Education Track

Tuesday, January 9

Time	Topic	Speaker
1:30-2:30 PM	Forms 101: Streamline Information Capture and Review (Room 101AB)	• DY Lee, Sales Account Manager, Laserfiche • Nicholas Rodriguez, Solutions Consultant, Laserfiche
2:45-3:45 PM	Enhancing Public Services: Standardizing Data Collection at the Outset (Room 103AB)	• LeeAnn Marchant, Project Coordinator/Business Analyst, Town of Okotoks
4:00-5:00 PM	Forms 103: Building Forms Processes Lab (Grand Ballroom A)	• John McNamara, Presales Engineer, Laserfiche

Wednesday, January 10

Time	Topic	Speaker
8:30-9:30 AM	**General Session Keynote** (Pacific Ballroom)	
9:45-10:45 AM	Workflow at Work: Onboarding 300 Employees in 3 Months (Room 103AB)	• John Rokenbrod, Software/Records Analyst, Bryan ISD • Shay Sicinski, Assistant Director of Human Resources, Bryan ISD
11:00 AM -12:00 PM	What I Wish I Had Known Before Automating My Process (Room 102AB)	• Michael Wells, Desktop Services Manager, Chesterfield County, VA • Carl Hunter, IT Analyst, City of Rochester, MN • Julie Holcomb, City Clerk, City of Ithaca, NY
11:00 AM -12:00 PM	End-to-End Process Automation: Taking Command of the Account Opening Process (Room 103AB)	• Jamie Pickering, System Engineer, First Command Financial Services, Inc.
	Lunch Break & Networking (Exhibit Hall) **Forms 105: Lunch Q& A** (Seaside Lobby)	
1:30-2:30 PM	When Failure is NOT an Option—How to Deliver IT Programs and Projects Successfully (Room 204)	• Thomas Phelps IV, VP of Corporate Strategy & CIO, Laserfiche • Erica Scoby, Program Manager, Laserfiche • Collin Boyce, CIO, City of Lansing, Michigan • Raelynn Napper, Public Safety Recruitment & Selection Division Manager, Personnel Department

2:45-3:45 PM	Audience Engagement: The Art of Storytelling for Leaders (Room 102AB)	• Kerri Garbis, President, Ovation Communication
4:00 – 5:00 PM	Chopped Laserfiche Edition: Business Process Automation Tournament (Room 102AB)	• Dave Covert, Enterprise Application Supervisor, Bonneville Joint School District No. 93 • Melissa Henley, Director of Marketing Communications, Laserfiche • Michael Wells, Desktop Services Manager, Chesterfield County • Beverly Strickland, Laserfiche Administrator, North Carolina Department of Environmental Quality • Amy Johnson, Systems Admin Senior, Hanover County, VA
5:30 – 7:30 PM	**Special Event: Empower After Hours** (Pacific Ballroom) **VOICES–Celebrity Singers of Pop, Rock and R&B**	

Thursday, January 11

Time	Topic	Speaker
8:30 – 9:30 AM	**General Session Keynote & Run Smarter Awards** (Pacific Ballroom)	
9:45-10:45 AM	Lending a Helping Hand: Better Case Management for Better Care (Seaside B)	• Dr. Will Brandon, CEO, Learning ARTS
11:00 AM -12:00 PM	Brew Up Better Meetings with the Lean Coffee Method (Room S7)	• Tim Nolan, Applications Manager, Collin County, TX
11:00 AM -12:00 PM	Painless & Paperless Requests: Accelerating Approval Processes with e-Forms (Room 103AB)	• Chris Cooper, Business Analyst, CATIC
Lunch Break & Networking (Exhibit Hall) **Workflow 103: Lunch Q&A** (Seaside Lobby)		
1:30-2:30 PM	Networking User Group: Education (Room S7)	• Grace Ding, Higher Education Marketing Specialist, Laserfiche • Noël Hong, K-12 Marketing Associate, Laserfiche
2:45-3:45 PM	Developer 101: Easy Integrations with Laserfiche Connector Lab (Room 202ABC)	• Brandon McDonald, Technical Trainer, Laserfiche
4:00-5:00 PM	Forms Power Demo: How to Design & Build a Smart Form in One Hour (Room 102AB)	• Dave Covert, Enterprise Application Supervisor, Bonneville Joint School District No. 93

Forms 101: Streamline Information Capture and Review

Laserfiche Forms offers quick, simplified data collection and processing for your entire organization.

