



**AGENDA**  
**INFOGOV WORLD 2023**  
**‘Information Governance in Action’**

A Global Conference in San Diego

October 2-4, 2023

Agenda As of September 12, 2023



**Day One, Monday, October 2**

<b>Time</b>			
<b>9am-5pm Pacific Time</b>	<b>Courtyard Registration &amp; Coffee</b>		<b>Regency Ballroom Exhibitor Setup</b>
	Regal Ballroom A	Regency West	Regal Ballroom C
<b>9am</b>	9am-4pm <b>CIGO Prep Training Class</b>  <b>Robert Smallwood</b> <i>Chair, CIGO Assn.</i> <b>Greetham</b> <i>PC Forensics</i> <b>Baird Brueseke</b> <i>eVisit</i> <i>et. al.</i>	9am-4pm <b>Policy Drafting Workshop</b>  <b>Lewis Eisen, J.D.</b> <i>Leading Authority on Policy Effectiveness</i>	10am-4pm <b>AI Governance Workshop</b>  <b>Peter Stockburger</b> <i>Managing Partner, Dentons S.D.</i> <b>Dr. Pat Franks</b> <i>San Jose State U</i> <b>Chris Surdak</b> <i>AI Expert</i> <b>Robert Cruz</b> <i>Smarsh</i> <b>Robert Smallwood</b>
<b>4pm-5pm</b>	<b>CIGO Association 1<sup>st</sup> Annual Meeting</b> <b>Regency</b>		
<b>5pm-7pm</b>	<b>Courtyard &amp; Regency Ballroom</b>  <b>“Meet the Speakers” Networking &amp; Drinks Reception</b>		
<b>7-9pm</b>	<b>Offsite Networking Events</b> <i>(Downtown San Diego)</i>		



## Day Two, Tuesday, October 3

Time	
7am Pacific Time 8:55am	<b>Hotel Lobby Courtyard</b>  <b>Registration &amp; Breakfast (full hot breakfast)</b>
8:55-9:10	<b>Horton Grand Theatre</b> <b>Welcome from the Conference Chair</b> <i>Robert Smallwood, CEO, InfoGov World</i>
9:10	<b>AI Governance</b> <b>Horton Grand Theatre</b> <b>Keynote Session:</b>  <b>“AI &amp; Digital Transformation: Where Are We Going? (and How Will We Know If We get There?)”</b>  <b>Chris Surdak</b> Quantiqs, Inc.
9:40	<b>Horton Grand Theatre</b> <b>Vendor Showcase</b>
9:50-10:30	<b>AI Governance Roundtable Discussion</b>  Chris Surdak, J.D. Pat Franks, PhD, IGP, CRM/ CIGO® Robert Cruz, MBA Peter Stockburger, J.D. Robert Smallwood, MBA, IGP, CIGO® (Moderator)
10:30-11:00	<b>Courtyard &amp; Regency Ballroom</b>  <b>Information Market &amp; Networking Time</b>



Day Two, Tuesday, October 3				
Session Rooms	Horton Grand Theatre	Regal Ballroom A	Regency West	Regal Ballroom C
11:00-11:45	<p><i>RIM Issues</i></p> <p><b>RIM Roundtable Panel Discussion</b></p> <p><b>Dr. Pat Franks</b> <i>San Jose State U</i></p> <p><b>Monica Crocker</b> <i>Wells Fargo</i></p> <p><b>Arlette Walls</b> <i>Iron Mountain</i></p> <p><b>Natausha Cruz-Wilson</b> <i>Qualcomm</i></p>	<p><i>AI Governance Info Risk</i></p> <p><b>Artificial Intelligence and Compliance: How to Identify and Mitigate the Risks</b></p> <p><b>Robert Cruz</b> <i>Smarsh, Inc.</i></p>	<p><i>Privacy</i></p> <p><b>The Governance Paradox: How to Resolve the Growing Conflict Between Management Mandates and Data Privacy Regimes</b></p> <p><b>Dean Gonsowski, Esq.</b> <i>Gimmel</i></p> <p><b>Matthew Krengel, Esq.</b> <i>Cooley LLP</i></p>	<p><i>Data Gov Privacy</i></p> <p><b>An Effective Sensitive Data Management Program and How it Solves for Consumer Privacy &amp; Data Governance Functions</b></p> <p><b>Anish Abraham, Aditya Kongara, &amp; Carlos Navarro</b> <i>USAA</i></p>
11:50-12:20pm		<p><i>AI Governance IG Best Practices</i></p> <p><b>The DL on AI &amp; IG</b></p> <p><b>Chad Hartman</b> <i>VP Operations</i></p> <p><b>Jim Higdon</b> <i>SVP Information Strategy</i> <b>Vendor Direct Solutions</b></p>	<p><i>IG Best Practices</i></p> <p><b>Should Information Age Like Fine Wine?</b></p> <p><b>David Gould</b> <i>Chief Customer Officer</i> <b>EncompaaS</b></p>	<p><i>eDiscovery</i></p> <p><b>Important eDiscovery Cases of 2023</b></p> <p><b>Tom O'Connor</b> <i>Director</i> <b>Gulf Coast Legal Tech Center</b></p>
12:20pm-1:20pm	<p><b>Courtyard &amp; Regency Ballroom</b></p> <p><b>Lunch &amp; Networking</b></p>			



