



Helping You Work
Better, Faster, Smarter

IMERGE Consulting InSights™ - June 2005

In this edition we feature an article by Robert Smallwood on evaluating email management solutions. We also have links to a number of articles we've written recently, as well as details of new services and educational offerings. We hope you'll enjoy this newsletter and welcome your feedback at jesse.wilkins@imergeconsult.com.

Regardless of your industry, your company, your own individual role and where you are in your career, IMERGE Consulting has many opportunities that can help you do business **better, faster, smarter!** Here are just a few:

(1.) IMERGE is featured in AIIM's Advice Center. Professional Members can access industry experts for free one-to-one advice on one of a number of topics (e.g., workflow/process management, records management, email management, outsourced services, and many more.) To learn more, [CLICK HERE](#).

(2.) Join us at the IMERGE Knows All About! Educational Series. IMERGE is pleased to announce our summer training schedule. We will be complementing our two-and three-day CDIA+ courses with a number of new workshops this summer, including a one-day workshop on effective email management, one-and two-day workshops on the TAWPI Information Capture Professional (ICP) certification, and a two-day workshop on records management for non-records managers. Details on each of these classes will be available shortly at the IMERGE website at <http://www.imergeconsult.com>.

Records Management for Non-Records Managers: IMERGE Principal Jesse Wilkins has partnered with Mimi Dionne, Chair of the ARMA 2006 Program Committee and Auditing Manager for Administaff, to make available a comprehensive two-day workshop on developing a records management program from the ground up. It is designed for those individuals who find themselves in charge of records, but do not have a records management background: project managers, office managers, legal staff, and other non-records managers.

This workshop will cover everything needed to get a records program off the ground:

- Developing a records policy
- Inventorying records, both physical and electronic
- Creating a taxonomy and file plan
- Managing active and inactive records
- Retention and disposition
- Auditing and improving the records program

We will provide practical approaches, tips and tricks, and templates and checklists that combine best practices and our own "battle scars" to ensure a successful program. Attendees will learn not only what to do, but how to do it, including managing a records program project, change management, getting buy-in from the organization and end-users, and how to do records on a budget. Cost of this workshop is \$795. Scheduled workshops include:

- August 25-26, Denver, CO
- October 20-21, Denver, CO
- November 17-18, Houston, TX

Electronic Records Management Workshop: Records managers know that effective programs manage records based on content, not media. But electronic records can be challenging to manage effectively for a variety of reasons. This workshop is designed for records professionals and organizations with an established records management program who need information and assistance with incorporating electronic records. Attendees will learn how to:

- Inventory their electronic records
- Classify electronic records efficiently and accurately
- Store and maintain electronic records over time
- Properly dispose of electronic records, including transfer and destruction
- Audit the program
- General guidelines for incorporating RM practices into IT processes

Cost of this 1-day workshop is \$495, including training manual, resource CD with templates and checklists, and catered lunch. Courses to be scheduled in July-September include:

- Denver, CO
- Atlanta, GA
- Greater Washington, DC area
- Houston

CDIA+ Courses:

This course prepares student for the CDIA+ exam and covers project management, imaging technologies, strategic planning, process analysis, and soft skills. Cost of the course is \$750.

CDIA+ Course Schedule:

- August 10-12, New Jersey, NJ
- Sept 7-9, Madison, WI
- Sept 15-17, Philadelphia, PA
- Sept 29 - Oct 1, Seattle, WA
- October 13-15, Denver, CO

ICP Courses:

This course prepares students for the ICP exam and covers remittance processing, forms design and processing, document management, workflow and human resources and ergonomics. This course is taught by a number of IMERGE partners & principals. The next class is scheduled for:

July 24, Baltimore (in conjunction with TAWPI 2005)

Additional classes will be scheduled in October and November to prepare students for the updated ICP, 2005 edition, which will debut in December.

Additional public courses will be scheduled based on demand, or bring IMERGE educational workshop to YOUR location! You provide the facility (a conference room works well), and IMERGE provides the materials, the instructors, and a superlative educational experience! IMERGE can also customize workshops for your organization.

(3) IMERGE offers three new advisory services related to electronic document production. For more information on these services contact Pierre Heymann at: pierre.heyman@imergeconsult.com.

Document Production Assessment

The document production process has changed tremendously over the last few years. Today, documents are more personalized, have more marketing and color content, and must be delivered to the customers via multiple channels: web, mail, email, fax, EDI, etc. With many different legacy and off-the-shelf composition tools many types of print data-streams, and many different processes, it is time to take a step back and gain more control and oversight. The document production assessment service provides companies with both a strategic and a tactical analysis of their technologies, processes, costs and practices and offers recommendations on how to improve the communication with the customers via all the channels, better meet business objectives and reduce costs.