In this session, you can see how different organizations are leveraging this tool and learn how to:
- Route, interact with and manage information through web-based forms
- Manage business processes in Laserfiche Forms
- Publish e-forms that people outside your organization can use with Forms Portal

Class Level: Beginner

Alternate sessions:
- Tuesday, January 9th at 1:30 PM in Room 101AB
- Wednesday, January 10th at 11:00 AM in Room 101AB

Speakers include:
- DY Lee, Sales Account Manager, Laserfiche
- Nicholas Rodriguez, Solutions Consultant, Laserfiche

About The Speakers

DY is an Account Manager at Laserfiche. He pursues new sales opportunities and is often the first point of contact for new projects. DY also consults with clients to address Laserfiche questions. He has partnered with teams and organizations across all industries and has lived in many cities across the U.S., including Seattle, Columbus and Chicago.

Nicholas Rodriguez is a Laserfiche Solutions Consultant. He directly serves some of the company's largest clients and develops strategic partnerships with existing and prospective customers across all industries. His product knowledge makes him a valuable liaison to project team engineers. Nick helps clients improve business efficiency with innovative solutions that are scalable and cost-effective.

Enhancing Public Services: Standardizing Data Collection at the Outset
LeeAnn Marchant, Project Coordinator/Business Analyst, Town of Okotoks

The Town of Okotoks is the largest town in the province of Alberta, Canada. Before implementing Laserfiche, the town struggled to manage paper documents spread out across 20 different business centers. This caused significant delays and higher risks of human errors as information on manual forms had to be rekeyed into their systems. Using Laserfiche Forms, the town has processed 21,000 digital forms into one repository and eliminated the need for paper. Laserfiche is not just a document storage system; it's a primary focus for future operations.

Find out how the Town of Okotoks:
- Generates massive savings from implementing Laserfiche Forms across 150 processes
- Increases transparency throughout the document lifecycle
- Encourages team collaboration on received documents and requests

About The Speaker

LeeAnn has worked for the Town of Okotoks in IT for 4 years. During this time, she identified and mentored individuals during the deployment of Laserfiche throughout the organization. Her responsibilities include working with the 20 Business Centers to identify key personnel and to train and assist them in leveraging the Laserfiche suite of products in their daily activities.

Forms 103: Building Forms Processes (Lab)
John McNamara, Presales Engineer, Laserfiche

Once you've built a form, plan how you'll use the information you gather.

In this session, you will learn:
- How to use the basic features of the Business Process Modeler in Laserfiche Forms
- How to route forms for review and approval
- How to use the Business Process Modeler to send participants notifications about required work

Class Level: Beginner

Alternate sessions:
- Tuesday, January 9th at 4:00 PM in Grand Ballroom A
- Wednesday, January 10th at 2:45 PM in Grand Ballroom A
- Thursday, January 11th at 2:45 PM in Grand Ballroom A
- Friday, January 12th at 2:45 PM in Grand Ballroom A

About the Speaker

John McNamara works as a Laserfiche Presales Engineer, designing innovative solutions to help organizations solve their business challenges. Although he is based out of Washington D.C., you can find him at user groups and VAR trainings across the country, sharing his product knowledge and helping customers get the most out of their Laserfiche systems.

Workflow at Work: Onboarding 300 Employees in 3 Months

People are the most valuable resource in any organization, and it is vital to empower employees with tools to do their best work. For Bryan Independent School District, which onboards over three hundred new employees during peak summer recruiting months, this meant implementing Laserfiche Workflow in HR to reduce the manual burden on staff and accelerate processes for prospective employees.

Learn how Bryan ISD achieved $350,000 in soft savings as they share strategies for:
- Designing powerful Laserfiche Workflows to streamline New Hire Onboarding for maximum impact
- Extending solutions through integration with core systems using Laserfiche Workflow
- Project-managing a successful process improvement initiative

Speakers include:
- Shay Sicinski, Assistant Director of Human Resources, Bryan ISD
- John Rokenbrod, Software/Records Analyst, Bryan ISD

About The Speakers

Shay has a long history working in K-12 education. She currently serves as the Assistant Director of Human Resources at Bryan ISD. She is responsible for staffing, certification, references and H1-B VISAs. She was previously a 7th and 8th grade science teacher, a girls athletic coordinator and the head coach for middle school volleyball, basketball and soccer.