<p style="text-align: center;"><b>Copley Alley</b>  <b>Networking Lounge Open</b>  <i>Sponsored by CIGO Association</i></p>				
Session Rooms	Horton Grand Theatre	Regal Ballroom A	Regency West	Regal Ballroom C
1:30pm PT	<p><b>1:30-2:20</b> <i>Data Gov</i></p> <p><b>Data Governance Roundtable Discussion</b></p> <p><b>Azeem Choudhury</b> PwC (Moderator)</p> <p><b>Aditya Kongara</b> USAA</p> <p><b>Anjali Gugle</b> Cisco Systems</p>	<p><b>1:30-2:00</b> <i>IG Best Practices</i></p> <p><b>Policymaking: How to Write Rules that People Will Follow</b></p> <p><b>Lewis Eisen</b> Policy Expert</p>	<p><b>1:30-2:00</b> <i>Cybersecurity Info Risk</i></p> <p><b>Conquering the Cyber-Elephant in the Boardroom: How to Get the C-Suite and Boardroom Onboard with Cyber Accountability</b></p> <p><b>Mathieu Gorge</b> CEO VigiTrust</p>	<p><b>1:30-2:00</b> <i>eDiscovery AI</i></p> <p><b>EDRM Workflow – In Real Life &amp; How AI May Impact It</b></p> <p><b>David Greetham</b> Principal PC Forensics</p>
	<p><b>2:35-3:25</b> <i>eDiscovery</i></p> <p><b>eDiscovery Governance Roundtable Discussion</b></p> <p><b>David Greetham (M)</b> Tom O'Connor Joy Murao Peg Gianuca</p>	<p><b>2:05-2:35</b> <i>IG Best Practices</i></p> <p><b>Introducing and Sustaining an IG Program</b></p> <p><b>Kris Helge</b> Deputy Director of IT Services CO Judicial Branch</p> <p><b>Jason Velasco</b> Founder &amp; CEO Kindato Consulting</p>	<p><b>2:05-2:35</b> <i>Data Gov</i></p> <p><b>Computational Data Governance with Data Mesh</b></p> <p><b>Anjali Gugle</b> Product Security and Data Strategy Cisco Systems</p>	<p><b>2:05-2:35</b> <i>AI RIM Best Practices</i></p> <p><b>Navigating the AI Landscape: From Content Creation through Retention and Disposition</b></p> <p><b>Dr. Pat Franks</b> Professor Emerita San Jose State U</p>
3:00-3:30	<p><b>Courtyard &amp; Regency Ballroom</b></p> <p><b>Information Market &amp; Networking Time</b></p>			

