### Conference At-A-Glance

#### Tuesday, November 4

**Preconference Workshops**

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<td>W15 –  Applying SharePoint 2013 Search—Successful Projects &amp; Practices</td>
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**Conference At-A-Glance**

#### Wednesday, November 5

**Welcome Reception**

- Constitution Ballroom, Level 3B

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#### Wednesday, November 5

**Welcome Reception**

- Constitution Ballroom, Level 3B

**Welcome & Keynote**

- Constitution Ballroom, Level 3B
- The Intranet of Everywhere: Redefining KM in the Age of the Empowered Employee
  - Louis Tetu

**Keynote**

- Constitution Ballroom, Level 3B
- Enterprise Knowledge, Work, & Customer Value
  - Don Hinchcliffe

**Conference At-A-Glance**

#### Wednesday, November 5

**Track A**

- Constitution Ballroom, Level 3B
- KM Strategies & Practices

**Track B**

- Farragut/Lafayette, Level 5B
- Digital Workspace

**Track C**

- Independence DE, Level 5B
- Enterprise Content Management (ECM)

**Enterprise Search & Discovery 2014**

**Independence BC, Level 5B**

### Conference At-A-Glance

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**Keynote**

- Constitution Ballroom, Level 3B
- Enterprise Knowledge, Work, & Customer Value
Thursday, November 6

8:45 a.m.– 9:00 a.m.

COFFEE

TRACK A — Constitution A, Level 3B

KM Enterprise Adoption: How to Make It Stick!

10:45 a.m.– 11:45 a.m.

12:00 p.m.– 12:45 p.m.

Creating a Strategy to Share Critical Insights More Broadly

12:45 p.m.– 2:00 p.m.

TRACK B — Constitution B, Level 3B

Capability Through KM

Innovative Learning Formats to Make Knowledge Stick

2:00 p.m.– 2:45 p.m.

3:00 p.m.– 3:45 p.m.

3:45 p.m.– 4:15 p.m.

TRACK C — Constitution C, Level 3B

Knowledge Sharing Tools: Industry Insights

Trends in Evolving Knowledge World

Seminar

4:15 p.m.– 4:45 p.m.

4:45 p.m.– 6:00 p.m.

COFFEE BREAK — In the Enterprise Solutions Showcase

ATTENDEE LUNCHEON — In the Enterprise Solutions Showcase

COFFEE

Friday, November 7

8:45 a.m.– 9:00 a.m.

COFFEE

KEYNOTE — Constitution Ballroom, Level 3B

It's a Process Jim, but Not as We Know It! — Dave Snowden

KEYNOTE — Constitution Ballroom, Level 3B

Achieving Successful Search — Kamran Khan

10:00 a.m.– 10:45 a.m.

TRACK A — Constitution A, Level 3B

Knowledge Sharing in the Flow of Work

10:45 a.m.– 11:45 a.m.

11:45 a.m.– 12:30 p.m.

Delivering Global Business Value

12:30 p.m.– 1:00 p.m.

2:00 p.m.– 2:45 p.m.

Social Enabling Your Extranet

3:00 p.m.– 3:45 p.m.

Experts: Utilizing & Growing

4:45 p.m.– 5:00 p.m.

COFFEE BREAK — In the Enterprise Solutions Showcase

KMWorld Conference

Consortium — Constitution Level (3B) — Farragut/Lafayette, Level 5B — LAFAYETTE/FARRAGUT SQUARE — Independence Level (5B)

KMWorld Symposium Conference — Constitution Ballroom, Level 3B

Enterprise Search & Discovery Conference — Constitution Ballroom, Level 3B

Taxonomy Boot Camp Conference — Constitution Ballroom, Level 3B

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LOCATION KEY

CONSTITUTION BALLROOM — Constitution Level (3B)

INDEPENDENCE BALLROOM — Independence Level (5B)

LAFAYETTE/FARRAGUT SQUARE — Independence Level (5B)

ENTERPRISE SOLUTIONS SHOWCASE — Independence Level (5B)

REGISTRATION — Independence Level (5B)
Tuesday, November 4

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

W1 • KM 101

Stan Garfield, Community Evangelist, Global Knowledge Services, Deloitte Touche Tohmatsu Limited; Author, Implementing a Successful KM Programme; Founder, SIKM Leaders Community

Are you new to knowledge management? Want to learn about all the possibilities for making your organization smarter, more collaborative, innovative, and productive? Join our expert knowledge manager to gain insights and ideas for building a robust KM program in your organization—even if it is called another name! This workshop highlights a range of potential enterprise KM activities being used in real organizations and shares how these activities are impacting the bottom line. It shows real KM practices and discusses various tools and techniques to give those new to KM a vision of what is possible in the enterprise.

W2 • SharePoint Strategy & Road Map

Paddy Plunket, Consultant, Information Leadership

SharePoint’s versatility makes it the ideal tool for managing a range of information, knowledge and business processes. Learn from an expert with more than 60 successful SharePoint implementations in many sectors how to translate ideas into actions, principles and decisions that will drive your implementation forward and keep it focused on what the business values. The workshop allows you to start building your strategy and road map for using SharePoint—be it from scratch or reining in an out-of-control implementation. It discusses making the business case and budgets, approaches to implementation, infrastructure and systems architecture, information architecture, governance and autonomy, and change management and shares many real-world examples and practices.

W3 • Improving Knowledge Flows: Using Lenses to See Needs in Systems of Engagement

Thomas Vander Wal, Senior Strategist, Design for Context

Organizations have been shifting how work is done, moving from working in documents and email to collaboration/social/systems of engagement platforms that are part of their digital transformation. This shift not only improves efficiency in work but improves knowledge capture for reuse. Organizations have many options and variations, and making sense of them without a guide is challenging. This workshop provides a tool, the foundational social lenses, to see the problems and issues better in order to understand an organization’s needs as well as to see the paths forward far more clearly. Those who have gone through this workshop have stated they wish they had this understanding and ability to see their needs and way forward many years back. Vendors have found value in these lenses to better understand gaps and areas that could use improvement with clarity to better design and develop solutions. Join this workshop and grab a wonderful tool to find the way forward and improve knowledge flows.

W4 • Knowledge Manager’s Toolkit

Stephanie Barnes, Chief Chaos Organizer, Missing Puzzle Piece Consulting; Author, Designing a Successful KM Strategy

Knowledge management has to be seen within the context of business strategy and business need. It is not an end itself, but a tool to deliver better business performance, and this view is crucial to developing and crafting an effective KM strategy. This half-day workshop, based on a recently published book, covers creating a strategy to give direction to a KM program, recognizing business drivers, clarifying strategic knowledge areas for the organization, finding and defining key stakeholders who need to be involved. Barnes discusses the KM framework for successful programs including dealing with information and content, the need for change management, a business case, and beginning with pilot projects.

W5 • Understanding SharePoint 2013 Search—Architecture & Capabilities

Jeff Fried, CTO & VP Engineering, BA Insight

This workshop focuses on the search capabilities of SharePoint 2013 and how to match them to a variety of search needs and strategies. Attendees get deep-dive information about the architecture, search capabilities, and tools—including content capture and enrichment, ranking models and relevance, query rules, result templates, and management tools. Fried illustrates these capabilities with real case studies and examples. Learn what’s possible, what’s easy, and what to watch out for with SharePoint 2013 search. Take home knowledge of what this new search technology is, what you can do with it, what its limitations are, and how to overcome them, as well as a set of resources you can apply as you get deeper. Understand common patterns connecting business and information strategy and how to relate them to search scenarios, search capabilities, and search-driven applications that can be fielded successfully and economically. Gain an understanding of how to apply SharePoint 2013 search capabilities successfully and how to construct search-driven applications with this platform, as well as what pitfalls to avoid. Get a peek forward into where SharePoint search is going and how to be in a good position as it continues to evolve.

W6 • Practical Intranet Navigation & Design

Rebecca Rodgers, Senior Consultant, Step Two Designs

Above all things, intranets must be easy to use for staff. Navigation must be clear and unambiguous, so staff can quickly find what they need. The design and layout of key pages, particularly the intranet homepage, must be carefully considered. This workshop provides a step-by-step practical methodology that offers practical techniques that can be done by all teams. This thoroughly practical workshop covers understanding staff needs, determining your intranet “brand,” best-practice intranet design methodology, key design principles, top tips for designing for mobile, creating and testing new intranet navigation, and working out what goes on the intranet homepage. It provides screenshots and examples from many different intranets and includes a hands-on chance to try the techniques, with plenty of time for answering common questions. Join this workshop and walk away with the knowledge needed to design and structure an intranet that really will work for staff.

W7 • Text Analytics

Tom Reamy, Chief Knowledge Architect, KAPS Group

Text analytics is a platform technology having a profound impact on everything from taxonomy development and application to enterprise search and search-based applications and KM initiatives such as expertise location and social media-based collaborative communities. However, to get the maximum value from text analytics requires a broad, enterprise-wide perspective and approach. This workshop covers all you need to know to build a text analytics foundation for a complete range of applications: the basic analytic techniques from machine learning to sophisticated rule building; a survey of the vendor space of text analytics, including new social media companies; an evaluation process of the right text analytics software for your organization; an iterative development process and how to overcome issues; types of applications that can be built with text analytics; and many case studies of the most exciting new applications of text analytics.

W8 • Revealing Your Knowledge Strategy

Jacob McNulty, Director, Social Business Management, & Lamont Exeter, Executive Director, Culture & Workforce 2.0, Peppers & Rogers Group, a TeleTech Company

Value drivers in the knowledge economy are largely invisible—knowledge, ideas, reputation, trust, and culture. Success in the knowledge economy requires us to “make the invisible visible.” Various tools and techniques exist to achieve this for the purposes of creating and sustaining communities of practice and knowledge communities, organizing for ideation and innovation, and hosting vibrant customer communities. Identifying the knowledge brokers within an organization or within a network of customers is critical to furthering the collaboration among the entire group. Visualizing how knowledge flows reveals strategies for enhancing knowledge transfer as well as the most likely source of ideas for innovation. Only then can the configuration of the appropriate social or collaboration tools occur. A social network analysis (SNA) is one example of an easily administered tool that produces a very powerful output—a visual map of the social fabric of a group. This can be a group of customers, employees, or partners and the maps are used to determine how to structure innovation sessions and programs, how to enable knowledge transfer and collaboration, and how to encourage additional in-
teration among customers or partners. This workshop discusses SNA and other methods for determining strategies for success in an economy where knowledge, ideas, and all things invisible are what will provide the competitive advantage of the future.

**W9 • Flexible & Agile Workstyles & Processes for the 21st Century Organization**

*Susan Scrupski, Founder, Change Agents Worldwide*
*Joachim Streh, Change Agent, Change Agents Worldwide*
*Catherine Shinners, Founder, Merced Group*
*Carrie Young, Principal, Talk Social to Me*

The future is already here and evenly distributed among the global members of the Change Agents Worldwide (CAWW) network. This half-day workshop shares their secrets: how they work, their values, how they adopt/adapt/exact new ways of working with their global team. A team of Change Agents discuss leading organizational concepts such as: new models for organizational design, the power of self-organization, social and organizational network analysis, and more. They’ll talk about the cornerstone of what makes their networked organization work: transparency, trust, authenticity, and a culture of sharing and cooperation. The CAWW network exemplifies how social and operational integration yields iterative improvements in responding to customers, working collaboratively with partners, and creating value in the marketplace. The workshop also talks about what supports their work: SWARMS, Pods, Cookie Jars, Green Rooms, and other new processes based on agile and self-organizing principles.

**W10 • New Ways of Working: Culture Change**

*Lucy Braun, Internal Communication Manager, & Ernst Decsey, Communication Specialist (Digital Workplace), UNICEF Private Fundraising & Partnerships Division*

Are resistance to change and strong hierarchies in your organization? Are new ways of working obvious to you but difficult to get into your colleagues’ minds and everyday habits? Are you still in early stages of an Enterprise Social journey and looking for inspiration on how to convince people to join you for the ride? In this interactive workshop, our two enthusiastic practitioners from the non-profit world talk about the steps you can take to plant seeds of change, the passion and effort it takes to create the best environment for these seeds to grow and the bottlenecks and push-backs along the way that you need to address. Take away a bouquet of25 practical ideas for how to make a compelling case to users and executives alike and find out why asking them to play with Lego blocks can be a very good approach when talking about Enterprise Social and the future Digital Workplace.

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

**W11 • Leading Organizational Change for KM Adoption**

*Steve Barth, Senior Consultant, and Jowilla Rabor, Senior Manager, Hitachi Consulting*

KM only matters if knowledge is shared in ways that build organizational value. “If you build it, they will come” is a poor mantra for KM programs. Too many initiatives struggle because they focus on technical implementation but neglect the realities of organizational behaviors and beliefs. This is true of almost any enterprise program, such as ERP, but KM is especially susceptible because knowledge sharing can only be voluntary. In this practical, interactive workshop:

- See why proactive “change management” makes such a difference in user adoption and ROI.
- Learn the basic components of any change management program.
- Practice how to assess and address challenges and opportunities in your organization.
- Engage in a forward-looking discussion about the latest thinking in organizational change.

**W12 • Creating a KM Strategy**

*Dave Snowden, Founder & CSO, Cognitive Edge*

This workshop, by a KM pioneer and popular KMWorld speaker, focuses on how to build a successful KM strategy and revitalize knowledge sharing within your organization. Dave Snowden, our engaging workshop leader, takes participants through a step-by-step approach to rethinking the role of the KM function within an organization. It includes creating a decision/information flow map to understand the natural flows of knowledge; defining micro-projects that directly link to the decision support needs of senior executives; mapping the current flow paths for knowledge within the organization; and finding natural ways to manage the knowledge of the aging workforce as well as the IT-enabled apprenticeship. Using real-world examples, Snowden shares winning strategies and insights to rejuvenate your knowledge-sharing practices.

**W13 • Guide to Selecting the Right Digital Workplace Technologies**

*Jarrod Gingras & Tony Byrne, Real Story Group*

This fast-paced workshop shares customer research from the noted analyst firm Real Story Group on significant digital workplace technology and provides a framework for buyers to assess technology choices based on their particular needs. Specifically, it provides a methodology for mapping business needs to technology alternatives, as well as a road map for evaluating technology vendors. It clarifies architectural choices in an increasingly confusing marketplace where standards remain more promise than reality. Gingras and Byrne address the practicalities that enterprises face when tackling the issue of developing and managing a social workplace. They share what analysts are hearing from customers, what is working, what is not and what the prognosis is for technology buyers who are under pressure.

**Welcome Reception**

*Tuesday, November 4 • 6:00 - 7:00 p.m.*

Constitution Ballroom, Level 3B

Enjoy a selection of wine and cheese in a relaxed atmosphere as Information Today, Inc. welcomes all conference attendees, speakers, and sponsors to the kick-off event of this year’s program.

(800) 300-9868 • kmworld.com/kmw14
Workshops

Tuesday, November 4

seeing illustrations of how these areas enhance and inspire innovation and employee engagement. This is a hands-on, interactive workshop, so come prepared to engage in an experience that takes you outside the usual knowledge management box to discover the benefits of creative KM.

W15 • Applying SharePoint 2013 Search—Successful Projects & Practices

Christian Gross, Search Consultant, Sebastian Klett, Senior Search Consultant, & Seung-Jun Hong, Senior Consultant, Raytion GmbH

Microsoft made a huge step forward in integrating search into the SharePoint platform, and, for many, SharePoint 2013 will be one of the best platforms available for enterprise search. But successful enterprise search projects need more than technology; they need effective approaches and practices. SharePoint 2013 provides enormous flexibility for tailoring—making it important to understand where the fuzzy boundary between configuration and customization lies in real-world projects and important to judge what to change and what to leave alone. Search projects can go poorly or can go very well. This workshop offers patterns, practices, and guidance to ensure success. Bring your challenges. Questions addressed in this interactive, scenario-driven, workshop include the following:

• What are good practices and approaches to take in a search project? What tends to trip up these projects?
• What are the common customization patterns for SharePoint 2013? When is out of the box sufficient, and where do projects need to configure, extend, and add on?
• If you are already using FS4SP, or are thinking about a migration to SharePoint 2013, how should you approach it? If you are using another search engine, what should you consider?
• What kind of skills, training, and resources are needed for a successful project and ongoing maintenance?
• How should search be successfully operated and grown once in production? What could be a long-term strategy to make the most out of your search investments?

W16 • Enterprise Social Networking: Business Case, Adoption, & Engagement

Catherine Shinners, President, Merced Group
Carrie Basham-Young, Principal, Talk Social To Me

Social and collaborative technologies are key to empowering employees to transform the way they work, interact, and engage, enabling companies to catalyze product and service innovation and deepening customer insight and relationships—in essence redesigning the way business is done. At the same time, an enterprise social network is inherently “human,” allowing people to be people by facilitating with technology the informal social connections that already thrive. Implementing an enterprise social network can also mean rethinking workplace practices and a need for new governance models, leadership skills, and transforming the way we communicate. No matter where you are on the path of integrating “social” into your organization, this workshop helps you understand the key elements of an enterprise social networking initiative, from business case development to ROI and value-measurement principles to cultural and organizational readiness, through use case development, leadership skills and engagement, social network analysis, governance strategies, and adoption planning and ongoing engagement. Get a comprehensive view of key planning elements and useful tools that have worked for organizations big and small since 2009. Targeted toward executive sponsors of social initiatives, community managers, and technical leaders of social product portfolios, this interactive workshop gives you the key elements to develop or improve your enterprise social networking initiative.

