

ADVANCE PROGRAM

# KMWWorld<sup>2024</sup>

## November 18–21

JW Marriott | Washington, DC

CO-LOCATED WITH

Enterprise Search  
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Solutions by Harnessing  
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Join us for an exciting event filled with relevant topics, key experts, practical speakers, and many learning and networking opportunities.

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## Unlocking Powerful Knowledge-Sharing Solutions by Harnessing Search, Discovery, Analytics, Taxonomy, & AI

Join us November 18-21, in Washington, D.C., for 4 days of practical advice, inspiring thought leadership, and in-depth training. This unique experience, with five co-located, KM- and enterprise-focused business technology conferences, showcases organizations who have creative digital solutions for their future, are allowing experimental and risk-taking processes to inform their practices, have made solid progress in changing the culture of their enterprises, and know how to utilize AI and other technology in practical and useful ways to charge forward in their industries.

KMWorld 2024, featuring Taxonomy Boot Camp, Enterprise Search & Discovery, Text Analytics Forum, and Enterprise AI World, offers nine tracks with more than 130 sessions and 200 speakers. You'll get unparalleled insights and details into the latest trends and developments in the world of knowledge management, content management, enterprise search, taxonomy, intranets, and AI. Register for a Platinum Pass for top-level access and to create your own agenda, a Gold Pass for expanded access, or stick with one individual conference. The choice is yours.

We'll also have the top technologies and solutions to meet your business needs on display in the Enterprise Solutions Showcase. Here, attendees can come together, share experiences, and see the products, solutions, and services that will help their organizations achieve a better bottom line.

You can expect to leave Washington, D.C., with new friends and business allies and actionable advice and strategies for moving your business forward. Don't miss this once-a-year opportunity to spend a few days with like-minded peers sharing, learning, and helping your business grow.

## CONFERENCE CHAIRS



**KMWorld<sup>2024</sup>**

**PROGRAM DIRECTOR**

*Jane Dysart*  
Dysart & Jones Associates



**KMWorld<sup>2024</sup>**

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**taxonomy**  
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*Tom Reamy*  
Chief Knowledge Architect &  
Founder, KAPS Group, LLC



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*Beth Rudden*  
CEO, Bast.ai



# GET MORE WITH THE PLATINUM PASS. IT'S OUR BEST DEAL!

## REGISTER FOR A PLATINUM PASS TODAY AND SAVE!

Take advantage of all that KMWorld 2024 and its co-located events have to offer. Find out more below and then register for a Platinum Pass for full access to these distinct, but synergistic, conferences.

[KMWORLD.COM/CONFERENCE](https://www.kmworld.com/conference)

[TAXONOMYBOOTCAMP.COM](https://www.taxonomybootcamp.com)

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[TEXT-ANALYTICS-FORUM.COM](https://www.text-analytics-forum.com)

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**KMWorld** 2024

Enterprise Search & Discovery 2024

Text Analytics Forum '24

ENTERPRISE AI World

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KMWorld 2024 is co-located with four other leading industry events: Taxonomy Boot Camp, Enterprise Search & Discovery, Text Analytics Forum, and Enterprise AI World. You may choose to attend any one of these concentrated programs individually. But, if you are seeking to create a comprehensive enterprise strategy that incorporates search as part of a larger knowledge management, content management, or collaborative strategy and want to better leverage taxonomies, text analytics and AI, be sure to register for the Platinum Pass.

- **MORE CONTENT.** Get access to KMWorld 2024, Enterprise Search & Discovery, Text Analytics Forum, Enterprise AI World plus Taxonomy Boot Camp OR two workshops — in one location, for a unique opportunity to broaden your understanding of knowledge management, content management, text analytics, collaborative and digital strategies, and acquire the information, tools and strategies you need to create a successful, knowledge-based enterprise. Choose from 100+ keynotes, sessions, and in-depth workshops.
- **MORE NETWORKING.** Connect with your peers and over 200+ speakers for the opportunity to learn from the leaders and innovators in the field at a variety of networking events, including breakfasts, coffee breaks, lunches, and two receptions on the show floor PLUS curated Knowledge Cafe mentoring sessions, a Communities of Interest meetup, and more.
- **MORE SAVINGS.** The Platinum Pass is designed to give you unparalleled access to multiple compelling industry events at one amazing location and low price. Each pass, if purchased separately at its regular rate would cost over \$5,000, but with a Platinum Pass, you'll have access to four events PLUS Taxonomy Boot Camp or two workshops for just \$1,995 when you register with early-bird rates by October 18.

## CONFERENCE OVERVIEW

### PRECONFERENCE WORKSHOPS— MONDAY, NOVEMBER 18

Choose among 20 workshops (see pages 6–8) to concentrate on your special areas of interest. Taught by experts, the workshops offer you a chance for interactive, small-group learning. Mix and match morning and afternoon workshops to customize your conference program and jump-start your week. Lunch is included when you register for a morning and afternoon workshop. (*Workshops are separately priced or available with the KMWorld Conference Pass PLUS Workshops or Platinum Pass options.*)

### ENTERPRISE SOLUTIONS SHOWCASE

The Enterprise Solutions Showcase is a one-stop shop for serious buyers to meet with vendors offering knowledge management, content management, enterprise search, taxonomy, AI, and intranet-related products and services. If you are looking for a particular product, evaluating competing systems, or keeping up with the latest trends and developments, you need to visit the Enterprise Solutions Showcase.

### SHOWCASE HOURS

Monday, Nov. 18 ..... 5:00 p.m. – 6:30 p.m.  
*Grand Opening Reception*

Tuesday, Nov. 19 ..... 10:00 a.m. – 6:00 p.m.  
*Networking Happy Hour* ..... 5:00 p.m. – 6:00 p.m.

Wednesday, Nov. 20 ..... 10:00 a.m. – 4:00 p.m.

### KMWORLD BOOKSTORE

Sponsored by  Enterprise Solutions School of Communication and Information

Interested in collaboration, innovation, and organizational improvement? Take advantage of the KMWorld Bookstore—browse our great collection of KM and related books at discount prices from our speakers, industry authors, and more—plus speak with the speakers/authors directly, and have them sign your books! The KMWorld Bookstore—a choice destination not to be missed!

### NETWORKING OPPORTUNITIES

KMWorld and its co-located events offer great opportunities to get acquainted with new colleagues and explore through casual conversation what others are doing in the space.

#### Enterprise Solutions Showcase

**Grand Opening Reception** *Sponsored by eGain*  
Monday, November 18 • 5:00 p.m. – 6:30 p.m.

Celebrate the grand opening of the Enterprise Solutions Showcase. Enjoy drinks and light bites while visiting with conference sponsors.

#### Networking Happy Hour

Tuesday, November 19 • 5:00 p.m. – 6:00 p.m.

Stop by the Showcase after a full day of stimulating sessions to mix and mingle with other conference attendees, speakers, and our conference sponsors.

#### Communities of Interest

Wednesday, November 20 • 5:30 p.m. – 6:30 p.m.

This year's fun networking event follows rousing discussions about AI and KM as well as search, data analytics, taxonomies, and more. Join your colleagues for a casual evening and stimulating conversations! Share your experiences and challenges while having fun.

*This meet-up will take place in the hotel bar. A cash bar will be available.*

#### KMWorld Knowledge Cafe & Mentoring Mixer

Thursday, November 21 • 10:15 a.m. – 12:00 p.m.

Participate in our popular interactive knowledge café, where you can share your KM challenges with colleagues and KM thought leaders and practitioners. Each table has a KM industry mentor and topic, and you will have time to visit at least three different tables during the morning. Meet and learn in this intimate networking environment.

#### Continental Breakfasts, Breaks & Lunches

### Stay Connected With Speakers, Sponsors, and Other Attendees



#KMWorld | #TaxoBC | #ESDDC | #TextAnalyticsDC | #EnterpriseAIWorld



### AMAZING ATTENDEES

Connect with like-minded professionals to hear about

their best practices and business strategies. Use this opportunity to network with your peers and learn from their challenges, experiences, and successes.



### TOP-NOTCH SPEAKERS

All five conferences attract the best and the

brightest that the industry has to offer. Hear from the leading analysts and brands in the world, innovative startups, and leading practitioners and executives from all types of unique organizations.



### SUPER SOLUTIONS

The top technologies and solutions for all your knowledge management,

content management, enterprise search, taxonomy, and intranet-related needs are on display in our Enterprise Solutions Showcase. Take this opportunity to be dazzled by innovative new tech, where you can efficiently compare solutions in this unique, one-of-a-kind environment.



8:30 a.m. – 9:15 a.m.	<b>KEYNOTE</b> = Value Every Voice: Leading Teams That Thrive = Dan Pontretract						<b>ENTERPRISE AI World</b>	
9:15 a.m. – 9:30 a.m.	<b>KEYNOTE</b> = New KM Practices to Supercharge the Power of AI = John Chmaja							
9:30 a.m. – 9:45 a.m.	<b>KEYNOTE</b> = Leveraging AI+ for Productivity = Devan Dewey & Laura Carson							
9:45 a.m. – 10:00 a.m.	<b>KEYNOTE</b> = Sinequa = Jeff Everingham							
10:00 a.m. – 10:45 a.m.	<b>COFFEE &amp; NETWORKING BREAK</b> = In the Enterprise Solutions Showcase							
	<b>TRACK A</b> = KM Strategies & Practices	<b>TRACK B</b> = KM With AI & New Technologies	<b>TRACK C</b> = KM Culture & Collaboration	<b>Enterprise Search &amp; Discovery 2024</b>				
10:45 a.m. – 11:30 a.m.	A201 KM & Knowledge Graphs	B201 KM Needs AI: Why?	C201 Humans as Learning Machines?	SharePoint Search Tips & Tricks				
11:45 a.m. – 12:30 p.m.	A202 Capturing & Transferring Knowledge: A 7-Step Process to Success	B202 Retaining Critical Knowledge With AI	C202 Fostering Knowledge Transfer: KM & AI	Organon's Enterprise Search Journey				
12:30 p.m. – 1:30 p.m.	<b>ATTENDEE LUNCHEON</b> = In the Enterprise Solutions Showcase							
1:30 p.m. – 2:15 p.m.	A203 Results-Focused Knowledge Exchange	B203 GenAI's Impact on KM & the Enterprise of the Future	C203 Navigating Change for KM	Has GenAI Removed the Need for Search?				
2:30 p.m. – 3:15 p.m.	A204 Knowledge Journeys & Knowledgebases With Microsoft 365	B204 Robot Knowledge-Based Agents: Implementing GenAI	C204 People Skills: Teams & KM in the Era of AI	Vector Search & RAG Patterns for Healthcare Applications				
3:15 p.m. – 4:00 p.m.	<b>COFFEE &amp; NETWORKING BREAK</b> = Last chance to visit the Exhibits in the Enterprise Solutions Showcase							
4:00 p.m. – 5:00 p.m.	A205 Industry Insights: Building Enterprise Knowledge Sharing	B205 Content Strategies for Enterprise KM	C205 Onboarding & Beyond	CEOs Talking AI & Search				
5:30 p.m. – 6:30 p.m.	<b>COMMUNITIES OF INTEREST</b>							

8:30 a.m. – 9:15 a.m.	<b>KEYNOTE</b> = KM, Experts & AI: Learning From KM Leaders = Kim Glover & Cindy Hubert							
9:15 a.m. – 9:30 a.m.	<b>KEYNOTE</b> = Achieving GenAI ROI: Clean Data & KM Strategies = Patricia Peht Liang							
9:30 a.m. – 9:45 a.m.	<b>KEYNOTE</b> = Protecting Your KM Investment: Navigating the AI Hype = Sean Coleman							
9:45 a.m. – 10:00 a.m.	<b>KEYNOTE</b> = Capturing Expert Knowledge With GenAI to Scale Transformation = Vanessa Liu & Judith Williams							
10:00 a.m. – 10:15 a.m.	<b>COFFEE &amp; NETWORKING BREAK</b>							
	<b>TRACK A</b> = Learning & KM	<b>TRACK B</b> = KM Insights	<b>TRACK C</b> = Content Management	<b>Enterprise Search &amp; Discovery 2024</b>				
10:15 a.m. – 11:00 a.m.	A301 <b>KMWorld Knowledge Café &amp; Mentoring Mixer</b> = Gloria Burke, Dan Rasmus, Kim Glover, Stan Garfield, Art Murray, Frank Cernone, Lyrida Braksiek	B301 Evolving KM: AI, Agile & Answers = Dave Snowden	C301 Understanding Search Behavior: The Key to GenAI's Value in Enterprise Applications	GenAI & Text Analytics in the Enterprise				
11:15 a.m. – 12:00 p.m.	A302 Neurosciences Hacks for KM Practitioners	B302 Learning, Training, & Retaining KMers	C302 Beyond CM for Real Knowledge Sharing	Genius Without the Gibberish				
12:00 p.m. – 1:00 p.m.	A303 KM Through Systems & Human Lenses	B303 KM x AI: Tacit Knowledge at Scale	C303 Bring Your AI() Game to Knowledge & Content Activation	Tools & Techniques				
1:00 p.m. – 1:45 p.m.	<b>KEYNOTE LUNCHEON &amp; AWARDS</b> = Pryon							
1:45 p.m. – 2:00 p.m.	A304	B304	C304	The Role Taxonomies Can Play in Enterprise Search				
2:00 p.m. – 2:45 p.m.	A305	B305	C305	Revisiting Faceted Search				
3:00 p.m. – 3:45 p.m.	A306	B306	C306	Closing Panel: The Future of Enterprise Search & Discovery				
4:00 p.m. – 4:15 p.m.	<b>KEYNOTE</b> = Beyond Boundaries: Content Readiness for AI in KM = Tim Hill							
4:15 p.m. – 5:00 p.m.	<b>KEYNOTE</b> = KM 2025 & Beyond = Brian Pichman, Julie Mohr, Dan Rasmus, & Dave Snowden							



Your choice of two half-day workshops is included when you register for a **PLATINUM PASS** or **KMWORLD** or **ENTERPRISE SEARCH & DISCOVERY PASS WITH WORKSHOPS**.

Workshops may also be registered for separately.

## MORNING WORKSHOPS ■ 9:00 a.m. – 12:00 p.m.

### W1 ■ KM 101

*Stan Garfield, Author of five KM books, & Founder, SIKM Leaders Community*

Are you new to knowledge management? Want to learn about all the possibilities for making your organization smarter, more collaborative, innovative, and productive? Join our expert knowledge manager and longtime KM mentor to gain insights and ideas for building a robust KM program in your organization—even if it is called by another name! This workshop highlights a range of potential enterprise KM activities being used in real organizations and shares how these activities are impacting the bottom line. It shows real KM practices and discusses various tools and techniques to give those new to KM a vision of what is possible in the enterprise as well as tips for how to get a dynamic program started in your organization.

### W2 ■ Collaborative Digital Platforms

*Chad Mairn, Librarian & Assistant Professor, Innovation Lab, Learning Resources, St. Petersburg College*

KM is all about collaboration, and as our organizations struggle with digital transformation and encompassing a global workforce, platforms matter. In addition to traditional platforms that we are now quite used to, there are 3D platforms that are stretching our capabilities. Learn more about AR (augmented reality), VR (virtual reality), XR (extended reality) and 3D platforms from our expert. Bring your questions and curiosity, and be prepared to play and use your imagination about how new tools might fit into your enterprise and enhance communication pathways.

### W3 ■ Compelling Storytelling for Effective KM

*Kim Glover, Director, Internal Communications, Global, TechnipFMC*  
*Tamara Viles, Knowledge Management Program Manager, TechnipFMC*

Humans connect through stories, and KM is all about connecting people. Even so, many KM programs don't utilize storytelling to drive adoption or teach the art of storytelling. This interactive workshop shares winning storyteller strategies, success stories, techniques, and more. Participants learn about storytelling through several fun activities, get a heightened awareness of the power of stories, and learn how to run storytelling workshops in their own organizations. A special focus is on the "KM Origin Story," in which attendees learn about telling a story that makes the case for the magic of KM. Come, learn, and enjoy "story-listening," as other KM practitioners tell their own tales. Led by our KM pros, you will learn lots in a fun environment.

### W4 ■ Aligning Information With User Needs & Organizational Goals

*Gary Carlson, Founder, Factor*

Successfully activating enterprise capabilities, such as KM, sales enablement, marketing, ecommerce, and personalization, among others, requires a robust information strategy. Defining an information model which reflects strategic business goals, addresses the current technology stack, and aligns with the needs of internal and external users improves information connectivity and encourages development of new organizational capabilities. This highly interactive workshop provides practical tactics for designing, building, maintaining, and governing taxonomies, ontologies, and other enterprise information models. Based on hard-won lessons learned from work with everything from large Fortune 50 enterprises to small ecommerce sites, Carlson discusses: modeling basics—a foundation to start creating a consistent vocabulary within large organizations with complex infrastructure, business goals, user profiles, and regulatory needs; a framework for shifting to an enterprise taxonomy model that meets the needs of enterprise and the individual business units, systems, user profiles, and interfaces; the impacts of an information-focused project on technology, governance, workflows, marketing, analytics, search, compliance, and the interaction with master data management; practical tips for providing stakeholders with resources to navigate internal tensions around implementation; and examples and case studies of large scale information modeling projects.

### W5 ■ Improving Findability in Microsoft 365

*Agnes Molnar, Managing Consultant, Search Explained*

Findability is much more than technology. It needs to be the combination of culture, communication, and technology, as well as how your content is organized. This workshop by our experienced and knowledgeable speaker discusses the most important success factors of enterprise search in Microsoft 365—roles and responsibilities, search metrics, risk management, governance, search lifecycle—and how to implement it well. Molnar uses real-world examples to go through all the steps to enable you to create an actionable plan for your organization. Get lots of practical tips and insights from our popular KMWorld speaker.

### W6 ■ Building a Governance Model for Enterprise Knowledge

*Art Murray, CEO, Applied Knowledge Sciences, Inc., & Director, Enterprise of the Future Program, International Institute for Knowledge and Innovation*

The volume of human and machine knowledge continues to grow exponentially. And as GenAI tools such as Chat GPT and Bard continue working their way into the mainstream, this growth will only accelerate, taxing the limits of traditional KM. As a result, leaders and decision makers will have far less visibility into how and even where their organization's knowledge is generated, along with its validity. How many of your business decisions are automated? How many business rules does your organization have? How secure are they? What social amplification and other risks are inherent in your organization's decision processes? If you can't answer these questions, it's a sign you need to start incorporating knowledge governance into your organization. In this workshop, you learn how to build a top-level governance model, along with a plan for implementation, including how to measure results and make adjustments along the way. Learn the seven major facets of organizational knowledge governance, how to align them with overall corporate governance, and, most importantly, how to evaluate the range of possible ESG impacts, both positive and negative. Don't let the volume of knowledge overwhelm you. Rather, create more KM joy by putting a governance model in place, reducing the risk and uncertainty along your KM journey, and gaining greater value from your organization's ever-expanding collection of knowledge assets.

### W7 ■ Harnessing Narrative Sensemaking: Future Backwards

*Ellie Snowden, Senior Research Consultant, The Cynefin Company (Cognitive Edge)*  
*Beth Smith, Senior Research Consultant, The Cynefin Co.*

Humans have always been storytelling animals. From sci-fi to fairytales and anecdotes shared around watercoolers, stories provide opportunities to learn, share, and take action on our hopes, dreams, and fears for the future. Narrative provides a collaborative and meaningful way for KM practitioners to explore the intractable issues of our time, a critical edge in embedding social and human capital into the world of work. Join the Cynefin team for one of their most popular workshop meth-

## GRAND OPENING RECEPTION

MONDAY, NOVEMBER 18 | 5:00 P.M. – 6:30 P.M.