John is Bryan ISD's Laserfiche project manager and recently added management of the district's non-digital records to his list of responsibilities. He has extensive experience in K-12 education and leadership, having served as an elementary and high school principal, central office administrator, secondary assistant principal, department head and teacher.

What I Wish I Had Known Before Automating My Process

Process automation and re-engineering is no easy task. Join a panel of automation experts to hear how you can avoid pitfalls and learn from their experience to ensure success from the start.

We will discuss:
- How to effectively design automated processes
- Tips and tricks to help users complete processes correctly
- Roll out strategies that increase user adoption

Speakers include:
- Michael Wells, Desktop Services Manager, Chesterfield County
- Melissa Henley, Director of Marketing Communication, Laserfiche
- Carl Hunter, IT Analyst, City of Rochester, MN
- Julie Conley Holcomb, City Clerk, City of Ithaca, NY

About The Speakers

Michael Wells has worked for the County of Chesterfield for 23 years both as an analyst and now as the manager of the Desktop Services Team. His team is responsible for the care and management of the enterprise installation of Laserfiche, which includes maintaining the existing records and repositories and working with customers to develop new solutions for ECM. Michael is one of the leaders of the Virginia Laserfiche User Group and considers the shared knowledge of users to be one of the most valuable assets. He himself has 11 years of experience working with the county's Laserfiche system.

Melissa Henley, Director of Marketing Communications at Laserfiche, oversees corporate marketing communications initiatives. Melissa, who joined Laserfiche in 2007, has nearly 20 years' experience driving strategic marketing plans for leading software, financial services and educational organizations. She is a frequent speaker at industry events, user groups and webinars on topics including change management, presentation techniques and other management skills. Melissa is a member of the International Institute of Municipal Clerks (IIMC) Foundation Board of Directors, where she serves as chair of the Marketing Committee.

A Minnesota native, Carl Hunter has been working in local government to create solutions with the Laserfiche suite for 3 years and working as an administrator for 2. His favorite part of using Laserfiche is when the business user turns from a skeptic to a proselytizer after their first solution goes live.

Julie Conley Holcomb has served as City Clerk and Deputy City Clerk for the City of Ithaca for the past 29 years. She is the City's Public Information Officer and Records Access Officer, and currently oversees the City's Department of Public Information and Technology.

End-to-End Process Automation: Taking Command of the Account Opening Process
Jamie Pickering, System Engineer, First Command Financial Services, Inc.

Come see how a financial services company in Fort Worth, Texas transformed their new account set up process with Laserfiche, streamlining the process from taking days to being funded within minutes. They'll reveal how they connected Laserfiche with their inhouse systems and worked with vendors to achieve maximum efficiency with end-to-end process automation.

Join us to learn about:
- Reducing roadblocks by ensuring the accuracy of essential information before it is even submitted
- Integrating e-signatures into forms with DocuSign to enable complete digitization of the account setup process
- Integrating seamlessly with third-party systems to reduce processing time down to seconds
- Employing Agile methodology to enhance collaboration and facilitate better opportunities during project development

About the Speaker

Jamie Pickering, Systems Engineer, utilizes Laserfiche to develop end-to-end straight-through processing, from designing client information forms to automating submissions to clearing firms. She worked on an initial implementation of a new account setup process, funding processes, and maintenance flows, including approval processes and repository storage.

When Failure is NOT an Option—How to Deliver IT Programs and Projects Successfully

The numbers are alarming: over half of IT projects fail from complexity or do not deliver on time, scope or budget. When failure is not an option and the stakes are high, how do you ensure projects are delivered successfully?