W17 • Social Network Analysis Methods and Tools

Patti Anklam, Principal Consultant, Net Work

Knowledge flows along established paths in organizations. To change or improve knowledge flow, it’s important to understand these current paths—which are often outside the formal organization structure. Social network analysis (SNA) and its organizational counterpart organizational network analysis (ONA) provides a methodology to map these pathways to gain insights into how the organization really works. The methodology includes sensitivity to collecting data about people using different means, including surveys, and using software to manage and analyze the data to create visual maps and detailed metrics. Metrics can provide information about the overall cohesiveness of the network as well as the roles that individuals play in the network, highlighting those who are in the best position to move knowledge and ideas around. The workshop covers the basic steps and tools used in the methodology with a hands-on case study. Bring your laptop to take advantage of free tools. Gartner has predicted that by 2015, 25% of organizations will “routinely utilize social network analysis to improve performance and productivity.” If your organization is not already using network analysis, or if you would like to understand more about this tool that has been helping knowledge managers for almost 10 years, you will want to attend this highly interactive workshop.

W18 • Conducting Knowledge Audits

Patrick Lambe, Founder, Straits Knowledge

This workshop by a longtime KM practitioner provides a step-by-step technique for conducting a knowledge audit to assess KM needs and opportunities in any organization. It helps you understand the different forms of organizational knowledge and their matching strategies, provides the keys to building and analyzing activity-based knowledge maps, and gives you the confidence to develop recommendations for operational KM interventions based on knowledge maps.

W19 • Building a Mentoring Program for Knowledge Transfer

Art Murray, President, Applied Knowledge Sciences, Inc.
Francesco Calabrese, President, ExMG, Inc.

The great retirement wave has finally arrived. Large numbers of employees with 30 or more years of experience are leaving the workforce, taking their knowledge with them. This is happening at a time when budgets are tight, demographics are shifting, and the speed of change in the marketplace is accelerating. In many organizations, mentoring is catching on as a means of transferring knowledge from one generation to the next, but often with disappointing results. This workshop focuses on how to develop and implement a structured mentoring program aimed at guiding mentors and mentees through a structured, agile-based process that makes the best use of everyone’s time, ensuring the whole process accommodates personal satisfaction and growth for both mentors and mentees. It includes the do’s and don’ts of setting up and running a successful mentoring program; problems that are most likely to arise and how to resolve them; which knowledge transfer methods work best in what situations; the difference between mentoring, training, and coaching and how they can work together; best practices for matching mentors and mentees; how to help a mentee make the transition to mentor; and how to evaluate your mentoring program and what to do when it’s not working.

W20 • From Traditional Hierarchy to Networked ‘Wirearchy’

Jon Husband, Techno-Anthropologist, Wirearchy

It’s becoming clearer to every organization and every leader that the interconnected network environment is here to stay. So how do we take advantage of it as effectively as possible? Adapting in productive and constructive ways means undertaking substantial change to organizational structures, leadership, and management challenges and dynamics, and the basics of work design. The dynamics of traditional hierarchy are increasingly finding the limits of effectiveness, as responses, decision-making and adaptive efforts are not rapid enough. Organizations struggle with work design and culture change efforts as the networked workplace becomes more and more rapid and complex. One of the ways that is quickly emerging as effective, people-centered and, in many senses, self-organizing and self-managed, has been termed “working out loud.” As organizations navigate the shift from traditional hierarchies to more agile and responsive ‘wirearchies,’ narrating and showing our work to each other opens up important opportunities and lessons for changing an organization’s culture and helping it navigate this shift. Hear how to create a “working out loud” style for your organization, get tips for its effective use, and build shared and generative knowledge, an increasingly valuable strategic advantage for thriving in ecosystems of connected information.
Enterprise Knowledge & Customer Value

- LEARN About Leading-Edge Practices
- STREAMLINE Information & Knowledge Flows
- GAIN Knowledge to Build Strong Organizations
- COLLABORATE With Experts & Colleagues
- EXPLORE Social Media & Networking for the Enterprise
- IMPROVE Taxonomies & Content Management

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kmworld.com/kmw14
Welcome to KMWorld 2014! We’re excited to have you here as we celebrate 18 years of helping the knowledge management community grow. This year’s theme, Enterprise Knowledge & Customer Value, is designed to help your organization delve into the many ways knowledge can be shared, transferred, and used to engage and impact customers in positive ways. Take advantage of the more than 90 sessions you’ll have access to over the next few days, as our speakers present you with the practical knowledge you need to help find new and innovative ways KM can improve the way you do business. Make time in your schedule to visit the Enterprise Solutions Showcase to explore new products and service solutions. You’ll have the chance to speak one-on-one with leading companies in the industry and learn more about the solutions they offer. Be sure to stop by the KMWorld bookstore where you’ll get exclusive show discounts on top-selling industry books. Plus, check onsite signage for speaker/author book signings. Enjoy your time at KMWorld 2014 and its co-located events. Remember to be social!

Wireless Internet
Complimentary Wi-Fi is available in all meeting rooms.
1) Network: Hyatt_Meeting
2) Click on browser to open log-in page
3) Enter passcode: infotoday2014

Welcome Reception
Tuesday, November 4 • 6:00 p.m. – 7:00 p.m.
Constitution Ballroom, Level 3B
Enjoy a selection of wine and cheese in a relaxed atmosphere as Information Today, Inc. welcomes all conference attendees, speakers, and sponsors to the kick-off event of this year’s program.

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

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

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

Enterprise Solutions Showcase Grand Opening Reception
Wednesday, November 5 • 5:00 p.m. – 6:30 p.m.
Come enjoy “a taste of fall” as we celebrate the grand 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 5
8:00 a.m. – 3:30 p.m. • Constitution Level Foyer
5:00 p.m. – 6:30 p.m. • Enterprise Solutions Showcase
Thursday, November 6
10:00 a.m. – 4:30 p.m. • Enterprise Solutions Showcase
Friday, November 7
10:00 a.m. – 2:00 p.m. • Enterprise Solutions Showcase

Communities of Interest
Thursday, November 6 • 5:00 p.m. – 6:00 p.m. • Cure Bar, Lobby Level
After a busy day, relax with colleagues in the Hyatt bar on the Lobby level. Share insights from the conference and learn more about your colleagues’ organizations and practices. With attendees from 24 different countries you can enjoy the richness of their knowledge, share experiences, and have fun networking.

Conference Presentations
Many speaker slides are available for download from the conference website (kmworld.com/kmw14). Click on “PRESENTATIONS” and enter Username/Password: DC2014.

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Wednesday, November 5

8:45 a.m. – 9:45 a.m.
WELCOME & KEYNOTE • Constitution Ballroom, Level 3B • Enterprise Knowledge, Work, & Customer Value • Dion Hinchcliffe

10:00 a.m. – 10:30 a.m.
KEYNOTE • Constitution Ballroom, Level 3B • The Intranet of Everywhere: Redefining KM in the Age of the Empowered Employee • Louis Tetu

10:30 a.m. – 11:15 a.m.
TRACK A • Constitution Ballroom, Level 3B • Knowledge Is the Business • A101 A102 A103 A104 A105 A106

11:15 a.m. – 12:15 p.m.
TRACK B • Farragut/Lafayette, Level 5B • Inside the Digital Workspace • B101 B102 B103 B104 B105 B106

12:15 p.m. – 1:15 p.m.
TRACK C • Independence D/E, Level 3B • 10 Mistakes to Avoid When Purchasing Digital Workspace Technology • Content Technology Roadmap

Thursday, November 6

8:45 a.m. – 9:00 a.m.
KEYNOTE • Constitution Ballroom, Level 3B • Knowledge Sharing in the Networked World of the Internet of Things • Lee Rainie

9:00 a.m. – 9:45 a.m.
WELCOME & KEYNOTE • Constitution Ballroom, Level 3B • “Working Out Loud” in Shell • Ian Jones

10:00 a.m. – 10:45 a.m.
COFFEE BREAK • In the Enterprise Solutions Showcase

10:45 a.m. – 11:45 a.m.
TRACK A • Constitution A, Level 3B • Social KM • A201 A202 A203 A204 A205

11:45 a.m. – 12:45 p.m.
TRACK B • Constitution Ballroom, Level 3B • Never Fail: Learn & Change • B201 B202

12:45 p.m. – 2:00 p.m.
TRACK C • Constitution E, Level 3B • Knowledge Sharing in the Networked World of the Internet of Things • Lee Rainie

2:00 p.m. – 2:45 p.m.
TRACK A • Constitution A, Level 3B • Capabilities Through KM • A201 A202

2:45 p.m. – 3:30 p.m.
TRACK B • Constitution B, Level 3B • Creating a Strategy to Share Critical Insights More Broadly • B201 B202 B203

3:30 p.m. – 4:15 p.m.
TRACK C • Constitution C, Level 3B • Enterprise Tools • C201 C202 C203 C204 C205

4:15 p.m. – 5:00 p.m.
TRACK A • Constitution A, Level 3B • KM Enterprise Adoption: How to Make It Stick! • A201 A202 A203 A204 A205

5:00 p.m. – 6:00 p.m.
COFFEE BREAK • In the Enterprise Solutions Showcase

5:30 p.m. – 6:30 p.m.
ATTENDEE LUNCHEON & KEYNOTE • Constitution Ballroom, Level 3B • Winning the Customer Experience Arms Race • Seth Earley

Friday, November 7

8:45 a.m. – 9:45 a.m.
WELCOME & KEYNOTE • Constitution Ballroom, Level 3B • It’s a Process Jim, but Not as We Know It! • Dave Snowden

9:00 a.m. – 9:45 a.m.
KEYNOTE • Constitution Ballroom, Level 3B • Achieving Successful Search • Kamran Khan

10:00 a.m. – 10:45 a.m.
COFFEE BREAK • In the Enterprise Solutions Showcase

10:45 a.m. – 11:30 a.m.
TRACK A • Constitution A, Level 3B • Knowledge Sharing in the Flow • A201 A202

11:30 a.m. – 12:30 p.m.
TRACK B • Constitution B, Level 3B • Defense Innovation Marketplace • B201 B202

12:30 p.m. – 2:00 p.m.
TRACK C • Constitution C, Level 3B • Stories Are Serious Business • C201 C202

2:00 p.m. – 2:45 p.m.
TRACK A • Constitution A, Level 3B • Assessing an Organization’s KM Program • A201 A202

2:45 p.m. – 3:30 p.m.
TRACK B • Constitution B, Level 3B • Delivering Global Business Value • B201 B202 B203

3:30 p.m. – 4:15 p.m.
TRACK C • Constitution C, Level 3B • Cognitive Computing & KM • C201 C202

4:15 p.m. – 5:00 p.m.
ATTENDEE LUNCHEON • Constitution Ballroom, Level 3B • Work, Content & the Next 10 Years • Louis Tetu

5:00 p.m. – 6:00 p.m.
COFFEE BREAK • In the Enterprise Solutions Showcase

5:00 p.m. – 6:00 p.m.
ATTENDEE LUNCHEON & KEYNOTE • Constitution Ballroom, Level 3B • Social Media Business: Using Online Connections to Increase ROI • Eve Mayer
Continental Breakfast 8:00 a.m. – 8:45 a.m.

WELCOME & KEYNOTE

Enterprise Knowledge, Work, & Customer Value
8:45 a.m. – 9:45 a.m.  Constitution Ballroom, Level 3B
Dion Hinchcliffe, Chief Strategy Officer, Adjutiv LLC & Co-Author, Social Business by Design

The way we work and share knowledge today is undergoing one of the largest shifts in history. How will we adapt our digital workplaces to this future? How can we help our organizations tap into the vast new global knowledge flows that impact our customers? How do we increase customer value in our organizations? Forrester says that companies are at long last making digital transformation a top priority, with 74% of executives saying that they currently have a strategy to get there, but only 10% say they are truly prepared. Hinchcliffe discusses ways that companies are adapting to digital business and suggests how successful and sustainable next-generation enterprises can better harness today's fast-flowing streams of digital innovation!

KEYNOTE

The Intranet of Everywhere: Redefining KM in the Age of the Empowered Employee
9:45 a.m. – 10:00 a.m.  Constitution Ballroom, Level 3B
Louis Tetu, CEO, Coveo

Forrester Research reports that “29% of the global workforce (and rising) are anytime, anywhere information workers—those who use three or more devices, work from multiple locations, and use many apps.” We live in an era of the Intranet of Everywhere, and success is reserved for those who embrace it. During this high-impact talk, Tetu shares proven strategies that empower success: Letting workers use the tools and channels they prefer, while ensuring that the knowledge they create with those tools is well-organized and easily findable by colleagues; Gaining a unified, real-time view of all your company’s diverse knowledge streams and understanding the “who, what, when, where, and why” of each knowledge asset; Automatically identifying subject-matter experts based upon automated analysis of all your knowledge assets and systems and; Unburdening teams from the never-ending task of manually tagging, cleansing, and deducing your enterprise data.

Coffee Break 10:00 a.m. – 10:30 a.m.

TRACK A  KM Strategies & Practices
Constitution Ballroom, Level 3B

How can enterprise knowledge create customer value in our organizations? Hear from forward-looking KM practitioners and thought leaders who share key strategies and applications within organizations to improve decision-making, learning, innovation, customer satisfaction, success and/or stronger bottom lines.

Moderated by Patti Anklam, NetWork

A101  Knowledge Is the Business
10:30 a.m. – 11:15 a.m.

Katrina Pugh, Academic Director, Columbia University, & Author, Sharing Hidden Know-How

The new frontier for knowledge practitioners is just that—the frontier, the edge, the face of the organization. As Tom Stewart and Pugh have written, “Knowledge is the Business—In leading knowledge-driven businesses, knowledge is what customers buy. Whether that knowledge is built into a product (e.g., a ‘smart’ phone), sold as knowledge itself (e.g., research reports), or embodied in people (e.g., a legal counselor), the customer is aware of it, pays for it, and judges it in making a buying decision.” Knowledge-driven products are everywhere, and success rides on a mix of business acumen and knowledge-integration skills—an ability to see a market possibility and to drive knowledge into product. Pugh discusses results of studying knowledge-based innovation, looking for two things: What made it competitive? What skills and processes did knowledge leaders bring to bear? She shares insights for sustaining a competitive edge and common differentiators, such as reducing transactions and search costs; providing access to inaccessible data or people; educating the customer (e.g., on regulation, market patterns); integrating with customer workflow; decision making processes; and helping customers improve their social capital, assets and attractiveness.

A103  New Thinking for Organization Transformation & Better KM
1:15 p.m. – 2:00 p.m.

Richard McDermott, McDermott Consulting & Author, Forthcoming How to Think Like an Expert

Our speakers share tips, techniques and new types of thinking for organization transformation, improved knowledge sharing and collaboration. Alarik focuses on enterprise system thinking and continuous collaboration. He illustrates with real world examples how systems thinking can build bridges between organization silos to align all units, projects, processes, and personnel with the company’s true mission – to serve the customer better, and for the long term! Based on brain research, McDermott describes how seasoned experts and managers think and suggests how the field of KM can shift the way it shares knowledge to be more aligned with the way we think. Creativity and effectiveness come from the thinking approaches we use and should be an integral part of the KM process.
A104 • Knowledge Capture & Transfer at Kraft Foods
2:15 p.m. – 3:00 p.m.
Jeni Wolf, Associate Principal Scientist, KM Group, Kraft Foods
Jean-François Tendron, Director, Kadrant Ltd.
Learn about the KM practices used at Kraft Foods focusing on the MASK method for knowledge capture. MASK, or Method for Analyzing and Structuring Knowledge, was developed in France by Jean-Louis Ermine for the Center for Atomic Energy. It is based on the philosophy that a body of knowledge is always structured in six points of view represented by six unique models. The MASK methodology has been successfully used by Kraft to capture and transfer critical tacit knowledge. It is of value to anyone interested in capturing knowledge in a way that makes it easy to find, understand and use.

Coffee Break • 3:00 p.m. – 3:15 p.m.

A105 • Gamification: Incentive for KM Engagement
3:15 p.m. – 4:00 p.m.
Allison Carroll, Associate, Digital Workforce Strategy, & Barry Tanner, Senior Associate, Booz Allen Hamilton
Benjamin van Rooy, Director, American Express
If you were to ask the average 8-year-old, “What was the most fun part of your day?” what do you expect the answer to be? Would it be learning multiplication tables or long division? Probably not. In similar fashion, the most interesting part of your employees’ day is likely to be their conversations at the water cooler about last night’s game or TV show. It won’t be logging into the internal knowledge management system to upload their latest project’s progress reports, delivering feedback on peer’s work, or logging their time at the end of the day. The Achilles heel of most KM initiatives is adoption—getting end users to engage and participate in KM processes and systems. Carroll and Tanner look at injecting game mechanics into the KM process so users have an incentive to participate and also some fun! Van Rooy talks about using gamification to encourage knowledge sharing and reveals some out-of-the-box ideas to improve engagement at American Express. He shares new tools to increase collaboration.

A106 • Knowledge: Transferring Across Generations
4:15 p.m. – 5:00 p.m.
Susan McCabe, Business Consultant, Enterprise Social, Unisys Corporation
Lesley Shneier, Alumni Network Manager, World Bank Group 1818 Society
The prediction of Baby Boomers retiring in droves has been interrupted by recent economic changes. As Boomers delay retirement, the makeup of the modern workforce now crosses generations to include boomers, Gen X-ers, and Millennials working together. Hear how businesses can use this opportunity to enable the seamless transfer of information and knowledge across the ages. Our speakers share experiences from their organizations as well as lessons learned.

