All sessions will take place in Mt. Vernon Square B, Meeting Room Level unless otherwise noted.
Enterpise Search Summit Fall

Wednesday, November 6

All sessions will take place in Mt. Vernon Square B, Meeting Room Level unless otherwise noted.

Continental Breakfast 8:00 a.m. – 8:45 a.m.

WELCOME & KEYNOTE

Building Collaborative Organizations 8:45 a.m. – 9:45 a.m. • Renaissance Ballroom, Ballroom Level
Nicco Mele, Co-Founder, EchoDitto; Faculty, Harvard Kennedy School, & Author, The End of Big
See page 12 for complete description.
Mele will be signing his new book exclusively from 10:00 – 11:00 a.m in the KMWorld Bookstore.

KEYNOTE

A New Search Architecture for the Big Data Era 9:45 a.m. – 10:00 a.m. • Renaissance Ballroom, Ballroom Level
Kamran Khan, CEO, Search Technologies
See page 12 for complete description.

Information Wayfinding: The Future of Search 10:15 a.m. – 11:00 a.m.
Tyler Tate, Cofounder, Twigkit
The puzzle pieces of search have evolved from lookup tools to the do facto way people interact with information. For that evolution to succeed, however, we must embrace a new metaphor for the search experience, which Tate calls "information wayfinding." He reviews the elements of an information environment, surfaces the strategies people use to traverse the environment, and provides guidelines for cultivating effective information wayfinding experiences. He also suggests that search and browse must fuse into a single operation. Hear about the future of search in this session.

Search is the Ultimate Decision Support Application 11:15 a.m. – 12:00 p.m.
Martin White, Intranet Focus
There is a tendency to focus on search technology and the "results" it provides without thinking about why people are looking for data, information, and knowledge. They want to make decisions that have the greatest impact on the business with the minimum of risk. In this presentation the "workflow" of a typical decision is unraveled to show the value of search as a decision support application. This is especially the case in organizations with extensive enterprise social networks. Taking this perspective enables the entire process of searching to be optimized, links search directly to business objectives and so provides the basis for a very persuasive business plan, and can be used to define the requirements for enhanced or new search applications.

ATTENDEE LUNCHEON & KEYNOTE

File Sync/Share Is Not Endpoint Backup 12:15 p.m. – 12:30 p.m. • Renaissance Ballroom, Ballroom Level
Ann Fellman, Director, Product Marketing, Code42 Software
See page 12 for complete description.

The Road to Superior Search Results: Web Analytics, Industry Data, and User Research 1:15 p.m. – 2:00 p.m.
Mark Ryan, VP Analytics & Insights, Extractable
Bess Lauer, Web Manager, Micron, Inc.
Regardless of which search an organization chooses to deploy, best practices can greatly improve the probability of driving real business benefits, as this case study from Micron and Extractable shows. Micron needed a powerful way to deliver massive amounts of technical data to engineers designing the next generation of computing devices. With Extractable’s help, Micron implemented multiple search techniques and functions within traditional site search and developed techniques such as search filters, search recommendations, and search keyphrase optimization. See from the inside how Micron.com utilized web analytics, industry data, session tracking, heat maps, and user research to inform and implement a superior onsite search strategy that yielded amazing results for Micron and for site visitors.

Search Semantics 2:15 p.m. – 3:00 p.m.
Chris McKinzie, CEO, Enlyton
Bryan Bell, VP, Enterprise Solutions, Expert System
The promise of semantic search for the enterprise is more long-standing than most people realize. It’s also a promise that hasn’t been completely realized in practice. This panel discussion presents some of the latest thinking on semantic technology—how it can deliver on the promise of fast, accurate information retrieval and navigation; why the technology is closer to being practical in producing fast, high-quality results; and where it can best be employed to intuitively solve the search conundrum.

Coffee Break Ballroom Level
3:00 p.m. – 3:15 p.m.

Market Insights: Creating Successful Search 3:15 p.m. – 4:00 p.m.
Christian Gross, Search Consultant, Rayton GmbH
Determining what makes search successful may be in the eye of the beholder, but certain absolutes apply. There’s no substitute for experience when it comes to designing successful search. In this session, experts share their experiences—good and bad—to guide would-be implementers of search solutions away from the common pitfalls and expensive mistakes.

