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# 10th Annual Information Management Summit

13 & 14 February 2012, Intercontinental Hotel, Wellington

Sharing lessons on IM & KM projects, trends, strategies and usability

### Focus on Case Studies from Christchurch:

- Setting up CERA's information requirements
- Developing processes and standards for large scale projects
- Disaster Preparation for IM: What has Christchurch taught us?

### New for 2012:

- Extended Roundtable Discussions
- Quick-Fire 20 minute presentations
- Extended Q&A time
- In-conference workshops



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### Further Case Studies and Insights from:

Auckland Council | Careers NZ | Environment Canterbury  
Information Leadership | Kiwibank | Flitter Ltd | Knowledge Cue | NZ Army

Supporting Organisations



The Information Architecture Institute



NZ's leading business conference experience



10th Annual

# Information Management Summit

13 & 14 February 2012, Intercontinental Hotel, Wellington

## Day One: 13th February 2012

8.30 Registration and coffee

9.00 **Opening remarks from the Chair**  
**Kim Sbarcea**, Director, **Thinking Shift**

### 9.05 **Local and international IM & KM trends**

The forecasts and trends around IM and KM will be examined in this overview session.

- Lessons learnt from KM World in Washington DC and what this means for New Zealand
- International trends for 2012 and beyond in IM, records keeping and metadata management
- How can IM continue to be relevant in 2012

**Chrissie Curtis**, Consultant, **Information Leadership**

### 9.50 **CIO Perspective: A new IM value proposition paradigm**

Faced with closures, downsizing, rightsizing and restructuring, how can the information management profession restate its value proposition to Ministers, CEOs and senior management in order to obtain support essential for growth and expansion? Matt will explore this in his presentation and cover:

- Adding value to IM through merging approaches and new technologies
- Real world examples of the strategic value IM can deliver
- Using IM as a means for driving transformation

**Matt O'Mara**, Chief Information Officer, **Careers NZ**

10.35 Morning tea

## Lessons Learnt from Christchurch

### 11.00 **Case Study: Developing processes and standards for large scale projects**

Dealing with the vast amounts of information generated from the Christchurch Earthquakes and the rebuild process is a huge task. This case study will look at the task of setting up architecture and record keeping standards to help support the Christchurch rebuild.

- Gathering and disseminating quality information
- Setting up and governing an effective IM system
- Creating a workflow approach to project management
- Using SharePoint as the hub for information sourced from multiple systems
- Reporting by exception – knowing promptly when project parameters start to stray

**Helen Bennett**, Senior Consultant, **Information Leadership**  
Helen is currently working with City Care on this project.

### 11.40 **Case Study: Setting up information management at the Canterbury Earthquake Recovery Authority (CERA)**

Julian Carver discusses the process of building a new government agency's IM under intense pressure, while dealing

with unpredictable, ever changing and evolving requirements.

- Delivering solutions on multiple time horizons simultaneously
- Using agile iterative approaches as the only viable option
- Evolving from a start-up to an established organisation
- Implementing processes, controls and tools in a 'just in time' fashion

**Julian Carver**, Director, **Seradigm**

12.20 Lunch

### 12.20 **Disaster preparation for IM: What has Christchurch taught us?**

Access to one's organisational information is essential in order to operate in a "business-as-usual" atmosphere. However, after the Canterbury earthquakes, access to organisations' core information was limited or completely cut off in many circumstances.

- Ensuring access to business information in emergency situations
- Back ups and contingency plans – what you'll need
- Ensuring your information infrastructure is strong enough to assist with disaster recovery processes

**Denise Thompson**, Team Leader – Records and Archives, **Environment Canterbury**

## Lessons from IM Projects

### 2.00 **Case Study: Records management and the Super-City**

What can be learnt from transitioning 8 different councils and their individual IM and record keeping practices into a single functioning initiative? Jacqueline will look at both the technical and people aspects from the amalgamation.

