NAVIANT SUMMIT

TRANSFORM THE WAY YOU WORK

SEPT 14TH & 15TH

TUESDAY, SEPTEMBER 14TH - *Central Time Zone (CDT)*

9:00 - 9:45	General Session: Customer Stories & Updates from Naviant
15-MIN BREAK	
10:00 - 10:30	OPTION 1 3 Ingredient Recipe for Digital Transformation Success
	OPTION 2 What's New in OnBase Foundation EP5
15-MIN BREAK	
10:45 - 11:15	OPTION 1 Contracts, PO's, and Invoices, Oh, My! Tame the Beast of the Back Office
	OPTION 2 Let the Sun Shine on Your Cloud Migration
	INVITATION ONLY Executive Session: Intelligent Automation
15-MIN BREAK	
11:30 - 12:00	OPTION 1 Entering the Shark Tank: Intelligent Automation Edition
	OPTION 2 RECALCULATING...RPA & Process Mining: Your GPS to Keep Your Transformation En Route

12:00 - 12:45	Workshops & Networking	
	TOPICS	
	User Experience (Mobile, Outlook, Web & Unity)	Higher Education Forum
	WorkView / Case Management	Robotic Process Automation
	Hyland Capture Technologies	How to Get the Most Out of Your SLA
	ABBYY Capture Technologies	Concept Solutions
	PM - Agile Scrum, Project Delivery, Managing Change	Training & Testing + Hyland Community
	Reporting Dashboards	Ask a Technical Expert
	Hyland Cloud	

WEDNESDAY, SEPTEMBER 15TH - *Central Time Zone (CDT)*

9:00 - 9:30	Keynote Speaker: Hyland's CEO & President, Bill Priemer & Innovation Award Announcement
15-MIN BREAK	
9:45 - 10:15	OPTION 1 Successful Change Management: It's all about the people!
	OPTION 2 Accelerate Your Digital Transformation with Low-Code App Development & Citizen Developers
15-MIN BREAK	
10:30 - 11:00	OPTION 1 Infuse Intelligence into Your Capture Process
	OPTION 2 Making Meaningful Connections: Foundational Hyland Tools for a Post-COVID World
15-MIN BREAK	
11:15 - 11:45	OPTION 1 Come Along on the HR Automation Journey
	OPTION 2 OnBase Tips & Tricks
11:45 - 12:30	OPTION 1 Government Industry Office Hours & Networking
	OPTION 2 Insurance Industry Office Hours & Networking

TUESDAY, SEPTEMBER 14TH

9:00 - 9:45 AM

General Session: Customer Stories & Updates from Naviant
Ed Modjeska - Naviant

Kicking off the Naviant Summit, this session includes hearing from Naviant customers as they reflect on their digital evolutions, as well as industry trends on how leading companies are transforming the way they work through digital transformation. You'll also hear special updates from Naviant.

10:00 - 10:30 AM

3 Ingredient Recipe for Digital Transformation Success
Ema Roloff - Naviant & Jeff Comer - Naviant

This easy 3-step recipe is perfect for beginners! Digital Transformation can seem like too much to keep up with, but with Naviant's family recipe for success, you will look like a 5-star chef. We will show you how to blend the three ingredients for success to begin streamlining processes, eliminating manual work, and creating a culture of continuous process improvement.

What's New in OnBase Foundation EP5
Colleen Alber - Hyland Software

Be the first to see the most exciting enhancements in OnBase Foundation Enhancement Pack 5 (EP5). You'll learn how to combine the latest updates in OnBase Foundation with other Hyland portfolio products. By doing this, you can build a more tailored solution and plan for future technologies. This session is full of "WOW" moments, including a NEW Integration for Adobe Sign, platform improvements, and major enhancements to key modules such as AP Invoice Approval App, Integration for Salesforce, and Mobile Access.

10:45 - 11:15 AM

Contracts, PO's, and Invoices, Oh My!
Tame the Beast of the Back Office
Guy Schroeder - Naviant & Bob Owens - Naviant

Regardless of the industry, every organization faces the necessary evil of ordering materials and services, paying the resultant bills, and managing critical contracts. Many organizations become frustrated by how manual and labor-intensive these processes are. You can use OnBase and other tools your organization may already own to transform the management of the Accounts Payable and Contract Management functions. We'll explore how many organizations use these tools to streamline the back office, transforming frustration into confidence in the process!