TRACK B • Digital Workspace

Farragut/Lafayette, Level 5B

Work, and its future, is changing rapidly. With many working outside organizational walls, real-time communication and collaboration, tools and platforms as well as strategies are changing in the digital workplace/workspace. Hear how leading-edge organizations are meeting the challenges of a mobile and fast-changing world.

Moderated by Daniel Lee, PricewaterhouseCoopers

B101 • Inside the Digital Workspace
10:30 a.m. – 11:15 a.m.
Rebecca Rodgers, Senior Consultant, Step Two Design
Lou Zulli, Centre for Advanced Technologies, Lakewood High School
Patrick V. DiDomenico, Ogletree, Deakins, Nash, Smoak & Stewart
Jase Wells, Prophet
This informative session lets you peek behind the firewall of leading-edge intranets and digital workplaces from a number of different worldwide industries and includes award-winning sites from the 2014 Intranet Innovation Awards.

B102 • 10 Mistakes to Avoid When Purchasing Digital Workplace Technology
11:30 a.m. – 12:15 p.m.
Jarrod Gingras, Real Story Group
Based on work with thousands of enterprises, Gingras shares the common mistakes that cause technology projects to go off the rails before they even start. He reviews the 10 most critical mistakes that enterprises make during the digital workplace technology selection process and introduces ways to navigate around them.

Attendee Luncheon & Keynote • 12:15 p.m. – 1:15 p.m.
(See page 12 for complete description.)

B103 • Digital Workplace at KCTCS
1:15 p.m. – 2:00 p.m.
Gary Liu, Unified Social Business, Unisys
Matt Varney, Intranet Manager, Kentucky Community & Technical College System (KCTCS)
Evolving to a premier digital workplace requires, beyond the technology, good change management practices, clearly defined and communicated goals and projects, and a shared understanding of everything involved. Hear how Unisys turned to social data analytics and social network analysis to optimize both the information flow among people, as well as connections with key subject matter experts. The result is improved dissemination of relevant topics to interested people and improved connectivity with and between the network of subject matter experts. The KCTCS story will sound familiar to KM and digital workplace professionals, as our speaker shares his organization’s practices (good and bad)/lessons learned, highlights milestones and pitfalls in its journey, discusses the challenges of changing market conditions and technology capabilities, and focuses on key strategies and tactics, particularly around search and communications. By broadening the conversation around the digital workplace, KCTCS is elevating the base understanding of how work happens successfully in the 21st-century digital economy.

B104 • A Consolidated Mobile Enterprise
2:15 p.m. – 3:00 p.m.
David Lavenda, VP, Product Strategy, harmon.ie, & Fast Company Columnist
The average workday has become disjointed. While workers enjoy the “freedom” that comes from being able to do their jobs without being chained to their desks, it is not without its obstacles. There is certainly no shortage of mobile apps for employees, yet each app only does one thing well, and it is becoming clear that work information is spread out between too many apps. As employees rely more on mobile access, the elusive single-screen, unified mobile experience could be the answer to enterprise information discovery woes. Our speaker, a Fast Company columnist and enterprise technology expert, discusses ways to overcome the information overload challenge using contextual capabilities now provided by mobile devices, a consolidated user experience, and activity streams. Get tips on how to best create a mobile enterprise that empowers productivity while increasing employee satisfaction!

Coffee Break • 3:00 p.m. – 3:15 p.m.

B105 • Delivering Great Mobile Solutions in the Enterprise
3:15 p.m. – 4:00 p.m.
Rebecca Rodgers, Senior Consultant, Step Two Designs
In organizations around the globe, staff are demanding the usability of in-home devices at the workplace. Mobile devices are transforming how we work, but there are still questions to answer to make them effective. This practical discussion provides real-world insight into how to design and deliver a mobile enterprise. It’s simpler and easier than you might think! See many screenshots and examples from leading organizations, and use the ideas gained to plan your own mobile projects.
B106 • Connected Enterprises: Industry Insights
4:15 p.m. – 5:00 p.m.
David Copp, CEO, Brainspace
Mike Vertal, President & CEO, Rivet Logic Corporation
John Wetenhall, Marketing Manager, Atlassian
Hear from industry leaders about their insights on digital workspaces. Using real-world examples, Copp talks about the need for connectedness and why every business needs an intelligence layer to drive it toward becoming a connected enterprise. Vertal illustrates, using a case study, how its employee experience maturity model can be implemented and used by any organization to assess and optimize employee collaboration, engagement and productivity.

C101 • Beyond Traditional ECM: New Approaches
10:30 a.m. – 11:15 a.m.
Cheryl McKinnon, Principal Analyst, Forrester Research
Content is an essential component for organizations developing an information-rich, data-driven strategy to serve customers or citizens. While compliance remains a key driver, organizations increasingly look to enterprise content management (ECM) to meet customer-focused requirements. Forward-thinking technology managers are putting more focus on using content to drive revenue and less on just operational cost reduction. Content is now viewed along with data as part of a bigger information ecosystem. Traditional ECM suites continue to be disrupted by SaaS and file synch and share platforms. Archive vendors are stepping up and competing more often with ECM vendors. ediscovery vendors are bringing analytics further upstream into the content life cycle. This session outlines the future of ECM and the key trends to consider when setting the groundwork for a new or modernized content strategy.

C102 • Content Technology Roadmap
11:30 a.m. – 12:15 p.m.
Richard Medina, Co-Founder & Principal Consultant, DocuLabs
This session explains how to manage and govern your organization’s new information management environment as it transforms from the older ECM systems and “systems of record” to its future state that incorporates the emerging “systems of engagement” technologies (mobile, social media, cloud). It provides a reference model to plan and manage your road map for the next 3 years, shows how to address the entailed records and governance issues, and recommends which kinds of applications, capabilities, and types of products to pursue.

C103 • Managing Content Across the Product Life Cycle
1:15 p.m. – 2:00 p.m.
Adam Duckworth, Associate Director, Knowledge Management, & Douglas Arnold, Director, Pipeline & KM, Merck
Merck Manufacturing Division (MMD) manufactures, packages and distributes Merck products to more than 140 markets. In addition to traditional products, MMD recognizes one of the most important “products” and key competitive advantages is knowledge. It is experience and expertise. It is rationale behind decisions. It is know how and “know why.” It is what Merck knows about its products. This talk explores one component of the MMD knowledge architecture—the management of technical knowledge, which is the knowledge our scientists and technical teams generate and use to develop, commercialize, support, and improve its small molecule, biologic, and vaccine products. With a focus on people, process, and content and through deployment of an integrated technology platform, a comprehensive content management capability has been successfully deployed to improve findability of product content and expertise.

C104 • Enterprise Search for KM
2:15 p.m. – 3:00 p.m.
Frank Minicucci, Senior Managing Consultant, IBM
Stacie Breznovich, Social Learning Strategist, Accenture
In today’s era of Big Data unstructured information is the new oil. How you manage and mine this information can make the difference in providing real value to an organization. Minicucci demonstrates how to leverage content analytics to discover and clean up your Big Data and how to discover content such as PII (personally identifiable information). Once data is clean, the true knowledge value of integrating structured information such as CRM or MDM into the search engine can be seen by a true knowledge view of information. Our second speaker shares Accenture’s story on the improvements made to content findability for its management consulting practice. Within a year, management consulting saw a 30% increase in its people’s ability to find relevant content within the knowledge repository, the Knowledge Exchange. Hear about the content management program focused around four key pillars: getting best content in, reducing the noise, improving content access, and raising awareness.

Coffee Break • 3:00 p.m. – 3:15 p.m.
C105 • Pushing the Envelope: From CMS to KCMS
3:15 p.m. – 4:00 p.m.
Laurie Nelsen, Ontology Manager, Mayo Clinic
Mayo Clinic’s delivery of high-quality, affordable healthcare depends on integrating its knowledge to promote innovation across patient care, research, and education. Providing the best current health information and services requires an agile and responsive content management ecosystem for creating and managing content as well as meeting the emerging needs for the delivery of “smart” content. Nelsen shares the technical architecture and design choices made to build and deploy its Knowledge Content Management System (KCMS). KCMS’s solution to the problem of knowledge integration and flexible access is twofold: First, it utilizes the capabilities of the CMS to author, manage, and deliver the information. Secondly, it tightly integrates the CMS with a semantic services layer that provides the intelligence that enables users to find the right information, no matter who authored it or how it is stored.

C106 • Using Tangible Interfaces for Predictive Knowledge Delivery
4:15 p.m. – 5:00 p.m.
Douglas Phair, Technology Evangelist, & Lorin Petersen, Software Systems Engineer, The MITRE Corporation
Thanks to Google, today much of what enterprise users interact with is a standard search box on a web page. Though simple in design, there is an explicit action that needs to be taken by the user to discover information and knowledge. In an effort to better integrate the physical workspace with backend knowledge systems, MITRE explored how implicit actions through everyday interfaces could aid in delivering information and knowledge to that same enterprise user. For example, it looked at how content from e-whiteboarding collaboration sessions can be scraped and parsed to obtain the context of the session, then at how the context could be automatically fed to the search mechanism on behalf of the user. The results were then delivered without any explicit action on the user’s part. MITRE also explored allowing the user to embed tags in their e-whiteboard drawings to perform implicit actions such as “<find me an expert >” or “<email this to xxy>”.

SHOWCASE OPENING RECEPTION
Come enjoy “a taste of fall” as we celebrate the grand opening of the Enterprise Solutions Showcase.
5:00 p.m. – 6:30 p.m.
Wednesday, November 5
Continental Breakfast • 8:00 a.m. – 8:45 a.m.

**KMWorld & Intranet Innovation Awards**
8:45 a.m. – 9:00 a.m. • Constitution Ballroom, Level 3B

*KMWorld* magazine is proud to sponsor the **KMWorld 2014 Reality & Promise Awards** which are designed to celebrate the success stories of knowledge management. See page 13 for details.

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.

### KEYNOTE

**Knowledge Sharing in the Networked World of the Internet of Things**
9:00 a.m. – 9:45 a.m. • Constitution Ballroom, Level 3B

Lee Rainie, Director, Pew Research Center’s Internet & American Life Project, & Author, *Networked: The New Social Operating System*

On the 25th anniversary of the web, Pew has released new research on the Internet of Things: “Many experts say the rise of embedded and wearable computing will bring the next revolution in digital technology. They say the upsides are enhanced health, convenience, productivity, safety, and more useful information for people/organizations.” Lively and popular speaker Rainie shares the latest research from Pew about the internet and puts it into organizational context with the expanding Internet of Things! Filled with insights and ideas for enhancing knowledge sharing and productivity in organizations, this keynote is not to be missed.

### coffee break

10:00 a.m. – 10:45 a.m.

**KEYNOTE**

**“Working Out Loud” in Shell**
9:45 a.m. – 10:00 a.m. • Constitution Ballroom, Level 3B

Ian Jones, KM Manager, Shell Projects and Technology

Shell leadership’s main focus for its KM investment is on building value through the strength of its professional communities. We are doing this by following a business sponsored KM strategy which has professional communities at its center; a standardized solution incorporating tools, processes, and behaviors; and a disciplined program of building and implementing in key value-adding areas of the enterprise.

This has allowed us to put the business at the center of our KM work, to make sure that our investment really adds value to our bottom line and is driving more of the enterprise to want to opt in. Through a unique company showcase we’ll bring the Shell Enterprise KM solution into the conference so you can share our journey so far.

**KMWorld 2014 Reality & Promise Awards**

10:00 a.m. – 10:45 a.m.

MODERATOR: Mary Abraham, Co-Founder, Broadli Inc.

Jean-Claude Monney, Global KM Lead, Microsoft

Stan Garfield, KM Community Evangelist, Deloitte

Deirdre Walsh, Jive Software

Many companies are quick to adopt a KM transformation program but few have managed to make them stick. KM adoption experience is facilitated and discussed by three KM practitioners from Deloitte, Jive, and Microsoft. Tips and lessons learned are shared as practical take-away recommendations. Don’t miss this one!

### Attendee Luncheon

12:00 p.m. – 12:45 p.m.

**A201 • KM Enterprise Adoption: How to Make It Stick!**
10:45 a.m. – 11:45 a.m.

MODERATOR: Mary Abraham, Co-Founder, Broadli Inc.

Jean-Claude Monney, Global KM Lead, Microsoft

Stan Garfield, KM Community Evangelist, Deloitte

Deirdre Walsh, Jive Software

Many companies are quick to adopt a KM transformation program but few have managed to make them stick. KM adoption experience is facilitated and discussed by three KM practitioners from Deloitte, Jive, and Microsoft. Tips and lessons learned are shared as practical take-away recommendations. Don’t miss this one!

### A202 • Creating a Strategy to Share Critical Insights More Broadly

12:00 p.m. – 12:45 p.m.

Rob Koplowitz, Forrester Research

The infrastructure for this may already be in place in the form of advanced enterprise social business, and/or unified communications and collaboration investments. However, if yours is like many organizations, these investments may not be as highly adopted as planned. Based on research from a recent study with *KMWorld* magazine, Koplowitz shares strategies and tips for using those channels to deliver the customer’s voice to your employees in order to enrich their value.

### A203 • Practical Social Media Tips

2:00 p.m. – 2:45 p.m.

Stan Garfield, KM Community Evangelist, Deloitte

We are all familiar with social media, and most, if not all, of us use Facebook, LinkedIn, and/or Twitter. This interactive session includes a variety of tips shared by our seasoned KM practitioner such as using daily themes, Twitter chats, live tweeting, mentioning people, Twitter lists, integrating Twitter with LinkedIn and Google+, Facebook communities, using LinkedIn connections, Google+ Hangouts and Communities, Google Sites, Foursquare, Quora, SlideShare, SharePoint, Yammer, Pinterest, Storify, About.me, and Divshare. Attendees can participate by sharing their favorite tools and techniques. Grab lots of ideas for using social tools to engage your community and provide lots of tools for collaboration.

### A204 • Ensuring Success With Enterprise Social

3:00 p.m. – 3:45 p.m.

Susan Hanley, President, Susan Hanley LLC

Many companies face significant barriers in achieving success and value with social business. Social has the potential to change the way work gets done—and the way knowledge gets transferred. But, to be successful, processes and organizational must be aligned to assure adoption. Hanley explores approaches to help your organization achieve meaningful results from your investment in social, including leading a social culture, measuring what matters, and engaging users to incorporate social in the flow of their work.

### coffee break

3:45 p.m. – 4:15 p.m.
Thursday, November 6

A205  ●  Using Social Media Platforms for KM Engagement
4:15 p.m. – 5:00 p.m.
Sara Teitelman, Director, KM, & John Whalen, SVP, KM & Innovation, Pact
Greg Nemeth, Social Enterprise Leader, Ernst & Young (EY)
Hear how Pact, a D.C.-based international NGO with 1200-plus staff in 25 countries, found new and better ways of cultivating, harvesting, and monetizing innovations across the organization. Rather than an ad hoc approach, Pact built a virtual social innovation hub, called Innovation Marketplace, on the organization’s new intranet running on the Jive social business platform. Through online idea submission, open voting and commenting, and transparent idea review and development processes, all staff, regardless of location or position, can actively participate in the ideation process, generating real value for the organization and its program beneficiaries. Nemeth discusses how in its first 90 days, EY’s Yammer network became one of the three largest in the world and produced more than 800 examples of tangible business value. How did such a clear success happen so quickly? By putting strategy first and cultivating business value. The key elements needed for an actionable social collaboration strategy before launching Yammer or similar platforms are shared as well as an understanding of how to balance business opportunities and legitimate risk and practical tips to roll out Yammer and foster adoption.

B201  ●  Capability Through KM
10:45 a.m. – 11:45 a.m.
Ilene Strongin-Garry, Manager, KM & Sharing Culture, InterContinental Hotels Group (IHG)
Gene Shin, Senior Program Manager, Virginia Department of Transportation (VDOT)
Murni Shariff, Senior Manager, KM & Institutional Capability, & M. Hamka Ibrahim, General Manager Technical Data, PMU, PETRONAS
This session highlights three case studies of change management to enable capability and KM within different organizations. Our first speaker looks at KM over 15 years in one organization, IHG, from grassroots and marketing through to recent senior management support and exciting breakthroughs. Shin discusses how the KM program has worked with almost every aspect of VDOT’s business, from frontline staff to executive leadership, and from every geographic area. He shares the diverse, complex ways knowledge has developed institutionally over time to both create and obscure gaps in what people know. He talks about the 3DK methodology which provides a way to address that complexity, delineating KM from information management and difficult to sustain. Get techniques and practical approaches that have worked.”

B202  ●  Integrating Learning Development & KM
12:00 p.m. – 12:45 p.m.
Susan Camarena, Chief Knowledge & Learning Officer, Federal Transit Administration (DOT)
Turo Dexter, Knowledge Resources Manager, Federal Transit Administration (FTA)
KM coordination may reside in any of several parts of an organization—for example, human resources, research, or IT. At the FTA, part of the U.S. Department of Transportation, KM is tightly integrated with the Learning and Development function in its own group within the Office of Administration, where FTA’s chief knowledge and learning officer is a peer with the director of HR and the director of IT. The powerful synergy of FTA’s integrated Learning, Development and KM strategy supports employees as learners—and also as teachers—from onboarding to exit, throughout every branch of the agency. This dynamic presentation illustrates FTA’s strategy development, describes the major program activities that support FTA as a learning organization, reviews the metrics used to evaluate program effectiveness, and offers a template and process to help participants identify key facets of knowledge related to each business function in their own organizations.