Print and Mail Efficiency Assessment

This service is targeted for companies printing and mailing a significant amount of documents. While the process

and technologies have not fundamentally changed over the last years, small advances in speed, automation, workflow and a focus on cost cutting and efficiencies have lead to gradual productivity improvements. IMERGE has found that there are many savings that can be achieved in the print and mail production area and can help you decided if you should outsource this function or keep it in-house. We have defined a methodology that carefully analyzes the operation from a technology, capacity, staffing, process, cost and procedures point of view and we provide the management with recommendations leading to real savings and improvements.

Office Printing and Copying Assessment

Office printing and copying is going through tremendous changes with the emergence of multi-functions copier/printer that offer faxing, scanning, document capture, and printing On Demand in monochrome and in color. While it is common for companies to achieve a 20 to 30% cost reduction by right-sizing the printer fleet, consolidating vendors, reducing inventories, and using newer devises that are cheaper to operate, it is possible to achieve even greater savings by putting in place monitoring tools, educating users, and reducing the volume of paper produced. This service helps companies re-evaluate their needs, assess their current costs, look at the opportunity of bringing in-house the productions of some color documents, rethink how paper documents are managed, look at capturing documents in distributed locations and develop a new office printing strategy.

Industry Quick Notes

CDIA+ Exam Revision. CompTIA has announced that the CIDA+ exam will be updated this year with slightly revised objectives and new questions. The exam went into beta June 3 for a limited time. The beta will cost \$75, a 66% discount on the regular \$225 price, and candidates who pass the beta will received the CDIA+ credential. For more information visit the CompTIA website at <http://www.comptia.org/cdiabeta>

ICP Exam in July. The next ICP exam will be offered July 23-30 at LaserGrade test centers and in conjunction with TAWPI 2005 in Baltimore. Candidates must register with TAWPI no later than June 23 in order to take the exam this cycle. Note: IMERGE Consulting will also be offering a one-day ICP workshop on July 24th at TAWPI 2005. To register, or for more information, please visit <http://www.imergeconsult.com/ICP.html>.

Document Management Workflow Conference Announced. The American Association of State Highway and Transportation Officials (AASHTO) and the State of Kansas Department of Transportation have announced the preliminary agenda for DMW 2005. This conference targets senior information technology and agency decision-makers from the State and Local Government markets. Session will cover best practices in imaging, document management, workflow, engineering management, and case studies from agencies. To register, or for more information, visit <http://www.ksdot.org/DMW/>.

Feature Article

Email Management Hits Center Stage By Robert Smallwood, IMERGE Consulting

As the Southern writer William Faulkner put it, "No man is a failure who is enjoying life." And email management vendors have been enjoying life quite a bit lately.

2005 is the year email and messaging management (EMM) software companies have been waiting for. Regulatory pressures, loosened IT purse strings and the health of the larger Enterprise Content Management (ECM) marketplace have created the "perfect storm" - in a good way - for EMM vendors and leading players are poised for a breakout year. In short, email management has arrived and become a crucial part of any ECM provider's portfolio.

The technical challenges are significant. Imagine this: large electronic document management systems may have the capacity to handle a few million documents, perhaps even tens of millions. But archiving all emails for an organization of 25,000 employees for a retention period of seven years would require handling up to 4.5 billion documents. Just as a reference, as of just a year ago, in early 2004, Google (google.com) handled only 4.3 billion documents! So, scalability is key.

To read more of this article, click on the link below.

http://www.kmworld.com/publications/magazine/index.cfm?action=readarticle&article_id=2016&publication_id=129

*This article is an excerpt of a two-part series that appears at <http://KMworld.com>
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Robert Smallwood is a Partner with IMERGE Consulting and a frequent author and speaker on records and content management topics. He assists end users in system selection and vendors in competitive strategies and may be reached at robert.smallwood@imergeconsult.com or 504-418-6552.

Coming Events, June-July 2005

Date: 6/19-24/2005

Event: Collaborative Technologies 2005

Program Details: Instant messaging, team workspaces, conferencing, unified messaging, wikis, VoIP, blogs... The new generation of collaborative technologies all have one thing in common: The focus is on users. Do your applications understand your people? Are you getting the most out of your technology and your team? Attend CTC 2005 and discover both a new vision of a better way of work and the practical realities of what technology can do for your organization.

More information: [CLICK HERE](#)

Date: 7/24-27/2005

Event: TAWPI 2005, Baltimore, MD

Program Details: The TAWPI Forum and Exposition is the leading event for technology and management professionals in data capture, mail, imaging, payment/remittance, document and forms processing. Join 1,500 industry practitioners for three days of instruction, inspiration and interaction.