Topics of interest include:
• Use cases/user experience
• Lessons learned
• Organizational/corporate team building
• Search ROI
• Key performance indicators

Open Source Platform at the Library of Congress 4:15 p.m. – 5:00 p.m.
Tammie Nelson, Project Manager, Congress.gov, and
Mike Nibeck, Web Development Manager, Library of Congress
With the mission of providing access to the data and documents that describe historical and current legislative activity, the Library of Congress developed the THOMAS system (named after Thomas Jefferson) 18 years ago. Today’s challenge is to replace this venerable system with one that is more modern and capable of meeting the needs of its 6.5 million unique visitors per year. LC needed to migrate to a modern search platform and provide a vastly improved web experience. Regardless of the mission of your organization, you can learn a great deal from the experiences of this project team.

Enterprise Solutions Showcase Grand Opening Reception Ballroom Level
5:00 p.m. – 7:00 p.m.
Thursday, November 7

All sessions will take place in Mt. Vernon Square B, Meeting Room Level unless otherwise noted.

Continental Breakfast * Ballroom Level
8:00 a.m. – 8:45 a.m.

KMWorld & Intranet Innovation Awards
8:45 a.m. – 9:00 a.m. * Grand Ballroom North, Ballroom Level

KEYNOTE

Big Data vs Human Data
9:00 a.m. – 9:45 a.m. * Grand Ballroom North, Ballroom Level
Dave Snowden, Founder & Chief Scientific Officer, Cognitive Edge

Will information come from the misty mountains of the internet or the cloud with no human engagement as Big Data suggests? Don’t we need human sensors to share knowledge? Our popular and provocative speaker discusses the cycles of techno-fetishism that try and ignore the importance of human intelligence, seeking to create the great algorithm which will answer the questions of life, the universe, and everything else. Big Data is important, but it’s only the start of the journey, and savvy organizations realize they need a synthesis of machine and human intelligence. Get lots of insights and ideas to take home to your organization.

KEYNOTE

Enterprise Search in Virtual Environments
9:45 a.m. – 10:00 a.m. * Grand Ballroom North, Ballroom Level
John Patzakis, President and CEO, X1

Virtualized data centers, cloud infrastructures, and virtual desktop environments are gaining critical mass in the enterprise. While there are many compelling benefits associated with this trend, one emerging and serious challenge is the search and retrieval of large datasets residing in enterprise private clouds and other virtual environments. Hear how organizations are solving these challenges and driving revenues for their organizations.

Coffee Break * In the Enterprise Solutions Showcase, Ballroom Level
10:00 a.m. – 10:45 a.m.

Improving the Search User Experience
10:45 a.m. – 11:45 a.m.
Beatrice Cacace, Knowledge Manager, Ubisoft
John Herzer, Enterprise Search Project Lead, Sandia National Laboratories

Users are the ultimate judges of how well search works. At Ubisoft, the team took a functional approach, including identifying sources to crawl, challenging the user interface, analyzing usage, and assessing relevancy. Sandia National Laboratories looked to a federated search framework to provide aggregated results from relevant data sources in a highly responsive manner. The two approaches nicely dovetail to stimulate thinking about what works best in your organization to improve the search experience.

Market Insights: Search Optimization and Preparation
12:00 p.m. – 12:45 p.m.
Martin Tuip, Product Marketing Manager, Recommind

Search optimization is usually seen as the purview of search marketing professionals for consumer sites. However, it is also becoming the goal of busi-
Enterprise Search Summit Fall

Scaling search across an enterprise requires a strategy, and a long-term plan or even billions of pieces of content both structured and unstructured and the number and capacity of silos, search must scale to hundreds of millions process across multiple and varied data sources, and as enterprises increase plug search in and walk away. However, users expect to have a single search don’t have one for enterprise search. The expectation is often that you can Enterprises often have strategies for a variety of business processes, but they don’t have one for enterprise search. The expectation is often that you can.

Transforming the Way We Collaborate
8:45 a.m. – 9:45 a.m. Grand Ballroom North, Ballroom Level
Carla O’Dell, CEO, APQC

Found! The Needle in the Haystack
2:00 p.m. – 2:45 p.m.
Sarah Berndt, Taxonomist, DB Consulting for NASA Johnson Space Center (JSC)

Designing Search Experiences With the Language of Discovery
3:00 p.m. – 3:45 p.m.
Joe Lamantia, UX Lead: Discovery Products and Services, Oracle Endeca

Found! The Needle in the Haystack
2:00 p.m. – 2:45 p.m.
Sarah Berndt, Taxonomist, DB Consulting for NASA Johnson Space Center (JSC)

Isn’t everybody in the search world looking for the proverbial needle in the haystack? At the NASA JSC, automatic classification provides identification and moderation of variables affecting the system, along with proprietary algorithms for both search indexing and classification, coupled with highly customizable semantic systems, and a variety of content-related variables. In this observational analysis, Berndt and Meza discuss efforts used to inform the JSC Semantic System on the navigation of content changes, software upgrades, and rule-based customization. The mythological haystack is successfully parsed!