Celebrate the grand opening of the Enterprise Solutions Showcase. Explore the latest products and services from the top companies in the marketplace while enjoying drinks and light bites. Open to all conference attendees, speakers, and sponsors.

Sponsored by **eGain**

ods, Future Backwards. F-B is an alternative to scenario planning and a side-casting technique designed by Dave Snowden. The method brings groups together through storytelling to increase the number of perspectives that an organization can take both on understanding its past and a range of possible futures. It is a fun, connecting method used for lessons learned, historical analysis, and context setting among other purposes. Learn how to expose the number of perspectives that a group can take, both on an understanding of its past and of the range of possible futures; discover what entrained patterns of past perception in an organization are determining its future; compare and contrast different aspirations as to the present and the future; and generate multiple turning points or decision points for use in the social construction of the Cynefin framework. This interactive and engaging workshop gives a practical approach to engaging employees in storytelling to explore the future of organizations, a means of conditions for novel discovery, cross-pollination of ideas and transformation, and lessons learning in workshops and beyond.

## W8 ■ Knowledge & Information Architecture for GenAI

*Seth Earley, CEO, Earley Information Science & Author, The AI Powered Enterprise*  
*Sanjay Mehta, formerly with Lucidworks*

There's a lot of nuances to architecture using AI, and some are interesting. GenAI is powerful in and of itself, but organizations are struggling with how to make it most useful for the enterprise. The key here is using GenAI to retrieve content and data from corporate sources. This means that the data, content, and knowledge need to be correctly structured and organized. There is no free lunch—GenAI requires that we carefully curated knowledge and data so that the algorithm has a source of ground truth to reference when responding to prompts. According to analysts, academics, and large consultancies, the most valuable application AI application will be retrieval-augmented generation (RAG)—meaning the large language model (LLM) is accessing corporate sources. This means that RAG will be only as good as the ability to search and retrieve the correct information. There are new approaches for dealing with data quality and completeness using LLMs, new ways of improving retrieval using “modular” RAGH—which applied concepts from the search world (data and content processing pipelines) to RAG. Each of these approaches uses certain patterns to ingest content and data along with various reference sources that can then be used to cleanse product data and knowledge. This is a major breakthrough in the industry and will make AI practical and valuable by impacting both internal facing and customer facing processes. Our speakers discuss principles of LLM applications such as ChatGPT; different types LLMs; the critical element of taxonomies, metadata, and ontologies; how data can be cleansed at scale using

templated prompts; prompt design and engineering; use case and business scenario development; ways of addressing and mitigating hallucinations; and more. This interactive workshop shares practical tips and provides a solid understanding of how to make these emerging technologies most valuable for the organization.

## W9 ■ Knowledge Capture & Transfer Playbook for the AI Age

*Guillermo Galdamez, Principal Consultant, Enterprise Knowledge, LLC*

The impacts of AI on our organizations and society since ChatGPT and other GenAI technologies have burst into the mainstream have left knowledge managers with the increased responsibility of stewarding, guiding, and embracing the potential of these new tools, while protecting organizations from its risks. Many organizations are also realizing the renewed need for capturing institutional knowledge and disseminating it across traditional silos in support of the rollout of AI solutions. This facilitated workshop provides tools for participants to steward their organizations and KM programs to create complementary knowledge capture and transfer programs to support their organizations' objectives and their AI initiatives. It looks at how to articulate and prioritize business needs to key stakeholders; develop personas to guide the discovery, design, and implementation; and plan an assessment of knowledge gaps. It discusses the common knowledge capture and transfer techniques, how to measure and communicate the value of knowledge capture and transfer, and assemble a playbook for organizational knowledge capture and transfer.

## W10 ■ Digital Employee Experience (DEX) & Workspace Design

*Rebecca Rodgers, Principal Consultant, Step Two*

Digital employee experience (DEX) is a holistic concept that looks at the entire experience of staff, as they progress through their work. It's about more than just rolling out new technology platforms, and it's as much about how staff work with each other as it is about the digital services provided by the business. This practical, hands-on workshop looks at how evolving intranets and digital workspaces in various industries manage and create great content, design user experiences that work, communicate while cutting through the noise, collaborate with ease, create efficiency, and remove frustration from across the business. This interactive workshop shares best practice tips and real-world examples to bring your intranet or digital workplace to the next level.

## AFTERNOON WORKSHOPS ■ 1:30 p.m. – 4:30 p.m.

### W11 ■ KM Strategy

*Dave Snowden, Founder & Chief Scientist, The Cynefin Company*

This high-demand workshop, given by a KM pioneer and popular KMWorld speaker, focuses on how to build a successful KM strategy and revitalize knowledge sharing within your organization. Snowden, our workshop leader, engages participants, taking them through a step-by-step approach to rethinking the role of the KM function within an organization. It includes creating a decision/information flow map to understand the natural flows of knowledge; defining micro-projects that directly link to the decision support needs of senior executives; mapping the current flow paths for knowledge within the organization; and finding natural ways to manage the knowledge of the aging workforce as well as the IT-enabled apprenticeship. Using real-world examples, Snowden shares winning strategies and insights to rejuvenate your knowledge-sharing practices. Always fresh and filled with interesting stories, this workshop continues to stand out with our audience!

### W12 ■ Beyond Storytelling: Using Story Thinking for KM Strategies

*John Lewis, CKO, Explanation Age LLC*

Neuroscience has found that we are wired for story. Storytelling uses story as a communication strategy, while story thinking uses story as an operational strategy. This workshop goes beyond the foundations of story psychology and focuses on applications for KMers. Specific approaches and exercises are included to support strategies around KM systems, cultures, leadership, knowledge sharing, project documentation, evaluation, and continuous improvement. Direct comparisons are shown between story structure as our fundamental sensemaking framework and popular certifications, like Six Sigma DMAIC, Design Thinking, Change Manage-

ment, Project Management, Kahneman, Kolb, Kotter, and Kubler-Ross. Discover how story thinking produces quad-loop learning and organizational flow, transforms change management into change leadership, and develops knowledge workers into knowledge leaders.

### W13 ■ Building & Curating E-Bodies of Knowledge

*Art Murray, CEO, Applied Knowledge Sciences, Inc., & Director, Enterprise of the Future Program, International Institute for Knowledge and Innovation*

Knowledge doesn't manage itself. No matter how far AI/ML evolves, knowledge, whether human or digital, will always need human curation. And as the growth in edge computing and hyper-automation continues to accelerate, having a reliable, consistent curation framework in place is more critical than ever. There is no shortage of tools and techniques for building knowledgebases and repositories. Yet the question remains: “How do I stay on top of the explosive growth in human and machine knowledge in my organization?” This workshop helps you do this by gaining an understanding of the three main pillars of knowledge curation: 1) knowledge capture and transfer; 2) governance; and 3) architecture, including the tools, platforms, and processes for putting it all together. Key elements include how to determine what knowledge is worth capturing and in what form; reconcile different world views, mental models, and learning modalities across various human and machine knowledge sources and recipients; determine which tools and approaches are appropriate for different types of knowledge; integrate the various tools and approaches into a single system; vet knowledge and keep it up-to-date; and make knowledge flow and grow, from a single individual to an entire community of experts and practitioners. Join our experienced KM expert and take home an initial plan for creating more KM joy in your organization by setting up and implementing a world-class knowledge curation program.

## W14 ■ Taming the KM Wild West (aka MS Teams)

*Rebecca Rodgers, Principal Consultant, Step Two*

You have more Team workspaces than you know what you do with, your employees don't know the difference between a team and a channel, group chat is all over the place and documents are more likely to be shared from a personal OneDrive than from a shared Team. Does any of this sound familiar? Our experienced presenter shows how to "tame Teams" and help employees develop good collaboration practices so that digital lives easier. Get lots of tips and see how other organizations have tamed their KM workspace.

## W15 ■ KM Mapping

*Beth Smith, Senior Research Consultant, The Cynefin Co.*

*Ellie Snowden, Senior Research Consultant, The Cynefin Company (Cognitive Edge)*

Have you been working with complex challenges and methods for a long time and wish to add something new to your toolkit? Or are you new to complexity and looking for a place to start? Join this workshop to learn about a complexity-informed approach to navigating the seas of organizational needs within the bigger-picture global tides. Estuarine mapping was presented for the first time at last year's conference by Dave Snowden, and it is gaining traction worldwide in industry and government as a conflict-free approach to strategy. In this hands-on, interactive session, learn how to assess the constraints at play in the organization and networks to make the energy cost of doing "bad" things harder and "good" things easier while allowing for emergence along the way. Explore how this framework links into radical new means of distributed decision making at the intersections of technology and human sensemaking using the power of narrative and human connection to find novel possibilities along the path. The workshop covers what we can change and manage in a complex environment, what we do when simple goals don't work, how we plan for uncertainty, how we combine the grand vision with the day-to-day to build collaborative organizations, and how we do sensemaking at scale with human sensor networks. Get a practical compass to start working with different ways to create conditions for novel discovery, cross-pollination of ideas, transformation, and more.

## W16 ■ Building Collaborative Organizations

*Barbara Bosha, President, Bosha Design +Communications*

*Joy Hammons, CEO, Forward, Inc.*

This interactive workshop bridges theory with practical application for building collaborative organizations and navigating the complexities of the digital age. Led by industry experts versed in the art of fostering teamwork and innovation, it shares a blend of case studies, group exercises, and dynamic discussions, so participants uncover the fundamental pillars of collaboration, learning how to cultivate an environment where collective intelligence thrives and silos crumble. With a focus on leveraging technology as an enabler rather than a barrier, the workshop delves into strategies for fostering seamless communication, knowledge sharing, and cross-functional cooperation. Explore cutting-edge tools and methodologies to break down traditional hierarchies and empower employees at all levels to contribute their unique insights and expertise. Get an understanding of the transformative power of collaboration and be poised to implement actionable strategies that drive organizational success in an increasingly interconnected world.

## W17 ■ GenAI & Text Analytics: Creating a Foundation for Business Value

*Tom Reamy, Chief Knowledge Architect & Founder, KAPS Group, LLC, & Author, Deep Text* GenAI continues to astound, but it also continues to struggle to produce real business value outside of a few applications like customer support chat and the productivity gains of producing rough drafts. While those are valuable, there is so much more that GenAI could do if it can overcome its current well-known limitations. GenAI's limitations include its tendency to hallucinate, that is, make up false facts. LLMs were trained on public information, but as we've seen many times, the content and vocabularies behind the enterprise firewalls are quite different; this is why transparency—understanding why it says what it does—is so important. Text analytics can refine the general answers of GenAI with text analytics precision. Learn how to set up both a text analytics and GenAI environment starting with selecting the right components (software, LLMs, etc.). Then get the basics for creating a text analytics foundation (autocategorization, data extraction, and more) and a GenAI approach that combines text analytics, prompt engineering, merging enterprise LLMs with the larger public LLMs, and RAG capability. This collaboration of text analytics and GenAI has the potential to transform how your business operates and competes. Join our experienced speaker and Text Analytics Forum chair to get tips and techniques to develop a strong foundation for business value in your organization.

## W18 ■ Maximizing Intranets: Out-of-the-Box MS 365 Features

*Susan S. Hanley, President, Susan Hanley LLC and Intranet Consultant, Microsoft MVP*

Microsoft 365 is packed with powerful tools and features for building an effective intranet. But with so many options, it can be overwhelming to know where to start. Hanley takes a deep dive into the "out-of-the-box" features of SharePoint Online and Microsoft 365 and shows you how to leverage them to build an intranet that meets your organization's unique needs. From creating and organizing content with SharePoint to enhancing communication with Teams and Viva Engage, she covers everything you need to get started, including new capabilities like the Brand Center and Copilot for SharePoint. By the end of the workshop, you'll have a solid understanding of the key features of SharePoint Online and how to use them to build an intranet that helps your organization communicate, collaborate, and succeed. You will also understand what is possible "in the box" and where you may want to invest in third-party solutions or custom development.

## W19 ■ Troubleshooting Your KM Program

*Kim Glover, Director, Internal Communications, Global, TechnipFMC*

*Luis Rodriguez, Manager of Knowledge Management, Technip Energies*

*Tamara Viles, Knowledge Management Program Manager, TechnipFMC*

"This ain't my first rodeo," and our three KMers, with a combined 52 years of experience in knowledge management, have gained wisdom from failures while also seizing serendipities. They work with participants, whether it's their first rodeo or not, to crowdsource the biggest barriers being faced by their KM programs today and facilitate the co-creation of solutions to remove those barriers, focusing not only on what works, but what doesn't. Have fun as you gain insights into other participants' programs and immediately implementable ideas to stay on that bucking bronco. Be ready to gain insights and gather tips and techniques to strengthen and problem solve in your organization.

## W20 ■ KM Assets: Lifecycles & Processes

*Dominik Aronsky, CMIO, Smedy, Vanderbilt University*

*Dirk Wenke, Head, SW Development, Smedy*

This practical workshop focuses on the lifecycles and workflow processes that knowledge engineers require to effectively manage complex and large volumes of knowledge. Knowledge assets represent diverse types of information, such as terminologies, information models, data elements, quality metrics, protocols, decision support rules, policies, etc. Content vendors provide collections of knowledge assets for different domains, but companies have to ensure that all active knowledge assets are integrated with delivery workflows. Systematic processes for asset review and curation are necessary, including consistently updating and tracking changes. Speakers provide an introduction to the most important KM activities, including the need to catalog and index knowledge assets, author and track asset metadata, manage relationships and dependencies among assets, import and export assets to/from various information systems, validate structural and semantic integrity when assets change, and implement a comprehensive asset lifecycle process. Get KM best practices, in combination with examples, challenges, and lessons learned from the extensive practical experience of speakers. Simple examples from the healthcare domain are used to illustrate the lifecycle and process management aspects.

The Enterprise Solutions Showcase is a one-stop shop for serious buyers to meet with vendors offering knowledge management, content management, enterprise search, taxonomy, and intranet-related products and services.

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# KMWWorld<sup>2024</sup>

## November 18–21

### JW Marriott | Washington, DC

## KM & ENTERPRISE INTELLIGENCE: Human or Artificial?

- **COLLABORATE** With Experts, Colleagues, & Customers
- **GAIN** Knowledge to Build High-Performing Organizations
- **MAXIMIZE** the Power of Taxonomies & Content Management
- **EXPLORE** Enterprise AI, Collaboration & Networking Tools



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# KMWorld 2024

November 18–21  
JW Marriott | Washington, DC



**PROGRAM DIRECTOR**  
Jane Dysart  
Dysart & Jones Associates



**PROGRAM COORDINATOR**  
Brian Pichman  
Evolve Project



## KM & ENTERPRISE INTELLIGENCE: Human or Artificial?

The human side of knowing has always been at the center of enterprise KM intelligence, programs and strategies. As AI and other technological innovations transform the way we learn, collaborate, and innovate, people are still key to knowledge sharing and bringing opportunities to excel within enterprise processes and operations. Join colleagues, thought leaders, and practitioners as we explore advances in neuroscience and cognitive thinking, pattern recognition and visualization, new AI and technology-enhanced KM applications, and more. Hear stories from leading KMers of their innovative breakthroughs and learning experiences as they steer their organizations into the future. See how KM aligns with the CEO agenda moving forward to deal with the governance and sustainability, SDGs (UN's Sustainable Development Goals), disruptions from many global and natural places, workforce and workplace changes, technology revolutions, and more. KMWorld 2024 addresses the human and technology factors of collaboration and knowledge augmentation via AI, the sharing and reuse of knowledge with new tools, the human roles that are even more important than the tools, the hybrid workplace shift in traditional organizations, emphasis on strategic versus operational knowledge—understanding and aligning with the big organizational or community picture, leadership skills driving knowledge adoption and reuse, especially from outside the organization such as the environmental and sustainability movement. KMWorld features new creative knowledge-sharing tools and techniques as well as human strategies that have an impact on all types of organizations and communities. Join us and take home exciting insights and ideas to apply in your environment or community.

### WHO SHOULD ATTEND

*KMWorld is designed for anyone who wants to run an innovative enterprise, including:*

- CIOs & CKOs
- Knowledge Managers
- Intranet Managers
- C-Level Executives
- IS/IT Professionals
- Communications Managers
- Information & Knowledge Architects
- Information Professionals
- Scientists, Engineers, & Researchers
- Content Managers
- Competitive Intelligence Professionals

*And professionals who plan, manage, or deploy systems and business practices for:*

- Content Management
- Sales Force Automation
- Human Resources
- Marketing & Sales
- Electronic Commerce
- Supply Chain
- Customer Relationship Management
- Competitive Intelligence

### PRECONFERENCE WORKSHOPS— MONDAY, NOVEMBER 18

Choose among 20 workshops (see pages 6–8) to concentrate on your special areas of interest. Taught by experts, the workshops offer you a chance for interactive, small-group learning. Mix and match morning and afternoon workshops to customize your conference program and jump-start your week. Lunch is included when you register for a morning and afternoon workshop.

*(Workshops are separately priced or available with the KMWorld Conference Pass PLUS Workshops or Platinum Pass options.)*

### KMWORLD BOOKSTORE

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Interested in collaboration, innovation, and organizational improvement? Take advantage of the KMWorld Bookstore—browse our great collection of KM and related books at discount prices from our speakers, industry authors, and more—plus speak with the speakers/authors directly, and have them sign your books! The KMWorld Bookstore—a choice destination not to be missed!

### ENTERPRISE SOLUTIONS SHOWCASE

The Enterprise Solutions Showcase is a one-stop shop for serious

buyers to meet with vendors offering knowledge management, content management, enterprise search, taxonomy, AI, and intranet-related products and services. If you are looking for a particular product, evaluating competing systems, or keeping up with the latest trends and developments, you need to visit the Enterprise Solutions Showcase.

### SHOWCASE HOURS

Monday, Nov. 18 ..... 5:00 p.m. – 6:30 p.m.  
*Grand Opening Reception*

Tuesday, Nov. 19 ..... 10:00 a.m. – 6:00 p.m.  
*Networking Happy Hour* ..... 5:00 p.m. – 6:00 p.m.

Wednesday, Nov. 20 ..... 10:00 a.m. – 4:00 p.m.

### NETWORKING OPPORTUNITIES

KMWorld offers great opportunities to get acquainted with new colleagues and explore through casual conversation what others are doing in the KM space.

**Enterprise Solutions Showcase Grand Opening Reception** *Sponsored by eGain*  
Monday, November 18 • 5:00 p.m. – 6:30 p.m.  
Celebrate the grand opening of the Enterprise Solutions Showcase. Enjoy drinks and light bites while visiting with conference sponsors.

**Networking Happy Hour**  
Tuesday, November 19 • 5:00 p.m. – 6:00 p.m.

Stop by the showcase after a full day of stimulating sessions to mix and mingle with other conference attendees, speakers, and our conference sponsors.

**Communities of Interest**  
Wednesday, November 20 • 5:30 p.m. – 6:30 p.m.

Join your colleagues at the end of the day for an informal debriefing and stimulating discussions. Meet and network with other attendees who have similar interests and interact with some of the outstanding conference speakers and moderators. *A cash bar will be available.*

**KMWorld Knowledge Café: Mentoring Morning Mixer**  
Thursday, November 21 • 10:15 a.m. – 12:00 p.m.

Participate in our popular interactive knowledge café, where you can share your KM challenges with colleagues and KM thought leaders and practitioners. Each table has a KM industry mentor and topic, and you will have time to visit at least four different tables during the morning. Meet and learn in this intimate networking environment.