- Setting up best practice guidelines
- Restructuring records management in the Super-City
- What have we learnt and where to from here

**Jacqueline Davidson**, Team Leader Records Management, **Auckland Council**

### 2.40 **Case Study: Using customer research to determine kiosk UI design**

Self-service technologies are becoming increasingly prevalent and popular across the IM profession, and when they work well they save time. But to work well, they need to be intuitive and easy to use.

- How early customer research is used to inform UI designs and flow before design even begins
- How regular customer walkthroughs and testing keeps design on track and results in an intuitive self-service system
- How customer insights also influence signage, kiosk placement, and staff uniforms

**Kat Hardisty**, Customer Research and Design Manager, **Kiwibank**

3.20 Afternoon tea

# Sharing lessons on IM & KM projects, trends, strategies and usability

## ROUNDTABLES

3.45 Interactive and perfect for information sharing, these facilitated roundtables are an ideal opportunity to discuss your IM challenges. Attend two roundtables in 30 minute sessions to discuss and debate with peers and experts.

### Roundtable 1: How can you harness Social Media for your organisation?

- What is the status of the social media strategy in your company?
- What do you want to achieve from social media?
- Do you need to have a formal policy in place?
- What will happen if you miss the social media wave?

**Justin Flitter**, Director, Flitter Ltd

### Roundtable 2: Challenges of Knowledge Management, Taxonomies and Metadata

- How are you finding your current system of classifying information?
- Are there differences in dealing with structured and unstructured information?
- What impact has digitalisation had?

**Mark Orange**, Director – Strategy and Innovation, Knowledge Cue

### Roundtable 3: Creating and Maintaining Open Data policies

- How important is transparency for your organisation?
- How can you ensure open data policies provide only pertinent information instead of an information flood?
- Has security issues created a new range of issues for IM and open data?

**Julian Carver**, Director, Seradigm

### Roundtable 4: Essential skills and mindsets for successful IM practitioners

- What have your experiences been in aligning practitioners and skills gaps?
- What do you think are the essential qualities for IM staff?
- Which skills do you find are lacking and how can this be rectified?

**Janita Stuart**, Information Manager, NZ Army

### 4.45 Roundtable round-up

In quick-fire presentations, the roundtable facilitators will present the main findings and themes from the discussion to the conference group.

### 5.05 The Information Management Summit Networking Drinks Forum

Day Two: 14th February 2012

## IN-CONFERENCE WORKSHOPS - Choose the sessions you want to attend

### 9.00 Workshop One: Benchmarking Practices: Creating key KPIs, scorecards & reports

Key KPIs, scorecards and reports will influence the direction your organisations IM is headed and are essential to help ensure your IM strategies are reaching their goals and serving the correct audiences.

- Identifying the direction and processes involved
- Creating effective score cards for changing IM environments
- Importance of updating KPIs and reports to ensure validity

**Crispin Garden-Webster**, Director, Garden-Webster Ltd

### OR Workshop Two: Developing an IM strategy and effective evaluation of IM investments

Having a comprehensive and compelling IM strategy is important to ensure business information is correctly managed, stored and analysed. In this workshop you will learn how to develop your IM strategy further and evaluate whether existing IM investments have been successful.

- Identifying, managing and understanding your IM goals
- Creating core KPIs and metrics to effectively measure successful IM practices
- Creating strong IM strategies and managing the process from concept to implementation

**David Spaziani**, Director, Andiamo Ltd

10.30 Morning tea

### 10.50 Workshop Three: Simple mechanisms for performing IA research

Making alterations to existing information architecture inevitably leads to initial research and fact finding missions. There are some simple mechanisms you can use to simplify the process of IA research. This workshop will give you a hands-on approach to achieve this.

- Understanding the way your key audiences will be interacting with the IA structures
- Which design processes lend themselves more easily to IA work?
- The benefits of thorough IA research at the inception of the process

**Steph Beath**, Senior Customer Experience Practitioner, Kiwibank

### OR Workshop Four: Advancing social media strategies for IM professionals

Social Media is becoming a greater force throughout all aspects of the business in today's digital world. Justin will cover how you can advance your social media strategy to better your information management goals and practices.

