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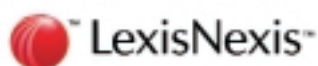
[THE PURSUIT OF KNOWLEDGE

THE INFORMATION PROFESSIONAL LEARNING CONFERENCE

“LINKING INFORMATION MANAGEMENT
TO BUSINESS PERFORMANCE”

29TH – 30TH JUNE 2004
The Grove, Hertfordshire

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DAY ONE: CONTENT MANAGEMENT AND DELIVERY: KEEPING ONE STEP AHEAD

"Content provision within a corporation concerns itself with, first, ensuring ongoing quality and reliability to end users and secondly, measuring the value of this to the business. As such, Information Professionals are increasingly looking at new methods to assess benchmarked standards, for both the products they have purchased and the services their departments provide. Recognising the key performance indicators built around the core corporate strategies of the business and finding new ways to effectively demonstrate the value of information management to the senior board executives are some of the critical issues to be addressed."

MORNING PRESENTATIONS: BUSINESS STRATEGIES AND IMPACTS

09.00 **Coffee & Registration**

09.30 **Chair's Welcome & Introduction**

Speaker: Nigel Spencer, Research and Business Development Manager, British Library

09.35 **Opening Address: Linking Information Management With Business Performance**

Speaker: Chris Bartlett, Business Productivity Director, Microsoft

10.00 **Management Expert: Strategies & Techniques for Optimising the Organisational Role of the Information Management Function**

Speaker: Dave Snowden, Director Cynefin Centre, IBM Global Services

- Work flow patterns: efficiency/effectiveness monitoring.
- Integrating the information department into the organisation, in line with the strategy and objectives of the business, as a whole.
- Overcoming the challenges and practical difficulties
- Managing the expectations of internal client.

10.45 **Practical Case Study: Demonstrating an Innovative Approach to Measuring the Value of Information Management**

Speaker: Elaine Reid, Head of Research, Booz Allen Hamilton

- What were the issues of the case study; before, during and afterwards? Discussion of the problems faced, the ideas generated, the processes implemented, the solutions applied, the ongoing issues addressed, and the future problems anticipated.
- How do you evaluate the successes and failures within the department? Creating measurable tools and processes to help with making potential problems/issues transparent.
- Communicating/marketing to the internal client.
- Integrating external and internal data into a workable process.
- Justifying the process to senior management.
- Identifying the benefits of the support you can provide to the organisation and communicating these to senior management.
- Demonstrate that these measurements of information management can be linked to competitive advantage.

11.20 **Exhibition Suite, Networking & Coffee Break**

11.45 MORNING BREAKOUT SESSIONS

SESSION 1: Aligning data/content to the business strategy.

- Performance measurement (scorecards/KPI).
- Applying scorecards with benchmarking.

Aim of session: 1. Create a document outlining the limitations, difficulties and implications of ensuring accurate measurement. 2. How do you go about choosing your KPIs?

Facilitator: Pat Dixon, Senior Lecturer, School of Information Studies, University of Northumbria

SESSION 2: Knowledge Management: What does it offer to improve business performance? What types and structures of information should be included in a KM solution to enhance best practice?

Aim of session: The aim of this session is to create a paper showing the tangible business merits of KM and cover the issues/problems that arise from implementing these strategies.

Facilitator: Ian MacKenzie, Independent Consultant to the financial and information industries.

SESSION 3: CRM Customisation at the desktop.

- CRM integration, how far have we got?
- Integration solutions of external content with internal content (licensing issues, which platforms can be used)

Aim of session: 1. Create a paper on how could CRM link into the offering at the desktop 2. What are the issues and the processes involved? 3. What added value could this bring for the end user?

Facilitator: Jackie Marfleet, VP of Operations, JP Morgan Chase

SESSION 4: Strategies on information delivery and how to enhance delivery by building a structured taxonomy.

- Technical/practical guide to building taxonomies.
- Who needs to build one and why?
- How easy is it to integrate internally defined structured hierarchies with automated software (such as Autonomy/Verity/Hummingbird)?
- What do they mean for the business?
- How do you set up your internal processes to compliment your content requirements as a business, by using taxonomies?
- How to measure their success/failure?
- Efficiencies/inefficiencies, cost effectiveness when budgets may be restricted.

Aim of session: Create a SWOT analysis on building your own taxonomy.

Facilitator: Neil Cameron, MD of Neil Cameron Consulting Group

SESSION 5: Trends in content delivery.

