



Jesse Wilkins, CIP, CIPP/US, CRM, IGP, CIGO, EDP

He has worked in the information management industry for more than 25 years as an end user, vendor, consultant, and trainer. His areas of expertise include enterprise content management, electronic records management, email management, document imaging, and training and certification development and delivery. Jesse has developed and delivered training courses for nearly 20 years and for organizations around the world.

He has written dozens of public, private, and custom training courses and delivered more than 200 training workshops. Jesse is recognized for his ability to explain and clarify complex information management topics. He was also the architect for the development of the AIIM CIP certification and wrote the CIP 2016 Study Guide and CIP 2019 Study Guide. Jesse is an internationally sought-after speaker and author on information management topics and has presented more than 400 keynotes and educational sessions at AIIM, ARMA, MER, and other industry conferences and events. He has received the ARMA Britt Literary Award and the AIIM Education Award. In 2020 he was enrolled in the AIIM Company of Fellows as Fellow #223.

Presentation Topic:

“How to Conduct a Business and Technical Assessment for an Information Management Initiative”

As Lewis Carroll once said, if you don't know where you're going, any road will take you there. But your organization doesn't have unlimited time, resources or budget for you to take the scenic route to better information management. Instead, you should start by conducting a business and technical assessment to understand where you are and where you need to go. In this session, we'll identify the key elements of a business assessment, including reviewing the regulatory and operational context. We'll also talk about the value of a maturity assessment and the process for conducting one. We'll take a look at how to conduct a technical assessment and what to include. We'll conclude with a review of next steps once the assessment is complete. Attendees will also receive a list of assessment instruments and a checklist for conducting the assessments.