Session Rooms	Horton Grand Theatre	Regal Ballroom A	Regency West	Regal Ballroom C
	<p data-bbox="479 590 594 653">3:30-4:20 <i>Legal</i></p> <p data-bbox="423 695 647 793">Law Firm IG Issues Roundtable Discussion</p> <p data-bbox="435 842 636 905">David Greetham (M)</p> <p data-bbox="459 911 612 936">PC Forensics</p>	<p data-bbox="743 386 859 411">2:40-3:10</p> <p data-bbox="708 426 894 489"><i>RIM M365/Purview</i></p> <p data-bbox="683 499 919 705">Information Architecture in M365: a Roadmap to Operationalizing Retention and Disposition</p> <p data-bbox="727 751 875 825">John Collins Lighthouse</p>	<p data-bbox="1003 386 1118 411">2:40-3:10</p> <p data-bbox="967 422 1154 447"><i>AI Governance</i></p> <p data-bbox="954 489 1167 695">The Robots Are Coming: How to Build a Successful AI Risk Management Program</p> <p data-bbox="951 737 1170 873">Peter Stockburger Managing Partner San Diego Dentons</p>	<p data-bbox="1260 386 1375 411">2:40-3:10</p> <p data-bbox="1224 422 1427 447"><i>IG Best Practices</i></p> <p data-bbox="1211 489 1430 663">IG by Design: Leveraging Tech Initiatives to Drive Governance Imperatives</p> <p data-bbox="1208 705 1430 873">Azeem Choudhury PwC Scott Whittington Fairfield Residential</p>
	<p data-bbox="464 982 612 1045">Leigh Isaacs DLA Piper</p> <p data-bbox="435 1094 641 1157">Patty Fitzpatrick Seyfarth Shaw</p> <p data-bbox="427 1199 647 1297">Matthew Kregel, Esq. Cooley LLP</p>	<p data-bbox="743 936 859 961">3:15-3:45</p> <p data-bbox="708 968 894 1031"><i>M365/Purview Change Mgmt.</i></p> <p data-bbox="683 1073 919 1255">Reassessing Success: Refocusing on the Needs of End Users with Real Microsoft 365 Change Management</p> <p data-bbox="708 1304 894 1402">Natausha Cruz-Wilson Qualcomm</p>	<p data-bbox="1003 936 1118 961">3:15-3:45</p> <p data-bbox="992 968 1130 993"><i>RIM Issues</i></p> <p data-bbox="954 1073 1167 1209">I Like Big Buckets: Retention Schedule Simplification</p> <p data-bbox="967 1251 1154 1314">Monica Crocker Wells Fargo</p>	<p data-bbox="1260 936 1375 961">3:15-3:45</p> <p data-bbox="1252 968 1390 993"><i>eDiscovery</i></p> <p data-bbox="1224 1052 1427 1150">Managing eDiscovery and Legal Holds</p> <p data-bbox="1224 1199 1427 1367">Ben Greene Legal Technology and Records Manager Land O'Lakes</p>
		<p data-bbox="743 1415 859 1440">3:50-4:30</p> <p data-bbox="708 1451 894 1514"><i>M365/Purview IG Best Practices</i></p> <p data-bbox="727 1535 875 1598">Using M365 Efficiently</p> <p data-bbox="716 1619 886 1717">Sheila Bryant Law Society of Alberta</p>	<p data-bbox="1003 1415 1118 1440">3:50-4:30</p> <p data-bbox="992 1451 1130 1476"><i>RIM Issues</i></p> <p data-bbox="954 1493 1167 1629">Defensible Retention: Maximizing the Value of Your Data</p> <p data-bbox="1003 1650 1130 1713">Glen Day NVISIONx</p>	<p data-bbox="1260 1415 1375 1440">3:50-4:40</p> <p data-bbox="1224 1451 1427 1476"><i>Data Protection</i></p> <p data-bbox="1211 1493 1430 1724">Become Stealth Online: Anonymize Your Digital Footprint for Security</p> <p data-bbox="1208 1661 1430 1724">Sandra Stibbards Camelot Investigations</p>



<b>4:30-6:30pm</b>	<b>Courtyard &amp; Regency Ballroom</b>  <b>InfoGov Excellence Awards Announcements Information Market Reception &amp; Networking Time</b>
<b>6:30pm</b>	<b>Adjourn</b>
<b>6:30-8:30pm</b>	<b>Offsite Networking Receptions</b>



**Day Three, Wednesday, October 4**

Time				
7am Pacific - 8:45am	<p style="text-align: center;"><b>Courtyard &amp; Regency Ballroom</b></p> <p style="text-align: center;"><b>Registration &amp; Breakfast</b></p>			
8:55-9:00	<p style="text-align: center;"><b>Horton Grand Theatre</b></p> <p style="text-align: center;"><b>Welcome from the Conference Chair</b> <i>Robert Smallwood, CEO, InfoGov World</i></p>			
9:05-9:45am	<p style="text-align: center;"><b>“Information Governance: State of the Industry 2023”</b> <i>Robert Smallwood, CEO, InfoGov World</i></p>			
9:50-10:20am	<p style="text-align: center;"><b>Courtyard &amp; Regency Ballroom</b></p> <p style="text-align: center;"><b>Networking Break</b></p>			
<p><b>Session Rooms</b></p> <p>10:20-11:00am</p>	<p style="text-align: center;"><b>Horton Grand Theatre</b></p> <p style="text-align: center;"><i>AI</i> <i>IG Best Practices</i></p> <p><b>AI in IG: Trends &amp; Issues</b></p> <p><b>Roundtable Discussion</b></p> <p><b>Pat Franks (M)</b> SJSU <b>Peter Stockburger</b> Dentons <b>Robert Cruz</b> Smarsh <b>Chad Hartman</b> VDS/FIT <b>(David Greetham)</b></p>	<p style="text-align: center;"><b>Regal Ballroom A</b></p> <p style="text-align: center;"><i>Privacy</i></p> <p><b>Privacy Program Alignment</b></p> <p><b>Bob Siegel</b> President <b>Benjamin Siegel</b> Sr. Privacy Consultant <b>Privacy Ref, Inc.</b></p>	<p style="text-align: center;"><b>Regency West</b></p> <p style="text-align: center;"><i>RIM</i> <i>IG Best Practices</i></p> <p><b>Beyond the IG Reference Model: Engaging New Stakeholders</b></p> <p><b>Arlette Walls</b> Iron Mountain</p>	<p style="text-align: center;"><b>Regal Ballroom C</b></p> <p style="text-align: center;"><i>Privacy</i> <i>Cybersecurity</i></p> <p><b>Actual Intelligence: Breaking Down Incident Mgmt. Silos</b></p> <p><b>Victor Maciel,</b> VP <b>Raymond James</b></p> <p><b>Zelda Olentia</b> RadarFirst</p> <p><b>Judy Titera</b> Independent Consultant</p>