- Overview of vendor technologies today and tomorrow.
- One vendor one platform.
- Desktop, centralisation, portals and outsourcing.
- Flexibility/customisation – myth or reality?
- Identifying the added value in the existing vendor products.
- Effects on skill set requirements of the Information Professional
- Where are we going?

Aim of session: Create a paper showing the major trends then list the issues (pros and cons) of how the panel sees these. What are the immediate and long term impacts of these issues on the processes currently employed by Information Professionals?

Facilitator: Karen Blakeman, RBA Information Services

SESSION 6: Formulating and managing Service Level Agreements (SLAs).

- How to get started?
- Key elements to formulating an SLA.
- Issues to anticipate.
- How to go about making them relevant to your company?

Aim of session: What does an SLA mean to you? Create a model version of the key elements that should be present in an SLA.

Facilitator: Don Roll, MD, Europe, Alacra

SESSION 7: Understanding the underlying IT architecture and how it might enhance content delivery from an information management perspective.

- How the IT architecture can aid content delivery within a company?
- What are the limitations today?
- Will this change in the future...and when?
- What are the problems/issues facing the IT teams for content delivery? eg. Inside the firewall/outside the firewall. Issues and problems/benefits of these.

Aim of session: Create a list of key questions to ask your Head of IT to determine the nature of your IT architectural set up, and how best to utilise it.

Facilitator: John Paschoud, Projects Manager and Infosystems Engineer, LSE Library

SESSION 8: How will vendors sell content in the future?

- One vendor one platform.
- Technology/pricing packages.
- Content or software.
- Evaluating costs/benefits of different product sources – what is the added value?

Aim of session: 1. What would the panel like to see the vendors do in terms of how they sell content in the future? Create a wish list. 2. Qualify these answers.

Facilitator: Lesley Robinson, Director of Lesley Robinson Consulting Services Ltd

13.00 LUNCH

14.00 Exhibition Suite, Networking & Coffee

14.30 Keynote Speaker: Best Practice Strategies for Managing Risks & Protecting Intellectual Property in the Delivery of Information throughout the Organisation

Speaker: Ned Wilsher, Founder of Knowledge-edge

- What are the best practices to managing risk?
- Will this mean more checks and balances, more red tape and increased costs? Short term effects and long term results of managing risk for information professionals?
- What are the benefits to the business?
- How does risk directly affect the Information Centre?
- Cross over and sharing of working practices with other departments within the business.

15.05 Copyright Issues

Speaker: Graham Cornish, Director of Copyright Circle

- Legal status concerning electronic copies of documents and electronic signatures

15.30 AFTERNOON BREAKOUT SESSIONS

SESSION 1: Electronic Copyright and Licensing Issues.

- What are the main requirements for a business surrounding electronic copyright and licensing issues – what are the solutions to these problems?
- What should the role of the Information Professional be, in terms of identifying and involving themselves in the issues associated with copyright?

Aim of session: 1. Create a document outlining the role of the Information Professional. 2. Create a checklist to ensure your department is in line with the standard copyright policies.

Facilitator 1: Graham Cornish, Director, Copyright Circle

Facilitator 2: Roger Cook, Head of the library and Information Services, Mayer, Brown, Rowe & Maw

SESSION 2: Data Protection Act.

- What is it? What are the implications of it: Disclosure of information and intellectual property. Does this affect outsourcing in any way?

Aim of session: List the key areas and disciplines within the Information Centre which would be affected by this Act.

Facilitator 1: Diana Edmonds, MD, Instant Library

Facilitator 2: Bojana Bellany, Global Data Privacy Compliance Lead, Accenture

SESSION 3: Content delivery standards and benchmarking requirements today.

- Transparency of accounting standards.
- What are the implications to the Information centre of these changes?
- Internal client benchmarking needs (processes for retrieving information).
- External client benchmarking (know your client).
- How will this affect the existing processes and systems currently in place?
- Requirements on your team's minimum skill levels and the necessity for ongoing training.

Aim of session: Create a paper showing the key factors that could directly affect information delivery due to the changes and benchmarked standards.

Facilitator 1: Judith Broady - Preston, Lecturer in the

Department of Information Studies, University of Aberystwyth

Facilitator 2: Stephen Regan, Senior Lecturer in Management Economics, University of Cranfield

SESSION 4: Approaches to managing risk: cost control, compliance, legal, IT.

- Compliance and legal – what are the restrictions on the banks, consultancies and law firms, post Enron?
- What internal standards should Information Centres be applying to ensure that you are managing risk effectively and in line with the rest of the industry?

Aim of session: Create a paper outlining the best practice approaches that might help Information Professionals manage the legal and compliance aspects.