Designing Search Experiences With the Language of Discovery
3:00 p.m. – 3:45 p.m.
Joe Lamantia, UX Lead: Discovery Products and Services, Oracle Endeca

The oncoming tidal wave of Big Data, with its rapidly evolving ecosystem of multi-channel, information-saturated environments and services, brings profound challenges and opportunities for the design of effective user experiences. In this coming Age of Insight, discovery is not only the purview of specialized data scientists who create exotic visualizations of massive data sets, but also a fundamental category of human activity. Search is the gateway to discovery, and Lamantia provides a simple, research-derived language that spans domains, environments, media, and user types. It’s a practical model that defines actionable patterns of information engagement throughout the enterprise. Discovery is a critical individual and organizational capability: Come learn what it means for you!

Unlocking Open Source
10:45 a.m. – 11:30 a.m.
Miles Kehoe, Director, Professional Services, LucidWorks

Market Insights: Scaling and Managing Search for the Large Enterprise
11:45 a.m. – 12:30 p.m.
Jeff Fried, CEO, BA Insights

Enterprises often have strategies for a variety of business processes, but they don’t have one for enterprise search. The expectation is often that you can plug search in and walk away. However, users expect to have a single search process across multiple and varied data sources, and as enterprises increase the number and capacity of silos, search must scale to hundreds of millions or even billions of pieces of content both structured and unstructured and return results that enable business users to make rapid, strategic decisions. Scaling search across an enterprise requires a strategy, and a long-term plan for information management.

10 Things Kmers Can Learn From Angry Birds
4:00 p.m. – 4:45 p.m. Grand Ballroom North, Ballroom Level
Dan Rasmus, Owner/Principal Analyst, danielwrasmus.com, & Author, Listening to the Future and Management by Design

Colorful and fun, our closing keynote speaker and futurist discusses lessons learned from various activities. He then uses scenario-based work and other research to discuss what the future of KM could be under different social, economic, political, and technological circumstances. Be prepared to hear why good ideas don’t become viral, and be inspired to think of KM in new and different ways.

KEYNOTE

KEYNOTE

Continental Breakfast • Ballroom Level
8:00 a.m. – 8:45 a.m.

Attendee Luncheon • In the Enterprise Solutions Showcase, Ballroom Level
12:30 p.m. – 2:00 p.m.

Coffee Break • In the Enterprise Solutions Showcase, Ballroom Level
10:00 a.m. – 10:45 a.m.

Unlocking Open Source
10:45 a.m. – 11:30 a.m.
Miles Kehoe, Director, Professional Services, LucidWorks

Stephen E. Arnold, ArnoldIT
The open source movement is gaining traction within the enterprise. Our panelists explore the ramifications of open source solutions, exploring whether open source “plays well” with SharePoint, how it handles Big Data, whether it really saves the enterprise money, and what the actual resources requirements are. Not only do our speakers bring the issues surrounding open source to the table, they help you understand when and how to implement appropriate technologies.

Market Insights: Scaling and Managing Search for the Large Enterprise
11:45 a.m. – 12:30 p.m.
Jeff Fried, CEO, BA Insights

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CLOSING KEYNOTE

10 Things Kmers Can Learn From Angry Birds
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KEYNOTE

KEYNOTE
Evaluating WHERE, WHEN, and HOW to Use It in the Enterprise
The SharePoint Symposium is something very different, a conference on the topic of Microsoft SharePoint that does not proselytize. Whether you already have SharePoint in your organization or are looking to acquire it, you will encounter no sales pitches here.

What you will experience are sessions led by true industry experts who lead you through the pros and cons and strengths and weaknesses of SharePoint in practice. From managing (and avoiding) the threat of sprawl and viral growth, to considering cloud alternatives and add-on technologies, all the conference sessions draw from real-life experience and best practices from leading practitioners.
**Conference Overview**

**Wednesday, November 6**
- 5:00 p.m. – 7:00 p.m. **Grand Opening Reception** in the Enterprise Solutions Showcase, Ballroom Level

**Thursday, November 7**
- All sessions will take place in Mt. Vernon Square A, Meeting Room Level unless otherwise noted.