**Continental Breakfasts, Breaks & Lunches**

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# CONFERENCE AT-A-GLANCE

## TUESDAY, NOVEMBER 19

8:30 a.m. – 9:30 a.m.	<b>WELCOME &amp; KEYNOTE</b> = Collective Superintelligence: Humans in the Loop = <i>Louis Rosenberg</i>		
9:30 a.m. – 9:45 a.m.	<b>KEYNOTE</b> = Using Knowledge Graphs to Improve GenAI = <i>Dave Clarke</i>		
9:45 a.m. – 10:00 a.m.	<b>KEYNOTE</b> = Trusted Knowledge for Customer Service in the Age of GenAI = <i>Ashu Roy</i>		
10:00 a.m. – 10:15 a.m.	<b>KEYNOTE</b> = Lessons Learned From Search & GenAI = <i>Sid Probst</i>		
10:15 a.m. – 11:00 a.m.	<b>COFFEE &amp; NETWORKING BREAK</b> = <i>In the Enterprise Solutions Showcase</i>		
	<b>TRACK A</b> = KM Practices & Strategies	<b>TRACK B</b> = Digital Workspaces & the Future of Work	<b>TRACK C</b> = Storytelling & KM Communities
11:00 a.m. – 11:45 a.m.	<b>A101</b> Transforming Decision Making With Information Architecture & LLMs	<b>B101</b> The Future of Intranets	<b>C101</b> Story Thinking: Combining Human & Artificial Intelligence
12:00 p.m. – 12:45 p.m.	<b>A102</b> Navigating Knowledge-Sharing Challenges	<b>B102</b> Next-Gen Digital Experience	<b>C102</b> Demonstrating the Value of Storytelling in Knowledge Organizations
12:45 p.m. – 1:45 p.m.	<b>ATTENDEE LUNCHEON</b> = <i>In the Enterprise Solutions Showcase</i>		
1:45 p.m. – 2:30 p.m.	<b>A103</b> KM & Engineering in the Enterprise: Case Studies	<b>B103</b> Intranet Showcase: Award-Winning Concepts	<b>C103</b> Human-to-Machine & Human-to-Human Knowledge Working
2:45 p.m. – 3:30 p.m.	<b>A104</b> Building KM Programs for Nonprofits	<b>B104</b> KM Strategies for MS365 in a Copilot World	<b>C104</b> Communities of Practice (CoPs) & Gatherings for Peer Learning & Knowledge Sharing
3:30 p.m. – 4:15 p.m.	<b>COFFEE &amp; NETWORKING BREAK</b> = <i>In the Enterprise Solutions Showcase</i>		
4:15 p.m. – 5:00 p.m.	<b>A105</b> KM Lessons Learned	<b>B105</b> Industry Insights: Preparing the Future Workforce With KM Tools	<b>C105</b> Communities of Practice: Breaking Knowledge Silos
5:00 p.m. – 6:00 p.m.	<b>NETWORKING HAPPY HOUR</b> = <i>In the Enterprise Solutions Showcase</i>		

## WEDNESDAY, NOVEMBER 20

8:30 a.m. – 9:15 a.m.	<b>KEYNOTE</b> = Value Every Voice: Leading Teams That Thrive = <i>Dan Pontefract</i>		
9:15 a.m. – 9:30 a.m.	<b>KEYNOTE</b> = New KM Practices to Supercharge the Power of AI = <i>John Chmaj</i>		
9:30 a.m. – 9:45 a.m.	<b>KEYNOTE</b> = Leveraging AI+ for Productivity = <i>Devan Dewey &amp; Laura Carson</i>		
9:45 a.m. – 10:00 a.m.	<b>KEYNOTE</b> = Sinequa = <i>Jeff Evernham</i>		
	<b>TRACK A</b> = KM Practices & Strategies	<b>TRACK B</b> = KM With AI & New Technologies	<b>TRACK C</b> = KM Culture & Collaboration
10:45 a.m. – 11:30 a.m.	<b>A201</b> KM & Knowledge Graphs	<b>B201</b> KM Needs AI: Why?	<b>C201</b> Humans as Learning Machines?
11:45 a.m. – 12:30 p.m.	<b>A202</b> Capturing & Transferring Knowledge: A 7-Step Process to Success	<b>B202</b> Retaining Critical Knowledge With AI	<b>C202</b> Fostering Knowledge Transfer: KM & AI
12:30 p.m. – 1:30 p.m.	<b>ATTENDEE LUNCHEON</b> = <i>In the Enterprise Solutions Showcase</i>		
1:30 p.m. – 2:15 p.m.	<b>A203</b> Results-Focused Knowledge Exchange	<b>B203</b> GenAI's Impact on KM & the Enterprise of the Future	<b>C203</b> Navigating Change for KM
2:30 p.m. – 3:15 p.m.	<b>A204</b> Knowledge Journeys & Knowledgebases With Microsoft 365	<b>B204</b> Robot Knowledge-Based Agents: Implementing GenAI	<b>C204</b> People Skills: Teams & KM in the Era of AI
3:15 p.m. – 4:00 p.m.	<b>COFFEE &amp; NETWORKING BREAK</b> = <i>Last chance to visit the Exhibits in the Enterprise Solutions Showcase</i>		
4:00 p.m. – 5:00 p.m.	<b>A205</b> Industry Insights: Building Enterprise Knowledge Sharing	<b>B205</b> Content Strategies for Enterprise KM	<b>C205</b> Onboarding & Beyond
5:30 p.m. – 6:30 p.m.	<b>COMMUNITIES OF INTEREST</b>		

## THURSDAY, NOVEMBER 21

8:30 a.m. – 9:15 a.m.	<b>KEYNOTE</b> = KM, Experts & AI: Learning From KM Leaders = <i>Kim Glover &amp; Cindy Hubert</i>		
9:15 a.m. – 9:30 a.m.	<b>KEYNOTE</b> = Achieving GenAI ROI: Clean Data & KM Strategies = <i>Patricia Petit Liang</i>		
9:30 a.m. – 9:45 a.m.	<b>KEYNOTE</b> = Protecting Your KM Investment: Navigating the AI Hype = <i>Sean Coleman</i>		
9:45 a.m. – 10:00 a.m.	<b>KEYNOTE</b> = Capturing Expert Knowledge With GenAI to Scale Transformation = <i>Vanessa Liu &amp; Judith Williams</i>		
10:15 a.m. – 12:00 p.m.	<b>KMWorld Knowledge Café &amp; Mentoring Mixer</b>	<b>Evolving KM: AI, Agile &amp; Answers</b>	
12:00 p.m. – 1:00 p.m.	<b>KEYNOTE LUNCHEON &amp; AWARDS</b> = <i>Pryon</i>		
	<b>TRACK A</b> = Learning & KM	<b>TRACK B</b> = KM Insights	<b>TRACK C</b> = Content Management
1:00 p.m. – 1:45 p.m.	<b>A301</b> Neuroscience Hacks for KM Practitioners	<b>B301</b> Governance in KM	<b>C301</b> Taxonomies Are Knowledge
2:00 p.m. – 2:45 p.m.	<b>A302</b> Learning, Training, & Retaining KMs	<b>B302</b> Integrating AI Into KM	<b>C302</b> Beyond CM for Real Knowledge Sharing
3:00 p.m. – 3:45 p.m.	<b>A303</b> KM Through Systems & Human Lenses	<b>B303</b> KM x AI: Tacit Knowledge at Scale	<b>C303</b> Bring Your A(I) Game to Knowledge & Content Activation
4:00 p.m. – 4:15 p.m.	<b>KEYNOTE</b> = Beyond Boundaries: Content Readiness for AI in KM = <i>Tim Hill</i>		
4:15 p.m. – 5:00 p.m.	<b>KEYNOTE</b> = KM 2025 & Beyond = <i>Brian Pichman, Julie Mohr, Dan Rasmus, &amp; Dave Snowden</i>		

Continental Breakfast ■ 8:00 a.m. – 8:30 a.m.

Coffee & Networking Break ■ In the Enterprise Solutions Showcase  
10:15 a.m. – 11:00 a.m.

## WELCOME & KEYNOTES



### Collective Superintelligence: Humans in the Loop

8:30 a.m. – 9:30 a.m.

*Louis Rosenberg, CEO, Unanimous.AI, & Author, Our Next Reality: How the AI-Powered Metaverse Will Reshape the World*

We need new frameworks for AI-powered decision making that keep humans in the loop (along with human values, morals, interests, emotions, and sensibilities). Rosenberg discusses an approach toward enabling collective superintelligence that is rooted in hundreds of millions of years of evolution, which is why it so greatly outperforms old-school methods that treat humans as mere datapoints to be aggregated. Humans are not data. Humans are powerful data processors. The most viable pathway to collective superintelligence is to connect people together in real time and allow them to act, react, and interact using AI as the interstitial tissue that empowers us to solve problems together in optimal ways. A lifelong technologist, Rosenberg earned his Ph.D. from Stanford University in the early 1990s, was a professor at California State University in the early 2000s and has been focused on enabling collective superintelligence for the last decade. He shares his insights and ideas for enterprises looking for ways to share knowledge in their organizations.



### Using Knowledge Graphs to Improve GenAI

9:30 a.m. – 9:45 a.m.

*Dave Clarke, EVP, Semantic Graph Technology, Squirrel*

GenAI retrieval-augmented generation (RAG) uses the natural language understanding (NLU) and natural language generation (NLG) capabilities of large language models (LLMs) to securely support conversational search and discovery over enterprise content and data repositories. But GenAI and RAG alone are not enough to ensure the completeness and accuracy of information for many mission-critical enterprise applications. Knowledge Graphs (KGs), including enterprise taxonomies and ontologies, can significantly improve the completeness and accuracy of information retrieved and generated by GenAI applications. Taxonomies and ontologies provide GenAI with machine-intelligible context about the domain knowledge and processes of the enterprise. When KGs and GenAI are integrated, taxonomists and ontologists can see and rapidly edit graph structures that explicitly guide RAG decision-making processes. With a simple no-code interface, taxonomists and ontologists are empowered to directly control GenAI dependencies, query refinement, and outcomes, thereby delivering high-quality, high-value business process automation. Using real-world applications, our knowledgeable speaker illustrates how using knowledge graphs improves enterprise GenAI.



### Trusted Knowledge for Customer Service in the Age of GenAI

9:45 a.m. – 10:00 a.m.

*Ashu Roy, CEO, eGain*

There is no question that GenAI has reignited interest in KM. Gartner predicts that 100% of GenAI virtual customer assistant and virtual agent assistant projects that lack integration to modern KM systems will fail to meet their CX and operational cost-reduction goals by 2025. As businesses experiment with GenAI, they are realizing that robust KM is foundational to its success. Roy discusses how KM and GenAI can accelerate and ensure mutual success, creating transformational business value at warp speed. He shares stunning success stories from clients. Get insights and ideas for your enterprise.



### Lessons Learned From Search & GenAI

10:00 a.m. – 10:15 a.m.

*Sid Probst, Founder & CEO, Swirl*

The world of information is exploding, but finding what you truly need can still feel like searching for a needle in a pile of needles. Probst explores how search and GenAI are joining forces to revolutionize how we discover information. He delves into the lessons learned from traditional search and how AI is pushing the boundaries. He shares real-world examples and discusses how this powerful synergy is shaping the future of information discovery.

## TRACK A ■ KM Practices & Strategies

Knowledge sharing at its best here at KMWorld features KM practitioners who highlight their experiences, learnings, practices, and strategies for enabling a successful KM program within their organization.

*Moderated by Gloria Burke, Slalom*

### A101 ■ Transforming Decision Making With Information Architecture & LLMs

11:00 a.m. – 11:45 a.m.

*Seth Earley, CEO, Earley Information Science*

*Giovanni Piazza, Former Head, KM Services, Takeda*

This case study examines the redesign of the drug portfolio evaluation process at Takeda Pharmaceutical. Moving from a cumbersome, manually updated, and limited searchability system to a streamlined process, the organization leveraged the existing SharePoint infrastructure to create a unified information environment that facilitated efficient portfolio management and improved searchability and provided executives with componentized views of submissions. This transformation not only optimized the drug portfolio evaluation process but also ensured secure and strategic management of sensitive information, demonstrating a significant leap in operational efficiency and decision-making speed for the organization. A large language model (LLM) PoC was also developed utilizing the PRC application information architecture which showed the improved recall and accuracy and virtually eliminated hallucinations using a retrieval-augmented generation (RAG) mechanism. Hear how Takeda Pharmaceuticals revamped its drug portfolio evaluation process, overhauling manual workflows, integrating systems, improving user experience, and aligning information architecture with corporate ontology and a knowledge graph. This optimized process ensures strategic information management, boosts operational efficiency, and showcases marked improvements in decision-making speed.

### A102 ■ Navigating Knowledge-Sharing Challenges

12:00 p.m. – 12:45 p.m.

*Mitch Kirby, PowerLight Technologies*

*Taylor Paschal, Enterprise Knowledge, LLC*

*Mike Gilger, CTO, Modus Operandi*

The U.S. Department of Defense (DOD) operates under complex data and security regulations and compliance standards, which can be difficult to navigate. Hear how our first speakers identified, validated, and prioritized key challenges that would maximize the initial impact of formalized KM efforts to accelerate and optimize engineering performance in the organization. What began as an approach to design and iterate on a SharePoint Online PoC became an intentional effort to organize data and information in preparation for exciting new capabilities, such as AI. Gilger discusses the building of a knowledge-driven Air Force collaborative ecosystem empowering airmen. It moved from siloed information to connected expertise with AI augmented KM, using a novel approach to KM with a collaborative strategy facilitating active knowledge sharing and refinement through features such as tagging, comments, and dynamic document assembly. With intelligent content assembly, users build new documents by directly referencing specific sections (paragraphs, images) from existing knowledge sources such as policies and procedures, ensuring knowledge builds upon itself, and any updates to core information are automatically reflected in all referencing documents. They also use AI tools to ask questions using natural language, leveraging the system's vast knowledgebase for accurate and relevant answers. By enabling collaborative creation, intelligent content assembly, and AI-assisted exploration, the USAF system empowers faster responses and a more agile Air Force. Get tips and insights from all our speakers for developing a forward-thinking approach to maturing knowledge sharing and corresponding technologies to try in your environment.

### Attendee Luncheon ■ In the Enterprise Solutions Showcase

12:45 p.m. – 1:45 p.m.

**A103 ■ KM & Engineering in the Enterprise: Case Studies**

1:45 p.m. – 2:30 p.m.

*Felicia Levy, Senior Manager, Knowledge Science,*  
*Melissa McCrea, Senior Information Architect,*  
*Jessica Peralta, KCS Manager, &*  
*Jena Baker, Associate Vice President Quality and Business Operations, Calix*  
*Greg Turcotte, Senior Engineering Manager, &*  
*Tamara Viles, KM Program Manager, TechnipFMC*

Similar to many service organizations, our first speakers' engineering organization was plagued by lack of data capture, reuse, and collaboration. Unlike service organizations though, their customers are internal employees, the engineers. The problem facing the organization is how to create a collaborative environment that encourages systematic reuse, transfer, and capture of knowledge while meeting the demands of new product deployment and solving customer issues. Hear how they focused on key challenges and overcame them and the outcomes of implementation. Our second speakers discuss solving problems the smart way and what happens when learning, KM, and engineering join forces in the enterprise. They discuss a new approach to developing products that a small deployment team of engineering leaders created, a new methodology for the 9,000-strong engineering community. Because from an engineer's perspective, changing the way the group had always developed products was disruptive and unwelcome, the team enlisted the help of the learning and KM team to expedite learning, adoption, and engagement. They deployed a comprehensive change management and communications plan, coupling proven solutions, such as a formal curriculum in the LMS, communities of practice, and wiki articles with new and innovative social learning tactics, such as a conference-like Expo, which drew 1,000 employees to a single live webinar; bite-sized knowledge nugget webinars; video success stories; podcasts; and more. Hear more about how they partnered to deploy the new process for a series of blended learning and KM solutions that drove adoption of best practices; ensured successful change management; leveraged communities of practice, experts, and executive sponsors; and created a high level of employee engagement.

**A104 ■ Building KM Programs for Nonprofits**

2:45 p.m. – 3:30 p.m.

*Jennifer Anna, Knowledge Manager, World Wildlife Fund (WWF)*  
*Jessica DeMay, Knowledge Management Consultant, Enterprise Knowledge, LLC*

At a nonprofit organization, effective KM maximizes resources and supports informed decision making, ultimately bolstering the organization's overall effectiveness and impact. Speakers share how the WWF is actively working to improve its KM strategy, discuss the initial challenges WWF faced when starting from ground zero while considering the organizational priorities, look at how gaps in KM were identified, and present the strategies they devised for overcoming obstacles encountered. The approach is multifaceted, integrating people, processes, and technology to develop a road map to the organization's target state, aligning with organizational goals, and to foster a knowledge-sharing culture with clear roles and a governance structure to enhance the quality and management of content within the organization. Speakers also discuss change management; techniques employed to navigate resistance, foster buy-in, and cultivate a sense of ownership among stakeholders; and more. Get insights and inspiration from this presentation!

**Coffee & Networking Break ■ In the Enterprise Solutions Showcase**

3:30 p.m. – 4:15 p.m.

**A105 ■ KM Lessons Learned**

4:15 p.m. – 5:00 p.m.

*Kemi Ayanda, Manager, KM & Knowledge Economy Projects, NEOM*  
*Scott Leeb, Chief Knowledge Officer, Fragomen*

Embark on a captivating exploration into the future of KM as speakers share invaluable insights derived from implementing KM systems. Ayanda discusses how her organization navigated uncharted territories, implementing mitigation strategies that reshaped the very foundations of its KM framework. She shares real-world anecdotes, incorporating user feedback data and quotes that vividly depict the transformative journey and talks about the core features and functionalities that define its KM system seamlessly integrating AI to augment user experiences and maximize operational efficiency; the user interface designed to intuitively cater to the diverse needs of our NEOM community; leveraging AI to enhance decision-making processes; and the implementation of an anchor solution through adopting a best-of-breed approach. While creating and building KM/business intelligence functions for four Fortune 500 companies, a leading philanthropy (Rockefeller Foundation),

and the world's largest immigration law firm (Fragomen), Leeb discusses the five key problems he's ID'd that KM professionals face. The key to solving them lies in the parameters of culture and the organization. He outlines the five problems (converting tacit to explicit knowledge; demonstrating ROI; articulating the value of KM, visibility, and findability of knowledge; collaboration; and technology as an enabler, not a solution) and discusses how they are addressed in a myriad of industries (financial, hi-tech, publishing) and sectors (commercial, not-for-profit, and government).

**TRACK B ■ Digital Workspaces & the Future of Work**

In our digitized and interconnected world, the importance of KM in shaping the future of work is so important, as it encompasses the systematic and deliberate management of knowledge within an organization with the goal of maximizing its use and value. In the context of the future of work, KM enables organizations to stay competitive and adapt to the rapidly changing landscape. Get tips and insights into making it work for your organization.

Moderated by *Jeremy Carter, IRS***B101 ■ The Future of Intranets**

11:00 a.m. – 11:45 a.m.

*Toby Ward, President, Prescient Digital Media*

Our longtime practitioner shares intranet and digital workplace trends as well as what to expect in the next 5 years, including but not limited to AI, digital assistants, search, and content management.

**B102 ■ Next-Gen Digital Experience**

12:00 p.m. – 12:45 p.m.