- Evaluating the impact social media has had on your organisation already
- Strategies to tackle how you can manage and analyse information gathered in social media outlets
- Deciding the direction you want your IM principals to head and whether social media can facilitate this
- Beyond Social Media 101 – moving into application and understanding the next wave of social media concepts

**Justin Flitter**, Director, Flitter Ltd

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12.20 Lunch

### Quick Fire Sessions

Each presenter has just 20 minutes to relay their key points in these quick-fire sessions

#### 1.20 Extending and Improving Navigation Functionality

Navigation and search tools are an essential part of IM and Records Management as more data becomes digitalised. How can you ensure they work simply, effectively and in a timely manner?

- Optimising search engines for IM
- Is Google the "gold standard"?
- Tips and tricks for improving your navigation functionality

**Mark Orange**, Director – Strategy and Innovation, Knowledge Cue

#### 1.40 Creating iterative design in IM tools and projects

The cyclic process of iterative design lends itself to the process of improving IM tools and projects. Steph will discuss how she uses iterative design in her work and the essential role it has in improving both staff and customer experiences through IM.

- Fundamental basics of iterative design
- Critical success factors
- Importance of research needs and measuring change

**Steph Beath**, Senior Customer Experience Practitioner, Kiwibank

#### 2.00 Cloud computing and IM: Who owns, manages and analyses what is in the cloud?

The move to store organisational information in the cloud has led to a realm of new questions and challenges for the IM team.

- Who is responsible for what happens in the cloud?
- The benefits of handling IM in the cloud versus traditional data storage avenues
- Does having the information available in the cloud open it to alternative possibilities for management and analysis?

**Julian Carver**, Director, Seradigm

#### 2.20 Information Sharing: Dealing with portability and security

Increased digitalisation of records and information in NZ has made increased security and portability for information paramount.

- How can you ensure information digitalised stays safe and secure

- The rise of portability and the innate need to access information remotely

**Janita Stuart**, Information Manager, NZ Army

#### 2.40 Extended Q&A with Quick-Fire presenters

Ask our Quick-Fire experts any questions you have about any of the Quick-Fire presentations.

3.00 Afternoon tea

#### 3.15 Avoiding common IM pitfalls to save time and money

Even with the most meticulous planning, IM initiatives can fail. In this session, Kim will look at some IM failures and point out potential pitfalls to avoid.

- The value of extensive planning
- What happens when it all goes wrong – is it game over or can you salvage it?

**Kim Sbarcea**, Director, Thinking Shift

#### 3.45 What do Information Managers need to know from a legal perspective?

Covering the latest updates around IM law and what information managers need to know from a legal perspective, this session will keep you updated on how to stay on the right side of IM legal requirements.

- Developments with the Public Records Act
- Dealing with privacy concerns and confidential information
- Official Information Act and open data requirements

**Samantha Gain**, Senior Associate, DLA Phillips Fox

#### 4.15 Assisting change management for IM strategies

What steps can be taken to facilitate change management and ensure changes to your IM systems and strategies go smoothly. With examples from a transformational system replacement and data quality improvement projects this session will cover:

- Incorporation of change management into project planning
- Getting buy-in from affected parties & senior stakeholders
- Identifying and managing barriers to change
- Embedding change into the organisation

**Penny Buckmaster**, Information Management Professional

Penny holds an MA in Information Services Management from London Metropolitan University and has worked in a wide variety of IM positions both in NZ and the UK. These have involved both transformational business change and smaller scale process and system re-engineering.

4.45 Close of Summit

## Separately bookable MASTERCLASSES

Amora Hotel, Wellington, 15th February 2012: 9.00am - 4.30pm

### Masterclass 1:

#### Fundamentals of Information Management and Knowledge Management

An introduction for new staff members or useful as a refresher, this workshop will cover the fundamental requirements of information management and knowledge management in the New Zealand business environment.