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

B203  ●  Innovative Learning Formats to Make Knowledge Stick
2:00 p.m. – 2:45 p.m.
Monika Weber-Fahr, Director, Knowledge & Learning, The World Bank Group
The leader of a recent World Bank Group large-scale event for staff (250-plus sessions) discusses the weeklong event revolving around 10 innovative learning formats, bringing small groups together with an aggregate total of 1,500 participants, and aiming to make knowledge “stick.” The learning formats were thoroughly prepared beforehand as well as evaluated afterwards. Weber-Fahr provides insights into how these formats worked, the lessons learned, and how the event contributed to behavior change at an institution that is increasingly focused on the added value of its knowledge.

B204  ●  Creating Learning Organizations: Commitment not Compliance
3:00 p.m. – 3:45 p.m.
Gloria Burke, Chief Knowledge Officer, Unisys
Nabil Keith Durand, Organisational Learning Technical Specialist, Large Multinational KM Oriented Organization
KM is a wicked problem too complex for systems thinking to solve. The next revolution cannot be done to people because it is people: it is personal and will unleash the Learner. Burke discusses the development of Unisys as a learning organization highlighting their enterprise social business transformation as a key to maximizing value. She focuses on leadership and stakeholder alignment, employee engagement and use, metrics and measurements to ensure a successful implementation. Unisys has a cutting edge, industry recognized implementation with an employee adoption and use rate of more than 91% and has received a number of recent awards. Weaving studies from different sciences and research, Durand breaks down “building commitment” into digestible components, diving deep into the realm of metacognition and intrinsic motivation—what is really going on inside the mind, and how can it be influenced to learn. Hear about cognitive feedback mechanisms in expertise acquisition, the challenges in feedback learning horizons, the difficulties in unlearning, neuroplasticity, and why logical approaches to KM are limiting and difficult to sustain. Get techniques and practical approaches that have demonstrated lasting change in highly complex environments.

Coffee Break  ●  In the Enterprise Solutions Showcase
3:45 p.m. – 4:15 p.m.

B205  ●  Change Strategies & Experiences
4:15 p.m. – 5:00 p.m.
Connie Crosby, Principal/Consultant, Crosby Group Consulting
Yasmin Khan, Head Librarian, City of Toronto, Legal Services Department
Maria Virginia Rojas, Social Learning Catalyst, Accenture
Benjamin Duffy, Manager, Project Delivery, Technology Enabled Learning and Performance Support Capabilities, Unum
This session looks at change in three organizations. First, hear how one public sector division is working toward moving to a knowledge-sharing culture through relationship building, expectation management, and collaboration. At Accenture, innovation is key to engage the community in new learning practices that generate provocative and opposing discussions. Rojas discusses the Learning Decathlon, a 10-event challenge designed to educate Accenture us-
ers on critical aspects of learning and, more importantly, to generate dialogue across Accenture organizations, encouraging creative thinking to challenge the status quo and bring differentiated points of view to clients to make informed decisions about their business. Discover how the Unum Benefits Center leverages SharePoint to enable performance, learning, and project success. Duffy talks about SharePoint workflows for managing and vetting new and updated content requests, business partner portals for quick access to project information, team metrics, and curated team knowledge; online communities of learners for each new hire class; learning calendar for managing class logistics and reporting metrics; enterprise-wide community sites to foster learning, communication, and curation of best practices; and use cases.

**TRACK C • KM Tools**

**Constitution E, Level 3B**

Traditional paradigms for how we create, manage, and interact with information and knowledge are continuing to be tested in a social, mobile, and cloud-enabled world. Technological innovation is laying the foundation for the development of new experiences in ways never before imagined. Hear from our practitioners about how they are using new tools to enhance information and knowledge flows in their organizations.

*Moderated by Lawrence Hart, Word of Pie*

**C201 • Knowledge Sharing Tools: Industry Insights**

10:45 a.m. – 11:45 a.m.

*Mark Herman, Manager, NA Solutions Consulting, eGain Corporation*

*Joe Hilger, Principal, Enterprise Knowledge, LLC*

*Jim Kochan, President, Vitesse Solutions*

Hear from industry leaders on their insights of current and emerging tools for enterprise knowledge sharing. Kochan shares the processes and technology used in global KM implementations by MAKE award winning organizations such as ConocoPhillips, Phillips 66, FMC Technologies, and Nalco Champion.

**C202 • Evolution of & Migration to SharePoint**

12:00 p.m. – 12:45 p.m.

*Beth Pabich, Department Manager, MITRE Corp.*

*Elizabeth Turner, Knowledge Manager, First Command*

Hear how several organizations’ use of SharePoint has evolved. Mitre started with a small pilot in 2003 and now has a robust set of several thousand intranet and extranet sites based on SharePoint 2010. It is used as a content management platform, a collaborative team platform (for projects, organizations and CoPs), for work process capture and scheduling, employee engagement, and blogging. It has become critical to MITRE’s business processes, resulting in an evolution of its capabilities over the years. Turner shares experiences and lessons learned in moving from an organization with grassroots content sharing (wiki, intranet, corporate stories) to a SharePoint-based organization with an intricate, heavily customized content management presentation. Speakers share their strategies and practices, providing lots of ideas and insights for others to take home and use!

**Attendee Luncheon • In the Enterprise Solutions Showcase**

12:45 p.m. – 2:00 p.m.

**C203 • Taxonomies & Students = New People Profile System**

2:00 p.m. – 2:45 p.m.

*Anne Rogers, Director, Research & Knowledge Services, Cargill, Inc.*

*Barbie Keiser, President, Barbie E. Keiser, Inc.*

Cargill recognized the expertise it had among its 140,000-plus employees worldwide and wanted a way to make everyone’s skills more widely known across the organization. Building a new people-profiling system that was easy for individuals to complete and update meant developing a taxonomy to underpin the effort. How could the organization create some degree of uniformity by putting a name to what people do and know without frustrating individuals who can’t find an adequate description or wind up with too many descriptions for similar expertise? Speakers describe the process taken by Cargill’s KM team, purchasing a commercial taxonomy and asking students enrolled in a KM class to assist in building out the taxonomy. This practical, how-to presentation looks at both the corporate side and the student/instructor perspective. The assignment allowed dual degree M.B.A.-M.S.I.S. students to see how that taxonomies are put into practice in organizations and have real consequences. A homework assignment to “find a taxonomy” became a multiview project for teams of students who consulted existing taxonomies in key areas for Cargill, developing secondary and tertiary-levels for several top term hierarchies. Learn how Cargill is promoting the new People Profile system, encouraging employees to complete their profiles, grab lessons learned, and how the taxonomy has developed.

**C204 • Twitter & Office Graph**

3:00 p.m. – 3:45 p.m.

*Zachary Baquet, Knowledge Management Specialist, U.S. Agency for International Development (USAID)*

*Maciej Chmielewski, Communications Specialist & Digital Designer, Insight Systems Corporation*

*Jeff Carr, Senior Manager, Search & Findability, Earley & Associates, Inc.*

For the past year and a half, USAID Bureau for Food Security has experiment-ed with #AskAg Twitter Chats to drive engagement and knowledge exchange inside and outside of its Agrilinks.org community. Part of Twitter’s value lies in its ability to foster global, multidirectional communications between users that can lead to real and meaningful knowledge exchange. The #AskAg Chats have moved from one-way, ask-the-expert type events to lively conversations in which participants share their experiences with the experts as well as each other. Speakers describe the process for implementing the chats and how it has changed, other products developed from the Twitter Chats, metrics used, and more. Carr discusses the recently introduced Office Graph that offers an innovative foundation for designing and delivering information rich experiences to users based on behavior and their relationships to both their peers and content. He explores how these contextually relevant experiences can be delivered through custom developed apps such as Oslo and how components of information architecture including taxonomy and metadata can be used to enrich these search-driven solutions.

**Coffee Break • In the Enterprise Solutions Showcase**

3:45 p.m. – 4:15 p.m.

**C205 • Improving Communication & Search**

4:15 p.m. – 5:00 p.m.

*Madelyn Blair, Consultant & Author, Riding the Current*

*Denise Lee, Director, PwC*

*Rober Kocher, Web Content Administrator, The Vanguard Group*

Narrative intelligence is a critical approach that helps an organization to strengthen its organizational vision, enhance communication, share organizational knowledge, externalize and internalize tacit knowledge, encourage innovation, build communities, and to develop effective social media strategies. Speakers share strategies, cases, and exercises on how using narrative intelligence through channels offered by social media and organizational communication can energize how the organization is communicating through digital channels. Kocher discusses how to leverage SharePoint to jump-start your KM by using the Enterprise Wiki site template to maximize the search engine. Get tips for improving search from his experience!
Continental Breakfast  •  8:00 a.m. – 8:45 a.m.

WELCOME & KEYNOTE

It’s a Process Jim, but Not as We Know It!
8:45 a.m. – 9:45 a.m. • Constitution Ballroom, Level 3B
Dave Snowden, Founder & Chief Scientific Officer, Cognitive Edge Pte Ltd

The traditional triangle of people, process, and technology delivering value has become a cliche during the last 3 decades, but it remains relevant. The question, however, is which people, when, with what processes and technology? Snowden, creator of the Cynefin framework, looks beyond increasingly industrial models of design thinking to creating co-evolutionary processes between unarticulated user needs, technology capability, and system opportunities to create a biological model of emergent value. It includes reports on radical new work on workforce and customer engagement through the creation of human sensor networks to provide real-time decision support and a continuous flow of micro-innovation.

KEYNOTE

Achieving Successful Search
9:45 a.m. – 10:00 a.m. • Constitution Ballroom, Level 3B
Kamran Khan, CEO, Search Technologies

Large enterprises and government agencies face many daunting challenges when trying to create successful search environments. Based on case study materials from recent search implementation projects in both the public and private sectors, this presentation discusses how to achieve success by developing agile, scalable, and future-proofed enterprise search platforms.

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

TRACK A  •  Knowledge Sharing in the Flow

Constitution A, Level 3B

This track begins by looking at how to assess your KM program and then focuses on a number of organizations which are sharing knowledge with social media and communities, extranets, and experts.

Moderated by Anne Rogers, Cargill Inc.

A301  •  Assessing an Organization’s KM Program
10:45 a.m. – 11:30 a.m.
Holly Baxter, CEO/Chief Scientist, Strategic Knowledge Solutions, Inc.

Traditional organizational assessments analyze the basic well-being of an organization but don’t often have the ability to adapt and focus on one of the most critical pieces of organizational survival and advancement—knowledge. Baxter looks at how the people, processes, technology, and culture integrate as methods of informal learning and using the trends and best practices found across more than 20 organizations, including the United Nations Development Programme and the U.S. Army, Baxter discusses how to help improve formal and informal learning and knowledge transfer in any organization.

A302  •  Delivering Global Business Value
11:45 a.m. – 12:30 p.m.
Louis-Pierre Guillaume, KM Officer, Schneider Electric
Jean-Claude Monney, Global KM Lead, Microsoft

“If Schneider knew what Schneider knows” is the vision of our 3-year KM&C program, Communities for our Collective Intelligence. Our first speaker focuses on the business value highlighted by the members of the 100-plus communities of practice, their sponsors, and the engagement of the leaders of this France-based multinational corporation. He discusses the results of the 2013 and 2014 surveys on 15,000 community members, one focused on employee engagement, the other one focused on the perceived value, represented by the election of the coveted Active Community Labels. At Microsoft Services, Knowledge is the business, it’s what they sell. KM analytics is a key service of the 9-year old KM Initiative that allows executives, KM practitioners and people managers to drive a knowledge culture. Monney shares real life examples, critical success factors and lesson’s learned as well as future trends in KM analytics.

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

A303  •  Social Enabling Your Extranet
2:00 p.m. – 2:45 p.m.
JenniferRefsnider, Social Business Engineer, Unisys

Working with business partners? Communicating with vendors? Providing customer support? In today’s world, delivering products and services often requires coordination across a number of different stakeholder groups. Socially enabling your extranet provides the means to effectively collaborate and share knowledge in this complex environment. From driving improved innovation and product development to allowing end users to collaborate effectively and address shared problems, social technologies drive improved performance across the value chain. This discussion highlights industry leading extranet capabilities and shares best practices as you begin socially enabling your extranet.

A304  •  Experts: Utilizing & Growing
3:00 p.m. – 3:45 p.m.
4

Lauren Trees, KM Research Program Manager, &
Darcy Lemons, Senior Consultant, American Productivity & Quality Center (APQC)

Many industries are grappling with expert shortages in scientific, technical, engineering, and math (STEM) disciplines. While most strategies to fill these gaps focus on education and recruitment, this presentation offers a different perspective: how leading organizations are applying KM tools to leverage more efficiently the technical experts they have while at the same time accelerating the rate of learning for mid-career employees. Speakers describe the most effective approaches to develop mid-career employees into experts along with practical steps organizations can take to more effectively capture, transfer, and reuse technical information and expertise.

TRACK B  •  Innovation

Constitution B, Level 3B

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.

Moderated by Richard McDermott, McDermott Consulting

B301  •  Defense Innovation Marketplace
10:45 a.m. – 11:30 a.m.
Jaymie Durnan, Special Advisor to the Acting Assistant Secretary of Defense for Research and Engineering, the Department of Defense (DoD)

The DoD has a broad-reaching research and development (R&D) enterprise which relies on the Military Departments and its laboratories, universities, allied and international partners, and industry to meet its needs for current and emerging technical capabilities. Hear how the DoD created a marketing place with R&D road maps, solicitations, and events intended to provide industry with that insight and quickly evolved it into a secure portal into which industry can submit summaries of proprietary IR&D efforts, which registered and approved DoD R&D and acquisition professionals may access.

B302  •  Knowledge Transfer & Adjacent Innovation
11:45 a.m. – 12:30 p.m.
Howard Cohen, Knowledge Leader – Technologist, Booz Allen Hamilton

At the 1992 Winter Olympics Geoff Bodine watched the U.S. bobsled team struggle during their competitions. He didn’t know much about bobsledding, but he knew a great deal about racing in NASCAR. He took his knowledge of racing cars and applied it to the first U.S.-made bobsled chassis. Ten years later after

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Bodine stepped in to help the U.S. Winter Olympic team, the U.S. bobsledders won not one, not two, but three medals at the 2002 Winter Olympics in Salt Lake City and again in 2010 in Vancouver. Auto racing made a great pairing of skills again but this time in the medical industry. Formula-1 pit crews passed key lessons to surgical teams about the use of efficient teams in checkout, briefings, and databases to look for errors. The practice is called cross-teams or adjacent innovation, and it’s a driver of ground-breaking innovations.

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

B303  Driving Innovation With Work Practices
2:00 p.m. – 2:45 p.m.
Oua Veda, IT Market Research Analyst, Intel
Bridget Reddy, Program Manager, Virtual Student Foreign Service (VSFS), & Isaiah Joo, Program Analyst, Office of Diplomacy, U.S. Department of State

Intel’s engineering organizations are sponsoring and expanding mindfulness training programs designed to address innovation challenges. These grass-roots-inspired programs provide individuals with the personal tools to engage themselves and others in more fulfilling and effective ways, while allowing a culture of innovation to thrive. Get tips and insights for kick-starting innovation in your organization. The second presentation discusses a continuum of collaboration and crowdfunding programs created by the U.S. Department of State’s Office of Diplomacy. The VSFS was launched by Secretary of State Hillary Clinton in 2009, empowering the next generation of diplomats through e-internships and microvolunteering. The VSFS uses an internal crowdfunding platform, called CrowdWork, to facilitate collaborative work worldwide.

B304  Building Innovative KM Programs
3:00 p.m. – 3:45 p.m.
Allison Rougeau, Executive Director, Canadian Council of Motor Transport Administrators
Kelly Foisy, Information Analyst Office of Traffic Safety, Alberta Transportation
Sheila Mbiru, Team Leader, Knowledge Management Steering Committee, Kenya Forestry Research Institute (KEFRI)

Hear about the development of two KM programs. The first is a project to build an online platform to support capture, store, exchange and use of transportation and highway safety information and knowledge across Canada. It is to help Canadian jurisdictional staff share information more quickly with more people, to share and re-use existing knowledge, and to help staff connect more easily with experts in other jurisdictions. By supporting cross-jurisdictional sharing and collaboration, the CCMTA hopes to enhance policy development and support evidence-based policy-making in Canada. Get tips and insights for developing a country-wide knowledge and information sharing platform, the challenges of communicating across jurisdictions, leadership and the shift from ownership to stewardship of information, lessons learned to-date, and CCMTA’s vision for the future. The second presentation discusses institutionalizing and implementing KM in KEFRI, maximizing the value and impact of KEFRI’s research and spurring innovation.

TRACK C  Trends in the Evolving Knowledge World

Constitution E, Level 3B
Our world changes so quickly, it’s difficult to keep up let alone look to the future. This track of sessions helps you look at what’s coming and what’s going to be important in 2015 and beyond, as well as the implications for KM and your organization.
Moderated by Connie Crosby, Crosby Group Consulting

C301  Cognitive Computing & KM
10:45 a.m. – 11:30 a.m.
Sue Feldman, CEO, Synthesis

This session examines what cognitive computing is, what it isn’t, and why it represents an emerging disruption for IT and computing. It discusses possible impacts for those in the search, discovery, content management, and knowledge management area. Feldman believes that far from rendering KM obsolete, cognitive computing and its allied technologies may finally fulfill the promise of KM by helping to automate the time-consuming repetitive processes that made it such a hard sell. Be sure to hear her predictions!