More information: [CLICK HERE](#)

IMERGE Speaker Bureau

IMERGE can provide speakers to cover numerous business management and technology topics, including compliance, operational efficiency, effective use of technology in support of business processes, and vertical applicaiton. We can cover a 60 minute meeting or all-day workshop, and provide practical, effective approaches to your organizational issues. We are available throughout the US and Canada. To request a speaker please contact Jesse Wilkins at (303) 574-1455 or jesse.wilkins@imergeconsult.com

IMERGE in the News

IMERGE Partner, Principal Recognized by AIIM. At the AIIM 2005 Award Banquet on May 18, IMERGE Partner Jim Minihan and IMERGE Principal Bernard Chester received the AIIM Master of Information Technologies designation, which recognizes experience and expertise in the enterprise content management industry.

IMERGE Principal Named to Chair Canadian Standard Committee. IMERGE Principal Vigi Gurushanta, FICB, has been named Chair of the Canadian Advisory Committee (CAC) on ISO/TC171 by the Canadian National Committee on the ISO (CNC/ISO) for a three year period. The ISO/TC171 committee primarily deals with document management application standards.

IMERGE Partner Completes Term as Chair of AIIM 2005. IMERGE Partner Don Post has completed his term as Chair of the successful AIIM 2005 conference held May 17-19 in Philadelphia. The conference was hailed as a success in the press and by AIIM, and with more than 35,000 attendees, is North America's largest enterprise technology event.

IMERGE Principal Joins AIIM EmTAG. IMERGE Principal Gary Gershon has been named to the AIIM Emerging Technologies Advisory Group (EmTAG), a committee of AIIM members charged with monitoring technology advances and assessing their impact on the AIIM community.

IMERGE Welcomes Bill Broddy, EDP, as Principal. William Broddy, EDP, is Principal Consultant for Compliance Communications Business Processes. He currently assists major organizations across North American with regulatory best practices, market planning, and implementation of electronic document delivery applications. Bill brings 25 years of experience with electronic document enabling and delivery, including experience at IBM and as Vice President of Business Development for Prinova Technologies. He is an EDP Commissioner and Course Instructor for the Canadian EDP Certification Program.

Bill has been published and quoted in both professional journals, and the general press, including: eBill Magazine, On-Demand Business, Xploration, Canadian Printer, the Globe and Mail, Macleans Magazine and the CBC (Canadian Broadcasting Corporation), News-World. Xplor, the Electronic Document Systems Association, recognized his leadership and expertise in 2004 with their most prestigious award "Xplor of the Year". Bill has an MBA from Loyola University.

For more information about Bill, [CLICK HERE](#).

IMERGE Welcomes Neil Buchanan as Principal. Neil Buchanan brings over 25 years experience as a consultant and executive in the field of enterprise systems, integrated electronic records and enterprise content management. Although Neil has a prolific knowledge of information systems and imaging technologies, his forte is the practical application of the correct technology.

As a veteran of the industry and a senior executive with Kodak, Neil has designed and deployed enterprise records management systems for clients in almost every market sector and vertical markets. During this time Neil has served clients such as CIBC, Scotiabank, Bell Canada, IBM, Barclays Bank, Ontario Hydro, Sun Life, Aetna and the Federation des caisses du Quebec.

Neil combines a deep theoretical foundation and strategic insight with the ability to successfully execute against the defined deliverables. An "out of the box" thinker, he has a well developed ability to isolate business problems, define strategy and translate ideas and concepts into practical solutions.

For more information about Neil, [CLICK HERE](#).

New Publications, April - June 2005

"Solutions for Pharma: Prescription for Compliance", by Robert Smallwood, KMWorld Magazine, June 2005, [CLICK HERE](#)

"Fundamentals: Change Management", by Bernard Chester, AIIM e-DOC Magazine, May/June 2005, [CLICK HERE](#)

"Documents on the Desktop", by Gary Gershon, AIIM, e-DOC Magazine, May/June 2005, [CLICK HERE](#)

"Collaborative Tools: Records Management Challenges", by Robert Smallwood, AIIM e-DOC Magazine, May/June 2005, [CLICK HERE](#)

"Finding a New Groove", by Robert Smallwood, KMWorld Magazine, May 2005, [CLICK HERE](#)

"Relieving the Burden", by Bernard Chester, DB2 Magazine, Q2 2005, [CLICK HERE](#)

"Email Takes Center Stage: Part 2", by Robert Smallwood, KMWorld Magazine, April 2005, [CLICK HERE](#)

"Email Takes Center Stage: Part 1", by Robert Smallwood, KMWorld Magazine, March 2005, [CLICK HERE](#)

"Lion, Tigers, Blogs - OH MY!", by Jesse Wilkins, AIIM, e-DOC Magazine Online, May 2005, [CLICK HERE](#)

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