Designed in a practical full day structure, this workshop will focus on essential requirements including:

- Overview of the Public Records Act and other IM legislation and their implications for both the public and private sector
- Understanding Metadata and Taxonomy and how this will influence your IM practices and systems
- Discussing digitalisation – what you need to be aware of and how to avoid common problems

Facilitated by:

**Janita Stuart**, Information Manager, NZ Army



Janita has been in the KM and IM profession for 4 decades across 14 agencies, both public and private sectors. In addition to regular employment, she has been a tutor in KM at Victoria University since 2003 and a tutor at the Open Polytechnic in KM and IM since 2006.

### Masterclass 2:

#### Migrating file shares into EDRMS or SharePoint

Transitioning systems is never an easy task and this workshop will help you make sense of the migration process. Starting out with the process of change management this workshop will help provide you with a road map to help make that transition easier.

Along with change management and project management skills, this full day workshop will cover:

- Understanding the steps in the process – know what you need to do and plan accordingly
- Facilitating staff interaction and ensuring sufficient support is available
- Planning and implementing migration road maps
- Tips and tricks to assist with file share migration

Facilitated by:

**Paul Jonson**, Daylight Consulting



Paul Jonson has consulted in the area of Information Management for over 15 years. He has a wealth of experience as a business consultant, gained across many sectors, including central and local Government and the private sector. Paul is a member of the PMI, RMAA and has an active relationship with Archives New Zealand.

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# 2 FOR 1

## Hottest Topics for 2012

- IM systems and governance
- Local and international IM trends
- Customer research and self-service IM tools
- Iterative design and IA
- Avoiding common IM pitfalls
- Change management for IM
- Social Media and IM

## Interactive one day Masterclasses

For further opportunity for hands-on learning see our choice of two post-conference masterclasses.

\*Please note the different venue for masterclasses

## Workshops

These in-conference workshops are new for 2012 and are interactive facilitated sessions run on the morning of day two. Choose which sessions you wish to attend and customise your summit experience.

## Roundtables

In 2012 we are extending the popular Roundtable sessions. Choose two tables of 30 minutes each. Discuss and debate with peers and experts before hearing the main themes from all four tables in quick-fire wrap up presentations.

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## Leading Industry Experts & Popular Presenters:



### Kim Sbarcea

Kim has specific expertise in working with organisational knowledge networks or communities of practice and using technology to support knowledge sharing efforts. She has been the Chief Knowledge Officer for a global professional services firm and has worked with communities of practice in a Federal Government agency in Australia.



### Mark Orange

Mark is an expert in ECM solutions and has a passion for delivering quality solutions. Prior to joining Knowledge Cue he designed and architected Intranet and Internet solutions on early versions of SharePoint and Microsoft Content Management Server. Much of his time is spent supporting clients in establishing enterprise strategies for SharePoint and IM.



### Julian Carver

Julian has extensive experience in the NZ science system, environment sector, and central and local government. He has led information system strategic plan development for a range of agencies including Landcare Research, Archives New Zealand, and the Animal Health Board. For the last seven years Julian has been heavily involved in cross agency information sharing strategies and shared services projects.



### Justin Flitter

Justin is the Director of Flitter Ltd; a Real Time Digital Media Agency specialising in monitoring, analytics and insights. Flitter works with household brands like Honda NZ, Advertising Agencies, and runs in house full day workshops with SME's and organisations around the country.



10th Annual

# Information Management Summit

13 & 14 February 2012 (Conference)  
Intercontinental Hotel, Wellington

15 February 2012 (Masterclasses)  
Amora Hotel, Wellington

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Conference: **CE098** A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

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**2<sup>nd</sup> Delegate** Mr/Ms/Mrs/Miss/Dr  Conference  Masterclass 1  Masterclass 2

First Name  Last Name  **FREE**

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