*Simon Denton, Enterprise Architect, Mott MacDonald*

Denton discusses EMMA, the next iteration of established flows introducing GenAI, as well as enhanced collaboration and knowledge centered around a personal, task-oriented approach to information architecture. EMMA is an acronym meaning something slightly different to different stakeholders. To some, it is Every Mott MacDonald Answer. To others, it is Everything Mott MacDonald Answered. Either way it is interpreted, stakeholders articulate the requirements for the digital experience to provide just-in-time knowledge, the microtransactions needed for the flow of work and personal productivity, as well as the necessary wayfinding to discover knowledge, connect with colleagues and create opportunities. It's not a "bot," but the orchestration, processes, and knowledge that feed into digital experience consumption points in the likes of Copilot, Search, Teams, and our intranet compass. Hear lessons learned in the GenAI journey, gain insights and ideas, and more.

**Attendee Luncheon ■ In the Enterprise Solutions Showcase**

12:45 p.m. – 1:45 p.m.

**B103 ■ Intranet Showcase: Award-Winning Concepts**

1:45 p.m. – 2:30 p.m.

*Group session facilitated by Rebecca Rodgers, Principal Consultant, Step Two, and featuring winners of our 2024 Intranet and Digital Workplace Awards*

In their 18th year, the Intranet and Digital Workplace Awards are global awards that recognize outstanding contributions to the fields of intranets and digital workplaces. The awards uncover remarkable solutions that deliver business value and then share them with the wider community. This session is a chance to meet award winners and look behind the firewall to see what the winners have achieved and, more importantly, how they achieved it! Get tips and ideas and see creative, inspirational, and valuable ideas to take back and apply in your organization.

**B104 ■ KM Strategies for MS365 in a Copilot World**

2:45 p.m. – 3:30 p.m.

*Susan Hanley, President, Susan Hanley LLC, & Intranet Consultant*

With the deprecation of Viva Topics in February 2025, Microsoft is losing the "hero" application for KM in Microsoft 365. But Viva Topics alone was never enough and certainly not the only app in your KM toolkit. Hanley discusses strategies for leveraging Microsoft 365 to achieve your KM goals—from both manual and automatic metadata classification in SharePoint to enhance explicit knowledge to AI-assisted tacit knowledge and expertise location experiences with Viva Engage and Answers in Viva to Copilot-assisted knowledge experiences grounded in your organizational content. She provides practical tips and takeaways for achieving your KM goals and a deeper understanding of how Microsoft 365 and Copilot can help your journey.

**Coffee & Networking Break** ■ In the Enterprise Solutions Showcase  
3:30 p.m. – 4:15 p.m.

## **B105** ■ Industry Insights: Preparing the Future Workforce With KM Tools

4:15 p.m. – 5:00 p.m.

TBD, Bloomfire

*Sarah Mecure, Semaphore Professional Services, Progressive Software*  
*Alexi Lopez-Lorca, Associate Director, Professional Services, Semantic Web Company*

Our industry leaders share their top tool for building the future workforce for KM. Gain insights about how their tools helped transform a client's organizational knowledge strategy and understand their real-world applications in enhancing workforce capabilities.

## **TRACK C** ■ Storytelling & KM Communities

This stream of sessions looks at storytelling and communities of practice (CoPs) as knowledge transfer and learning tools, especially with the new technologies such as AI. It looks at what makes a good story and how it has an impact, and how CoPs break silos and contribute to knowledge sharing.

Moderated by *John Lewis, Explanation Age, & Kim Glover, TechnipFMC*

## **C101** ■ Story Thinking: Combining Human & Artificial Intelligence

11:00 a.m. – 11:45 a.m.

*John Lewis, CKO, Explanation Age LLC*

*Art Murray, CEO, Applied Knowledge Sciences, Inc.; Director, Enterprise of the Future Program, International Institute for Knowledge and Innovation*

Speakers discuss the neuroscience and knowledge representation of story thinking and how it supports human and AI performance combined. While storytelling uses stories as a communication strategy, story thinking uses story structure as an operational strategy, embedding sensemaking within working and learning models and environments. Examples discussed include organizational KM strategies, innovation management, leadership profiles, clinical process models within healthcare, early warnings within large projects, and an emerging AI-assisted platform designed to activate the story thinking capacity of users and induce a state of flow when making sense of information from multiple sources.

## **C102** ■ Demonstrating the Value of Storytelling in Knowledge Organizations

12:00 p.m. – 12:45 p.m.

*Johel Brown-Grant, Principal & Founder, StoryDNX Consulting*

*Kim Glover, Director, Internal Communications, TechnipFMC*

This conversation between two longtime KM and storytelling practitioners touches on storytelling's place in business and in human success. They explore these questions: What makes a good organizational story? How can organizations measure the impact and ROI of stories? What practices can be implemented to ensure effective knowledge transfer through stories? How can GenAI support this most human of all activities?

## **Attendee Luncheon** ■ In the Enterprise Solutions Showcase

12:45 p.m. – 1:45 p.m.

## **C103** ■ Human-to-Machine & Human-to-Human Knowledge Working

1:45 p.m. – 2:30 p.m.

*Victoria Ward, Co-Director, Jigsaw Foresight*

*Bonnie Cheuk, Senior Director, Head of Business & Digital Transformation, AstraZeneca*

Speakers share practical, real-world, current examples to apply narrative, foresight, and critical thinking methods to organizational transformation. As human-machine and human-human relationships evolve in the workplace, they share how companies can address human and technology factors in collaboration and knowledge augmentation. How can organizations document and narrate experimentation and new tacit knowledge in a way that also nurtures interior work and workplaces? What are the new (and are they new?) human capabilities for knowledge workers in an environment increasingly mediated by different technologies? How can narrative, and other methods, be seeded into change programs to move people from fear to agency? Get lots of insights and ideas from this talk!

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## **C104** ■ Communities of Practice (CoPs) & Gatherings for Peer Learning & Knowledge Sharing

2:45 p.m. – 3:30 p.m.

*Lane Pollack, Senior Learning Advisor, Bureau for Policy, Planning & Learning (PPL), & Jane Lowicki-Zucca, Senior Youth Advisor, Bureau for Resilience, Environment, and Food Security, USAID*

*Michael Weinraub, Learning Advisor, Bixal*

*Diana Fernholz, Organizational Development and Learning Specialist, Environmental Incentives*

The U.S. Agency for International Development's (USAID) Bureau for Planning, Learning and Resource Management (PLR) has pioneered the CoPx2 initiative, a dynamic meta-community aimed at enriching and optimizing CoPs across the agency. Created in 2020, CoPx2 serves as a collaborative space where CoP leaders share best practices, develop a comprehensive library of resources, and engage in mutual learning. This initiative not only facilitates the application of good practices in leading CoPs but also pioneers avenues for cross-CoP collaboration, addressing the often-siloed nature of specialized groups. This model exemplifies how structured peer learning and collaborative platforms can significantly enhance organizational knowledge, foster innovation, and drive meaningful change. Through strategically designing, planning, and facilitating various events for the group, CoPx2 fostered a stronger community in PLR with active information sharing and collaboration between hosts. Get lots of tips, tricks, and lessons learned for group practices in thought leadership and peer learning using a holistic and collaborative way. But is all we need to know about knowledge sharing what we learned in kindergarten: take turns, try new things, pay attention, and perhaps above all—engage in show and tell? Our second speakers discuss how USAID leveraged existing CoPs to convene gatherings that promote the sharing, uptake, and application of relevant evidence and practical resources. The human-centered design approach was informed by the KM framework developed by Nick Milton and Patrick Lambe, which promotes an integration of four fundamental knowledge transactions (discuss, document, synthesize, find/review). They describe the context, approach, and actual convenings they led; share activities for an experiential understanding of those convenings; and provide templates and guidance to sketch knowledge-sharing agendas in other enterprises.

## **Coffee & Networking Break** ■ In the Enterprise Solutions Showcase

3:30 p.m. – 4:15 p.m.

## **C105** ■ Communities of Practice: Breaking Knowledge Silos

4:15 p.m. – 5:00 p.m.

*Ede Ijjasz, CEO & Founder, Eigen Impact Consulting & Author, Communities of Practice at the World Bank: Breaking Knowledge Silos to Catalyze Culture Change & Organizational Transformation*

*Philip Karp, Consultant, Formerly KM Management & Learning Specialist,*

*Pascal Saura, Senior Knowledge & Learning Officer, &*

*Rasmus Heltberg, Lead Evaluation Officer, The World Bank*

Speakers share the experience of the World Bank, the world's premier international development institution, in undertaking a remarkable organizational transformation, with KM at the heart of a substantial institutional change process. It reviews how a leadership team at the World Bank used KM as a tool to integrate a large group of staff, dispersed across more than 90 countries and representing diverse professional disciplines and business sectors, that had not historically worked together. It discusses how a suite of KM tools was used to build a cohesive, high-performing team with diverse members coming from more than 90 nationalities but who were able to build a shared vision and sense of purpose and describes the strategies, instruments, tools, and processes at the core of one of the most important and radical reorganizations in the history of the World Bank. It focuses on the role of CoPs in fostering the development of knowledge citizenship and innovation, demonstrating how KM, traditionally viewed as being about information systems and processes, can in fact play a fundamental corporate role by creating a competitive edge for organizations, increasing team performance, and fostering effective, large-scale organizational change.

## NETWORKING HAPPY HOUR

TUESDAY, NOVEMBER 19 | 5:00 P.M. – 6:00 P.M.

Stop by the Enterprise Solutions Showcase after a full day of stimulating sessions to mix and mingle with other attendees, speakers, and our conference sponsors.

# KMWorld 2024 AWARDS

**SUBMIT**  
your nominations  
today!

The deadline for submissions  
is August 26, 2024.

## KMPromise

The search for a knowledge management solution is not an easy one. Many companies vow they offer the best technology to meet a client's needs, but finding the vendor that actually fulfills that promise can be challenging. The **KM Promise Award** is given to a company that implements and integrates knowledge management practices into business processes and works with clients to ensure they reach their goals. The award recipient provides innovative technology that breaks through the hype to help customers gain insights, collaborate, and compete in a mobile and global business environment.

## KMReality

The **KM Reality Award** recognizes an organization in which knowledge management is a positive reality, not just rhetoric. The award recipient has demonstrated leadership in the implementation of knowledge management practices and processes, realizing measurable business benefits. To be considered for the Reality Award, the knowledge management program must be in place for at least 1 year, receive support from senior management, and have defined metrics to evaluate the initiative and its impact on organizational goals.

# ATTEND THE AWARDS CEREMONY!

## WINNERS WILL BE ANNOUNCED

during KMWorld 2024 taking place November 18-21 in Washington, D.C.,  
and featured in the January/February 2025 issue of *KMWorld* magazine.

FIND OUT MORE — <https://bit.ly/KMAwards24>

Continental Breakfast ■ 8:00 a.m. – 8:30 a.m.

## KEYNOTES



### Value Every Voice: Leading Teams That Thrive

8:30 a.m. – 9:15 a.m.

Dan Pontefract, Founder & CEO, Pontefract Group, & author, *Work Life Bloom*, *Flat Army*, & others

Today's business landscape is changing faster than ever before in history. The power of inclusive engagement and collaborative curiosity cannot be overstated. Join leadership strategist and award-winning author Dan Pontefract as he unveils essential techniques to cultivate a culture where every voice is valued and heard. Drawing on global primary research and more than 25 years of experience with leading organizations, he shares actionable insights and transformative strategies that empower KM teams to work better together. Gain expert tips on creating an environment where collaboration prospers, every team member feels genuinely valued, and the opportunity to bloom is open to all.



### New KM Practices to Supercharge the Power of AI

9:15 a.m. – 9:30 a.m.

John Chmaj, Chief KM Strategist, Verint

As organizations integrate AI into their product ecosystems, innovative KM practices are essential to keep information relevant and useful. In the age of GenAI and LLMs, the principle of "garbage in, garbage out" remains true—AI systems are only as effective as the data they process. Chmaj discusses emerging content models, new competencies, advanced authoring techniques, and governance practices that are transforming the KM landscape. It's vital that companies evolve their technology, resources, and strategies to unlock the full potential of AI-driven KM capabilities. In this dynamic and complex AI landscape, content remains king! Get lots of insights and ideas from our experienced KM leader.



### Leveraging AI+ for Productivity

9:30 a.m. – 9:45 a.m.

Devan Dewey, Principal, Chief Technology Officer, NEPC, LLC  
Laura Carson, CMO, M-Files

The productivity of knowledge workers is critically important to the growth and profitability of businesses. However, they remain weighted down, spending nearly half their time on mundane tasks, leaving less time for the work that matters most. An organization's information is the lifeline that provides the insights required to gain collective intelligence. Speakers discuss how organizations can gain a strategic, competitive advantage by leveraging knowledge work automation. They share actionable insights on harnessing the power of automation and AI to eliminate information chaos, improve productivity, and reduce business risk to enable knowledge workers to thrive.



### Sinequa

9:45 a.m. – 10:00 a.m.

Jeff Evernham, Chief Strategist & Evangelist, Sinequa

As a thought leader in applying search, AI, and LLMs to solve business problems so companies use their information assets to accelerate innovation, inform decision making, and improve outcomes, our speaker shares insights, ideas, and real-world case studies of how organizations successfully do this.

Coffee & Networking Break ■ In the Enterprise Solutions Showcase  
10:00 a.m. – 10:45 a.m.

## TRACK A ■ KM Practices & Strategies

This track continues to highlight KM practitioners who share their experiences, learnings, insights, practices, and strategies for enabling a successful KM program within the enterprise.

Moderated by Art Murray, Applied Knowledge Sciences, Inc.

### A201 ■ KM & Knowledge Graphs

10:45 a.m. – 11:30 a.m.

Dave McComb, President & Co-Founder, Semantic Arts

The KM and knowledge graph (KG) communities have detected each other, but so far, there has been little integration or alignment. This is kind of a tragedy as the two communities have so much to offer each other. The KG community has vast amounts of data and information but little knowledge. The KM world has knowledge, but most of it is disconnected from the information it was spawned from, as well as the information it is yet to create. The KG community has a well-oiled machine for organizing data and information in machine processable and beautifully visualizable formats. The KM community has perfected the ability to find and distill knowledge, but it seems to end up in text or internal wiki-like structures. McComb introduces a framework for working together, extending each other's spheres of influence by discussing the essential difference between KM and KG, how knowledge could be stored in a graph database providing far richer avenues for access and combination, and how real-world organizations can benefit from this integration.

### A202 ■ Capturing & Transferring Knowledge: A 7-Step Process to Success

11:45 a.m. – 12:30 p.m.

Tamara Viles, KM Project Manager & Adrian Villarreal, KM Specialist, TechnipFMC

There's a need to capture knowledge lost by attrition, whether it stems from the retirement of the Baby Boomers, the lure of opportunities at other companies, or changing roles. How do you stem the loss of critical skills and capabilities and transfer that valuable knowledge to the next generation while maintaining quality and consistency in product and service delivery in today's rapidly evolving workforce? TechnipFMC has developed a knowledge transfer process based on the premise that an expert doesn't know what they know. Rather, it's the people who are dependent on the expert's knowledge and expertise who take center stage. Because of their dependency on the expert, these "next perts" are well-positioned to articulate the critical knowledge that needs to be captured. Our speakers share their seven-step knowledge transfer process, where focus groups and surveys are deployed to define the expert's knowledge, skills, and expertise, which is then assessed and mapped to isolate the most critical knowledge that, if lost, would adversely impact the company. They cover the tactics used to preserve and share the knowledge to the appropriate audiences using platforms such as webinars, videos, and multimedia, wikis, interviews, storytelling, training, tutorials, elearning courses, and discussion forums for CoPs. These efforts ensure the company's greatest asset—the knowledge of its people—is both celebrated and documented for the next generation.

Attendee Luncheon ■ In the Enterprise Solutions Showcase  
12:30 p.m. – 1:30 p.m.

### A203 ■ Results-Focused Knowledge Exchange

1:30 p.m. – 2:15 p.m.

Shobha Kumar, International Development & KM Specialist, The World Bank

Daniel Shapiro, Associate Director, Organon

Yianna Vovides, Senior Director Learning Design and Research Georgetown University, Washington DC

When done right, knowledge exchange can build the capacity, confidence, and conviction of individuals and groups to act, and it can also influence results at the institutional and even systemic levels. Kumar tells the story of Art of Knowledge Exchange (AoKE), World Bank Group's (WBG) key reference on client and staff learning, which made a cross-sectoral knowledge exchange methodology directly relevant to an extensive group of sectoral specialists and practitioners and helped institutionalize a results-focused approach to knowledge exchange across the WBG. He discusses good design and results at the core of successful knowledge exchange; a structure to guide knowledge exchange activities to be uniquely results-focused by defining clear objectives and linking them to a series of knowledge and learning outcomes; a common framework and language/taxonomy for knowledge exchange interventions; an intuitive road map; a well-structured toolbox; and practical, real-world examples, all built on the foundation of a tried and tested results framework. Shapiro discusses



how a Merck spinoff matured, evaluated better search tools, and rolled out multiple successful enterprise search solutions, including GenAI. Discover how Organon monitors and evaluates enterprise search for improved knowledge exchange.

## A204 ■ Knowledge Journeys & Knowledgebases With Microsoft 365

2:30 p.m. – 3:15 p.m.

*Tori Reddy Dodla, Knowledge Collaborative Engineer Principal, & Author, Mastering Knowledge Management Using Microsoft Technologies, SAIC*

*Chiedu Ozuzu, Director, KM, Abt Global*

*Gabriel Karawani, Co-Founder, ClearPeople*

A fundamental distinction between an information system and a digital KM system lies in the integration of a knowledgebase. Many U.S. government and DoD organizations predominantly use Microsoft 365 yet lack dedicated KM systems equipped with knowledgebases. Dodla discusses the essential components of a knowledgebase, shows an interactive demonstration to illustrate the process of building one, and provides tips to use in your organization. Our second speakers talk about Abt Global, a mission-driven global consulting and research firm, where effective KM is vital for driving growth. The organization's ability to leverage collective expertise fuels agility, collaboration, and innovation—critical capabilities for expanding into new markets and larger opportunities. Teams at Abt Global were struggling to quickly find and utilize critical information at scale, including internal experts, proposals, solutions, and past performance data. This knowledge gap hampered employees' capacity to identify opportunities, develop proposals, and deliver projects, all of which directly impacted business growth, reputation, and client outcomes. To tackle this challenge, it invested in a Microsoft 365-based KM solution to modernize the employee experience, promote contextual knowledge delivery, enhance search capabilities, and enable seamless collaboration. Hear how this broke down knowledge silos, unleashed their intellectual capital, and measurably improved outcomes.

## Coffee & Networking Break ■ 3:15 p.m. – 4:00 p.m.

Last Chance to Visit the Exhibits in the Enterprise Solutions Showcase

## A205 ■ Industry Insights: Building Enterprise Knowledge Sharing

4:00 p.m. – 5:00 p.m.

*TBD, Yurts AI & KMS Lighthouse*

Building collaborative communities and knowledge-sharing platforms is key to enterprise success. Our industry partners share case studies of how their technologies support today's enterprises.

## TRACK B ■ KM With AI & New Technologies

Early adopters of AI and investors are seeing the business value and potential gains from integrating AI into their ways of working that are sustainable, fostering innovation through collaboration, and enhancing productivity. Our speakers shed light on possible uses in the enterprise, and the impact on KM and the organization. Industry leaders share their insights on the future of AI. Get a grounding and ideas with this exciting track of topics.

*Moderated by Tony Rhem, A. J. Rhem & Associates*

## B201 ■ KM Needs AI: Why?

10:45 a.m. – 11:30 a.m.