Let the Sun Shine on Your Cloud Migration
Chris Krause - Naviant & Mel Gatwood - Naviant

The sun will shine bright for you by transforming your enterprise OnBase premise-based solution suite to the cloud. No matter the size or complexity of your existing solution, you can leverage all the scalability, security, and operational efficiencies gained from migrating to the cloud. We will guide you through the key migration considerations, including security, integrations, reporting, upgrades, and critical lessons learned so your cloud migration project only brings sunshine instead of raining on your transformation parade.

EXECUTIVE SESSION: Intelligent Automation with Pascal Bornet
Pascal Bornet - Author of Intelligent Automation, Michael Carr - Naviant, Mark Miller - Naviant, & Ema Roloff - Naviant

Intelligent Automation (IA) or Hyperautomation, is one the most recent terms in the Digital Transformation landscape. IA is a combination of methods and technologies, involving people, organizations, machine learning, low-code platforms, robotic process automation (RPA), and more. Join us for a conversation with Pascal Bornet, the author of *Intelligent Automation: Learn how to harness Artificial Intelligence,* to boost business and make our world more human. We will discuss the key ideas that every modern executive should know about Intelligent Automation.

11:30 AM - 12:00 PM

Entering the Shark Tank: Intelligent Automation Edition
Ema Roloff - Naviant & Glenn Gibson - Hyland Software

You may not be asking for $5 Million for 25% of your company, but Digital Transformation does require funding and Executive and Stakeholder buy-in. Make your pitch for Transformation as polished as it would be if you were heading into the Shark Tank. In this session, we will discuss the type of information you should include in your pitch, how to get your executives on board, and how to deliver an aMMMazing presentation.

RECALCULATING...RPA & Process Mining: Your Organizational GPS to Keep Your Transformation En Route
Mark Miller - Naviant & Jeff Comer - Naviant

You've started your digital transformation journey, but how confident are you that you're heading down the right path? The chosen path might be filled with bias and perception; wouldn't you like to know that you're heading in exactly the right direction? As your "travel" guide, Naviant complements our process first approach with technology to help confirm you're on the right path. In this session, you'll learn how to use Robotic Process Automation with Full-Cycle Automation and Intelligent Process Mining as your organizational GPS, so you'll dodge the speed bumps on your trip, allowing you to transform faster and grow your organization.

12:00 - 12:45 PM

Workshops & Networking

Think of this like your professor's "office hours" back in the good ole' days of college. Drop into any workshop to get your questions answered by an expert on the topic. You can use this time to help you learn a little more about a solution you're considering exploring or get a deep dive into the technology behind a solution. Many attendees visit a variety of workshops throughout this time, so feel free to come and go as you please into each workshop.

Topics

- User Experience (Mobile, Outlook, Web & Unity)
- WorkView / Case Management
- Hyland Capture Technologies
- ABBYY Capture Technologies
- PM - Agile Scrum, Project Delivery, Managing Change
- Higher Education Forum

- Robotic Process Automation
- How to Get the Most Out of Your SLA
- Concept Solutions (Deep Thoughts by Chris Krause)
- Reporting Dashboards
- Ask a Technical Expert
- Hyland Cloud

Dinner *(time varies by location)*

We will be hosting in-person social events for you and a guest in Madison - WI, Salt Lake City - UT, and Syracuse - NY. You and your guest are invited to join us for some socializing and fun on Tuesday night in those locations. All in-person social events will include dinner, drinks (alcoholic and non-alcoholic), and guaranteed fun.

Wisconsin	**Utah**	**New York**
Bishops Bay	Market Street Grill	Lemon Grass
3500 Bishops Dr	2985 East Cottonwood Pkwy	238 W Jefferson St.
Middleton, WI 53562	Salt Lake City, UT	Syracuse, New York 13202
Starting at 4:30 PM CDT	Starting at 5:30 PM MDT	Starting at 5:30 PM EDT

WEDNESDAY, SEPTEMBER 15TH

9:00 - 9:30 AM

Keynote Speaker: Hyland's CEO & President, Bill Priemer & Innovation Award Announcement
Ed Modjeska - Naviant & Bill Priemer - Hyland Software

Day Two kicks off with another meeting of the minds where we will bring everyone together again to start the day. Highlights include hearing from Bill Priemer, Hyland's President & CEO, on the future of the Content Services industry. During this session, we will also announce the winner of the Innovation Award for Naviant's 2021 Summit. If you think your organization's Digital Transformation Solution outshines the rest, nominate your solution for this year's Innovation Award.