C302  Stories Are Serious Business
11:45 a.m. – 12:30 p.m.
Melinda J. Bickerstaff, Principal, Accenture Federal Services & Chapter Author, The Leader’s Guide to Storytelling, Beyond E-Learning

Storytelling or narrative is big business. Top medical schools are instituting programs in “narrative medicine” so doctors can better analyze patient stories; journalists are replacing the inverted pyramid with protagonists and story arcs; legal scholars are investigating how storytelling can clarify the maze of law and its implications; and top executives at IBM and the World Bank have promoted the business value of storytelling as a way to change these huge organizations. Interest in this ancient genre of communication stems from the rising importance of “sharing knowledge” as a competitive advantage and realizing its inspirational and instructive value as a duo that abstraction and conventional analysis cannot match. Hence, the re-birth of the “story” to spark action, encourage shared values, share knowledge and best practices, get people to work together or march forward together into the future.

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

C303  Work, Content & the Next 10 Years
2:00 p.m. – 2:45 p.m.
John Newton, Co-founder & CTO, Alfresco Software, Inc.

The transformation of work will accelerate faster in the next 10 years than ever before and content will be even more important for that work. New technologies will simplify and focus our working lives allowing us to be more creative, collaborative, and productive. During the next 10 years, the way we collaborate, share, and create will be turned upside down, from the complex environment of today to a future of simple execution. Our speaker explores the transformation that is entering office environments today to inspire attendees to envision what it will be like to work in the future.

C304  Knowledge Transfer & the Future
3:00 p.m. – 3:45 p.m.
Jeff Stemke, President, Stemke Consulting

Effective knowledge transfer is a critical factor for business success, government effectiveness, and education excellence. Stemke looks at how this value has been demonstrated with metrics such as revenue, operating costs, productivity, safety, quality and innovation. The single-most-important asset is the expertise of an organization’s people. The business case for management and employee engagement is clear. Hear about the factors shaping the future of expertise such as the Millennial “crew change,” thought leadership, knowledge loss and recovery, mental models and learning how to think like an expert, Big Data, visualization, and crowdsourcing.

CLOSING KEYNOTE

Social Media Business: Using Online Connections to Increase ROI
4:00 p.m. – 4:45 p.m.  Constitution B, Level 3B
Eve Mayer, CEO, Social Media Delivered, & Author, The Social Media Business Equation

Facebook, Twitter, LinkedIn, and YouTube are changing how our world communicates. A vast majority of CEOs remain hesitant to embrace the new era of emerging media and continue to wonder if it’s possible for an organization to truly leverage these tools and grow their business as a result. Mayer dispels common social media myths and focuses on the logic behind using social media regardless of an organization’s size or industry. Mayer reviews several different case studies from a variety of small, medium, and large companies such as Lane Bryant, Mayo Clinic, and General Motors.
Organizing the Future: Taxonomies Leading the Way?

November 4–5, 2014
Grand Hyatt Washington
Washington, DC

- Managing and growing a taxonomy
- New tools on the market and where the market is headed
- Enhancing your information infrastructure with the right taxonomy
- Taxonomy design concepts and strategies
- Selecting the right metadata, taxonomy approach, and tools for your environment
- Evaluating auto-categorization schemes and tools
- Working collaboratively with your content and stakeholders
- Measuring and demonstrating the business impact and ROI
- Creating and implementing successful taxonomies
- Case studies, lessons learned, and best practices

taxonomy Boot Camp

TaxonomyBootCamp.com
For the past ten years, Taxonomy Boot Camp has been leading the way in bringing together the foremost thinkers and practitioners in the field of information organization, to spark conversations and provide insights into the complex world of taxonomies, ontologies, and their application in real-world environments. For this tenth anniversary event, we look into the future—where will taxonomies be in another ten years, and how can they help your organization succeed? How will they be supporting your organization’s core needs and strategic objectives? What trends are pushing the boundaries of taxonomy use? How can you migrate your taxonomies into ontologies (and why would you want to do that)? How can social media and folksonomies integrate with enterprise information structures (and how can they increase revenues and reduce costs)? What is the future of automated tagging and classification? Will search solve everything? What unanticipated opportunities might open up for the work that you’ve done? What will be new (and what will stay the same)?
CONFERENCE OVERVIEW

TUESDAY, NOVEMBER 4

8:00 a.m. — 9:00 a.m.  Continental Breakfast
9:00 a.m. — 10:00 a.m.  Welcome & Keynote
10:00 a.m. — 10:15 a.m.  Coffee Break
10:15 a.m. — 11:45 a.m.  Track 1
11:45 a.m. — 12:00 p.m.  Industry Insights
12:00 p.m. — 1:15 p.m.  Attendee Luncheon & Keynote
2:00 p.m. — 3:00 p.m.  Coffee Break
3:00 p.m. — 5:00 p.m.  Defining Value
3:30 p.m. — 4:15 p.m.  Governance
4:15 p.m. — 5:00 p.m.  Getting Started
5:00 p.m. — 7:00 p.m.  Welcome Reception

WEDNESDAY, NOVEMBER 5

8:00 a.m. — 8:45 a.m.  Continental Breakfast
8:45 a.m. — 9:45 a.m.  Keynote
9:45 a.m. — 10:00 a.m.  COFFEE BREAK
10:00 a.m. — 10:30 a.m.  “Social” Taxonomies
10:30 a.m. — 11:15 a.m.  I/A/UX & Taxonomy
11:15 a.m. — 12:15 p.m.  Attendee Luncheon & Keynote
12:15 p.m. — 1:15 p.m.  Managing Terminology
1:15 p.m. — 2:00 p.m.  COFFEE BREAK
2:00 p.m. — 3:00 p.m.  Methods for Taxonomy Development
3:00 p.m. — 3:45 p.m.  Taxonomies in the Arts
3:45 p.m. — 4:00 p.m.  COFFEE BREAK
4:00 p.m. — 5:00 p.m.  Panel: 10 Years Back, 10 Years Forward
5:00 p.m. — 6:30 p.m.  Grand Opening Reception

All sessions will take place in Independence I, Level 5B unless otherwise noted.

CONSIDER THE BOLD

8:00 a.m. — 9:00 a.m.  Continental Breakfast
9:00 a.m. — 10:00 a.m.  Welcome & Keynote
10:00 a.m. — 10:15 a.m.  Coffee Break
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4:15 p.m. — 5:00 p.m.  Getting Started
5:00 p.m. — 7:00 p.m.  Welcome Reception

WEDNESDAY, NOVEMBER 5

8:00 a.m. — 8:45 a.m.  Continental Breakfast
8:45 a.m. — 9:45 a.m.  Keynote
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Continental Breakfast © 8:00 a.m. – 9:00 a.m.

WELCOME & KEYNOTE

From Cataloguers to Designers: A New Role for Taxonomists in Knowledge Graphs, Machine Classification, and Search Based Applications
9:00 a.m. – 10:00 a.m. © Independence A, Level 5B

Patrick Lambe, Partner, Straits Knowledge; Adjunct Professor in KM, Hong Kong Polytechnic University; Author, Organising Knowledge: Taxonomies, Knowledge and Organisation Effectiveness

Professional taxonomists are still largely focused on organising information and content for the enterprise. However there are three big, interlocking trends in knowledge organisation beyond the enterprise that will drive the demand for taxonomists’ skills in the future: knowledge graphs and graph-based databases; machine-aided classification and its application to big data and statistical and monitoring systems; and the role of taxonomies in powering search based applications. In this shift, taxonomists will increasingly be called upon to act as designers of knowledge organisation systems, beyond their traditional role of cataloguing and mapping concepts and their relationships to each other. In this keynote, Patrick Lambe will illustrate the differences, in particular the importance of the shift from cataloguing what is, to designing what can be.

Coffee Break © 10:00 a.m. – 10:15 a.m.

TRACK 1 © Independence A, Level 5B

Moderated by Hannah Rubin, Congressional Research Service

Taxonomy Fundamentals Workshop
10:15 a.m. – 11:45 a.m.

John Horodyski, Partner, Optimity Advisors

This tutorial covers the fundamentals, strategies, standards, design methodology, and best practices of developing taxonomies for your digital asset management system, content management system, search, or metadata management system for your organization. It is based on best practices for establishing information structure, and managing and governing your digital assets. This tutorial addresses how to develop a taxonomy, improve existing metadata schemas, establish good governance using taxonomies and metadata, and calculate ROI for particular classes of users, digital assets, and media channels.

Industry Insights
11:45 a.m. – 12:00 p.m.

Bryan Bell, Executive Vice President, Expert System

Hear from an industry leader about taxonomies, the management of information and knowledge, and insights on customers and trends.

Attendee Luncheon © 12:00 p.m. – 1:00 p.m.

GETTING STARTED
1:00 p.m. – 2:00 p.m.

Taxonomy: Resources & Revelations

How does one stay current with taxonomy-related research and implementation? This presentation provides something for the novice taxonomist as well as something for the expert. In addition to plumbing the depths of some of the existing online taxonomy reservoirs, it introduces some new resources. Fresh research from the results of various surveys, polls and interviews of those working within the taxonomy field is presented.

Taxonomy: Taking a Team-Based Approach
Beth Maser, Director of Taxonomy and Metadata, PPC
Robert Allen, Content Applications Developer, F.A. Davis Company

A 125-year-old publishing company is still wedded to print. It has no taxonomy and is in the process of designing an enterprise taxonomy. The company utilized a team-based approach and added a taxonomy consultant to help it get through the initial design phase. This talk details the process from personality testing taken to set up the team to the final product. It takes an in-depth look at lessons learned and best practices in taxonomy design when working with a team of beginners.

Buy It or Build It? How Do You Make the Decision?
Marti Heyman, Executive Director, Metadata Standards and Services, Cengage Learning

Is it realistic to think you can ever buy a “plug-and-play” taxonomy—one which you can drop into your environment that will immediately meet your business needs? Probably not, but how do you know when it’s close enough and worth the investment versus when you should bite the bullet and build what you need from scratch? This talk discusses a process to use and the objective factors to consider (and quantify) to help drive some objectivity into what is potentially a very subjective decision.

Selecting Your Future: A Taxonomy Management Tool Selection Process
Ahren Lehnert, Taxonomy & Search Analyst, FMC Technologies

When it comes to managing your taxonomy in a production environment, there are tool choices ranging from spreadsheets and text files to highly sophisticated taxonomy management software. How do you select the right taxonomy management tool for your organization? What process should you follow? This session describes the process used to select a taxonomy management tool for an oil and gas products and services provider, from requirements gathering to implementation.

TALKING ABOUT TAXONOMIES
2:00 p.m. – 3:00 p.m.

Getting Your Organization Ready for an Enterprise Taxonomy
Gary Carlson, Principal Taxonomist, Factor

Enterprise taxonomies cross organizational, system, and distribution boundaries. Crossing these boundaries presents real challenges to the taxonomist. Resource, organizational alignment, internal politics, and technology all impact the success of a taxonomy project. Identifying the risks and the organizational readiness for a taxonomy project can be a huge factor in the project success. Using real-world examples, this presentation highlights the types of problems that can torpedo a project and provides remedies that companies have used to make the taxonomy project (or more specifically, the omni-channel experience or intranet project) successful.

Promoting Taxonomy & Metadata Projects in Your Organization
Ben Liccari, Senior Associate, Information & Risk Management, PWC
Suzanne Carroll, Senior Enterprise Taxonomist, XO Group

Whether you’re just getting started with taxonomies, building out a metadata schema, or working as a full-time taxonomist, you’ve likely found yourself explaining taxonomy and metadata to people who are totally unfamiliar with the finer points of controlled vocabularies. Presenters provide tips and tricks on how to clearly explain what you do as a taxonomist to your coworkers, clients, and friends. Liccari explores the many different—and sometimes conflicting—definitions of taxonomy and metadata and discusses what they mean in the context of information and content management. Carroll shows how she’s borrowed techniques from data visualization and change management to quickly get her colleagues at XO Group engaged and on the same page.

Creating Visual Taxonomies in the Digital Age
Jocelyn Coverdale, Owner, Ballantrae Solutions

From the toolkit of LEAN Office, taxonomy builders can borrow an effective concept known as “Visual Controls,” a tool to manage processes through easy-to-understand, “at-a-glance” visuals that help teams and individuals quickly understand a process, and, perhaps as important, immediately spot deviations from standard practices with a quick check against a visual guide. The presentation provides a framework with examples, tools, and case studies of how to structure a taxonomy as a “visual control”—or process map—that makes filing and retrieval easy for end users, not to mention fun! The visual...
Tuesday, November 4

Taxonomy demonstrated in this presentation offer participants creative approaches, methods, and examples to engage end users with the at-a-glance findability a visual taxonomy provides.

**Taxonomy for Bartenders: Getting Stakeholder Buy-In**
Angela Pitts, Consultant, The Creative Group

The best way to share a taxonomy is to break it down by parts to share with members of your team. The entire taxonomy as a spreadsheet is often too overwhelming, and spreadsheets are rarely the best tool to edit and proofread node names and categories. Here are tips for making the taxonomy accessible to stakeholders from whom you would like to elicit feedback, and gain approval or buy-in. Pitts demonstrates how to convert a .csv file in spreadsheet form into a readable and shareable Word document using fun examples of cocktails and recipes.

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

**DEFINING VALUE**
3:15 p.m. – 3:45 p.m.

**Using Taxonomies to Leverage Value**
From Your Business Processes
Joshua Rattan, Director, PricewaterhouseCoopers
Bethany Sehorn, Manager, PricewaterhouseCoopers

This session focuses on ways in which taxonomies can help companies locate, use and store information. Knowledge of how business units interact allow the taxonomy to provide a “window” into the vast interworkings of an enterprise and its business processes and can impact master data management, business intelligence, information security, and records management. It provides examples of how taxonomy and metadata models add value and insight, and how these models might be incorporated into an information management strategy.

**The Economics of Taxonomies—Managing Assets & Liabilities**
Denise Bedford, Goodyear Professor, KM, Kent State University

Although we have several decades of experience working with taxonomies, we don’t have a robust set of metrics that tells us whether what we’re doing is or isn’t working. We need to know whether the taxonomies we’ve created are actually generating benefits and value, or whether they’re creating liabilities and costing us real dollars or other opportunities. Bedford makes the case that taxonomies generate value when aligned with business goals, have clear outcomes, are well-designed and suited to their purpose, are managed in a sustainable way, and are continuously evaluated. Hear about metrics for different types of taxonomies, values you might expect and can promote to your management, and costs and liabilities you should try to avoid.

**GOVERNANCE**
3:45 p.m. – 4:15 p.m.

**Change Request Management With SharePoint or Lotus Notes—Lessons Learned**
Ralph Tamlyn, Principal, Taxonomy and Classification, Metodata Consulting

Managing taxonomy and ontology change requests is a cornerstone of taxonomy and ontology management. Change requests need to be managed from creation through assessment to resolution (approval or rejection). Assessment includes both assessment of the change within the taxonomy or ontology and assessment of the impact of the change on existing systems and business processes. Tamlyn discusses best practices for managing change requests and how to use a collaborative tool such as Lotus Notes or SharePoint to manage the change requests as items in a list. Among the topics covered is the use of views, as an aid in accessing, resolving, and implementing change requests.

**Optimizing Taxonomy & Content Governance**
Richard Iams, Principal Analyst, Project Performance Company (PPC)

Now that you have a taxonomy or content information architecture, how do you maintain it? This discussion leverages two contrasting, real-life scenarios as examples. The first depends on using best practices to build a taxonomy governance plan from scratch. The second considers existing, accepted business process workflows as inputs for developing governance policies and procedures. It’s all about finding the right balance for efficient decision-making.

**One Taxonomy. Multiple Businesses. Unlimited Possibilities**
Ann Donovan, Director, Content Strategy, Fidelity Investments
Ashley O’Brien, Senior Publisher, Central Publishing, Fidelity Investments

Taxonomies are important because they allow us to create and maintain consistency when categorizing and organizing content. This is especially important for large and diverse companies such as Fidelity Investments, where there are multiple business units and multiple websites. In this talk, Donovan and O’Brien explain how they maintain and govern a single taxonomy that is used across multiple businesses and a number of websites. They also discuss how the taxonomy is used to not only organize information, but to share content across site sections, display content dynamically, gain useful web measurement statistics, and create a personalized web experience.

**The Curious Lives of Full-Time Taxonomists**
4:15 p.m. – 5:00 p.m.

**MODERATOR: Zach Wahl, Principal, Enterprise Knowledge, LLC**
Daniel O’Connor, Senior Analyst, Product Taxonomy Team, Target
Jami Ansell, Experience Analyst, Phase2
Sarah Barrett, Experience Designer, Factor
Barbara McGlumery, Director, Taxonomy & Metadata, Higher Education, Pearson

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.
to ensure that what is being taught will indeed allow students to meet the requirements of the standards? What about remedial areas? How do you know when they are needed? This unique application of a taxonomy for education exceeds the expectations of the Common Core and makes learning fun!

Integrate: Leverage Both Your Taxonomy & Peer Review System
Anna Jester, Director, Sales & Marketing, eJournalPress

Jester discusses the integration between Data Harmony and eJournalPress, allowing terms to be associated with a manuscript at submission and also once a manuscript has been accepted. One of the many benefits publications reap when using terms to correctly identify manuscripts is accurate assignment of potential reviewers during the peer-review process. This not only ensures the appropriate reviewers are asked to participate but can help widen the reviewer pool, preventing and alleviating reviewer fatigue.