<p>11:05-11:35am</p>	<p><b>11:05-11:55</b> <i>Cybersecurity &amp; Info Risk</i></p> <p>Roundtable Discussion</p> <p><b>Baird Brueseke</b> <b>Anjali Gugle</b> <b>Dustin Fritz</b> <b>(Mathieu Gorge)</b></p>	<p><b>11:05-11:35am</b> <i>Privacy</i></p> <p>Managing the Complexities of Global Data Privacy Compliance</p> <p><b>Robin Andruss</b> Chief Privacy Officer <b>Skyflow</b></p>	<p><b>11:05 -11:35am</b> <i>IG Best Practices</i></p> <p>IG Considerations in Legacy Data Cleanup</p> <p><b>Dean Felicetti</b> Director of Data Risk &amp; Remediation <b>SullivanStrickler</b></p>	<p><b>11:05-11:35am</b> <i>IG Best Practices</i></p> <p>Curing Data Diabetes: A Prescription for Digital Transformation</p> <p><b>Chris Surdak</b> <b>Quantiqs, Inc.</b></p>
<p>11:40am-12:10pm</p>		<p><i>Privacy</i></p> <p>US Privacy Landscape in 2023</p> <p><b>Taylor Bloom</b> Partner - Privacy and Data Protection <b>Baker &amp; Hostetler</b></p> <p><b>Tucker Sarchio</b> <b>Baker &amp; Hostetler</b></p>	<p><i>IG Best Practices</i></p> <p>Meaningful Metrics to Quantify IG Program Value</p> <p><b>Amy Sowder</b> <b>FedEx</b></p>	<p><i>Privacy</i> <i>IG Best Practices</i></p> <p>The Intersection of Privacy &amp; IG</p> <p><b>Suzanne DiCicco</b> Director of IG <b>SEI Investments</b></p>
<p>12:15-1:20pm</p>	<p><b>Courtyard &amp; Regency Ballroom</b></p> <p><b>Lunch &amp; Networking</b></p> <p><b>Copley Alley</b></p> <p><b>Networking Lounge Open</b> <i>Sponsored by CIGO Association</i></p>			
<p>1:30-2:10pm PT</p>	<p><b>Horton Grand Theatre</b></p> <p><b>Keynote Address:</b></p> <p><b>“Lights, Camera, Action!</b> How to Transform Your IG Program into a Blockbuster Hit that Inspires Trust”</p> <p><b>Justine Phillips, Partner, Baker &amp; McKenzie</b></p>			



Session Rooms	Horton Grand Theatre	Regal Ballroom A	Regency West	Regal Ballroom C
2:15-2:45pm PT	2:15-3:10pm PT <i>Privacy &amp; Data Protection</i>  Roundtable Discussion  Justine Phillips DLA Piper Robin Andruss Skyflow Taylor Bloom Baker Hostetler Bob Siegel Privacy Ref	2:15-2:45pm <i>Cybersecurity Privacy</i>  Cyber Aspects of Privacy Program Management  (Matt Stamper) Executive Advisors	2:15-2:45pm <i>Cybersec</i>  How to Catch Insider Threats: 2 Real Life Cases of Source Code Leaks and How to Prevent Them  Dustin Fritz Troncore Security	2:15-2:45pm <i>AI Privacy</i>  Privacy Considerations Related to Big Data and AI Arianna Evers and Ali Jessani Wilmer Hale LLP
2:50-3:20	3:25-4:20pm <i>Career Development</i>  Upskilling Legal & Tech Careers w/ Durable Skills Joy Murao (Moderator) Peg Gianuca Disney Justine Phillips DLA Piper Sheila Grela Buchalter Julie Ruse Cooley	2:50-3:20 <i>IG Best Practices</i>  The CIGO® Certification Explained  Rob't Smallwood (M) Patty Fitzpatrick Suzanne DiCicco Dean Felicetti	2:50-3:20 <i>Cybersecurity Info Risk</i>  Measuring and Communicating Cyber Risk Priya Mouli Seasoned Cyber Pro	2:50-3:20 <i>IG Best Practices</i>  Information Governance vs. Slack  Baird Brueseke Director of IG eVisit
4:20pm PT	<b>Adjourn</b>			
5:45-7:15 pm	<b>Reception for IAPP 'Privacy. Security. Risk.' Conference</b> <a href="#">Marriott Marquis San Diego Marina</a>			