- 8:00 a.m. – 8:45 a.m. **Continental Breakfast** • Ballroom Level
- 8:45 a.m. – 9:00 a.m. **KMWorld & Intranet Innovation Awards** • Grand Ballroom North, Ballroom Level
- 9:00 a.m. – 9:45 a.m. **Keynote** • Grand Ballroom North, Ballroom Level • Big Data Vs Human Data • Dave Snowden
- 9:45 a.m. – 10:00 a.m. **Keynote** • Grand Ballroom North, Ballroom Level • Enterprise Search in Virtual Environments • John Patzakis
- 10:00 a.m. – 10:45 a.m. **Coffee Break** in the Enterprise Solutions Showcase, Ballroom Level

**Track 1** • SharePoint in the Bigger Picture
- 10:45 a.m. – 11:45 a.m. **Keynote** • SharePoint and Beyond: A New Emerging Digital Workplace? • Tony Byrne
- 12:00 p.m. – 1:00 p.m. **Keynote** • Customer Panel: SharePoint at Scale • Jerry Boyle, Andy Zimmerman & MaryGael Timberlake
- 1:00 p.m. – 2:00 p.m. **Attendee Luncheon** in the Enterprise Solutions Showcase, Ballroom Level

**Track 2** • Practical Applications of SharePoint
- 2:00 p.m. – 2:45 p.m. Mastering Findability in SharePoint • Shawn Shell
- 3:00 p.m. – 3:45 p.m. SharePoint in the Cloud: A Critical Assessment • Jill Hannemann & Adam Levithan
- 3:45 p.m. – 4:15 p.m. **Coffee Break** in the Enterprise Solutions Showcase, Ballroom Level
- 4:15 p.m. – 5:00 p.m. Stump the SharePoint Consultant

**Friday, November 8**
- All sessions will take place in Mt. Vernon Square A, Meeting Room Level unless otherwise noted.

- 8:00 a.m. – 8:45 a.m. **Continental Breakfast** • Ballroom Level
- 8:45 a.m. – 9:00 a.m. **Keynote** • Grand Ballroom North, Ballroom Level • Transforming the Way We Collaborate • Carla O’Dell
- 9:45 a.m. – 10:00 a.m. **Keynote** • Grand Ballroom North, Ballroom Level • Enterprise Search in the Age of Big Data • Jeff Veis
- 10:00 a.m. – 10:45 a.m. **Coffee Break** in the Enterprise Solutions Showcase, Ballroom Level

**Track 3** • Critical Questions About SharePoint
- 10:45 a.m. – 11:30 a.m. Industry Analyst Debate: 5 Critical Questions You NEED to Answer About SharePoint • Rob Koplowitz & Tony Byrne
- 11:45 a.m. – 12:45 p.m. The Federal Government Experience With SharePoint • Dan Elam
- 12:45 p.m. – 2:00 p.m. **Attendee Luncheon** in the Enterprise Solutions Showcase, Ballroom Level

**Track 4** • The SharePoint Ecosystem
- 2:00 p.m. – 2:45 p.m. Spotlight on Solutions • MODERATOR: Hugh McKellar
- 3:00 p.m. – 3:45 p.m. Best Practices in Enterprise SharePoint Info Architecture • Stephanie Lemieux
- 4:00 p.m. – 4:45 p.m. **Closing Keynote and Town-Hall Discussion** • What Did We Learn? • Jarrod Gingras
Continental Breakfast • Ballroom Level
8:00 a.m. – 8:45 a.m.

KMWorld & Intranet Innovation Awards
8:45 a.m. – 9:00 a.m. • Grand Ballroom North, Ballroom Level

KEYNOTE
Big Data vs Human Data
9:00 a.m. – 9:45 a.m. • Grand Ballroom North, Ballroom Level
Dave Snowden, Founder & Chief Scientific Officer, Cognitive Edge
Will information come from the misty mountains of the internet or the cloud with no human engagement as Big Data suggests? Don’t we need human sensors to share knowledge? Our popular and provocative speaker discusses the cycles of techno-fetishism that try and ignore the importance of human intelligence, seeking to create the great algorithm which will answer the questions of life, the universe, and everything else. Big Data is important, but it’s only the start of the journey, and savvy organizations realize they need a synthesis of machine and human intelligence. Get lots of insights and ideas to take home to your organization.