Navigation vs. Backend Taxonomies: Case Study
Ari Kramer, Communications Officer, Robert Wood Johnson Foundation (RWJF)

Joseph Busch, Principal, Taxonomy Strategies

As part of an effort to expand their reach, increase engagement in their work among target audiences, and raise the visibility of their brand, the Foundation has been working on improving how “Topics” are framed, organized, and used in the RWJF website. Using a combination of evidence-based methodologies such as topic usage and search log analysis, and more qualitative methodologies such as interviews, competitive analysis, and textual analysis, the Foundation has been refining a set of broad web topics that distill the detailed and large set of backend metadata topics and keywords that originate in the RWJF’s project information management system. This talk discusses the process and considerations associated with developing a navigation taxonomy that can be provisioned with content that is organized and categorized using a backend taxonomy based on the RWJF web taxonomy and other related navigation and backend taxonomy experience.

Categories that Convert:
Five Keys to a Profitable Taxonomy
11:45 a.m. – 12:00 p.m.

Stewart Coever, Principal Consultant, Codifyd

Constructing a taxonomy that drives search engine traffic and increases conversions involves more than just implementing a logical structure. Join Codifyd’s presentation and learn how to create a taxonomy that spurs cross-selling opportunities and creates seamless browsing for more web traffic, better conversions, and higher online revenue.

Attendee Luncheon  12:00 p.m. – 1:00 p.m.

TAXONOMY CONVERSION
1:00 p.m. – 2:00 p.m.

From a Hierarchical Classification to a Faceted Taxonomy: Case Study
Arthur Smith, Lead Data Analyst, APS Journal Information Systems

Joseph Busch, Founder & Principal, Taxonomy Strategies

Since 1975, APS Physical Review article submission, editorial assignments, and journal tables of contents have been based on the Physics and Astronomy Classification Scheme (PACS) developed by the American Institute of Physics (AIP), a five- to six-level hierarchical classification system. In 2013, APS decided to replace PACS with a new faceted scheme because AIP is no longer maintaining it, APS desires a single categorization scheme for all types of content (journal articles, conference papers, and website content), and to develop new capabilities for topic-based online services such as faceted navigation, targeted alerts, personalized subscriptions, etc. The proposed scheme includes several discrete sets of categories (facets) whose values can be combined to express concepts such as existing PACS codes, as well as new concepts such as those that have already been added by APS along with new categories that have not yet emerged or have been difficult to express with the existing PACS. APS is using the PoolParty thesaurus management tool to build, maintain, and publish the new faceted taxonomy using the SKOS standard. This presentation discusses the process that has been developed for the APS Taxonomy so that it is, as far as possible, backward-compatible with the legacy content categorized using PACS and is extensible and scalable to support new information services.

Elastic XML: XML Taxonomy Transformation Using XSLTs
Jim Sweeney, Product Manager, Synaptica LLC

The Canadian Library of Parliament uses an Integrated Library System (ILS) and an associated OPAC (Online Public Access Catalogue) to manage and make accessible the Library’s collection. The ILS system requires a specific version of XML schema called MARC21 to operate. Seeing a need for a more streamlined solution than running a manual conversion each time the taxonomy is updated, they asked the Synaptica team to develop a turnkey method to transform outputs from their taxonomy management tool into MARC XML records, which they in turn would convert to MARC21 using the widely available MARCEdit toolset. Over the long term, MARC21 may be phased out in favor of an alternate XML schema. However, the provided solution will allow for the insertion of any XSLT (eXtensible Stylesheet Language Transformation) as part of the transformation process to provide for the transformation to any alternate XML output that may be used for any taxonomy consuming application.

Foundation Center Case Study:
Adventures in Taxo Modernization & Negotiation
Stephanie Lemieux, President, Dovecat Studio

The Foundation Center is a nonprofit that maintains the most comprehensive data on U.S., and increasingly global, philanthropy to produce knowledge tools and research for the philanthropic sector. The Center has recently undertaken a large-scale revamp of its grant classification taxonomy—a 30-year-old nationally adopted classification structure. The aim was to update the classification scheme to reflect modern fields of interest and also to simplify how the Center manages its data. The Foundation Center also needed to get buy-in on a new, faceted model for the taxonomy that would streamline data capture but which represented a fairly drastic change in how grants were being coded. As hundreds of grant-making organizations use the taxonomy to classify their activities, collecting and integrating comments from such a large pool of stakeholders across different sectors created a big challenge. This case study illustrates how the Foundation Center approached the task of updating its classification scheme.

TAXONOMIES+<LINKED DATA, ONTOLOGIES, SKOS>
2:00 p.m. – 2:45 p.m.

Keep the Complexity. Simplify with SKOS
James Morris, Information Architect, Smartlogic

The “S” in SKOS stands for “simple”. As a W3C standard, SKOS is a taxonomist’s common denominator, enabling vocabulary interoperability and interchangeability in a networked world. However, because of its simplicity, SKOS is sometimes criticized for not being able to support the necessary sophistication of some of our ontologies. At the same time, some valuable ontologies modeled in languages like OWL, can seem impractical without an extensive conversion effort. By applying Linked Data techniques, Morris will demonstrate that Semantic Web principles allow us to have it both ways. Adopting SKOS to make vocabularies more widely usable does not require sacrificing the complexity of an ontology.

Retrieving & Using SKOS Taxonomy Data
Bob DuCharme, Director of Digital Media Solutions, TopQuadrant

In addition to lots of data from Wikipedia infoboxes, the public web service DBpedia includes data about the categories into which concepts described by Wikipedia pages have been sorted. Much of this data conforms to the W3C SKOS standard for vocabulary management, a standard used by the Library of Congress, the New York Times, and many other organizations. This DBpedia data includes information about preferred labels, broader terms, and related terms, and being in SKOS means that modern taxonomy management tools can often take advantage of this data directly. DuCharme looks at how to retrieve taxonomies ranging from horror movies to product categories and how to connect them to people, places, and things.

Semantic Indexing of Unstructured Documents Using Taxonomies & Ontologies
Jans Aasman, CEO, Franz Inc.

Life science companies and healthcare organizations use RDF/SKOS/OWL-based vocabularies, thesauri, taxonomies, and ontologies to organize enterprise knowledge. There are many ways to use these technologies but one that is gaining momentum is to semantically index unstructured documents through ontologies and taxonomies. This talk discusses two use cases and demonstrates two projects using a combination of SKOS/OWL-based taxon-
omies and ontologies, entity extraction, fast text search, and Graph Search to create a semantic retrieval engine for unstructured documents. The first project organized all science-related artifacts in Malaysia through a taxonomy of scientific concepts. It indexed all papers, people, patents, organizations, research grants, etc., and created a user-friendly taxonomy browser to quickly find relevant information. The second project involved a large socioeconomic content publisher that has millions of documents in at least eight different languages. Fortunately, the organization had begun developing a large, SKOS-based taxonomy that linked common concepts to various preferential and alternative labels in many languages. This taxonomy indexed millions of document fragments, and the speaker shows how to perform relevancy search and retrieval based on taxonomic concepts.

Using Agile to Build a Taxonomy/Ontology
2:45 p.m. - 3:00 p.m.

Evelyn L. Kent, Content Strategist, Smartlogic

Learn how using an Agile approach to building a taxonomy or ontology creates a sound basis for classifying content and gets you started quickly. Kent talks about how ontologies can grow organically from your organization’s needs, making them agile, functional and practical. She illustrates with lessons learned from building a multi-faceted, general news ontology that needed to classify often ambiguous content.

Coffee Break  3:00 p.m. – 3:15 p.m.

TAXONOMIES IN SEARCH
3:15 p.m. – 4:15 p.m.

What’s Cooking? How Taxonomy & Metadata Improve the Search Experience
Ben Licciardi, Senior Associate, Information & Risk Management, PWC

Using cooking and recipe sites as examples, Licciardi explores how taxonomy and metadata help drive faceted search experiences, facilitate personalization, and optimize Google search results. He explores how backend metadata informs frontend search, user-interface design, and content display and distribution. He takes a look at how recipe sites are leveraging a particular type of metadata—microdata—to enable faceted search experiences in Google. Although this talk focuses on the tastier side of web content, the principles outlined are applicable to a broad range of industries and websites.

Taxonomy in Enterprise Search: Making the Business Case
Mindy Carner, Consultant, Optimity Advisors

Many companies turn to enterprise search to help them sift through terabytes of content. But many decision makers do not see the value in including taxonomy in a search system that is advertised to work “out of the box.” The real problem is that many decision makers believe that when they purchase an out-of-the-box enterprise search system, they are going to get something that works for their content the way that online search engines work for the web. This just isn’t correct. Carner walks you through the differences between enterprise search appliances and online search, explores how taxonomy fills the gaps presented by an out-of-the-box search appliance, and raises the ROI on this project from “Well, it’s better than what we had before,” to “a vastly improved search system that consistently returns high value results.” She shares the tools you need to return to your stakeholders and present a strong business case for including taxonomy in an enterprise search development project from the very beginning.

SEO Strategy: It Begins With A Robust Digital Taxonomy
Tina Johnson Marcel, Senior Content Lead, Siteworx, LLC

When developing a digital taxonomy strategy with clients, a very consistent and recurring theme is SEO: “We want to improve search.” Educating stakeholders on the difference between taxonomy and search and how they work together can prove challenging. Taxonomy is not search; however, taxonomy can enhance search. The key is finding a way to illustrate how the two can deliver an intuitive and flexible digital experience. In short, it’s all about semantics. Marcel provides language and tools you can use to explain to clients how an effective SEO strategy begins with a robust digital taxonomy. Learn how to help clients visualize the co-dependent relationship between the two specialties and how those connections—when implemented correctly—can drive the ability to refine search and browser results, creating an optimal and contextual experience to help users find the content they need.

Using a Predictive Model in Search
Beth Maser, Director of Taxonomy & Metadata, PPC

Giancarlo Crocetti, Business Partner, Boehringer-Ingelheim

Andrew Fast, Chief Scientist, Elder Research

This case study illustrates how an organization's data and applied predictive analytics can predict outcomes. With a layer of taxonomy over the predictive analytics, the predictions improved by 10%. Hear how the two tools can be combined to be extremely powerful.

AUTOMATED TAXONOMY MANAGEMENT
4:15 p.m. – 5:00 p.m.

Three Steps Toward Connected Taxonomy Management
Daniel Mayer, VP Marketing, TEMIS

Taxonomy offers the promise of improved content organization, search, and navigation. But with enterprise content growing by 50% a year, automation is a key to scalable metadata enrichment and to making taxonomy’s promise come true. The good news is that integrating taxonomy work, semantic enrichment, and domain experts’ feedback is possible and bridges the gaps that are present in these workflows when they are disconnected. Mayer showcases how these workflows can be connected in practice and provides concrete examples of the resulting productivity and quality benefits.

Auto-Cat: Now That I Have It, How Do I Manage It?
Paula McCoy, Managing Editor, Science & Taxonomy, ProQuest

Once you have gone through the process of defining what you want to do with auto-categorization, evaluating and selecting vendors, and then installing the software, is your work done? By no means! Actually implementing auto-cat within your operations means you have to manage it. And managing it requires decisions about how you will maintain it from Day 1 onward. This presentation provides guidance on how to manage the early days of a new auto-cat process; how to determine who and how many people you need to handle it; how to assess the results of auto-cat and then ensure that you have continuous improvement; and how to justify that your auto-cat has been a success.

Text Analytics: A Tool for Taxonomy Development
Tom Reamy, Chief Knowledge Architect, KAPS Group

Text analytics and taxonomy have been partners for a long time, as text analytics auto-categorization typically requires a taxonomy. However, as new capabilities are added to text analytics software, including advanced text mining capabilities, text analytics can now be used to greatly enhance the entire process of taxonomy development in a number of ways. This talk explores how these new capabilities were used in two projects to develop taxonomies. Text mining was used to uncover not just the most frequent topics in a text corpus, but by combining that with other analytics (categorization, entity extraction, and summarization) KAPS was able to characterize these topics according to such dimensions as basic generality, their centrality to the corpus using advanced relevance and clustering techniques, and the activities associated with various topics (using verbs as much as nouns). An additional success was to use text analytics to first identify dynamic communities within the organization based on their communication and then develop audience-specific taxonomies based on an analysis of the writings of those communities.
Seth Maislin, Taxonomy Practice Lead, Earley & Associates, Inc.

New Types & Uses for Social Taxonomies

In order for a taxonomy project to be successful, it needs to be aligned with both user and business goals, not just to the content being tagged. Insiders can often fall into the trap of thinking more (more features, more options, more content, more devices) is always better and end up losing sight of the actual users they are trying to help. User experience and information architecture make it easy for users to find desired information or functionality in an information management system, regardless of channel or platform—a content management system, website, web portal, tablet, or mobile device. Through examples and ideas, the panelists examine methods and tools used in UX and IA which can be applied in taxonomy work to improve taxonomy design, usability and presentation for big and small screens. The panel will also look at how taxonomy development can improve UX and IA practices.

KEYNOTE

The Intranet of Everywhere: Redefining KM in the Age of the Empowered Employee

9:45 a.m. – 10:00 a.m.  •  Constitution Ballroom, Level 3B

Louis Tetu, CEO, Coveo

See page 12 for complete description.

MANAGING TERMINOLOGY

1:15 p.m. – 2:00 p.m.

Author Disambiguation

Bob Kasenchak, Production Coordinator, Access Innovations, Inc.

Many institutions and organizations have large—sometimes very large—lists of names. These names are from member directories, employees and staff, clients and customers, marketing, development, and many other sources; indeed, oftentimes the lists from various departments in the same organization are not connected or resolved with one another in any way. This growing problem has given rise to a subfield in the information/data industry variously called “named entity disambiguation” or “author disambiguation.” This talk outlines an approach of using semantic metadata—that is, terms from a taxonomy—as “named entity disambiguation” or “author disambiguation.” This talk outlines an approach of using semantic metadata—that is, terms from a taxonomy—as a tool to greatly increase the accuracy of author disambiguation algorithms.

Taxonomy, Thesaurus, or Something in Between

Heather Hedden, Senior Vocabulary Editor, Cengage Learning

Patricia Parsons, Vocabulary Editor, Cengage Learning

Taxonomy or thesaurus—which do you need? It is commonly understood that a thesaurus is a kind of taxonomy with additional related-term relationships. But what are the other differences? The distinction can be blurred because some taxonomies have features of thesauri, and some thesauri have features of taxonomies. This presentation examines the differences and discusses strengths and weaknesses to help you determine which option is the best fit for your circumstance. Speakers describe the case at Cengage Learning, where thesauri have long been used for research projects, when the decision was made to develop taxonomies for curriculum-related products.

Integrating Enterprise Taxonomies With Local Variations: A Case Study

Seth Maislin, Taxonomy Practice Lead, Earley & Associates, Inc.

The important job of correctly tagging content often falls on individuals who didn’t choose to be taggers. But that’s OK. The bigger problem is that many content authors just don’t see the fun in it. Using gamification best practices and principles, Maislin shows how, with proper socialization and implementation, metadata tagging can be not just fun but also an enriching experience to those who have to get it done. And the timing is perfect, too, as Gartner predicts that by 2015 gamification will be the primary mechanism used by 40% of Fortune 1000 companies to transform business operations.
fails to adequately reflect real local needs. This talk, based on a recent project at a large international financial institution, describes how KAPS put together an integrated solution out of a somewhat fragmented environment with 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.

METHODS FOR TAXONOMY DEVELOPMENT

2:15 p.m. – 3:00 p.m.

Developing Use Cases Before Developing the Taxonomy

Joseph Busch, Principal, Taxonomy Strategies
Vivian Bliss, Associate, Taxonomy Strategies

Use cases, user stories, and user tasks are what drive feature development in the agile method. It is critical that taxonomy be included as a component in agile development and tracking software such as Jira. However, often use cases are no more than functional requirements, e.g., “the taxonomy should improve content findability”; a use case should ideally define a set of steps with a sufficient level of detail to be able to accomplish a task. For example, a use case should explicitly show how a taxonomy would improve findability, such as by providing assisted navigation with fly-out or cascading lists. Discovering use cases at the start of an information management project can help avoid costly mistakes or unhappy clients when taxonomy deliverables are presented. Showing wireframe examples with descriptions of the user steps can also be helpful in documenting and communicating use cases. This presentation discusses why you should, and how you can readily, develop use cases and supporting documentation, using examples from clients such as the Environmental Protection Agency, Dell, and the American Physical Society.

Easy Taxonomies: Win-Win for All Involved

Barbie Keiser, President, Barbie E. Keiser, Inc.
Anne Rogers, Director, Research and Knowledge Services, Cargill, Inc.

Cargill recognized the expertise it had among its 140,000-plus employees worldwide and wanted a way to make everyone’s skills more widely known throughout the organization. Building a new people profiling system that was easy for individuals to complete and update meant developing a taxonomy to underpin the effort. How could the organization create some degree of uniformity by putting a name to what people do and know without frustrating individuals who can’t find an adequate description or winding up with too many descriptions for similar expertise? This presentation describes the process taken by Cargill’s knowledge management team, purchasing a commercial taxonomy and asking students enrolled in a knowledge management (KM) class to assist in building out the taxonomy. Learn how Cargill is promoting the new People Profile system, encouraging employees to complete their profiles, and see how the system has developed.

The Rocky Marriage of Taxonomy & Technology

Jenny Ammerman & Kristin Homer, Consulting Managers, Access Sciences

Creating an enterprise-wide taxonomy is one thing; creating one that can be used in an information management application is another. Speakers share lessons learned during the rapid development and implementation of multiple company-wide taxonomies in different applications as part of separate projects to facilitate cross-departmental collaboration and information sharing. They address what to know before you start, critical taxonomy considerations, and keys to user adoption and success.