*Daniel W. Rasmus, Founder & Principal Analyst, Serious Insights, & Author*

Futurist and popular KMWorld speaker Rasmus explores the reasons AI needs KM. He looks at the manual processes involved in AI that requires KM or KM-like disciplines in order to provide ongoing value, stability, history, and insight to AI developers. These areas include, but are not limited to guardrails, LLM metadata, context models, prompt management, model management and retirement, new knowledge or lack thereof, and retrieval-augmented generation (RAG). Get an understanding of the areas of need but also practical suggestions for managing them.

## B202 ■ Retaining Critical Knowledge With AI

11:45 a.m. – 12:30 p.m.

*Grace Chen, Associate Director, Merck*

*Rebecka Isaksson, KM Strategist & Founder, KnowFlow Value*

Standardized retention of critical knowledge interviews have been used to extract tacit knowledge from experienced workers to pass on to new staff and to protect

the business from knowledge loss due to natural attrition. Combining this with newly available data analysis techniques, Merck analyzes large bodies of data for trends based on sentiment in novel ways. Chen presents use cases on organizational data that has been gleaned to provide recommendations to leaders on how to effectively pause and restart areas. She discusses the pros and cons of manual analysis, broad AI tools, the strategic application of AI and natural language processing (NLP), and how their activities impacted employee satisfaction and sense of community. Isaksson discusses how AI-powered knowledge solutions can help shift focus from mundane work to value-add activities that drive real business and customer value while fostering a culture that ensures the well-being of its people. She provides tips on building a knowledge-centric culture, motivating and inspiring the people in your organization, preparing for cultural and mindset changes, and how to reap the full benefits of AI-powered knowledge, the key to organizational success!

## Attendee Luncheon ■ In the Enterprise Solutions Showcase

12:30 p.m. – 1:30 p.m.

## B203 ■ GenAI's Impact on KM & the Enterprise of the Future

1:30 p.m. – 2:15 p.m.

*Julie Mohr, Principal Analyst, Forrester*

GenAI is having a profound impact on the knowledge economy and knowledge work with the promise of improved productivity for knowledge workers. As we embrace these transformative forces, organizations must go beyond mere AI integration into existing workflows and reimagine how work is performed. GenAI should empower the GenAI worker—the curious questioner who drives a learning organization—transcending mundane tasks and fostering creativity and innovation. Knowledge improves the human ability to create and engage in innovation, and now is the time to build knowledge capacity and harness GenAI wisely, bridging the gap and propelling us toward a future where AI truly becomes our advantage. Our experienced analyst and researcher shares trends, strategies, and practices to future-ready your enterprise with GenAI.

## B204 ■ Robot Knowledge-Based Agents: Implementing GenAI

2:30 p.m. – 3:15 p.m.

*Moira Levy, CEO, ROM Global*

In the realm of KM, the 2024 journey toward innovation includes implementing GenAI. This first step revolutionizes knowledge work by integrating smart and responsible AI technologies, augmenting human roles, and pioneering new frontiers in KM. This foundational shift not only enhances how we manage and disseminate knowledge but also invites us to envision the future of knowledge work, having AI as a collaborative partner. The second stage of this evolution introduces a groundbreaking concept: specialized GPTs, termed robot-based knowledge agents. This novel term encapsulates the leap beyond traditional AI applications, marking a significant milestone in KM. These agents complement the next generation of knowledge workers, equipped to deliver unparalleled efficiency, drive innovation, and redefine our value propositions in KM.

## Coffee & Networking Break ■ 3:15 p.m. – 4:00 p.m.

Last Chance to Visit the Exhibits in the Enterprise Solutions Showcase

## B205 ■ Content Strategies for Enterprise KM

4:00 p.m. – 5:00 p.m.

*Jason Kaufman, Principal AI Content Strategist, Irrevo*

*Utkarsh Contractor, AI and ML, AISERA*

*Emily Crockett, Content Engineer, Enterprise Knowledge, LLC*

This session features three presentations looking at the transformative role of AI in enhancing KM practices. Kaufman looks at AI's impact on content creation and strategy, highlighting the ways in which technologies such as natural language processing (NLP), machine learning, and ChatGPT are redefining the landscape of knowledge sharing. He discusses the concept of "AI intuition," emphasizing the importance of recognizing AI's potential to automate and improve KM processes. He offers insights into developing this intuition among KM professionals through hands-on experience with AI tools, identification of use cases, and prompt engineering, a novel approach to content creation that leverages AI to produce relevant and effective knowledge content. He outlines the key elements of crafting AI prompts and demonstrates their application in real time, underscoring the significance of managing prompt drift to maintain content accuracy and relevance. Contractor

discusses GenAI's impact, especially LLMs, on improving business operations. He shares strategies for implementing GenAI in enterprises, covering topics such as enterprise prompt engineering, fine-tuning, and domain adaptation while emphasizing data privacy and responsible AI. Using real-world applications, he looks at how organizations can leverage the potential of LLMs and GenAI applications to enhance factuality, accuracy, ensuring responsibility, and security in their integration across business applications, ranging from AI copilots to building domain-specific LLMs. Our last speaker discusses content engineering and the value it brings to internal and external KM, including a case study on how personalizing product release notes led to a 300% increase in engagement by customers. All our speakers provide practical guidance for integrating AI into KM strategies and emphasize the benefits for the enterprise in enhancing user productivity and attaining operational efficiency.

## TRACK C ■ KM Culture & Collaboration

KM is all about learning and knowledge sharing, and it's the people, the humans, who are the key to success. This series of talks illustrates the tools and processes which enable this to happen in organizations. Get tips, ideas, and insights from our experienced speakers.

Moderated by *Barbie Keiser, Barbie E. Keiser, Inc., NOVA Community College*

### C201 ■ Humans as Learning Machines?

10:45 a.m. – 11:30 a.m.

*Kim Glover, Director, Internal Communications, TechnipFMC*

Glover emphasizes a harmonious balance between human creativity and technological tools. The success of KM initiatives heavily hinges on organizational culture—a culture that embraces change—and learning is crucial for leveraging AI and other technologies effectively. Glover believes culture eats strategy for breakfast and explores how a supportive culture acts as the bedrock for strategic implementation. Cultures resilient to change, however, may significantly hinder the adoption of new technologies, thereby stifling innovation and growth. Moreover, the importance of emotional intelligence, a growth mindset, and diverse skills such as storytelling are discussed as essential for fostering an inclusive and productive organizational environment. By integrating lessons from communications, change management, project management, and employee engagement, our experienced KM practitioner shares a road map for KM professionals to build robust, future-ready organizations and illustrates the vital role of inclusivity in the workplace and the synergy between generations to amplify knowledge creation. Get tips and techniques for how the dynamic interplay of human and artificial intelligence can guide us through current and forthcoming challenges, crafting new paradigms of value in an increasingly digital landscape.

### C202 ■ Fostering Knowledge Transfer: KM & AI

11:45 a.m. – 12:30 p.m.

*Dawn Brushammar, KM Lead, Implement Consulting Group*  
*Rebecka Isaksson, KM Strategist & Founder, KnowFlow Value*

Our speakers from Sweden explore the convergence of KM and AI through the lens of the Swedish fika tradition. Through an engaging discussion and practical examples from their combined 50 years of KM and tech experience, they demonstrate how embracing the spirit of fika can transform KM initiatives and AI implementations into vibrant ecosystems of tacit knowledge exchange. Infused with humor and anecdotes from lived experiences being a Swede in America (Isaksson) and an American in Sweden (Brushammar), this conversational session has a personal touch and embrace the fika essence. Speakers explain how open communication and camaraderie can inspire effective tacit knowledge transfer within organizations and share practical approaches for cultivating a culture of trust, openness, and collaboration that fosters continuous learning and innovation. They describe how AI technologies can augment the capture and sharing of tacit knowledge among employees, while preserving the human touch essential for meaningful interactions and finding the perfect balance between human expertise and AI-driven insights in KM processes.

**Attendee Luncheon** ■ In the Enterprise Solutions Showcase

12:30 p.m. – 1:30 p.m.

### C203 ■ Navigating Change for KM

1:30 p.m. – 2:15 p.m.

*Lynda Braksiek, Principal Research Lead, KM, APQC*

Change management continues to be a priority skill set for KM teams to develop. Drawing from recent APQC research, Braksiek explores how KM teams effectively navigate and manage change, emphasizing the synergy between the science and

art of change practices in the new age of AI. Key points include the significance of change management practices and capabilities for KM success, how change contributes to an overall mature KM program (as per the APQC KM maturity model), and practical examples from accomplished KM organizations.

### C204 ■ People Skills: Teams & KM in the Era of AI

2:30 p.m. – 3:15 p.m.

*Maggie Starkey, KM Specialist, Kraton*  
*Beth Gleba, Senior Director, Digital Workplace, BCD Travel*

In an era of technology and AI, people skills are needed more now than ever to make the human connection people are longing for. KM is all about the people, and our first speaker looks at research on the top people skills from KM experts around the globe and why they are so critical to engage teams and effect the change you are trying to make in your organization. She then discusses her own company's journey on how it utilized top people skills to gain adoption and grow its KM program. Gleba showcases several examples of DEX (digital employee experiences) being deployed at BCD Travel, a highly virtual organization with more than 13,000 employees. Purpose-driven, technology-enabled, people-focused practices help the company revolutionize the way employees work and foster thriving workplaces.

### Coffee & Networking Break ■ 3:15 p.m. – 4:00 p.m.

Last Chance to Visit the Exhibits in the Enterprise Solutions Showcase

### C205 ■ Onboarding & Beyond

4:00 p.m. – 5:00 p.m.

*Greg DeVore, CEO & Co-Founder, ScreenSteps*  
*Dr. Cynthia "Cindy" J. Young, Founder/CEO, CJ Young Consulting, LLC*

In today's knowledge-driven business environment, integrating effective KM into employee onboarding is not just an advantage—it's a necessity. DeVore discusses the critical missteps organizations often make during the onboarding process that undermine their KM efforts and foster an environment of continuous learning and information sharing. He outlines practical methods to measure the efficiency of knowledge transfer organizations, looks at common pitfalls trainers encounter that inadvertently stifle knowledge dissemination, and discusses strategies to avoid these errors. Young shares tips for making post-HR onboarding easy for new hires while accelerating the speed of collaboration between them and their teams. She provides targeted strategies to enhance and accelerate collaboration within the organization, such as leveraging knowledge mapping. By developing a comprehensive map that details where expertise and information reside within the company, new hires can independently navigate their learning paths and efficiently connect with the right people and resources, shortening the time to full productivity and creating sponsorship programs for new hires that bridge the gap between onboarding and full team integration. Assigning a sponsor from the team helps new employees assimilate company culture and workflows more deeply and provides a reliable point of contact for navigating early challenges. Implementing a project-based integration approach can foster immediate collaboration. By involving new hires in small, manageable projects from the start, they can quickly learn through doing, which helps them effectively understand team roles, expectations, and dynamics. Gain insights into practical steps that can be taken after the initial onboarding phase to ensure new hires are well-acclimated and contributing members of their teams and create a supportive environment that nurtures continuous learning and team cohesion.

## COMMUNITIES OF INTEREST

WEDNESDAY, NOVEMBER 20 | 5:30 P.M. – 6:30 P.M.

This year's fun networking event follows rousing discussions about AI and KM as well as search, data analytics, taxonomies, and more. Join your colleagues for a casual evening and stimulating conversations! Meet some new colleagues. Share your experiences and challenges while having fun. This meet-up will take place in the hotel bar. A cash bar will be available.

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Continental Breakfast ■ 8:00 a.m. – 8:30 a.m.

Coffee & Networking Break ■ 10:00 a.m. – 10:15 a.m.

## KEYNOTES



### KM, Experts & AI: Learning From KM Leaders

8:30 a.m. – 9:15 a.m.

*Kim Glover, Director, Internal Communications, TechnipFMC*  
*Cindy Hubert, Fellow, KM, APQC, & Author, The New Edge in Knowledge: How KM Is Changing Business*



In today's landscape, the airwaves resonate with discussions about AI. Embracing emerging technologies has elevated KM efforts. From the early days of portals and expertise location to the collaborative power of wikis and shared spaces, technology has consistently given KM a much-needed boost. This conversation begins with Hubert discussing how experts fit into the AI equation with knowledge creation, capture, and seamless transfer. Given observations from today's breakneck speed of business, the challenges have only gotten more daunting and the need for tapping into expertise is needed even more. She shares a model for thinking of how to enable AI using the skills of experts. In the dynamic interplay between human expertise and AI, she provides a path to unlock the potential for groundbreaking insights that lead us into uncharted territories of new knowledge. As we navigate this synergistic landscape, both seasoned experts and the KM programs that bolster their efforts must seize the opportunity to capitalize on their collective wisdom. Those who work smarter, fearlessly embracing collaboration with AI, are poised for success.



### Achieving GenAI ROI: Clean Data & KM Strategies

9:15 a.m. – 9:30 a.m.

*Patricia Petit Liang, Product Marketing Manager, Coveo*

Is your enterprise experimenting with generative answering, but facing significant challenges with data cleanliness? Liang shares best practices and discusses the strategic role KM plays in delivering effective GenAI. Get proven strategies for refining generative outputs and practical insights from enterprise customers including Xero, F5, and Forcepoint. Uncover proven metrics and KPIs to ensure accurate, relevant, and safe generated answers, optimizing your knowledgebases. Enhance productivity, proficiency, and decisionmaking with curated generative answering.



### Protecting Your KM Investment: Navigating the AI Hype

9:30 a.m. – 9:45 a.m.

*Sean Coleman, SVP & GM, Knowledge and Call Center Productivity, Upland Software*

Coleman cuts through the chaos and offers a practical road map for KM teams grappling with the AI revolution. He discusses three key steps to make no-regrets AI investments while safeguarding your hard-earned KM progress: how to separate AI fact from fiction; how to identify AI opportunities that actually complement your existing KM ecosystem; and how to implement a measured, value-driven approach to AI adoption. Get actionable insights to navigate the next phase of KM with confidence.



### Capturing Expert Knowledge With GenAI to Scale Transformation

9:45 a.m. – 10:00 a.m.

*Vanessa Liu, Co-Founder & CEO, and*  
*Judith Williams, Co-Founder, Sugarwork*

We have all been wowed by amazing examples of GenAI. But beyond the headlines, things look a little different. While employees are leveraging GenAI to increase productivity on individual and team levels, enterprises are frequently not yet using GenAI in a structured manner across their organizations, mainly due to the lack of private enterprise data. Capturing tacit expert knowledge is where big quantifiable gains can be made. The founders of Sugarwork share a customer case study to highlight the productivity gains the business experienced when it captured and deployed tacit expert knowledge at scale using GenAI.

## KMWorld Knowledge Cafe & Mentoring Mixer

10:15 a.m. – 12:00 p.m.

Meet your fellow participants! Take part in our popular interactive knowledge café, where you can share your KM challenges with colleagues and KM practitioners. Each table has a KM industry mentor and topic; you will have time to visit three to four different tables during the café. Meet and learn in this intimate networking atmosphere with thought leaders and practitioners of the KM industry.

### MENTORS INCLUDE:

*Gloria Burke, Global Director, Knowledge Management, Slalom—Building Global Knowledge Centers of Excellence*

*Dan Rasmus, Serious Insights—Apple Intelligence & KM*

*Kim Glover, Director, Internal Communications, Global, TechnipFMC—Growing a KM Culture: Getting Engagement*

*Stan Garfield, Author of five KM books, & Founder, SIKM Leaders Community—Community Management*

*Art Murray, CEO, Applied Knowledge Sciences, Inc., & Director, Enterprise of the Future Program, International Institute for Knowledge & Innovation—Knowledge Curation & Governance*

*Frank Cervone, Program Coordinator, Information Science and Data Analytics, San Jose State University—Knowledge Sharing & AI Tools for the Enterprise*

*Lynda Braksiek, Principal Research Lead, KM, APQC—Change Management*



### Evolving KM: AI, Agile & Answers

10:15 a.m. – 12:00 p.m.

*Dave Snowden, Founder & Chief Scientist, The Cynefin Co.*

KM has always been about finding answers, sharing information and knowledge, supporting decision-making and innovation, gaining insights and more. How this is achieved is changing at an incredible pace so KMers need new tools, technologies and strategies to keep pace and succeed. Our longtime KM practitioner, thought leader, and developer of the Cynefin method, provides an entertaining learning environment and shares techniques you can use in your enterprise.

## KEYNOTE LUNCHEON & AWARDS

### Pryon

12:00 p.m. – 12:15 p.m.

For keynote updates visit [KMWorld.com/conference](http://KMWorld.com/conference).

### KMWorld Awards

12:30 p.m. – 12:45 p.m.

KMWorld magazine is proud to sponsor the 2024 KMWorld awards, KM Promise & KM Reality, which are designed to celebrate the success stories of knowledge management. Information Today, Inc. is excited to introduce and present a new award: KM Community Award recognizes an individual who has made a significant impact in the KM community. The awards will be presented along with Step Two's Digital Awards, where you get a sneak peek behind the firewall of these organizations. Find out more—[kmworld.com/Conference/2024/Awards.aspx](http://kmworld.com/Conference/2024/Awards.aspx)



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## TRACK A ■ Learning & KM

Building learning organizations is an important part of KM. Our speakers share their experiences, insights, and lessons learned. They also look at developing new knowledge managers.

### A301 ■ Neuroscience Hacks for KM Practitioners

1:00 p.m. – 1:45 p.m.

*Ninez Piezas-Jerbi, KM Consultant, & Former Chief, KM, World Trade Organization (WTO)*

In today's age of rising GenAI, KM leaders need to learn how to leverage new technologies while continuing to deliver efficient and inclusive solutions for organizations. They increasingly need to justify their relevance, get "buy-in," and up their game. That means knowing how to better read and communicate with people, quickly grasp what's important, and stay grounded while engaging colleagues in implementing KM processes. Our speaker uses tested neuroscience concepts to provide tips for promoting trust within teams, learning, and decision making. She explores how these can help colleagues understand and embrace KM processes and foster knowledge-sharing cultures. She draws on recent research to share neuroscience hacks to improve mindful communication with stakeholders as well as practical techniques to support resilience, especially for KM practitioners facing resistance often accompanying slow organizational progress in establishing KM policies.

### A302 ■ Learning, Training, & Retaining KMers

2:00 p.m. – 2:45 p.m.

*Jeremy Carter, Associate Director, Office of KM, IRS University (IRSU), Enterprise Talent Development (ETD), IRS*

*Anahit Gasparyan, LD Professional, Central Bank of Armenia*

Henry Ford famously said, "The only thing worse than training your employees and having them leave is not training them and having them stay!" This powerful statement challenges you to rethink how you nurture and retain your talent. So, do you focus on attention (teaching), adjustment (coaching), or accomplishment (mentoring)? These crucial questions can make a difference in your professional development strategy. Get tips, techniques and lessons learned from our first speaker. Gasparyan discusses how to map organizational and learning culture and the tools for aligning with learning and development for a more efficient organization.

### A303 ■ KM Through Systems & Human Lenses

3:00 p.m. – 3:45 p.m.

*Rachel Teague, Principal Consultant, Disruption Learning & Technology LLC*

Successful KM initiatives require a harmonious balance between the systems and human lenses, recognizing that neither can exist effectively without the other. While systems provide the infrastructure and tools, it is the human factor that drives knowledge creation, sharing, and application; it's important to understand that they are not mutually exclusive, and one cannot exist effectively without the other in the context of successful KM initiatives. Teague shares her research findings on the dichotomy and delicate balance of people vs. process; one is not "better" or "worse" than the other, however, they both need to work in tandem in order to get the most out of your KM system.

## TRACK B ■ KM Insights

This stream of sessions hopes to spark ideas and insights around KM, especially around governance and AI.

