

STRENGTHEN YOUR IG TOOLBOX: MANEUVERING THROUGH REAL AND VIRTUAL THREATS

ARMA GOLDEN GATE SPRING SEMINAR
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GILLIAN GLASS
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Agenda

- Introductions
- An IG Program
 - Implementation
 - Maintenance
 - Challenges/Risks
- Nuts & Bolts
- Questions?

Panelists



Megan Hertzler

PG&E

**Director, Enterprise
Information Governance**

Megan is the Director, Enterprise Information Governance for PG&E, one of the largest natural gas and electric utilities in the United States. Megan leads the Enterprise Records and Information Management team, which is responsible for the effective management of PG&E records and information assets.

Previously, Megan was the Director of Information Governance at Xcel Energy, an attorney in private practice, and an Assistant Attorney General providing legal counsel to the Minnesota Public Utilities Commission.



Panelists



Gillian Glass

**Farella Braun + Martel
LLP**

**Director of Practice Support,
Paralegals and Information
Governance**

Gillian manages electronic discovery, litigation support, records, calendar and paralegals at Farella, a mid-sized law firm in San Francisco. As co-chair of the firm's eDiscovery Task Force, she consults with the firm's clients on information governance and litigation readiness. She also shares in responsibility for portals and knowledge management.

Previously she was litigation support manager at the San Francisco City Attorney's office.

Gillian is a Certified Records Manager and a Certified eDiscovery Specialist.



Panelists



Jeffrey Richards

**Wendel Rosen Black &
Dean LLP**
Director of Information
Technology

Jeffrey Richards is currently the Director of Information Technology at Wendel, Rosen, Black & Dean LLP, an Oakland-based law firm serving a diverse clientele of business, public and individual clients on transactional and civil litigation matters in several related fields. Prior to commencing his role at Wendel Rosen, Jeffrey was the Senior Consulting Engineer at Volant Consulting, a San Francisco-based firm that delivers technology solutions and services to a diverse array of businesses. Jeffrey has a mix of both service provider and law firm experience in the legal technology industry.



Panelists



Mark Diamond

Contoural, Inc.
President & CEO

As founder and CEO of Contoural, Mark Diamond is one of the industry thought leaders in information governance addressing proactive records & information management, litigation readiness and risk & compliance strategies. As CEO & Founder of Contoural he and his team work with more than 30% of the Fortune 500, many mid-sized companies as well as Federal Agencies and public sectors organizations. Mark addresses more than 100 companies each year.



Moderator



Kimberly Quan

Dragon Discovery
COO | VP Information
Governance

Kimberly specializes in providing leadership in the eDiscovery and risk mitigation realms, including litigation lifecycle workflow design, and has led projects with activity in the US, Canada, UK, South Korea, Japan, and Australia. Kimberly also brings extensive experience in disputes and investigations.

She provides incident response, electronic discovery and litigation support advisory services, and has led projects involving electronic discovery efforts, including data collection, preservation, processing, analytics, conversion and production to courts and regulatory bodies. This includes trial preparation, organizational and process creation, and training curriculum and knowledge management creation and implementation..

Specialties: Information Governance, incident response, electronic discovery and litigation support advisory services.



IG Program: Implementation

- Getting Leadership Support and Building a Governance Structure
- Hiring the Right Team
- Knowing What You Have and Where it is Located
- Documenting and Communicating Program Requirements
- Measuring Progress

IG Program: Maintenance

- Identify new information stores and how to manage them
- Audit compliance – identify what's working and what isn't
 - How are users responding?
 - What's falling through the cracks?
 - Where are you having compliance struggles?
 - What changes can make to improve a struggling program?
- Sell your successes

IG Program: Challenges/Risks

- Buy-in By Decision Makers
- Working in Silos
- Underestimating Change Management
- Failing to Proactively Manage Vendors
- Managing by Exception
- Underestimating Security Risks

Nuts & Bolts

- Priorities and practical steps
- Technology
- Educational resources
- Certifications

Questions?