Enterprise Search in Virtual Environments
9:45 a.m. – 10:00 a.m. • Grand Ballroom North, Ballroom Level
John Patzakis, President and CEO, X1
Virtualized data centers, cloud infrastructures, and virtual desktop environments are gaining critical mass in the enterprise. While there are many compelling benefits associated with this trend, one emerging and serious challenge is the search and retrieval of large datasets residing in enterprise private clouds and other virtual environments. Hear how organizations are solving these challenges and driving revenues for their organizations.

Coffee Break • In the Enterprise Solutions Showcase, Ballroom Level
10:00 a.m. – 10:15 a.m.

TRACK 1 • SharePoint in the Bigger Picture

KEYNOTE
SharePoint and Beyond: A New Emerging Digital Workplace?
10:45 a.m. – 11:45 a.m.
Tony Byrne, President & Principal Analyst, Real Story Group
It is now a truism that SharePoint is not an end in itself, but a means to an end. What’s the larger goal here? Today, savvy enterprise leaders are trying to craft a new digital workplace that allows digital workers to perform without barriers. Where does SharePoint fit into the equation? Where does SharePoint come up short? How should you revisit your strategies in light of SharePoint 2013?

KEYNOTE
Customer Panel: SharePoint at Scale
12:00 p.m. – 1:00 p.m.
Jerry Boyle, SharePoint Delivery Manager, HJ Heinz
Andy Zimmerman, Senior Intranet Strategy Manager, McKesson Corporation
MaryGael Timberlake, Director, EY Knowledge, Ernst & Young LLP
What happens when you deploy SharePoint in the world’s largest enterprises? This special keynote panel brings together SharePoint program managers from large enterprises from varying industries to discuss their experiences and lessons.

Attendee Luncheon • In the Enterprise Solutions Showcase, Ballroom Level
1:00 p.m. – 2:00 p.m.

TRACK 2 • Practical Applications of SharePoint

Mastering Findability in SharePoint
2:00 p.m. – 2:45 p.m.
Shawn Shell, Vice President, Microsoft Platform, Hitachi Consulting
SharePoint search simultaneously is both a sought-after and reviled feature. Sometimes called a “random document generator,” organizations of all shapes and sizes struggle to “get search right.” However, what if search was not the solution? What if find was the solution and search was simply one of many components? During this talk, Shawn Shell, vice president of Hitachi Consulting’s U.S. Microsoft Platform Practice in the Midwest, demonstrates innovative ways to create information findability using a variety of methods, including search. Using real-world examples, Shell shows you how to create successful SharePoint solutions where users can actually find what they’re looking for.

SharePoint in the Cloud: A Critical Assessment
3:00 p.m. – 3:45 p.m.
Jill Hannemann, Director of Advisory Services, &
Adam Levithan, Senior Consultant, Portal Solutions
It seems like everyone is talking about moving to the cloud. What does “cloudification” mean for SharePoint owners? In this lively session, two consultants debate the pros and cons of using SharePoint in the cloud versus using SharePoint in a traditional, on-premise installation.

Coffee Break • In the Enterprise Solutions Showcase, Ballroom Level
3:45 p.m. – 4:15 p.m.

Stump the SharePoint Consultant
4:15 p.m. – 5:00 p.m.
For those of you unfamiliar with this format, the concept is simple: Bring your toughest, thorniest, most intractable SharePoint conundrum or challenge and a team of experienced SharePoint consultants will compete to offer you the best advice in 2 minutes or less. But there’s a twist… we’ll use noise-canceling headphones to make sure the consultants can’t hear the answers that the other consultants give. Come and get insightful, likely controversial, and sometimes entertaining answers to your most pressing questions.
Continental Breakfast • Ballroom Level
8:00 a.m. – 8:45 a.m.

KEYNOTE
Transforming the Way We Collaborate
8:45 a.m. – 9:45 a.m. • Grand Ballroom North, Ballroom Level
Carla D’Orell, CEO, APQC
External forces are transforming how knowledge managers formulate strategies and value propositions for their programs. New technologies and disciplines are constantly influencing the portfolio, use, and value of available KM approaches. Based on 20 years of KM leadership by APQC, D’Orell discusses how to harness these forces while also dealing with the consumerization of IT, how and when to apply social media tools to collaborative work, and how to use analytics to set the KM agenda.