Best Practices in Taxonomy Development

Lee Lipscomb, Assistant Librarian, Federal Judicial Center, & Author

The theory of taxonomy development is foundational in the field of Library Science, but how does the theory transform into the pragmatic approach demanded by the workplace? Once the library student becomes a librarian tasked with drafting a taxonomy, the practical application of library school theories can be daunting. However, creating a taxonomy is simple once a process is established and followed. This presentation, based on the publication of the same name, provides guidance to first-time taxonomy developers through a set of recommended steps, including Identifying Your Content, Identifying Your Audience, Letting the Content Lead, Identifying Your Structure, Identifying Your Terms, and Throwing Out Lifelines. The transition from theory to reality is not insurmountable. The aspiring taxonomist must remain composed and work through the process established through the practice points. The result will be a taxonomy functional for the website and patrons.

Coffee Break • 3:00 p.m. – 3:15 p.m.

TAXONOMIES IN THE ARTS

3:15 p.m. – 3:45 p.m.

Spotlight on Taxonomy for Theatre Professionals

Jayne Dutra, Graduate Student, California State University–Fullerton

When a theatre develops a production, what electronic files are created? Construction drawings, visualization files, imagery and documentation for scenic design, costume sketches, and light plots are just a few of the many types of information that must be stored, tracked, and retrieved for accurate production management. Most often, creative artists are not concerned with standardized methods of storing and cataloging their materials. Many show files exist on individual hard drives that are scattered across the organization or uploaded to a shared file server on the network without thought to retrieval, version management, or efficient information sharing down the road. Modernizing IT practices by using classification techniques along with standardized information processes tailored to production methodologies can revolutionize the technical theatrical experience and speed production by minimizing miscommunication and ensuring better quality of the end result. This session presents research and use cases discovered and documented during the past year with an eye toward developing a Common Artistic Theatre Taxonomy (CATT) as an application that can address universal business cases that commonly surface in theatrical production scenarios.

Advances in Accessing Art Online

Dave Clarke, CEO, Synaptica

At the 2013 Taxonomy Boot Camp conference, Clarke delivered a talk that surveyed the state of public access to art on the web by examining the online offerings of six brick-and-mortar art museums and four virtual galleries, with particular emphasis on the use of taxonomy to improve search and browse access. The session ended by drawing attention to two areas that required further research. This complementary “part two” presentation discusses some of the particular challenges posed by access to large or complex images and issues relating to derivative digital versions. It provides an update on recent advances in accessing and presenting art online, with a special focus on the use of linked data.

Connecting Real-World Objects...With Taxonomies

Eric Bregand, TEMIS

The days of standalone products are counted, with ecosystems of connected devices emerging on the horizon in every field. Devices that are increasingly able to support verbal interaction with humans, of learning, recommending and deciding on their own, based on standardized knowledge. Taxonomies (and ontologies!) are at the heart of these ecosystems, improving human to machine communication and supporting smart machine to machine interaction. This session showcases a real-world project where taxonomies are instrumental in making the 2020 connected device landscape come true.

PANEL: 10 Years Back, 10 Years Forward

4:15 p.m. – 5:00 p.m.

MODERATOR: Stephanie Lemieux, President, Dovecot Studio
Joseph Busch, Principal, Taxonomy Strategies
Seth Earley, CEO, Earley & Associates
Tom Reamy, Chief Knowledge Architect, KAPS Group
Gary Carlson, Principal Taxonomist, Factor

Ten years ago, the panelists were all speakers at the first Taxonomy Boot Camp. This year, for the tenth anniversary of the event, they look back at developments over those 10 years to draw some lessons learned and insights from the world of taxonomy, and use those to look into the future to see where we may be 10 years from now. Come to this session to find out what went right and wrong in the past 10 years and what you can expect to see happening in the world of taxonomies by 2024!!

Enterprise Solutions Showcase

Grand Opening Reception • 5:00 p.m. – 6:30 p.m.

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Welcome to the Fall 2014 Enterprise Search & Discovery conference. We’re glad you’re here to participate in this exciting event.

We know that enterprises want to leverage internal data to enhance profitability and deliver excellent services. To do that, they need discovery mechanisms as well as enterprise search. Today, we’re awash with the conversion of search and discovery, collaborative working environments, and an era of constant change. It’s no longer about merely searching for information within the firewall—it’s about customers finding products, companies monetizing real-time activities, and organizations maximizing the data they own.

As enterprises consider conversion, collaboration, and change, Big Data makes enterprises rethink how they handle search, databases, analysis, and decision-making. Cloud computing, outcome-based metrics, adaptive filtering, taxonomy and metadata tools, predictive analysis, open source, knowledge graphs, and mobile delivery raise people’s expectations for search and discovery.

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WIRELESS INTERNET
Complimentary Wi-Fi is available in all meeting rooms.
1) Network: Hyatt_Meeting
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WELCOME RECEPTION
Tuesday, November 4 • 6:00 p.m. – 7:00 p.m.
Constitution Ballroom, Level 3B
Enjoy a selection of wine and cheese in a relaxed atmosphere as Information Today, Inc. welcomes all conference attendees, speakers, and sponsors to the kick-off event of this year’s program.

CONTINENTAL BREAKFAST & BREAKS
A continental breakfast will be provided outside of the keynote room each morning from 8:00 a.m. – 8:45 a.m. Check your program for additional morning and afternoon break times and locations.

ATTENDEE LUNCHEONS
Lunch on Wednesday will be served in the Constitutional Ballroom. On Thursday and Friday lunch will be served in the Enterprise Solutions Showcase.

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

ENTERPRISE SOLUTIONS SHOWCASE
GRAND OPENING RECEPTION
Wednesday, November 5 • 5:00 p.m. – 6:30 p.m.
Come enjoy “a taste of fall” as we celebrate the grand 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 5
8:00 a.m. – 3:30 p.m. • Constitution Level Foyer
5:00 p.m. – 6:30 p.m. • Enterprise Solutions Showcase
Thursday, November 6
10:00 a.m. – 4:30 p.m. • Enterprise Solutions Showcase
Friday, November 7
10:00 a.m. – 2:00 p.m. • Enterprise Solutions Showcase

CONFERENCE PRESENTATIONS
Many speaker slides are available for download from the conference website (enterprisesearchsummit.com). Click on “PRESENTATIONS” and enter Username/Password: DC2014.

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WEDNESDAY, NOVEMBER 5

8:00 a.m. — 8:45 a.m.  CONTINENTAL BREAKFAST

8:45 a.m. — 9:45 a.m.  WELCOME & KEYNOTE  • Constitution Ballroom, Level 3B  • Enterprise Knowledge, Work, & Customer Value  • Dion Hinchcliffe

9:45 a.m. — 10:00 a.m.  KEYNOTE  • Constitution Ballroom, Level 3B  • The Intranet of Everywhere  • Louis Tetu

10:00 a.m. — 10:30 a.m.  COFFEE BREAK

10:30 a.m. — 11:15 a.m.  Turning Search Upside Down  • Charlie Hull

11:30 a.m. — 12:15 p.m.  Upside Down or Right Side Up?  • MODERATOR: Miles Kehoe

12:15 p.m. — 1:15 p.m.  ATTENDEE LUNCHEON & KEYNOTE  • Constitution Ballroom, Level 3B  • Winning the Customer Experience Arms Race  • Seth Earley

1:15 p.m. — 2:00 p.m.  Improving Findability at Pfizer  • Fran Holly

2:15 p.m. — 3:00 p.m.  Case Studies in Search and Discovery  • Xavier Pornain, Jeff Veis, John Felahi

3:00 p.m. — 3:15 p.m.  COFFEE BREAK

3:15 p.m. — 4:00 p.m.  Finding Elephants: Enhancing Search With Predictive Analytics  • Andrew Fast & Beth Maser

4:15 p.m. — 5:00 p.m.  GRAND OPENING RECEPTION in the Enterprise Solutions Showcase

THURSDAY, NOVEMBER 6

8:00 a.m. — 8:45 a.m.  CONTINENTAL BREAKFAST

9:00 a.m. — 9:45 a.m.  KEYNOTE  • Constitution Ballroom, Level 3B  • Knowledge Sharing in the Networked World of the Internet of Things  • Lee Rainie

9:45 a.m. — 10:00 a.m.  KEYNOTE  • Constitution Ballroom, Level 3B  • “Working Out Loud” in Shell  • Ian Jones

10:00 a.m. — 10:45 a.m.  COFFEE BREAK in the Enterprise Solutions Showcase

10:45 a.m. — 11:45 a.m.  Semantic and Graph Search  • MODERATOR: Jeff Fried

12:00 p.m. — 12:45 p.m.  User Behavior Testing  • Ahren Lehnert, Stephanie Rothfuchs, Luis Rodriguez

12:45 p.m. — 2:00 p.m.  ATTENDEE LUNCHEON in the Enterprise Solutions Showcase

2:00 p.m. — 2:45 p.m.  Corralling Your Content in SharePoint  • Jonathan Ralton

3:00 p.m. — 3:45 p.m.  Tuning Up Search Relevance: The Gold Sample and the Black Box  • Theresa Simek & Dave Copps

3:45 p.m. — 4:15 p.m.  COFFEE BREAK in the Enterprise Solutions Showcase

4:15 p.m. — 5:00 p.m.  Security and Compliance  • C. David Seuss & James Dawson

FRIDAY, NOVEMBER 7

8:00 a.m. — 8:45 a.m.  CONTINENTAL BREAKFAST

8:45 a.m. — 9:45 a.m.  KEYNOTE  • Constitution Ballroom, Level 3B  • It’s a Process Jim, but Not as We Know It!  • Dave Snowden

9:45 a.m. — 10:00 a.m.  KEYNOTE  • Constitution Ballroom, Level 3B  • Achieving Successful Search  • Kamran Khan

10:00 a.m. — 10:45 a.m.  COFFEE BREAK in the Enterprise Solutions Showcase

10:45 a.m. — 11:30 a.m.  Who’s Who in the Zoo  • Anne Buff

11:45 a.m. — 12:30 p.m.  Future of the Query  • Jonathan Bordoli & Sean Martin

12:30 p.m. — 2:00 p.m.  ATTENDEE LUNCHEON in the Enterprise Solutions Showcase

2:00 p.m. — 2:45 p.m.  Extracting Value From Existing Data  • Camille Wellard & Tyson Henrie

3:00 p.m. — 3:45 p.m.  Searching or Finding?  • Bryan Bell

4:00 p.m. — 4:45 p.m.  CLOSING KEYNOTE  • Constitution B, Level 3B  • Social Media Business: Using Online Connections to Increase ROI  • Eve Mayer
All sessions will take place in Independence B/C, Level 5B unless otherwise noted.

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

WELCOME & KEYNOTE

Enterprise Knowledge, Work, & Customer Value
8:45 a.m. – 9:45 a.m. • Constitution Ballroom, Level 3B
Dion Hinchcliffe, Chief Strategy Officer, Adjuvi LLC & Co-Author, Social Business by Design
See page 9 for complete description.

KEYNOTE

The Intranet of Everywhere: Redefining KM in the Age of the Empowered Employee
9:45 a.m. – 10:00 a.m. • Constitution Ballroom, Level 3B
Louis Tetu, CEO, Coveo
See page 9 for complete description.

Coffee Break • 10:00 a.m. – 10:30 a.m.

Turning Search Upside Down
10:30 a.m. – 11:15 a.m.
Charlie Hull, Managing Director, Flax
How do you turn search upside down? One answer lies in open source. Charlie Hull uses detailed case studies to demonstrate how to utilize open source software to apply tens of thousands of queries every second. He also discusses migrating from expensive, slow, and outdated closed source search engines without any need to change the syntax of the stored queries. Learn how to future proof search!

Upside Down or Right Side Up?
11:30 a.m. – 12:15 p.m.
Moderated by Miles Kehoe, CEO, New Idea Engineering, Inc.
PANELISTS:
Charlie Hull, Managing Director, Flax; Eric Pugh, Principal, OpenSource Connections; Pritesh Patel, Principal Architect, Search & Big Data Analytics, Avonal Consulting LLC
In reacting to “Turning Search Upside Down,” this panel of search aficionados considers the ups and downs of open source, what works, what doesn’t, and what’s on the horizon for enterprise search and discovery.

ATTENDEE LUNCHEON & KEYNOTE

Winning the Customer Experience Arms Race
12:15 p.m. – 1:15 p.m. • Constitution Ballroom, Level 3B
Seth Earley, CEO, Earley & Associates, & Editor, Data Analytics, IT Professional Magazine
See page 9 for complete description.

Improving Findability at Pfizer
1:15 p.m. – 2:00 p.m.
Fran Holly, Director, Enterprise Search & Retrieval Solutions, Pfizer
Pfizer’s enterprise search & retrieval team partners closely with key business customers to provide technology solutions that improve the “findability” of content. Enterprise search governance helps set priorities related to expanding the content sources covered by enterprise search, while making the user experience more intuitive, relevant, and actionable. Learn how to create an enterprise search strategy and road map that balances the needs of both “general users” and “business line-specific users,” plus see how the “app store” metaphor of the mobile world can be adapted to create “search apps” that users can leverage for frequently used, complex, targeted searches.

Case Studies in Search and Discovery
2:15 p.m. – 3:00 p.m.
Xavier Pornain, VP Sales and Alliances, SINEQUA
Jeff Veis, VP, HP Autonomy
John Felahi, Chief Strategy Officer, Content Analyst Company
Enterprise search and discovery is never a cookie cutter affair. Two use cases from Sinequa, one from a pharmaceutical company and one from a telecommunications company, offering an instant and intuitive 360° view of customers calling a contact center, with data being pulled together from up to 30 enterprise applications containing customer data. HP Autonomy sees increased reliance on mobile, social, and cloud technologies and the addition of rich media to enterprises’ information assets as integral to enterprise search requirements. Semantic analysis adds an important dimension to enterprise search, according to Content Analyst. What will work best in your work situation?

Coffee Break • 3:00 p.m. – 3:15 p.m.

Finding Elephants: Enhancing Search With Predictive Analytics
3:15 p.m. – 4:00 p.m.
Andrew Fast, Chief Scientist, Elder Research, Inc.
Beth Maser, Director of Records and Information Systems, Taxonomy and Metadata, PPC
Search is the cornerstone of enterprise information management. However, as the amount of searchable information grows, keyword relevance becomes increasingly inadequate for finding elephants, those hard-to-describe concepts. Andrew Fast and Beth Maser recount their successes with predictive analytics techniques, including predictive models and document similarity. Join them on their elephant hunt!

Search From the Customer Perspective
4:15 p.m. – 5:00 p.m.
Garrett Eastham, Co-Founder and CEO, Compare Metrics
Christian Gross, Search Consultant, Raytion GmbH
Compare Metrics asked consumers what they liked and disliked about the current online discovery process on top retailer sites. The research showed that people want a modern product discovery experience, personalized for them. At Raytion, search experts look at various aspects of how customers can reduce project risk and get content successfully into their search engines. Giving people what they want in the search experience can be done.

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Wednesday, November 5
5:00 p.m. – 6:30 p.m.
Continental Breakfast  8:00 a.m. – 8:45 a.m.

KMWorld & Intranet Innovation Awards
8:45 a.m. – 9:00 a.m.  * Constitution Ballroom, Level 3B

KEYNOTE

Knowledge Sharing in the Networked World of the Internet of Things
9:00 a.m. – 9:45 a.m.  * Constitution Ballroom, Level 3B

Lee Rainie, Director, Pew Research Center’s Internet & American Life Project, & Author, Networked: The New Social Operating System

On the 25th anniversary of the web, Pew has released new research on the Internet of Things: “Many experts say the rise of embedded and wearable computing will bring the next revolution in digital technology. They say the upsides are enhanced health, convenience, productivity, safety, and more useful information for people/organizations.” Lively and popular speaker Rainie shares the latest research from Pew about the internet and puts it into organizational context with the expanding Internet of Things! Filled with insights and ideas for enhancing knowledge sharing and productivity in organizations, this keynote is not to be missed.

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

Semantic and Graph Search
10:45 a.m. – 11:45 a.m.

Moderated by Jeff Fried, CTO & VP Engineering, BA Insight

PANELISTS:
Patrick White, CEO and Co-Founder, Synata
Steve Kearns, Director of Product Management, ElasticSearch
Seth Earley, CEO, Earley & Associates

Adding underlying structure to search engines provides some remarkable new capabilities for the enterprise. Several major companies, including Facebook, Google, and Microsoft, have added graph search to their offerings. New, smaller companies and open source projects are providing semantic search and graph search. What does this mean for your organization and how should you proceed? This panel explores the technology, applications, and implications of semantic search and graph search in particular. Long-standing industry experts, active in this arena, contribute their views.

User Behavior Testing
12:00 p.m. – 12:45 p.m.

Ahren Lehnert, Taxonomy & Search Analyst; Stephanie Rothfuchs, Technical Writer & Communications Specialist; & Luis Rodriguez, Knowledge Management Specialist, EMC Technologies

To more forward with an effective search strategy, you first need to define the problem and requirements. Then, develop a road map blending industry best practices with the specific needs of the organization. Learn how an oil and gas products and services provider conducted user behavior testing to move from a general consensus that “search sucks” to an improved user experience, including autocategorization and line of business data system in search results.

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

Corralling Your Content in SharePoint
2:00 p.m. – 2:45 p.m.

Jonathan Walton, Senior Information Architect, BlueMetal Architects

SharePoint offers extensive opportunity for flexibility in the storage and retrieval of your information and documents. Whether you are planning for a small, team-based collaboration site or a department-wide portal, the value of taking the time to chart your course before you start diving into site settings and configuring views on your libraries and lists is irrefutable. SharePoint offers you an arsenal of constructs to tame your disorganized data. Use this arsenal wisely, and you’ll have a solid foundation to build upon.