### B301 ■ Governance in KM

1:00 p.m. – 1:45 p.m.

*Linda Lavelle, Owner, Knowledge Dynamics*

*Lulit Testfaye, VP, Knowledge & Data Management, &*

*Madeleine Powell, Senior Analyst, Enterprise Knowledge, LLC*

Our speaker explores a comprehensive process for governing knowledge centers, centralized platforms for employees to access the knowledge they need when and where they need it. Implementing a best-in-class governance process helps ensure these sites become trusted sources of the best possible knowledge. Lavelle discusses how AI can be a powerful tool, but ultimately, human oversight remains essential. Get best practices for each step of the governance process. Our second speakers discuss how KM is steadily growing beyond its traditional role of providing the framework for sharing, applying, and managing the knowledge and information of an organization to serve as the foundation for advancements in AI. This shift in the role of KM at an enterprise level has heightened visibility for KM and has pushed

the industry to identify more optimized ways to organize teams and measure and convey their value to organizational leaders. AI has been fueling the democratization of knowledge and data, leading to a growing recognition of the interdependence between data, information, and KM teams. By employing knowledge models and semantic standards such as metadata, business glossaries, taxonomy/ontology, and graph solutions, a semantic layer has emerged with a framework to aggregate and connect traditionally siloed data and content, explicitly providing business context for data and serve as the layer for explainable AI. Through a semantic layer, teams are able to locate and work with not only enterprise data, but their own, unit-specific knowledge as well. By bridging the gap between data teams and business-oriented KM teams, organizations are able to better connect technical initiatives to the actual use cases for employees, customers, and other stakeholders. Speakers present case studies, best practices, and lessons learned and discuss how these technological and organizational shifts in priority are blurring the lines between the traditional divide between knowledge and data management practices.

### B302 ■ Integrating AI Into KM

2:00 p.m. – 2:45 p.m.

*Tony Rhem, CEO/Principal Consultant, A. J. Rhem & Associates, & Author, Knowledge Management in Practice; Essential Topics in Artificial Intelligence*

AI features and capabilities are becoming an integral part of KM solutions both internally and in vendor KM commercial off-the-shelf (COTS) products. The integration of AI technologies into KM solutions significantly enhances KM capabilities. From automating the categorization and tagging of knowledge resources, predicting trending knowledge areas/topics, improving content creation using GenAI, and enabling search to be more relevant, precise, and efficient, AI is finding more ways to enhance KM. With the integration of AI into KM solutions comes the need to ensure that AI applied to KM is without bias, can explain how answers are derived from the collective knowledge of the organization, and that the people who use and rely on the solution can trust its accuracy—basically, that it is ethical and trustworthy. Rhem discusses the IEEE CertifAIEd Assessor, which can provide a comprehensive exploration of social responsibility in autonomous intelligent systems.

### B303 ■ KM x AI: Tacit Knowledge at Scale

3:00 p.m. – 3:45 p.m.

*Kent Greenes, Founder & Principal Consultant, Greenes Consulting, & Larry Todd Wilson, Founder, knowledgeharvesting.ai*

Harvesting and digitizing tacit knowledge at scale are now possible and needed more than ever to fuel and shape the elusive promise of AI-enabled KM. Whether leveraging collective knowledge to enhance performance and create new value or harvesting strategic and organizational intelligence for success amidst change, achieving these promises requires deep human insights born from experience and learning—tacit knowledge, recent advances in AI have enabled the delivery of knowledge harvesting agents (KHAs), composed of tasks-and-instructions, content chunks, and graphs. They replicate a proven knowledge harvesting methodology and enhance interactions with subject matter experts by leveraging pattern recognition, tacit/implicit KM, adaptive reasoning, and automated skills. Our seasoned knowledge harvesters share insights from their combined 50 years of experience to discuss goals and options for making tacit knowledge explicit and accessible, transforming how organizations leverage human and artificial intelligence.

The Enterprise Solutions Showcase is a one-stop shop for serious buyers to meet with vendors offering knowledge management, content management, enterprise search, taxonomy, and intranet-related products and services.

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## TRACK C ■ Content Management

Managing information, content, and knowledge in any enterprise is always a challenge. Our speakers discuss taxonomies, search, and AI and present tips to up your content game to enhance organization KM.

### C301 ■ Taxonomies Are Knowledge

1:00 p.m. — 1:45 p.m.

*Ahren Lehnert, Principal Taxonomist, Nike*

Taxonomies and ontologies, often called knowledge organization systems, are foundational structures used in many applications to support findability. If they are knowledge organization systems, are they themselves knowledge? If we recognize knowledge organization systems as knowledge, then we can structure them in ways reflecting the organization's domain(s), the organization's perspective and thinking, and embed truths in these structures as an additional layer of meaning connecting other forms of knowledge. Because taxonomies are knowledge, embedded truths, encoded biases, and false assertions can find their way into the semantics, potentially putting the business at risk of damaging exposure. In this session, learn how to recognize when potentially dangerous information is being encoded in semantic structures. Also, hear techniques and governance processes for developing and maintaining current and accurate metadata models to support knowledge management practices.

### C302 ■ Beyond CM for Real Knowledge Sharing

2:00 p.m. — 2:45 p.m.

*Rebecka Isaksson, KM Strategist & Founder, KnowFlow Value*

*Urmi Majumder, Principal Consultant &*

*Maryam Nozari, Senior Data Scientist, Enterprise Knowledge, LLC*

For decades, knowledge workers, organizations, and KM practitioners have tried to resolve "the search problem" without relying on users being fluent in meta data and taxonomy-speak. It has been a constant battle without any winners! Content management is hard. What is logical and intuitive to one person is far from logical to another, so we tend to build knowledge systems and content management solutions that equate "knowledge" to "content" at the expense of experience, expertise, and peer-to-peer learning. With modern technology such as AI and intelligent solutions such as SharePoint Premium, Viva, and Copilot, we have all the tools we need to be able to mine and tap into all different aspects of an organization's knowledge: codified, documented, and personal. Isaksson shares some thoughts and principles for taking a holistic approach to knowledge sharing, retention, and monetization and discusses new ways to grow business value by cultivating every aspect of organizational knowledge that goes beyond content management and search. Nozari discusses how the rate of data creation in the digital environment today significantly exceeds our capacity to govern it effectively. This discrepancy poses risks of data spillage and highlights the urgent need for automated systems to enhance data governance and quality. She explores the innovative integration of AI in role-based access control to ensure robust data governance and access at the time of need and looks at how we can use various levels of metadata and labels to classify enterprise data or manage corresponding sensitive information classes within an organization based on an adaptable rule foundation (ARF) system. This approach groups enterprise data into core (universally applicable across an industry or the organization), common (domain-specific or relevant to only certain business units), and unique (group of organization-specific). Get tips and ideas from our speakers about harnessing AI to transform content management, data governance, and knowledge sharing, making it more dynamic, secure, and efficient in the era of exponential data growth.

### C303 ■ Bring Your A(I) Game to Knowledge & Content Activation

3:00 p.m. — 3:45 p.m.

*Jeffrey Gilmore, Senior Director, KPMG*

*Jans Aasman, CEO, Franz*

Getting the right content to the right people at the right time and in the right format can be achieved at scale with AI. A simple, agnostic, and flexible framework (along with few helpful mental models) can help you match pace with the market and drive value through more effective acquisition, acceleration, and activation of knowledge. "Acquisition" requires rethinking the configurations of core data and knowledge platforms to more intelligently recognize and understand what "knowledge" is stored and harvestable. Care needs to be taken to consider permissibility, security, taxonomy, prioritization, and purpose of the data and content. "Acceleration" involves revisiting the core processes of data and content management—and redesigning them. AI capabilities need to be developed to speed the harvesting, processing, and related data and content flows. "Activation" is the goal. It requires a deeper understanding of the user experience and use cases for data and content. Aligning the acquisition and acceleration allows enterprises to use AI agents to prescriptively and predictively anticipate content needs based on client, market, and business activities. With real-world examples and practical steps to take action, Gilmore shares many tips for accelerating content activation. Aasman discusses data integration, scalability, and the interpretability of AI models. He showcases cutting-edge solutions and methodologies developed to overcome these hurdles, ensuring the effective deployment of knowledge graphs and neuro-symbolic AI in real-world scenarios. Gain insights into the future of KM, equipped with actionable strategies to harness these advanced technologies for optimizing organizational knowledge assets.

## CLOSING KEYNOTES



### Beyond Boundaries: Content Readiness for AI in KM

4:00 p.m. — 4:15 p.m.

*Tim Hill, Director, Product Management, NICE*

This session tackles the crucial role of content preparation for AI in KM. Discover strategies for optimizing content for AI-powered features such as generative search. Hill delves into everything from data structuring to crafting effective prompts equipping you to unlock your knowledgebase's true potential. See AI in action with a compelling case study showcasing a real-world application of generative search and its significant impact. Learn how to transform knowledge boundaries into a springboard for limitless growth.

### KM 2025 & Beyond

4:15 p.m. — 5:00 p.m.

MODERATOR: *Brian Pichman, Director, Strategic Innovation, Evolve Project*

*Julie Mohr, Principal Analyst, Forrester*

*Dan Rasmus, Founder & Principal Analyst, Serious Insights, & Author*

*Dave Snowden, Founder & Chief Scientist, The Cynefin Co.*

Where is KM going with all the AI developments for the enterprise? How are our organizations responding to the social structures and changes in our world? How are they innovating and exceeding customer expectations? Get inspiration from our practitioners and futurists and be ready for KM in 2025.

# taxonomy

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Best practices for developing & implementing taxonomies

Governing taxonomies at scale

Working collaboratively with experts & stakeholders

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Integrating taxonomies into different systems (e.g., search, content management)

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## AGENTS OF CHANGE



CONFERENCE CHAIR

Stephanie Lemieux  
Dovecot Studio

The Taxonomy Boot Camp conference is a one-of-a-kind boutique learning and networking event dedicated to exploring the successes, challenges, methodologies, and products for taxonomies.

Taxonomies are not just a static end-product, they are organic and evolving, always growing and adapting to meet new challenges and create new opportunities. Change is a key element in everything we do—change management within organizations, change processes for keeping taxonomies current and useful, and changing to adapt to or drive new tools and technologies such as AI. Change and innovation is happening faster and at a larger scale than ever before, requiring robust governance to balance the needs of multiple consuming systems, evolving language, and increasing automation.

As enterprises embrace advanced technologies like knowledge graphs and AI, change management—in all senses of the word—becomes a key part of taxonomy management. Join us in Washington, D.C., this November to learn from experts on taxonomies, ontologies, folksonomies, tagging mechanisms and other techniques for organizing information, and how taxonomies and taxonomists can be agents for change.

Taxonomy Boot Camp showcases taxonomies as key components of knowledge and data management systems that aim to build collective intelligence within or across organizations and help solve real-world problems. Speakers share their experience in creating successful taxonomy solutions and advise on both hard and soft skills to help our attendees accelerate their learning and success.

The Taxonomy Boot Camp program is designed to provide something for everyone, from taxonomy newbies to seasoned experts (and everyone in between). Beginner sessions provide those new to the field with the nuts and bolts they need to get up-to-speed and give more experienced practitioners insight into how others have evolved their approaches. Also hear case studies, practical sessions on taxonomy tools and methods, and cutting-edge developments in the field.

You can expect to leave Taxonomy Boot Camp with new friends and business allies and fresh ideas and strategies. Join us this November to move your organization and career forward.



## CONFERENCE OVERVIEW

### NETWORKING OPPORTUNITIES

Taxonomy Boot Camp offers great opportunities to get acquainted with new colleagues and explore through casual conversation what others are doing in the space.

#### Enterprise Solutions Showcase

##### Grand Opening Reception *Sponsored by eGain*

Monday, November 18 • 5:00 p.m. – 6:30 p.m.

Celebrate the grand opening of the Enterprise Solutions Showcase. Enjoy drinks and light bites while visiting with conference sponsors.

##### Networking Happy Hour

Tuesday, November 19 • 5:00 p.m. – 6:00 p.m.

Stop by the showcase after a full day of stimulating sessions to mix and mingle with other conference attendees, speakers, and our conference sponsors.

#### Continental Breakfasts, Breaks & Lunches

### ENTERPRISE SOLUTIONS SHOWCASE

The Enterprise Solutions Showcase is a one-stop shop for serious buyers to meet with vendors offering knowledge management,

content management, enterprise search, taxonomy, AI, and intranet-related products and services. If you are looking for a particular product, evaluating competing systems, or keeping up with the latest trends and developments, you need to visit the Enterprise Solutions Showcase.

### SHOWCASE HOURS

Monday, Nov. 18 ..... 5:00 p.m. – 6:30 p.m.

*Grand Opening Reception*

Tuesday, Nov. 19 ..... 10:00 a.m. – 6:00 p.m.

*Networking Happy Hour* .... 5:00 p.m. – 6:00 p.m.

Wednesday, Nov. 20 ..... 10:00 a.m. – 4:00 p.m.

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### WHO SHOULD ATTEND

Taxonomy Boot Camp is designed for anyone responsible for categorizing, organizing, or managing content, including:

- Taxonomists
- Content managers
- Information architects
- Information professionals
- Knowledge engineers
- Information scientists
- Intranet/portal developers
- Content classification strategists



# CONFERENCE AT-A-GLANCE

## MONDAY, NOVEMBER 18

8:00 a.m. – 9:00 a.m. **CONTINENTAL BREAKFAST**

9:00 a.m. – 9:10 a.m. **Opening Remarks** • Lemieux

9:10 a.m. – 10:00 a.m. **OPENING KEYNOTE** • **Be the Change: Your Taxonomy Expertise Can Help Drive Organizational Transformation** • Stilling

10:00 a.m. – 10:15 a.m. **COFFEE & NETWORKING BREAK**

### TRACK 1 • Taxonomy Fundamentals

**Fixing a Fixer-Upper: How to Rehab an Existing Taxonomy** • Kaari

**The Complete Guide to Sourcing Terms** • Hedden

**Enabling Exploratory Discovery Through Taxonomy** • Degler

### ATTENDEE LUNCHEON

**Journey From a Minimal Viable Taxonomy to a Full Taxonomy** • van Aalten

**Nomenclature, Historical Terms, & Shifting Meaning** • Greene & Clark Hill

**Wrangling Big Datasets: A Case Study** • Greenberg

**Taxonomy's Role in Successful Asset Management Systems** • Levenson

### COFFEE & NETWORKING BREAK

**Future-Proofing Your Organization's Taxonomy With a Governance Plan** • Little, Cantrell, Ratanatharathorn, & Duncan

**Updating ISO 25964, the Standard for Thesauri and Interoperability (With Q&A)** • Busch & Hlava

5:00 p.m. – 6:30 p.m. **ENTERPRISE SOLUTIONS SHOWCASE GRAND OPENING RECEPTION** = Sponsored by **eGain**

### TRACK 2 • Taxonomy Applications

**Using Taxonomy to Move From Paper to Knowledge Graph** • Busch

**Empowering Your Enterprise With a Dynamic Taxonomy Program** • Pettai

**Extensible Taxonomies for Sustainability** • Hlava, Fogelson, Kirk, & Bellur

**9 Signs Your Product Data Needs Help** • Schweizer

**What Can Your Enterprise Content Teach You About Taxonomy (and Vice Versa)?** • Downs

**Stand Still Like the Hummingbird: Enterprise Taxonomy Strategy When Nothing Stands Still** • Lehnert

**What Is This Data? Annotating Data for Privacy** • Vann & Downs

**Taxonomies & AI-Driven Tools as Catalysts: Case Studies** • Cakici, O'Brien-Scott & Maddison

**Game-Changing Taxonomy and Machine Learning at Electronic Arts** • Randle

### TRACK 3

**Taxonomy 101 Workshop**

• Jenkins, Black & Clark Hill

10:15 a.m. – 10:45 a.m.

10:45 a.m. – 11:15 a.m.

11:15 a.m. – 12:00 p.m.

12:00 p.m. – 1:00 p.m.

1:00 p.m. – 1:30 p.m.

1:30 p.m. – 2:00 p.m.

2:00 p.m. – 2:30 p.m.

2:30 p.m. – 3:00 p.m.

3:00 p.m. – 3:15 p.m.

3:15 p.m. – 4:15 p.m.

4:15 p.m. – 5:00 p.m.

5:00 p.m. – 6:30 p.m.

## TUESDAY, NOVEMBER 19

8:00 a.m. – 8:30 a.m. **CONTINENTAL BREAKFAST**

8:30 a.m. – 9:30 a.m. **WELCOME & KEYNOTE** • **Collective Superintelligence: Humans in the Loop** • Rosenberg

9:30 a.m. – 9:45 a.m. **KEYNOTE** • **Using Knowledge Graphs to Improve GenAI** • Clarke

9:45 a.m. – 10:00 a.m. **KEYNOTE** • **Trusted Knowledge for Customer Service in the Age of GenAI** • Roy

10:00 a.m. – 10:15 a.m. **KEYNOTE** • **Lessons Learned From Search and Generative AI** • Probst

10:15 a.m. – 11:00 a.m. **COFFEE & NETWORKING BREAK** in the Enterprise Solutions Showcase

### TRACK 1 • Taxonomy Operations

**Taxonomy as a Service: Adobe's TaaS-timonial** • Maddison

**Consulting From Within: Best Practices for the Solo Taxonomist** • Griffin

**Beyond Chat Bots: LLMs & 'Human-in-the-Loop' Taxonomy Development at EA Games** • Moore & Gaibort

### ATTENDEE LUNCHEON

**Aligning AI Approaches for Taxonomy & Tagging** • Jenkins & Lee

**Practical Strategies for Maximizing Content Impact With Information Architecture & Taxonomy Systems** • Rafat & DiNicola

3:30 p.m. – 4:15 p.m. **COFFEE & NETWORKING BREAK** in the Enterprise Solutions Showcase

**Stump the Taxonomist** • Wahl

5:00 p.m. – 6:00 p.m. **NETWORKING HAPPY HOUR** in the Enterprise Solutions Showcase

### TRACK 2 • Advanced Data and Semantic Layers

**Mastering Metadata With a Data Catalog** • TBD

**Semantic Layers and the Ghost in the Machine** • Lehnert

**Untangling Credentialing: A Healthcare Use Case for Data and Metadata** • Rodriguez

11:00 a.m. – 11:45 a.m.

11:45 a.m. – 12:15 p.m.

12:15 p.m. – 12:45 p.m.

12:45 p.m. – 1:45 p.m.

1:45 p.m. – 2:30 p.m.

2:45 p.m. – 3:30 p.m.

3:30 p.m. – 4:15 p.m.

4:15 p.m. – 5:00 p.m.

5:00 p.m. – 6:00 p.m.

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Continental Breakfast ■ 8:00 a.m. – 9:00 a.m.

## WELCOME & OPENING KEYNOTE

### Opening Remarks

9:00 a.m. – 9:10 a.m.

*Stephanie Lemieux, President & Principal Consultant, Dovecot Studio*



### Be the Change: Your Taxonomy Expertise Can Help Drive Organizational Transformation

9:10 a.m. – 10:00 a.m.

*Thomas Stilling, Digital Strategist and Metadata Maestro*

In today's fast-paced digital world, the role of taxonomy and metadata has never been more critical. And yet, it can be challenging to shape this narrative in any size organization. Stilling delves into the strategic importance of harmonizing taxonomies and creating consistent semantic layers across the organization—and how to explain this to leadership in a way that resonates. Through three compelling case studies, explore how leading organizations have navigated digital transformation journeys, leveraging metadata to drive foundational changes and infrastructure investments. Learn strategies to position taxonomy, often overlooked during pivotal transformation moments, ensuring it plays a central role in your company's major decisions.