This session will cover:
- Different project management methodologies based on the organizational culture and type of project
- A five step approach to manage project risks
- A perspective from the CIO of the City of Lansing, Michigan, on delivering successful projects
- A "voice of the customer" viewpoint from the Personnel Department with the City of Los Angeles

Speakers include:
- Thomas Phelps IV, VP of Corporate Strategy & CIO, Laserfiche
- Erica Scoby, Program Manager, Laserfiche
- Collin Boyce, CIO, City of Lansing, Michigan
- Raelynn Napper, Public Safety Recruitment & Selection Division Manager, Personnel Department, City of Los Angeles

About the Speakers

Thomas Phelps IV is the Vice President of Corporate Strategy & CIO for Laserfiche. He leads IT, vertical marketing, analyst relations and major corporate initiatives. He is part of the executive team that launched Laserfiche Cloud in 2015. Previously, Thomas was the national entertainment and media champion for cybersecurity at PwC. He was part of a five-person startup team that launched the Internet Products Software Division at Motorola.

Thomas has co-authored/contributed to five books, including Risks of Customer Relationship Management—a joint publication by PwC and ISACA—and Telecommunications Cost Management published by CRC Press. He is a Past-President of ISACA Los Angeles and is on the International 50th Anniversary Advisory Panel. He is on the Executive Board for UCLA IS Associates and serves as the Co-President of Ascend Los Angeles. Along with speaking at the Harvard IT Summit and instructing the CISA Review Course, Thomas guest lectures at USC and CSU-Long Beach on security, data analytics and marketing. He has been quoted in Business News Daily, CBS Pulse, CIO Review, InvestmentNews, LA Times, TechTarget and many other publications.

Erika joined Laserfiche as the Program Manager for Laserfiche Consulting Services (LFC) in early 2017. She began her career at an algorithm development company as a programmer and data analyst, and quickly moved into a project management role.

Prior to Laserfiche, Erika served as Director of Project Management and Customer Onboarding for the professional services team at a financial technology startup in San Francisco, where she helped build the services team from the ground up and managed all of the early projects with large financial institutions.

Collin Boyce is the Chief Information Officer for the City of Lansing, Michigan. Boyce provides leadership for the technology-based customer service improvements, technology based workflow optimizations, and secure computing for information technology. His primary responsibility encompasses a wide variety of strategic technology issues: governance and policy, resource allocation, information security and assurance, and information technology services.

Prior to joining the City of Lansing, Boyce spent 20 years in informational technology roles in multiple industries including Biodefense, Call center, dotcom, education, finance and telecommunications. Most recently, as the Directory of Information Technology for Comlink. Boyce holds a B.A and M.A., from the Fairleigh Dickinson University, Teaneck, NJ.

Raelynn Napper has worked for the City in a variety of assignments, primarily in the Personnel Department, for over 18 years. She currently serves as the manager of the Public Safety Recruitment and Selection Division of the Personnel Department, and she oversees approximately 90 public safety exams, including Police Officer and Firefighter, which involves handling and processing over 10,000 candidates per year. In 2014, she initiated PerformLA, which is a program that brings Lean methodology to the City through training and process improvement facilitation.

Prior to this assignment, she managed the EEO and Employee Development Division, where she guided the transition from classroom based learning to e-learning and the establishment of an online training academy. Prior to becoming the EEO Manager, she provided dedicated assistance and expertise to Fire Department management in developing an organizational structure, procedures, training, and other solutions to address EEO, hazing, and personnel-related workplace issues. Other key assignments included Executive Recruitment in the wake of a new Mayor and revising the employment provisions of the City Charter. In 2008, Raelynn graduated from Southwestern Law School, where she attended while working full-time. She is also a proud member of the Trojan Class of 2000.

Audience Engagement: The Art of Storytelling for Leaders
Kerri Garbis, President, Ovation Communication

When was the last time a presentation made you sit up and take notice? Did that presenter tell you a story? Storytelling is the most effective way to get a message across to any audience. It allows you to connect emotionally with your listeners, persuade them more easily, and garner the results you want. This highly interactive session will introduce you to the six major components needed for a complete story, the different types of stories you can tell, and where/when to tell a story. You will learn how to present with poise and engage your audience in a positive, memorable manner as well as the professional's go-to techniques for conquering stage fright!

About the Speaker

Kerri is the President and co-founder of Ovation Communication. A professional actress since childhood, her company helps business professionals master the art of human interaction through transformative Presentation Skills, Storytelling and Emotional Intelligence training. Kerri's first book, Presentation Skills for Managers, is available now from McGraw-Hill.