KEYNOTE
Enterprise Search in the Age of Big Data
9:45 a.m. – 10:00 a.m. • Grand Ballroom North, Ballroom Level
Jeff Veis, Vice President of Marketing, HP Autonomy
Is the search solution you are using today solving yesterday’s problems? As knowledge workers rely more on mobile, social, and cloud technologies to perform their jobs, the boundaries between personal and professional data are becoming blurred. Unstructured data, including video and other rich media, now forms a large portion of an enterprise’s information assets. How do these trends affect your enterprise search requirements? Find out what you can do to succeed in today’s information age.

Coffee Break • In the Enterprise Solutions Showcase, Ballroom Level
10:00 a.m. – 10:45 a.m.

TRACK 3 • Critical Questions About SharePoint
Industry Analyst Debate: 5 Critical Questions You NEED to Answer About SharePoint
10:45 a.m. – 11:30 a.m.
Rob Koplowitz, Vice President, Principal Analyst Serving CIOs, Forrester Research
Tony Byrne, Founder and President, Real Story Group
Featuring analysts from Real Story Group and Forrester, this world-class panel shares their thoughts on SharePoint today and its impact on the technology sector. Each analyst explains and debates the five critical questions that you need to answer about SharePoint. Find out what about SharePoint is hype and what is real; the highs and lows of the SharePoint experience in the cloud.

The Federal Government Experience With SharePoint
11:45 a.m. – 12:45 p.m.
Dan Elam, Executive Director, Techead
How is SharePoint similar or different in the government space? Veteran consultant Dan Elam moderates a panel of SharePoint users and managers who explain where SharePoint can be successful and where it has caused issues.

Attendee Luncheon • In the Enterprise Solutions Showcase, Ballroom Level
12:45 p.m. – 2:00 p.m.

TRACK 4 • The SharePoint Ecosystem
Spotlight on Solutions
2:00 p.m. – 2:45 p.m.
MODERATOR: Hugh McKellar, Chair, SharePoint Symposium, Editor-in-Chief, KMWorld
Top SharePoint solution providers and their customers share successful deployments built on what is arguably the industry’s most versatile platform.

Best Practices in Enterprise SharePoint Info Architecture
3:00 p.m. – 3:45 p.m.
Stephanie Lemieux, President and Principal Consultant, Dovecot Studio
The way you organize your content can dramatically impact your SharePoint project’s success. In this session, an experienced SharePoint IA consultant reveals real-life tips to improve your SharePoint implementation’s usability.

CLOSING KEYNOTE
Town-Hall Discussion: What Did We Learn?
4:00 p.m. – 4:45 p.m.
Jarrod Gingras, Director, Real Story Group
We end wrapping up the key takeaways that we have learned at this year’s SharePoint Symposium. We also field any lingering questions from you to make sure all of your pressing SharePoint questions have been answered.

Give Your Conference Experience a Boost!
Get social and connect with speakers, exhibitors, and other attendees during and after the event. Plus, be the first to know about discounts and giveaways.

#sharepointsym #taxobc #essdc

(800) 300-9868 • www.SharePointSymposium.com
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Exhibitor List & Floor Plan

Exhibitor List & Floor Plan

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Enterprise Solutions Showcase Hours

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5:00 p.m. – 7:00 p.m.  
Grand Opening Reception

Thursday, November 7  
10:00 a.m. – 4:30 p.m.

Friday, November 8  
10:00 a.m. – 2:00 p.m.

Email Stations

A limited number of email stations will be available for attendee use during regular Showcase hours.  
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Employee List & Floor Plan

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BA Insight .................................................. 102  
Bloomfire ................................................ 108  
Code42 Software ......................................... 401  
Columbia University–School of Continuing Education ........................................ 400  
Coveo ......................................................... 109  
Dell Software ............................................... 203  
Discover Technologies, LLC .............................. 100  
HP Autonomy .............................................. 101  
Intlock ....................................................... 408  
K2 ............................................................. 406  
Kapow Software, a Kofax company ................ 307  
Kent State University–Knowledge Management .................................................. 208  
KM Institute ............................................... 308  
KMWorld Magazine ..................................... See Floor Plan

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Wednesday, November 6 5:00 p.m. – 7:00 p.m.
Grand Opening Reception

Thursday, November 7 10:00 a.m. – 4:30 p.m.
Friday, November 8 10:00 a.m. – 2:00 p.m.

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