Coffee & Networking Break ■ 10:00 a.m. – 10:15 a.m.

## TRACK 1 ■ Taxonomy Fundamentals

### Fixing a Fixer-Upper: How to Rehab an Existing Taxonomy

10:15 a.m. – 10:45 a.m.

*Jennifer Kaari, Catalog Specialist, OpenSesame*

Rehabbing an existing taxonomy presents a unique sense of challenges. How do you get started? Do you rip everything out to the studs? What can be salvaged, and what needs to go? Kaari presents two case studies of taxonomy projects within OpenSesame's elearning marketplace catalog for insights on how to approach redeveloping a well-used (though perhaps not well-loved) taxonomy. Hear how to combine data with user feedback to make effective decisions about terminology and structure, along with the issues related to stakeholder communication and buy-in. Learn how to set yourself up for a smooth transition from taxonomy redevelopment to taxonomy maintenance.

### The Complete Guide to Sourcing Terms

10:45 a.m. – 11:15 a.m.

*Heather Hedden, Senior Consultant, Enterprise Knowledge, LLC*

Whether building a new or revising an existing taxonomy, there are many possible sources for your taxonomy's terms (concepts and labels). Suggestions from users are important, but there are multiple ways to get user input, some more effective than others. Content analysis is a great tool, but the extent to which it is manual or automated can vary. Learn how to utilize search logs, uncontrolled keywords, automatically extracted terms, and leveraging AI and LLM methods. Hedden also explains how to evaluate legacy controlled vocabularies, and metadata terms and also addresses glossaries.

### Enabling Exploratory Discovery Through Taxonomy

11:15 a.m. – 12:00 p.m.

*Duane Degler, Principal Consultant—IA, Design for Context*

Not everything can just be searched. "Aha!" moments deliver value. Exploration leads to insights and surfaces contexts. How do you prepare your content for these user experiences? See some interfaces that integrate public archives and cultural content collections. (They're public: You can explore them after the talk.) The interfaces show how taxonomies and knowledge graphs play a direct role in the UI (not just in the backend). From there, Degler broadens out to other domains, looking at how knowledge graphs provide focused "discovery glue" across repositories and how taxonomies can signpost insights across departments, partner organizations, or countries.

Attendee Luncheon ■ 12:00 p.m. – 1:00 p.m.

### Journey From a Minimal Viable Taxonomy to a Full Taxonomy

1:00 p.m. – 1:30 p.m.

*Joyce van Aalten, Taxonomy Consultant, Invenier*

Taxonomy goals can be extremely ambitious, creating the semantic glue between content and contributing to omnichannel and headless content strategies. However, getting there doesn't happen overnight: Tight budgets, legacy systems, procedures, and people stand in the way. The challenge is to start with a minimal viable taxonomy (MVT) that the organization can use and implement in the short term, without blocking the taxonomy to grow in the future. van Aalten shares her experiences with taxonomy projects that started with an MVT and over time evolved into a more mature taxonomy. Learn how to decide the systems scope, level of granularity, types of semantic relationships and industry standards to follow.

### Nomenclature, Historical Terms, & Shifting Meanings

1:30 p.m. – 2:00 p.m.

*Teresa Greene, Independent Consultant*

*Lauren Clark Hill, Client Solutions Specialist, Synaptica*

The Nomenclature for Museum Cataloging Committee of the American Association for State and Local History is a group made up of museum professionals that maintains a controlled vocabulary for cataloging museum collections of manmade objects. One of the challenges with this is the reconciliation of divergent terms across different historical periods and contexts. Greene and Hill explore solutions and methods of resolving these conflicts and demonstrates how auto-categorization can be used for long-form, unstandardized object descriptions to create deeper tags for collections, enriching and streamlining their cataloging processes and more efficiently leveraging the available human capital.

### Wrangling Big Datasets: A Case Study

2:00 p.m. – 2:30 p.m.

*Elizabeth Greenberg, Senior Multilingual Taxonomist, Freelance*

How do you map and clean large amounts of messy metadata with a tiny team? And how do you do it fast? Greenberg presents an anonymized case study on cleansing millions of assets worth of metadata in a single year using a combination of human review and code. Learn how to prioritize, how to communicate, and how to save money and time by assigning the right tasks to a program instead of a person.

### Taxonomy's Role in Successful Asset Management Systems

2:30 p.m. – 3:00 p.m.

*Yonah Levenson, Co-Academic Director/Instructor, Rutgers University*

Metadata and taxonomies are the backbone of asset management. Whether you have a DAM, CMS, MAM, or PIM system (or a mix of these), understanding the current and desired workflows of metadata capture is key to success. When and where in the process the data is updated and/or extended and ultimately finalized influences and shapes the taxonomies and their application. Strategic design and integration of flexible taxonomies that are fit for purpose are crucial. Levenson describes approaches for taxonomy development by understanding the "who, what, where, when, why, and how" of multiple workflows and systems.

Coffee & Networking Break ■ 3:00 p.m. – 3:15 p.m.

### Future-Proofing Your Organization's Taxonomy With a Governance Plan

3:15 p.m. – 4:15 p.m.

*Paula Little, Lead Senior Information Architect & Taxonomist, &*

*Connor Cantrell, Information Architect, Factor Firm*

*Kristen C. Ratanatharathorn, Senior Manager—Grant Information & Administration, The Andrew W. Mellon Foundation (AWMF)*

*Stephanie Duncan, Taxonomy Consultant, Dovecot Studio*

Change is inevitable, but designing (and following) a governance framework is much easier said than done. Little & Cantrell explore some of the key pillars of a good governance plan, including business drivers for taxonomy changes, guidelines for balancing proactive and reactive workflows, and communication and training plans using case studies of recently implemented plans. Learn the critical role documentation plays in change management and the types of documentation needed for success. Ratanatharathorn and Duncan describe the governance and maintenance

strategies for the Grant Classification Taxonomy, which has been in use since September 2021 at the AWMF. Hear their processes and best practices for understanding and documenting use cases, vetting them, and balancing the perspectives of different user groups in order to cultivate a taxonomy that suits the needs of many.

## Updating ISO 25964, the Standard for Thesauri and Interoperability (With Q&A)

4:15 p.m. – 5:00 p.m.

Joseph Busch, Principal, Taxonomy Strategies  
Marjorie Hlava, Chief Scientist, Access Innovations

There are more than 800 ISO standards related to terminology. ISO 25964 Part 1, which focuses on thesauri for information retrieval, is being reviewed and revised by a working group. Since the last update of the standard in 2011, the scope has expanded to include terminology management and use, the semantic web, linked data, and AI (meaning NLP, machine learning, LLM, etc.) and interoperability between thesaurus management systems and consuming applications. Busch and Hlava explain the key areas of change that have been included in the draft revision including alignment with SKOS and other related standards, alternatives to preferred term, representative visual resources, persistent identifiers, “multilinguality,” granularity, and others. An interactive Q&A session follows to answer any questions on the standard draft and its potential impact on taxonomy practitioners.

## TRACK 2 ■ Taxonomy Applications

### Using Taxonomy to Move From Paper to Knowledge Graph

10:15 a.m. – 10:45 a.m.

Joseph Busch, Principal, Taxonomy Strategies

A transit authority has undertaken an initiative to eliminate legacy paper records, to downsize their footprint, and relocate 3,000 office-based employees spread across 10 aging buildings. Busch describes the metadata strategy and taxonomy framework that emerged from working with more than 60 business units from across the authority. Learn how the named entities (people, organizations, locations, events, things, etc.), classifications (incidents, document file plans, system maps, access control, etc.) and the relationships among them can be used as the building blocks for a transit system knowledge graph.

### Empowering Your Enterprise With a Dynamic Taxonomy Program

10:45 a.m. – 11:15 a.m.

Lindsay Pettai, Data Governance Manager, Grant Thornton LLP (Canada)

In data governance, an enterprise taxonomy program is essential for navigating data complexities, enabling efficient management, and structuring knowledge assets. Hear about how Pettai and her team are expanding Grant Thornton’s enterprise taxonomy program and platform through the integration of controlled vocabularies across four enterprise applications. Learn about their approach to taxonomy governance, adoption strategies, and the tangible ROI from this transformative initiative. Attendees gain insights into effective change management and communication strategies, along with artifacts which aid implementing an enterprise taxonomy program.

### Extensible Taxonomies for Sustainability

11:15 a.m. – 12:00 p.m.

MODERATOR: Marjorie Hlava, Chief Scientist, Access Innovations  
PANELISTS: Joann Fogelson, Director of Digital Publishing, ASCE  
Rebecca Kirk, Taxonomist and Director of Manuscript Submissions, PLOS  
Prakash Bellur, Senior Director Marketing & Sales, IEEE

Sustainability is on the minds of many organizations. The United Nations created a broad outline on sustainability, but providing actionable data is an important additional step. For publishers, creating collections on the topic from their existing materials to aid researchers to quickly find the connections is paramount. The general challenge for organizations with a well-organized collection and existing thesaurus/taxonomy is how to pull out the material on sustainability and still coordinate with the “master” taxonomy, which is true for all collections requiring marketing and showcasing content for specific audiences and needs. Learn how three organizations have approached the topic of sustainability and presentation of materials best suited to answer the questions from both readers and researchers on the topic.

Attendee Luncheon ■ 12:00 p.m. – 1:00 p.m.

## 9 Signs Your Product Data Needs Help

1:00 p.m. – 1:30 p.m.

Chantal Schweizer, Director of Strategic Data Services, Pivtree

Product data issues can arise in a number of ways from a messy onboarding experience to a bad search experience to even a bad channel grading affecting a company’s relationship with distributors. Schweizer explores different ways that bad data may surface and how to tackle those issues to increase revenue, conversion rates and decrease data production costs.

## What Can Your Enterprise Content Teach You About Taxonomy (and Vice Versa)?

1:30 p.m. – 2:00 p.m.

Sarah Downs, Director of Client Solutions, Synptica

Taxonomy design often starts with a content audit, but once a taxonomy is in production, how often do we test and improve it with real-time content feedback? A constructive feedback loop—from taxonomy to content and back again—is often limited by technical constraints. Taxonomists may require data science or engineering solutions to sample content, analyze it, and deploy taxonomy improvements. But there is another way: By extending enterprise taxonomies for autocategorization, enterprises can support human-in-the-loop, machine-driven tagging. When you integrate a transparent text analytics service that can be adapted with rules, you can enable nontechnical taxonomist users to power this process: no coding or scripting skills required. If these annotations are stored in a “content aware knowledge graph,” your taxonomy data can power insight into content trends and nuanced content recommendations.

## Stand Still Like the Hummingbird: Enterprise Taxonomy Strategy When Nothing Stands Still

2:00 p.m. – 2:30 p.m.

Ahren Lehnert, Principal Taxonomist, Nike Inc.

One of the foundational pillars for managing data and content is consistent, centralized, accessible metadata in the form of taxonomies and ontologies. Even when an organization recognizes the value of taxonomies, how do you begin to develop an enterprise taxonomy strategy across siloed, incongruous, and duplicative data systems? How do you scale from a few terms in a spreadsheet to an enterprise taxonomy program ladder up to business goals and key performance indicators? How do taxonomists balance the need to build sustainable semantic models while serving business needs and keeping up with the pace of enterprise delivery? Learn techniques for developing and maintaining a successful enterprise taxonomy strategy even in rapidly changing, complex (perhaps even chaotic) business environments where nothing stands still.

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## What Is This Data? Annotating Data for Privacy

2:30 p.m. — 3:00 p.m.

Briana Vann, Privacy Taxonomist, Meta  
Sarah Downs, Director of Client Solutions, Synptica

Data annotation for compliance with global privacy regulation requires complex data models—preferably an ontology, but possibly a taxonomy—to bridge the gap between abstract privacy concepts and granular data realities. Building this bridge requires nuanced data modeling but also learning from and supporting diverse perspectives. Policy experts and engineers conceive and describe data significantly differently and that evolves over time. Vann and Downs describe the facets of data that are relevant for privacy: ownership, origin, intent, consent, storage format, semantic meaning. Through working examples, learn how this data can be modeled and explore the trade-offs between modeling nuance and practicalities including UX/UI and incentives.

Coffee & Networking Break ■ 3:00 p.m. — 3:15 p.m.

## Taxonomies & AI-Driven Tools as Catalysts: Case Studies

3:15 p.m. — 4:15 p.m.

Tatiana Baquero Cakici, Senior KM Consultant, Enterprise Knowledge, LLC & Sara Mae O'Brien-Scott, Senior Semantic Engineering Consultant, Enterprise Knowledge, LLC

Rachael Maddison, Product Manager, Taxonomy as a Service Platform, Adobe

AI solutions, such as recommendation engines and chatbots, are gaining traction in solving a multitude of business and content problems. Baquero Cakici illustrates how various AI tools such as recommendation engines, chatbots, and employee 360 views can help solve learning content management challenges. Hear about practical considerations, design methods, and best practices for designing learning taxonomies and ontologies to catalyze AI transformations, and how to get started. Maddison shows how Adobe Learn's Taxonomy as a Service platform delivers unique value by providing an AI-driven tool that unlocks cross-silo insights for their content creators, content strategists, and content experience teams in something they've coined as "MetaHealth." See real-life examples that show how marrying taxonomic metadata with content engagement data can unlock key capabilities.

## Game-Changing Taxonomy and Machine Learning at Electronic Arts

4:15 p.m. — 5:00 p.m.

Rebekah Randle, Taxonomist, Electronic Arts (EA)

Dive headfirst into the world of gaming taxonomies through "Project K": a story of how Electronic Arts (EA) harnesses the power of taxonomies to organize and label a universe of digital assets used in video games—from combat weapons and high-speed vehicles to the minutiae of vegetation and furniture. Hear how assets

from two blockbuster EA video games were reprocessed, meticulously labeled, and made accessible for artist reuse. Randle explains how machine learning models were trained using these taxonomies and then used to turbocharge human tagging during the processing pipeline. Discover how taxonomies are reshaping the future of digital asset management and machine learning in the gaming industry.

## TRACK 3 ■

### Taxonomy 101 Workshop

2:00 p.m. — 5:00 p.m.

Michele Ann Jenkins, Senior Consultant & Katherine Black, Senior Consultant, Dovecot Studio  
Lauren Clark Hill, Client Solutions Specialist, Synptica

Whether you are brand new to the world of taxonomy or are looking to solidify your foundational knowledge, this workshop equips you with the key concepts to help you hit the ground running on your own taxonomy work. Starting with an accessible, practical examination of what taxonomies are, learn how they fit into the information and content management landscape and the most common use cases, including dynamic content, search and discovery, and reporting. Explore the three pillars of what makes a good taxonomy good: strategy and style (term selection and form, relationships, synonyms, and other properties), governance (roles and responsibilities, processes, and documentation), and technology (technical standards, taxonomy tools, metrics, and analytics needed to implement, integrate, and monitor a taxonomy across platforms). Hear about the more advanced approaches such as knowledge graphs, ontologies, and AI tools. Clark also gives a special deep dive on practical taxonomy change management, including policies, approval workflows, and various methods of versioning and tracking.

## GRAND OPENING RECEPTION

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Continental Breakfast ■ 8:00 a.m. – 8:30 a.m.

Coffee & Networking Break ■ In the Enterprise Solutions Showcase  
10:15 a.m. – 11:00 a.m.

## WELCOME & KEYNOTES



### Collective Superintelligence: Humans in the Loop

8:30 a.m. – 9:30 a.m.

*Louis Rosenberg, CEO, Unanimous.AI, & Author, Our Next Reality: How the AI-Powered Metaverse Will Reshape the World*

We need new frameworks for AI-powered decision making that keep humans in the loop (along with human values, morals, interests, emotions, and sensibilities). Rosenberg discusses an approach toward enabling collective superintelligence that is rooted in hundreds of millions of years of evolution, which is why it so greatly outperforms old-school methods that treat humans as mere datapoints to be aggregated. Humans are not data. Humans are powerful data processors. The most viable pathway to collective superintelligence is to connect people together in real time and allow them to act, react, and interact using AI as the interstitial tissue that empowers us to solve problems together in optimal ways. A lifelong technologist, Rosenberg earned his Ph.D. from Stanford University in the early 1990s, was a professor at California State University in the early 2000s and has been focused on enabling collective superintelligence for the last decade. He shares his insights and ideas for enterprises looking for ways to share knowledge in their organizations.



### Using Knowledge Graphs to Improve GenAI

9:30 a.m. – 9:45 a.m.

*Dave Clarke, EVP, Semantic Graph Technology, Squirro*

GenAI retrieval-augmented generation (RAG) uses the natural language understanding (NLU) and natural language generation (NLG) capabilities of large language models (LLMs) to securely support conversational search and discovery over enterprise content and data repositories. But GenAI and RAG alone are not enough to ensure the completeness and accuracy of information for many mission-critical enterprise applications. Knowledge Graphs (KGs), including enterprise taxonomies and ontologies, can significantly improve the completeness and accuracy of information retrieved and generated by GenAI applications. Taxonomies and ontologies provide GenAI with machine-intelligible context about the domain knowledge and processes of the enterprise. When KGs and GenAI are integrated, taxonomists and ontologists can see and rapidly edit graph structures that explicitly guide RAG decision-making processes. With a simple no-code interface, taxonomists and ontologists are empowered to directly control GenAI dependencies, query refinement, and outcomes, thereby delivering high-quality, high-value business process automation. Using real-world applications, our knowledgeable speaker illustrates how using knowledge graphs improves enterprise GenAI.



### Trusted Knowledge for Customer Service in the Age of GenAI

9:45 a.m. – 10:00 a.m.

*Ashu Roy, CEO, eGain*

There is no question that GenAI has reignited interest in KM. Gartner predicts that 100% of GenAI virtual customer assistant and virtual agent assistant projects that lack integration to modern KM systems will fail to meet their CX and operational cost-reduction goals by 2025. As businesses experiment with GenAI, they are realizing that robust KM is foundational to its success. Roy discusses how KM and GenAI can accelerate and ensure mutual success, creating transformational business value at warp speed. He shares stunning success stories from clients. Get insights and ideas for your enterprise.



### Lessons Learned From Search and GenAI

10:00 a.m. – 10:15 a.m.

*Sid Probst, Founder & CEO, Swirl*

The world of information is exploding, but finding what you truly need can still feel like searching for a needle in a pile of needles. Probst explores how search and GenAI are joining forces to revolutionize how we discover information. He delves into the lessons learned from traditional search and how AI is pushing the boundaries. He shares real-world examples and discusses how this powerful synergy is shaping the future of information discovery.

## TRACK 1 ■ Taxonomy Operations

### Taxonomy as a Service: Adobe's TaaS-timonial

11:00 a.m. – 11:45 a.m.

*Rachael Maddison, Product Manager, Taxonomy as a Service Platform, Adobe*

Maddison explains how her team introduced the Taxonomy as a Service Platform (TaaS) at Adobe, envisioning a centralized solution for taxonomy design, implementation, and governance for more intuitive client adoption. TaaS revolutionizes the approach to taxonomy, offering a one-stop-shop experience tailored to diverse taxonomy client needs. Also hear how Adobe uses OKRs and KPIs to win over leadership and get things done. Maddison shares OKR and KPI templates for you to use in your journey to taxonomy stardom in your company.

### Consulting From Within: Best Practices for the Solo Taxonomist

11:45 a.m. – 12:15 p.m.