Chopped Laserfiche Edition: Business Process Automation Tournament

Let's get ready to rumble! This smash hit session is back by popular demand: watch as three adept Laserfiche users battle it out in a rapid-fire competition to design winning solutions to common business problems. They'll be relying on their wits and their extensive experience to select the right tools for the job and build the most efficient and effective process possible.

Join this thrilling session to learn:
- The best ways to approach designing new automation projects
- How to pick the right tools and features for designing a process that meets your organization's needs
- Which Laserfiche products work best in different situations and how they work together to complement each other

Speakers include:
- Dave Covert, Enterprise Application Supervisor, Bonneville Joint School District No. 93
- Melissa Henley, Director of Marketing Communications, Laserfiche
- Michael Wells, Desktop Services Manager, Chesterfield County
- Beverly Strickland, Laserfiche Administrator, North Carolina Department of Environmental Quality
- Amy Johnson, Systems Admin Senior, Hanover County, VA

About the Speakers

Dave Covert has worked in the Technology Department with Bonneville Joint School District No. 93 for almost 30 years. In the past 4 years he has used Laserfiche to dramatically improve efficiency and productivity within the district by using Forms and Workflow to benefit all patrons and employees.

Melissa Henley, Director of Marketing Communications at Laserfiche, oversees corporate marketing communications initiatives. Melissa, who joined Laserfiche in 2007, has nearly 20 years' experience driving strategic marketing plans for leading software, financial services and educational organizations. She is a frequent speaker at industry events, user groups and webinars on topics including change management, presentation techniques and other management skills. Melissa is a member of the International Institute of Municipal Clerks (IIMC) Foundation Board of Directors, where she serves as chair of the Marketing Committee.

Michael Wells has worked for the County of Chesterfield for 23 years both as an analyst and now as the manager of the Desktop Services Team. His team is responsible for the care and management of the enterprise installation of Laserfiche, which includes maintaining the existing records and repositories and working with customers to develop new solutions for ECM. Michael is one of the leaders of the Virginia Laserfiche User Group and considers the shared knowledge of users to be one of the most valuable assets. He himself has 11 years of experience working with the county's Laserfiche system.

Beverly Strickland has worked for the NC Division of Water Resources for more than 20 years, where she has been a driving force in moving from a paper-based system to providing online access to millions of records. She holds a degree in business administration from Meredith College and has twice been named outstanding employee of the year.

Amy has worked for the Hanover County Commissioner of the Revenue since 1992 and has co-lead the Virginia Laserfiche User Group since 2009. In 2014, she was honored with the Margaret Anderson Deputy of the Year Award. She loves finding ways for Laserfiche to help her office be more efficient.

Lending a Helping Hand: Better Case Management for Better Care
Dr. William Brandon, CEO, Learning ARTS

Quadrupling caseloads and simultaneously increasing the quality of care provided to clients is no easy feat, but Learning ARTS did just that by using Workflow and Forms to streamline the way they manage cases. Founded in 1997, this California-based company helps hundreds of families every year who are affected by Autism Spectrum Disorder (ASD) by providing health and education development programs. Come learn how they used Laserfiche to automate the influx of over 60,000 educational and medical records each month and doubled staff retention rates with improved training.

They'll be highlighting how they:
- Improved care by gathering electronic data to make smarter, more informed decisions
- Developed strategies to effectively integrate with other software
- Fostered the use of technology with internal staff and external clients

About the Speaker

Dr. Will Brandon has been working with children with autism for the past 20+ years and is the founder of Learning ARTS. In addition to his work with Learning ARTS, Dr. Brandon has been an adjunct professor and participated as a guest speaker and presenter at numerous conferences and symposiums.

Brew Up Better Meetings with the Lean Coffee Method
Tim Nolan, Applications Manager, Collin County, TX

Tired of wasting time in long, drawn-out meetings? Are you ready to finally have a productive meeting where everyone is fully engaged and participating? Are you ready for a fun new meeting format? The Lean Coffee method is all about collaboration and simplicity.

In this workshop, we will cover the following:
- What tools are necessary for conducting a Lean Coffee meeting
- How Lean Coffee can be applied in your office
- A Lean Coffee meeting followed by a retrospective to discuss the upsides, downsides, and how this meeting format can fit in at your organization

About the Speaker

Tim was hired at Collin County in 1992. He launched GIS, Scrum and kanban at Collin County. He's learned that Records Management is cooler than you think, and apps are the best way to share information. GIS was his first love, and Agile is his new love.