Facilitator 1: Jonathan Gordon-Till, Information Manager, AON Consulting

Facilitator 2: Deborah Talbot, senior manager in IT effectiveness, PWC

16.45 Closing Remarks

16.50 Exhibition Suite & Networking Round-up

19.00 Drinks & Gala Dinner

END OF DAY 1

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Day Two – 30TH JUNE 2004 The Grove, Hertfordshire

DAY TWO: SOLUTIONS TO CRITICAL INFORMATION MANAGEMENT CHALLENGES

Desktop or centralised? In-house or offshore? Whatever route you and your company have chosen to follow, there are implications of these changes which affect delivering the ideal structures and processes, for both staffing your department and managing the expectations of your end users, all within a strict budget. What challenges does the future hold for Information Professionals?

MORNING PRESENTATIONS: MEETING THE EVOLVING MANAGEMENT CHALLENGES

09.00 **Coffee**

09.30 **Chair's Welcome & Introduction**

Speaker: Sandra Higginson, Senior Editor, KM Magazine

09.35 **Opening Address: New Perspectives on Business Management & Leadership: The Theory & the Practice**

Speaker: Eva Pascoe, co-founder of Cyberia and MD of Zoom.co.uk

- What are the latest management/organisational structures?
- Current management strategies, thinking, visions and projections, how are things going to be done in the future?
- How do you manage and measure business processes?
- Project and implementation skills required to redesign processes or manage change.
- Ensuring transferability of skills.

10.10 **Panel Discussion: Using Alternative Management Structures (Internal), Redefining the Role of the Information Team, Challenges of Creating Alternative Management Structures (Outsourcing & Off Shoring)**

Speakers: Stephen Phillips, VP of Business Information Services, Morgan Stanley. Robert Santiago, Head of Operations, FT Research Centre, Financial Times Ltd. Caroline Plumb, Co-Managing Director, FreshMinds. Martin Cotterill, Senior Associate, Latham & Watkins

- Transferring information management teams to specialise their skill sets to meet the requirements of the internal client.
- Strategic issues involved in managing alternative information team structures.
- Differing perceptions of the value of the service provided.
- User education, skills and development.
- Evolving role of the information manager: Managing change and continuing to offer creative solutions to clients.
- Off shoring and remote management: How does it work in practice?
- Outsourcing today and beyond outsourcing – what will it allow you to do in the future?
- How would you change a vendor if they are unsuitable? What restrictions/problems could it create?

10.50 **Question & Answer**

- The Q & A session is an opportunity to pre-submit your questions which will then be read out to the audience.

11.10 **Exhibition Suite, Networking & Coffee Break**

11.45 MORNING BREAKOUT SESSIONS

SESSION 1: Convergence (Financial) – Job roles more and more are seen to be overlapping in their functions.

- Relationship between information centre, market data, IT, procurement and records management.
- Who should be doing what when it comes to information?
- Should these teams work together or as separate functions?

Aim of session: Create a set of job profiles and define the interdependencies between them.

Facilitator 1: Steve Borley, Information Manager, Royal Bank of Scotland

Facilitator 2: Janet Inglis, Head of Information Centre, ABN AMRO

SESSION 2: Convergence (Legal/Consultancy) – who should be doing what when it comes to information?

- Relationship between procurement, the information centre/library, the IT team, knowledge management departments, and PSLs (professional support lawyers)

Aim of session: Create a set of job profiles and define the interdependencies between them.

Facilitator 1: Lesley Robinson, Director of Lesley Robinson Consulting Services Ltd

Facilitator 2: Elisabeth Tooms, Head of Global Library Services, Allen & Overy

SESSION 3: What is the best way to manage information systems and research teams in the future?

- Remote management, in the light of structural changes, cultural implications, staff motivation, and legal differences.

Aim of session: Create a list of issues associated with remote management in which an Information Professional may be faced with, when outsourcing, offshoring or as Global Head of Information.

Facilitator 1: Richard Beveridge, Business Development Manager, Instant Library

Facilitator 2: Caroline Plumb, Co-Managing Director, FreshMinds.

SESSION 4: Identifying and delivering skills for the future Information Professional.

- How the skill set for the Information Professional has changed?
- Why has it changed?

Aim of session: Create a paper showing the key requirements needed for a junior team member and a senior team leader within the Information Centre/library today.

Facilitator 1: Jennifer Barrow, Head of KM, Baker McKenzie

Facilitator 2: Julia Hordle, MD, Intelligent Resources

13.00 **LUNCH**

14.30 **Closing remarks and close of conference**