Tuning Up Search Relevance: The Gold Sample and the Black Box
3:00 p.m. – 3:45 p.m.

Theresa Simek, Search Services Advisor, EY

Best practices for measuring and maintaining relevancy involve the gold sample. At EY, explains Theresa Simek, relevancy tuning ranges from a large application with a significant amount of content being migrated to a new platform to a news application with a constantly refreshed content set and limited availability and a new learning platform. Based on these real-world situations, she reveals the main considerations when preparing a gold sample for relevancy tuning. Dave Copps, CEO of Brainspace, which offers a machine-learning-based semantic platform, shares his views on how black box search is dying and why transparency + intelligence will drive the post-search era.

Coffee Break  * In the Enterprise Solutions Showcase
3:45 p.m. – 4:15 p.m.

Security and Compliance
4:15 p.m. – 5:00 p.m.

C. David Seuss, CEO, Northern Light

James Dawson, Director Forensic Technology, KPMG

What happens inside the firewall should stay within the firewall. But sometimes it doesn’t. Content frequently gets posted to SharePoint that should not be widely shared, including licensed third-party research reports. C. David Seuss has suggestions for minimizing your risk and protecting yourself from expensive rights violations. James Dawson thinks that internal record classification requires serious consideration. From a legal and regulator compliance perspective, tagging documents and messages intelligently will lead to defensible disposition.
Search-based application architectures (SBAs) differ from traditional data-centric application architectures, according to Jonathan Bordoli. They aggregate and deliver information from structured and unstructured content sources through a unified interface. They also provide a query model against a single structured data layer. Thus, information can be surfaced holistically and related across the breadth of content in ways that are otherwise impossible. The future of the query might actually be invisibility, since search is baked into the very fabric of the application. Sean Martin adds his views about smart data integration and analytics.

Extracting Value From Existing Data

2:00 p.m. – 2:45 p.m.

Camille Wellard, Director, Internal eBusiness, and
Tyson Henrie, Search & Collaboration Product Manager, Intermountain Healthcare

In healthcare, having access to the right information can be a matter of life or death. At Intermountain Healthcare, as with other organizations, the challenge of bringing together content from different repositories requires a strategy to mitigate those differences. Collaboration between the clinical and business sides of the enterprise enhanced existing content from disparate silos, each with their own metadata and taxonomies, and optimized search results.

Searching or Finding?

3:00 p.m. – 3:45 p.m.

Bryan Bell, Executive Vice President, Expert System

What is the actual business requirement: searching or finding? Internal and external information comes at us faster than we can keep up with. Business expectations for deploying solutions, through enterprise search and content navigation, that will both capture and leverage hidden value have not changed. Semantics can enhance the effectiveness of existing platforms and narrow the gap between interfaces powered by keyword-based algorithms and an unstructured knowledgebase. Get the latest on exploiting semantic search to alter the traditional search paradigm!

Social Media Business: Using Online Connections to Increase ROI

4:00 p.m. – 4:45 p.m. * Constitution B, Level 3B

Eve Mayer, CEO, Social Media Delivered, & Author,
The Social Media Business Equation

Facebook, Twitter, LinkedIn, and YouTube are changing how our world communicates. A vast majority of CEOs remain hesitant to embrace the new era of emerging media and continue to wonder if it’s possible for an organization to truly leverage these tools and grow their business as a result. Mayer dispels common social media myths and focuses on the logic behind using social media regardless of an organization’s size or industry. Mayer reviews several different case studies from a variety of small, medium, and large companies such as Lane Bryant, Mayo Clinic, and General Motors.
GRAND HYATT WASHINGTON, DC

NOVEMBER 6–7, 2014

Evaluating Where, When, and How to Use It in the Enterprise

SHAREPOINTSYMPOSIUM.COM
2015 finds SharePoint at a crossroads. Many enterprises have yet to upgrade to SharePoint 2013, but as Redmond emphasizes cloud deployment models going forward, customers face critical decisions. In making those decisions, ideally, you’d have direct access to strategic advice from real practitioners.

The SharePoint Symposium gives you just that. Designed for business and technology leaders, the two-day event helps guide your decision-making on key topics, including mobile, cloud, and best practices in information architecture, search, and adoption. Whether your enterprise is new to the platform or has a longstanding SharePoint estate, the Symposium arms you to make effective choices for 2015.

Wireless Internet
Complimentary Wi-Fi is available in all meeting rooms.
1) Network: HyattMeeting
2) Click on browser to open log-in page
3) Enter passcode: infotoday2014

Welcome Reception
Tuesday, November 4 • 6:00 p.m. – 7:00 p.m. • Constitution Ballroom
Enjoy a selection of wine and cheese in a relaxed atmosphere as Information Today, Inc. welcomes all conference attendees, speakers, and sponsors to the kick-off event of this year’s program.

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

Enterprise Solutions Showcase Grand Opening Reception
Wednesday, November 5 • 5:00 p.m. – 6:30 p.m.
Come enjoy “a taste of fall” as we celebrate the grand 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.

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

KMWorld Bookstore
Located in the Enterprise Solutions Showcase.
Wednesday, November 5 • 5:00 p.m. – 6:30 p.m.
Thursday, November 6 • 10:00 a.m. – 4:30 p.m.
Friday, November 7 • 10:00 a.m. – 2:00 p.m.

Conference Presentations
Many speaker slides are available for download from the conference website (sharepointsymposium.com). Click on “PRESENTATIONS” and enter Username/Password: DC2014.

Get Connected on Twitter!
Don’t miss a thing! Join the conversation by following @SharePointSym and using #SharePointSym in your tweets.

SharePoint Symposium In Motion
The program for SharePoint Symposium and its co-located events is available in a mobile version and is an easy way to access everything you need during the event at any time.

Enter URL: http://m.KMWorld.com
Smartphone Users SCAN HERE
CONFERENCE OVERVIEW

WEDNESDAY NOVEMBER 5
5:00 p.m. - 6:30 p.m. GRAND OPENING RECEPTION in the Enterprise Solutions Showcase

THURSDAY NOVEMBER 6 All sessions will take place in Farragut/Lafayette, Level 5B unless otherwise noted.
8:00 a.m. - 8:45 a.m. CONTINENTAL BREAKFAST
8:45 a.m. - 9:45 a.m. KEYNOTE • Constitution Ballroom, Level 3B
Knowledge Sharing in the Networked World of the Internet of Things • Lee Rainie
9:45 a.m. - 10:00 a.m. KEYNOTE • Constitution Ballroom, Level 3B • “Working Out Loud” in Shell • Ian Jones
10:00 a.m. - 10:45 a.m. COFFEE BREAK in the Enterprise Solutions Showcase

TRACK 1 • When and Where to Use (or not) SharePoint
10:45 a.m. - 11:45 a.m. The Future of SharePoint in the New Digital Workplace • Tony Byrne
12:00 p.m. - 1:00 p.m. Customer Panel: SharePoint at Scale • MODERATOR: Tony Byrne • Craig St. Clair & MaryGael Timberlake
1:00 p.m. - 2:00 p.m. ATTENDEE LUNCHEON in the Enterprise Solutions Showcase

TRACK 2 • Tuning Up Your SharePoint Strategy
2:00 p.m. - 2:45 p.m. Best Practices in Enterprise SharePoint Info Architecture • Stephanie Lemieux
3:00 p.m. - 3:45 p.m. Tuning Up Your SharePoint Implementation • Shawn Shell
3:45 p.m. - 4:15 p.m. COFFEE BREAK in the Enterprise Solutions Showcase
4:15 p.m. - 5:00 p.m. Using Metrics to Tune Up Your SharePoint Estate • Susan Hanley

FRIDAY NOVEMBER 7 All sessions will take place in Farragut/Lafayette, Level 5B unless otherwise noted.
8:00 a.m. - 8:45 a.m. CONTINENTAL BREAKFAST
8:45 a.m. - 9:45 a.m. KEYNOTE • Constitution Ballroom, Level 3B • It’s a Process Jim, but Not as We Know It! • Dave Snowden
9:45 a.m. - 10:00 a.m. KEYNOTE • Constitution Ballroom, Level 3B • Achieving Successful Search • Kamran Khan
10:00 a.m. - 10:45 a.m. COFFEE BREAK in the Enterprise Solutions Showcase

TRACK 3 • SharePoint in the Cloud
10:45 a.m. - 11:30 a.m. Stump the SharePoint Guru • MODERATOR: Jarrod Gingras • Jill Hanneman, & Shawn Shell
11:45 a.m. - 12:45 p.m. Collaboration in the Cloud: Office 365 vs. Alternatives • Jill Hanneman & Laurence Hart
12:45 p.m. - 2:00 p.m. ATTENDEE LUNCHEON in the Enterprise Solutions Showcase

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. Analyst Panel: Social, Mobile, and SharePoint • Tony Byrne & Rob Koplowitz
4:00 p.m. - 4:45 p.m. CLOSING KEYNOTE • Town Hall Discussion: What Did We Learn • Jarrod Gingras
Thursday, November 6

All sessions will take place in Farragut/Lafayette, Level 5B unless otherwise noted.

Continental Breakfast • 8:00 a.m. – 8:45 a.m.
KMWorld & Intranet Innovation Awards
8:45 a.m. – 9:00 a.m.

KEYNOTE

Knowledge Sharing in the Networked World of the Internet of Things
9:00 a.m. – 9:45 a.m. • Constitution Ballroom, Level 3B
Lee Rainie, Director, Pew Research Center’s Internet & American Life Project, & Author, Networked: The New Social Operating System

On the 25th anniversary of the web, Pew has released new research on the Internet of Things: “Many experts say the rise of embedded and wearable computing will bring the next revolution in digital technology. They say the upsides are enhanced health, convenience, productivity, safety, and more useful information for people/organizations.” Lively and popular speaker Rainie shares the latest research from Pew about the internet and puts it into organizational context with the expanding Internet of Things! Filled with insights and ideas for enhancing knowledge sharing and productivity in organizations, this keynote is not to be missed.

KEYNOTE

“Working Out Loud” in Shell
9:45 a.m. – 10:00 a.m. • Constitution Ballroom, Level 3B
Ian Jones, KM Manager, Shell Projects and Technology and Enterprise KM Lead

Shell leadership’s main focus for its KM investment is on building value through the strength of its professional communities. We are doing this by following a business sponsored KM strategy which has professional communities at its center; a standardized solution incorporating tools, processes, and behaviors; and a disciplined program of building and implementing in key value-adding areas of the enterprise. This has allowed us to put the business at the center of our KM work, to make sure that our investment really adds value to our bottom line and is driving more of the enterprise to want to opt in. Through a unique company showcase we’ll bring the Shell Enterprise KM solution into the conference so you can share our journey so far.

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

TRACK 1 • When and Where to Use (or not) SharePoint

KEYNOTE: The Future of SharePoint in the New Digital Workplace
10:45 a.m. – 11:45 a.m.
Tony Byrne, President, Real Story Group

SharePoint has arrived. Now more than 10 years old, it has become an almost ubiquitous part of many enterprise intranets. But what about the future? As notions of a “digital workplace” get traction, it’s time to re-assess the role of SharePoint in the work and lives of your fellow colleagues.

Customer Panel: SharePoint at Scale
12:00 p.m. – 1:00 p.m.
MODERATOR: Tony Byrne, President, Real Story Group
Craig St. Clair, Intranet Manager, HOK
MaryGael Timberlake, Findability Leader, Global Markets - EY Knowledge Ernst & Young, LLC

What happens when you deploy SharePoint in the world’s largest enterprises? Is it just “Big SharePoint” or something entirely different? 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
1:00 p.m. – 2:00 p.m.

TRACK 2 • Tuning Up Your SharePoint Strategy

Best Practices in Enterprise SharePoint Info Architecture
2:00 p.m. – 2:45 p.m.
Stephanie Lemieux, President & 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 will reveal real-life tips to improve your SharePoint implementation’s usability.

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

Using Metrics to Tune Up Your SharePoint Estate
4:15 p.m. – 5:00 p.m.
Susan Hanley, Founder & President, Susan Hanley LLC

As you transition to SharePoint 2013 and possibly SharePoint in the cloud, how can you tell how effectively you’re implementing the platform today? Join SharePoint guru Sue Hanley for a tour of key metrics to capture and analyze to improve adoption and business value.

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Best Practices in Enterprise SharePoint Info Architecture
2:00 p.m. – 2:45 p.m.
Stephanie Lemieux, President & 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 will reveal real-life tips to improve your SharePoint implementation’s usability.

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

Using Metrics to Tune Up Your SharePoint Estate
4:15 p.m. – 5:00 p.m.
Susan Hanley, Founder & President, Susan Hanley LLC

As you transition to SharePoint 2013 and possibly SharePoint in the cloud, how can you tell how effectively you’re implementing the platform today? Join SharePoint guru Sue Hanley for a tour of key metrics to capture and analyze to improve adoption and business value.
Continental Breakfast • 8:00 a.m. – 8:45 a.m.

WELCOME & KEYNOTE

It’s a Process Jim, but Not as We Know It!
8:45 a.m. – 9:45 a.m. • Constitution Ballroom, Level 3B
Dave Snowden, Founder & Chief Scientific Officer, Cognitive Edge Pte Ltd

The traditional triangle of people, process, and technology delivering value has become a cliché during the last 3 decades, but it remains relevant. The question, however, is which people, when, with what processes and technology? Snowden, creator of the Cynefin framework, looks beyond increasingly industrial models of design thinking to creating co-evolutionary processes between unarticulated user needs, technology capability, and system opportunities to create a biological model of emergent value. It includes reports on radical new work on workforce and customer engagement through the creation of human sensor networks to provide real-time decision support and a continuous flow of micro-innovation.

KEYNOTE

Achieving Successful Search
9:45 a.m. – 10:00 a.m. • Constitution Ballroom, Level 3B
Kamran Khan, CEO, Search Technologies

Large enterprises and government agencies face many daunting challenges when trying to create successful search environments. Based on case study materials from recent search implementation projects in both the public and private sectors, this presentation discusses how to achieve success by developing agile, scalable, and future-proofed enterprise search platforms.

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

TRACK 3 • SharePoint in the Cloud

Stump the SharePoint Guru
10:45 a.m. – 11:30 a.m.
MODERATOR: Jarrod Gingras, Analyst and Director of Advisory Services, Real Story Group
Jill Hanneman, Director of Advisory Services, Portal Solutions
Shawn Shell, Vice President, U.S. Microsoft Platform Practice, Hitachi Consulting, Real Story Group

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 gurus 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 gurus can’t hear the answers that the other panelists give. Come and get insightful, likely controversial, and sometimes entertaining answers to your most pressing questions. The person deemed to have stumped the consultants the most will go home with their own noise-canceling headphones!

Collaboration in the Cloud: Office 365 vs. Alternatives
11:45 a.m. – 12:45 p.m.
Jill Hanneman, Director, Advisory Services, Portal Solutions
Laurence Hart, Content Management Strategist, Alfresco Software

It seems like everyone is talking about moving to the cloud. What does “cloudification” mean for SharePoint owners? In this lively session, learn the pros and cons of using SharePoint in the cloud versus using alternative providers who may or may not offer a better fit.

Attendee Luncheon • In the Enterprise Solutions Showcase
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, Editor-in-Chief, KMWorld
Top SharePoint solution providers and their customers share successful deployments built on what is the industry’s most versatile (and vexing) platform.

Analyst Panel: Social, Mobile, and SharePoint
3:00 p.m. – 3:45 p.m.
Tony Byrne, President, Real Story Group
Rob Koplowitz, VP, Principal Analyst, Forrester Research

Two rapid-fire sessions will look at Social, Mobile and SharePoint—today and in the future. RSG’s Tony Byrne will kick off with a critical evaluation of 3rd-party modules that purport to amp up your SharePoint implementation. Then, Forrester’s Rob Koplowitz will show us his crystal ball for where SharePoint is likely headed in an increasingly competitive landscape.

CLOSING KEYNOTE

Town-Hall Discussion: What Did We Learn?
4:00 p.m. – 4:45 p.m.
Jarrod Gingras, Analyst and Director of Advisory Services, Real Story Group

We’ll end the symposium wrapping up the key takeaways that we learned at this year’s SharePoint Symposium. We’ll also field any lingering questions from you to make sure all of your pressing SharePoint questions have been answered.

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# Speaker Directory

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### KMWorld Bookstore Hours

**Wednesday, November 5**
- 8:00 a.m. – 3:30 p.m. • Constitution Level Foyer
- 5:00 p.m. – 6:30 p.m. • Enterprise Solutions Showcase

**Thursday, November 6**
- 10:00 a.m. – 4:30 p.m. • Enterprise Solutions Showcase

**Friday, November 7**
- 10:00 a.m. – 2:00 p.m. • Enterprise Solutions Showcase
### Exhibitor List & Floor Plan

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<td>Sinequa</td>
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<td>Vitesse Solutions</td>
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**Enterprise Solutions Showcase Hours**

- **Wednesday, November 5**
  - 5:00 p.m. – 6:30 p.m.
  - Grand Opening Reception

- **Thursday, November 6**
  - 10:00 a.m. – 4:30 p.m.

- **Friday, November 7**
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  - 8:00 a.m. – 3:30 p.m.
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    - Enterprise Solutions Showcase

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    - Enterprise Solutions Showcase

- **Friday, November 7**
  - 10:00 a.m. – 2:00 p.m.
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