Painless & Paperless Requests: Accelerating Approval Processes with e-Forms
Chris Cooper, Business Analyst, CATIC

This class will showcase a dynamic Laserfiche Forms solution built for requesting and submitting information from employees in the field. See how a New England-based insurance company eliminated paper and cut their processing time in half for retrieving vital claims information. They'll be demonstrating how they streamlined information capture and review, and they'll be highlighting powerful features like payment requests & approval, task reassignment, and even a grading system for ensuring the accuracy and completeness of data submitted by fieldworkers.

Join this session to see how to:
- Streamline time-consuming and paper-heavy processes
- Use creative routing and variables to save major steps and reduce processing time
- Create dynamic and flexible forms solutions that benefit every department involved in business processes

About the Speaker

Chris Cooper is a business analyst at CATIC. He oversaw the Laserfiche implementation which earned them a 2016 Run Smarter Award for Most Significant Process Automation Initiative. He holds a B.S. in Business Management and is completing his M.S. in Management and Organizational Leadership from Albertus Magnus College.

Networking User Group: Education
Enjoy a nice afternoon tea party with other education Laserfiche users. Network and exchange technology solution ideas and share common interests. This group is open for users of all levels from the Education sector.

Speakers include:
- Grace Ding, Higher Ed Marketing Specialist, Laserfiche
- Noël Hong, K-12 Marketing Associate, Laserfiche

About the Speakers

Grace Ding is a Higher Ed Marketing Specialist at Laserfiche, where she focuses on supporting and growing the higher education and K-12 user communities and working with developers and customers to create software solutions tailored for education users. Follow her on Twitter at @gracetding.

Noël Hong recently joined Laserfiche as the K-12 Marketing Associate, a role that is well suited for her background in academic research and entertainment marketing and communications. At Laserfiche, Noël monitors industry trends in the K-12 market and helps schools and districts learn best practices through webinars and user groups. Follow her on Twitter at @Noel_Laserfiche.

Developer 101: Easy Integrations with Laserfiche Connector (Lab)
Brandon McDonald, Technical Trainer, Laserfiche

Laserfiche Connector is a simple, code-free way to integrate line of business applications like CRM and ERP systems with Laserfiche.

In this session, you will learn how to:
- Set up Connector-based integrations
- Use third-party applications to search for information stored in Laserfiche
- Assign metadata to a scanned document from information in a third-party application

Class Level: Beginner

Alternate sessions:
- Wednesday, January 10th at 2:45 PM in Room 202ABC
- Thursday, January 11th at 2:45 PM in Room 202ABC
- Friday, January 12th at 1:30 PM in Room 202ABC

About the Speaker

Brandon McDonald recently joined Laserfiche as a Technical Trainer. He brings a wealth of technical training experience from both the biomedical and academic fields. Through trainings and consultation forums, Brandon develops clients' and vendors' technical expertise of the Laserfiche product suite.

Forms Power Demo: How to Design & Build a Smart Form in One Hour
Dave Covert, Enterprise Application Supervisor, Bonneville Joint School District No. 93

Join this one-hour power demonstration to gain insight on how to design smarter solutions with Laserfiche Forms. From planning to publishing, Forms guru Dave Covert will be sharing the process he's perfected for formulating powerful and time-saving solutions. He'll even build a form during this class using input from the audience to show just how easy it can be!

Come learn how to:
- Identify pain points in your business processes and determine how to develop a solution with Laserfiche Forms
- Ask the right questions during the planning stage to help thoroughly map out the requirements
- Take advantage of tools like hidden fields and database lookups to automatically route forms where they need to go, eliminating bottlenecks in your processes

Class Level: Beginner

Alternate session:
- Tuesday, January 9th at 4:00 PM in Room 102AB
- Thursday, January 11th at 4:00 PM in Room 102AB

About the Speaker

Dave Covert has worked in the Technology Department with Bonneville Joint School District No. 93 for almost 30 years. In the past 4 years he has used Laserfiche to dramatically improve efficiency and productivity within the district by using Forms and Workflow to benefit all patrons and employees.