9:45 - 10:15 AM

Successful Change Management: It's all about the people!
Mark Miller - Naviant & Terry Weitgenant - Naviant

When you think about digital transformation, you often think of the technologies that drive change; but real change starts with PEOPLE and a transformation mindset. Truly understanding how your organization functions today sets the foundation for you to execute process improvements and recognize growth. No one likes to change, but effectively enabling change throughout your organization can be the difference between growing during turbulent times or getting gobbled up by the competition. In this session, you'll learn why change management is so important, and you'll hear one client's lessons learned from deploying a formalized change management process while on their transformation journey.

Accelerate Your Digital Transformation with Low-Code App Development & Citizen Developers
Chris Krause - Naviant, Nela Khalaf - Naviant, & Michael Miles - Naviant

Transformative technologies leverage easy to deploy solutions that are point and click configurable with advanced capabilities a click away. Accelerate your solution deployments with concept solution frameworks to enable rapid application development, including OnBase Workflow processing and WorkView case management. Take advantage of your expert users' skills by empowering them to craft business-specific solutions as citizen developers to expand your solution's reach. Learn how to transform your development lifecycle with easy-to-configure tools to drive the most value for your software investment and measure your existing process to ensure they are achieving your business goals.

10:30 - 11:00 AM

Infuse Intelligence into Your Capture Process
Ema Roloff - Naviant & Brian Espinosa - Naviant

Infusing herbs and fruits in oils, butters, and liquors enhances the flavor of your cooking or cocktails. The same principle applies to infusing intelligence into your capture processes. While we aren't enhancing the flavor of your index values, we are enhancing the efficiency of your processes by adding elements of AI and Machine Learning to the tried-and-true technology of Optical Character Recognition (OCR). Join us to discuss the benefits of Intelligent Capture, the new capabilities available within Hyland Software and ABBYY Software's solution suites, and how to combine the power of OCR with other capabilities to transform the way you work.

Making Meaningful Connections: Foundational Hyland Tools for a Post-COVID World
Colleen Alber - Hyland Software

It's no secret that we're living in a virtual world, and for many organizations, remote work is here to stay. While remote work can be challenging in some ways, it can also create opportunities to increase productivity, prompt collaboration, and digitally transform your operations. Learn how to leverage new and existing OnBase tools to enhance areas of your business to make more meaningful connections with the people you serve. We will also share practical COVID-19 pandemic case studies from Hyland customer organizations just like you!

11:15 - 11:45 AM

Come Along on the HR Automation Journey
Trevor Graham - Naviant & Tricia Shields - Naviant

This session will help to map out some impactful key areas to focus on as you consider introducing or enhancing automation in HR. We will join one HR professional on her own exploration through the HR automation adventure. Discover how to spend more time focused on candidate recruitment, employee engagement and organizational development, while letting technology do the busy work.

OnBase Tips & Tricks
Ian Wilson - Naviant & Jennifer (Pixie) Siegel - Naviant

OnBase has many great features and functions. It's impossible to cover everything in a single training session or even weeks of training. This year, we are focusing on keeping your OnBase system running smoothly like a well-oiled machine. How can you check your system for inefficiencies? What tasks should you be doing daily, weekly, monthly to make sure the system is operating at its peak? We'll unveil the best tips and tricks that have saved OnBase users, admins, and companies' time and money. Join us to explore the cool tools and shortcuts OnBase offers to propel your OnBase solution to the next level.

11:45 AM - 12:30 PM

Government Industry Office Hours & Networking
Ed Modjeska - Naviant & Kevin Albrecht - Hyland Software

Join Ed Modjeska, SVP of Government Solutions at Naviant, and Kevin Albrecht, Hyland Manager of Industry Consulting, for a discussion on the positive impact that content, process, and case management can have on your government agency. We will uncover many ideas for how you can leverage WorkView to do more with less. You'll also get the scoop on the latest and greatest of OnBase, including what's next for OnBase in the public sector. This session is a combination of a presentation and an open discussion, so you will be able to get your questions answered live.

Insurance Industry Office Hours & Networking
Mark Miller - Naviant & Marcus Anderson - Hyland Software

Join Marcus Anderson, Senior Customer Advisor for Insurance at Hyland, and Mark Miller, SVP of Enterprise Solutions at Naviant, for a discussion on applying OnBase throughout your company. OnBase can help eliminate inefficiencies and reduce costs, whether in Claims Processing, New Business and Underwriting, Policy Maintenance, Compliance, or Customer Service. You'll also learn tips and tricks on identifying and prioritizing your next OnBase opportunity as well as what's new in OnBase for Insurance. This session is a combination of a presentation and an open discussion, so you will be able to get your questions answered live.