*Bonnie Griffin, Taxonomist, PayPal*

Taxonomists often work solo within an organization but collaborate with a variety of data scientists, content strategists, project managers, and more who may have a limited understanding of taxonomy. Whether you are operating as a de facto internal consultant or planning work as an external consultant or contractor, Griffin shares some "do's" and "don'ts" of consulting that can set you up for success. Learn these best practices, such as introducing and advocating for taxonomy-driven solutions, effective project scoping, adapting to changing priorities (especially amidst the drive for generative AI-driven solutions), and the art of compromise.

### Beyond Chat Bots: LLMs & 'Human-in-the-Loop' Taxonomy Development at EA Games

12:15 p.m. – 12:45 p.m.

*Shannon Moore, Senior Taxonomy Analyst & Max Gaibort, Associate Taxonomy Analyst, Electronic Arts (EA)*

EA's taxonomy team outlines their innovative collaboration with the data science team. Discover how they've redefined taxonomy development by harnessing the power of advanced LLMs to process player support data and using GenAI to generate candidate terms, forming the backbone of their work. Hear about the "human-in-the-loop" approach, where human taxonomy experts meticulously analyzed, clustered, and refined these terms into structured taxonomies adhering to logical standards and best practices. This case study highlights how human intelligence can enhance AI to set new benchmarks in the industry.

## TRACK 2 ■ Advanced Data and Semantic Layers

This track addresses the advanced data applications and usages of the semantic layer that employ taxonomies and ontologies to realize business value. It explores how organizations are leveraging semantics to unite their information in all its forms to realize the full value of their collective knowledge, align disparate sources and systems, and fuel AI.

GUEST CHAIR: *Zach Wahl, CEO, Enterprise Knowledge, LLC*

### Mastering Metadata With a Data Catalog

11:00 a.m. – 11:45 a.m.

*Speaker TBD*

Increasingly, the world of data is waking up to the importance of taxonomies and metadata. Hear an end-to-end case study of an enterprise data catalog, from design through implementation, explaining the critical roles that taxonomy and metadata play in data governance, findability, and reuse.

### Semantic Layers and the Ghost in the Machine

11:45 a.m. – 12:15 p.m.

*Ahren Lehnert, Principal Taxonomist, Nike Inc.*

Effective, unbiased machine learning models require clean, consistent, contextual, and well-considered data. Together, taxonomies and ontologies are the semantic layer representing an organization's subject matter expertise, shared understand-

**Taxonomy**  
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ing, knowledge, and viewpoint applied to content and data powering a variety of applications. As such, they are at risk of carrying inbuilt subjectivity and bias—a ghost in the machine—flowing into other data consuming systems and machine learning models. Learn processes for modeling, building, and applying semantic models representing the business while reducing the introduction of biases which can skew downstream applications.

## Untangling Credentialing: A Healthcare Use Case for Data and Metadata

12:15 p.m. – 12:45 p.m.

Laura Rodriguez, Knowledge Manager, HealthStream

As a healthcare learning, credentialing and scheduling company, Healthstream manages lots of user credential information. The knowledge management team is working to make this a more valuable data set by enhancing their Credentials taxonomy with a robust ontology. This will allow for more nuanced state specific data as well as allow us to bring together useful information that is currently siloed in multiple products and data stores that aren't all using a common vocabulary. The ultimate goal is to create a high-quality curated dataset of credentials that would be easy to verify and report on.

## Attendee Luncheon ■ In the Enterprise Solutions Showcase

12:45 p.m. – 1:45 p.m.

## Aligning AI Approaches for Taxonomy & Tagging

1:45 p.m. – 2:30 p.m.

Michele Ann Jenkins, Senior Consultant, Dovecot Studio

Erik Lee, Taxonomist, Factor Firm

As the AI rush began, companies created directives to integrate AI into their products to avoid getting left behind. The result of this “AI for AI’s sake” mindset has been a slew of poor implementations and worse outcomes. However, it is possible to know if, when, and how to integrate AI intentionally into a project by aligning integration with your methodology. Lee explores the spectrum of available tools, ranging from manual effort to advanced techniques leveraging multiple AI techniques. Spoiler: It’s not just LLMs! Jenkins dives deeper into the key use case around using different approaches to validate and enhance metadata tagging workflows to reduce the burden on content creators and improve quality. Hear caveats, considerations, and risks involved in adding AI automations to tagging workflows. Learn the practical applications of AI in taxonomy and tagging illustrated with real-world examples that can be implemented today, as well as insights into what’s on the horizon for tomorrow.

## Practical Strategies for Maximizing Content Impact With Information Architecture & Taxonomy Systems

2:45 p.m. – 3:30 p.m.

Mandana Rafat, Director, Organic Growth & Retention, Skillshare

Celia DiNicola, Deputy Director, Stand Together

Explore the pivotal role of information architecture (IA) and taxonomy structures in driving organic growth and maximizing the impact of content marketing efforts. Learn how effective IA and taxonomy can enhance organic growth by optimizing content discoverability, improving user experience, and boosting search engine visibility. There’s also a synergy between ontologies and AI in augmenting content marketing strategies for future success. Rafat provides real-world examples to illustrate successful implementations and give you actionable strategies and insights to leverage IA effectively. DiNicola shows how Stand Together tackled a simplification process during its last redesign and replatforming to identify core audiences and negotiate content categorization, building the taxonomy structure that matters and works for users and authors.

## Coffee & Networking Break ■ In the Enterprise Solutions Showcase

3:30 p.m. – 4:15 p.m.

## Stump the Taxonomist

4:15 p.m. – 5:00 p.m.

MODERATOR: Zach Wahl, CEO, Enterprise Knowledge, LLC

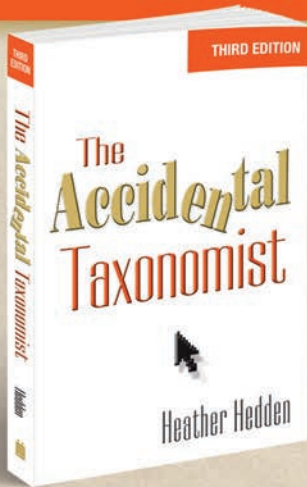
Interested in industry trends? Stymied by a taxonomy design challenge at work? Bring your toughest, crunchiest taxonomy issues and challenges to our panel of seasoned full-time taxonomists, who compete to answer your questions with insight, entertainment, and perhaps even controversy! The best questions (as voted by the audience) will bring home prizes!

## NETWORKING HAPPY HOUR

TUESDAY, NOVEMBER 19 | 5:00 P.M. – 6:00 P.M.

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## An Indispensable Guide for the Taxonomist!



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# Enterprise Search & Discovery 2024

NOVEMBER 19–21, 2024

JW MARRIOTT | WASHINGTON, D.C.

## Bringing Our Search and Discovery Superpowers to Work

- ▶ Building search teams
- ▶ Implementing GenAI
- ▶ Innovating search & discovery
- ▶ Improving relevancy & findability
- ▶ Understanding search behavior
- ▶ Investigating the power of RAG
- ▶ Considering the future of search
- ▶ Meeting new search & discovery challenges
- ▶ Maximizing investment in search technologies
- ▶ Finding value in existing data
- ▶ Exchanging tips & techniques with colleagues



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# Enterprise Search & Discovery 2024

NOVEMBER  
19–21, 2024

JW MARRIOTT  
WASHINGTON, D.C.

## Bringing Our Search and Discovery Superpowers to Work

Unlocking the knowledge found within organizations depends upon search. Discovering needed information across data silos in a timely manner depends upon search. Improving productivity through reliable information access depends upon search. Satisfying customer queries depends upon search.

Thus, enterprises depend upon search experts to accelerate the process. In today's world, the promise of enterprise search to deliver relevant results are greatly enhanced by AI-based technologies. Developments in GenAI, machine learning, semantic layers, knowledge graphs, query understanding, data security, personalization, NLP, and others contribute to enhanced employee and customer satisfaction. Search superpowers turn dreams into reality.

At the Enterprise Search & Discovery conference, we explore how to manage the rapidly changing landscape of search and discovery. As enterprise search is redefined from simple information retrieval to knowledge understanding and creation, user expectations change dramatically. Managing new expectations regarding collaboration, accessibility, bias, and diversity requires a new mindset. Enterprises are implementing (or re-implementing) search and discovery solutions.

Has AI helped solve the age-old question of search relevance? Have user attitudes toward enterprise search become more positive? What have search experts done that worked, what changes did they make, what technologies did they adopt, what content became intelligently searchable, and how have enterprises adjusted to changing work environments? These questions are answered at Enterprise Search & Discovery 2024. Now in its 21st year, Enterprise Search & Discovery is where you learn how to effectively implement

new technologies affecting search, meet the challenges arising from changing user expectations, and bring your search and discovery superpowers to work.



### CONFERENCE CHAIR

Marydee Ojala  
KMWorld Magazine



### WHO SHOULD ATTEND

Enterprise Search & Discovery is designed for anyone responsible for organizing, managing, and retrieving internal and/or external information, including:

- ▶ Search managers
- ▶ Line-of-business departmental managers
- ▶ IT managers and executives
- ▶ Information and knowledge architects
- ▶ Compliance and legal officers
- ▶ Customer experience/customer care managers
- ▶ Intranet/portal managers
- ▶ Executive management
- ▶ Web publishers and developers
- ▶ Information professionals
- ▶ Content managers and directors
- ▶ Knowledge management professionals
- ▶ Information governance directors

### PRECONFERENCE WORKSHOPS— MONDAY, NOVEMBER 18

Choose among 20 workshops (see pages 6–8) to concentrate on your special areas of interest.

Taught by experts, the workshops offer you a chance for interactive, small-group learning. Mix and match morning and afternoon workshops to customize your conference program and jump-start your week. Lunch is included when you register for a morning and afternoon workshop. (*Workshops are separately priced or available with the Enterprise Search & Discovery Conference Pass PLUS Workshops or Platinum Pass options.*)

### ENTERPRISE SOLUTIONS SHOWCASE

The Enterprise Solutions Showcase is a one-stop shop for serious buyers to meet with vendors offering knowledge management, content management,

enterprise search, taxonomy, AI, and intranet-related products and services. If you are looking for a particular product, evaluating competing systems, or keeping up with the latest trends and developments, you need to visit the Enterprise Solutions Showcase.

### SHOWCASE HOURS

**Monday, Nov. 18** ..... 5:00 p.m. – 6:30 p.m.  
*Grand Opening Reception*

**Tuesday, Nov. 19** ..... 10:00 a.m. – 6:00 p.m.  
*Networking Happy Hour* .... 5:00 p.m. – 6:00 p.m.

**Wednesday, Nov. 20** ..... 10:00 a.m. – 4:00 p.m.

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### NETWORKING OPPORTUNITIES

Enterprise Search & Discovery offers great opportunities to get acquainted with new colleagues and explore through casual conversation what others are doing in the space.

**Enterprise Solutions Showcase Grand Opening Reception** *Sponsored by eGain*  
Monday, November 18 • 5:00 p.m. – 6:30 p.m.

Celebrate the grand opening of the Enterprise Solutions Showcase. Enjoy drinks and light bites while visiting with conference sponsors.

**Networking Happy Hour**  
Tuesday, November 19 • 5:00 p.m. – 6:00 p.m.

Stop by the showcase after a full day of stimulating sessions to mix and mingle with other conference attendees, speakers, and our conference sponsors.

**Continental Breakfasts, Breaks & Lunches**



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# CONFERENCE AT-A-GLANCE

## TUESDAY, NOVEMBER 19

8:00 a.m. – 8:30 a.m.	CONTINENTAL BREAKFAST
8:30 a.m. – 9:30 a.m.	<b>WELCOME &amp; KEYNOTE</b> • <b>Collective Superintelligence: Humans in the Loop</b> • <i>Rosenberg</i>
9:30 a.m. – 9:45 a.m.	<b>KEYNOTE</b> • <b>Using Knowledge Graphs to Improve GenAI</b> • <i>Clarke</i>
9:45 a.m. – 10:00 a.m.	<b>KEYNOTE</b> • <b>Trusted Knowledge for Customer Service in the Age of GenAI</b> • <i>Roy</i>
10:00 a.m. – 10:15 a.m.	<b>KEYNOTE</b> • <b>Lessons Learned From Search and Generative AI</b> • <i>Probstein</i>
10:15 a.m. – 11:00 a.m.	COFFEE & NETWORKING BREAK in the Enterprise Solutions Showcase
11:00 a.m. – 11:45 a.m.	<b>Lead Your Search Team to Success</b> • <i>Molnar</i>
12:00 p.m. – 12:45 p.m.	<b>Bringing GenAI Applications to MITRE Users</b> • <i>Rajaram &amp; Lavender</i>
12:45 p.m. – 1:45 p.m.	ATTENDEE LUNCHEON in the Enterprise Solutions Showcase
1:45 p.m. – 2:30 p.m.	<b>Building Our Own M365 Search</b> • <i>Vanneste</i>
2:45 p.m. – 3:30 p.m.	<b>Intelligent Search Within the Enterprise</b> • <i>Sweeny</i>
3:30 p.m. – 4:15 p.m.	COFFEE & NETWORKING BREAK in the Enterprise Solutions Showcase
4:15 p.m. – 5:00 p.m.	<b>Managing the Legal Challenges in Ecommerce Search</b> • <i>Baumgartel</i>
5:00 p.m. – 6:00 p.m.	NETWORKING HAPPY HOUR in the Enterprise Solutions Showcase

## WEDNESDAY, NOVEMBER 20

8:00 a.m. – 8:30 a.m.	CONTINENTAL BREAKFAST
8:30 a.m. – 9:15 a.m.	<b>KEYNOTE</b> • <b>Value Every Voice: Leading Teams That Thrive</b> • <i>Pontefract</i>
9:15 a.m. – 9:30 a.m.	<b>KEYNOTE</b> • <b>New KM Practices to Supercharge the Power of AI</b> • <i>Chmaj</i>
9:30 a.m. – 9:45 a.m.	<b>KEYNOTE</b> • <b>Leveraging AI+ for Productivity</b> • <i>Dewey &amp; Carson</i>
9:45 a.m. – 10:00 a.m.	<b>KEYNOTE</b> • <b>Sinequa</b> • <i>Everham</i>
10:00 a.m. – 10:45 a.m.	COFFEE & NETWORKING BREAK in the Enterprise Solutions Showcase
10:45 a.m. – 11:30 a.m.	<b>SharePoint Search Tips &amp; Tricks</b> • <i>Patrick</i>
11:45 a.m. – 12:30 p.m.	<b>Organon's Enterprise Search Journey</b> • <i>Shapiro</i>
12:30 p.m. – 1:30 p.m.	ATTENDEE LUNCHEON in the Enterprise Solutions Showcase
1:30 p.m. – 2:15 p.m.	<b>Has GenAI Removed the Need for Search?</b> • <i>Molnar, Lippell, Pugh, &amp; Ulmer</i>
2:30 p.m. – 3:15 p.m.	<b>Vector Search &amp; RAG Patterns for Healthcare Applications</b> • <i>Fried</i>
3:15 p.m. – 4:00 p.m.	COFFEE BREAK & NETWORKING Last Chance to Visit the Exhibits in the Enterprise Solutions Showcase
4:00 p.m. – 5:00 p.m.	<b>CEOs Talking AI &amp; Search</b> • <i>Probstein, Zavrel &amp; Selz</i>

## THURSDAY, NOVEMBER 21

8:00 a.m. – 8:30 a.m.	CONTINENTAL BREAKFAST
8:30 a.m. – 9:15 a.m.	<b>KEYNOTE</b> • <b>KM, Experts &amp; AI: Learning From KM Leaders</b> • <i>Glover &amp; Hubert</i>
9:15 a.m. – 9:30 a.m.	<b>KEYNOTE</b> • <b>Achieving GenAI ROI: Clean Data &amp; KM Strategies</b> • <i>Liang</i>
9:30 a.m. – 9:45 a.m.	<b>KEYNOTE</b> • <b>Protecting Your KM Investment: Navigating the AI Hype</b> • <i>Coleman</i>
9:45 a.m. – 10:00 a.m.	<b>KEYNOTE</b> • <b>Capturing Expert Knowledge With GenAI to Scale Transformation</b> • <i>Liu &amp; Williams</i>
10:00 a.m. – 10:15 a.m.	COFFEE & NETWORKING BREAK
10:15 a.m. – 11:00 a.m.	<b>Understanding Search Behavior</b> • <i>Pugh &amp; Macrakis</i>
11:15 a.m. – 12:00 p.m.	<b>Automated Content Aggregation: The Key to GenAI's Value in Enterprise Applications</b> • <i>Seuss</i>
12:00 p.m. – 1:00 p.m.	KEYNOTE LUNCHEON & AWARDS • <i>Pryon</i>
1:00 p.m. – 1:45 p.m.	<b>The Role Taxonomies Can Play in Enterprise Search</b> • <i>Jenkins &amp; Hlava</i>
2:00 p.m. – 2:45 p.m.	<b>Revisiting Faceted Search</b> • <i>Rappoport</i>
3:00 p.m. – 3:45 p.m.	<b>The Future of Enterprise Search &amp; Discovery</b> • <i>Ojala</i>
4:00 p.m. – 4:15 p.m.	<b>KEYNOTE</b> • <b>Beyond Boundaries: Content Readiness for AI in KM</b> • <i>Hill</i>
4:15 p.m. – 5:00 p.m.	<b>CLOSING KEYNOTE</b> • <b>KM 2025 &amp; Beyond</b> • <i>Pichman, Mohr, Rasmus, &amp; Snowden</i>

Continental Breakfast ■ 8:00 a.m. – 8:30 a.m.

## WELCOME & KEYNOTES



### Collective Superintelligence: Humans in the Loop

8:30 a.m. – 9:30 a.m.

*Louis Rosenberg, CEO, Unanimous.AI, & Author, Our Next Reality:*

How the AI-Powered Metaverse Will Reshape the World

See page 12 for complete description.



### Using Knowledge Graphs to Improve GenAI

9:30 a.m. – 9:45 a.m.

*Dave Clarke, EVP, Semantic Graph Technology, Squirro*

See page 12 for complete description.



### Trusted Knowledge for Customer Service in the Age of GenAI

9:45 a.m. – 10:00 a.m.

*Ashu Roy, CEO, eGain*

See page 12 for complete description.



### Lessons Learned From Search and GenAI

10:00 a.m. – 10:15 a.m.

*Sid Probst, Founder & CEO, Swirl*

See page 12 for complete description.

**Coffee & Networking Break** ■ In the Enterprise Solutions Showcase  
10:15 a.m. – 11:00 a.m.

### Lead Your Search Team to Success

11:00 a.m. – 11:45 a.m.

*Agnes Molnar, Managing Consultant, Search Explained*

Leading a search team requires more than just technical expertise. It demands effective management, collaboration, and a keen understanding of information governance, management, architecture, and permissions. In this opening session for Enterprise Search & Discovery, longtime search expert Agnes Molnar delves into the essential aspects of search team leadership and provides practical guidance on how to navigate these critical areas. Gain valuable insights and a set of immediate actions to take that can transform your search team's performance, drive better search performance, and obtain greater user satisfaction.

### Bringing GenAI Applications to MITRE Users

12:00 p.m. – 12:45 p.m.

*Pari Rajaram, Principal AI Architect, &  
Beth Lavender, Chief Engineer, MITRE*

MITRE harnessed the power of ChatGPT in the Azure cloud to develop a range of applications, including chatbots and a feature that allows users to ask questions of their own documents. Rajaram and Lavender explain how they integrated many private MITRE datasets with ChatGPT using advanced vector search retrieval to ground the context for the chat conversation. Finally, they discuss how they implemented their own agentic AI using the GenAI stack. This innovative approach enables the AI to act autonomously, making decisions and taking actions on behalf of a user without requiring explicit instructions for every step. They provide insights into the practical aspects of developing and deploying GenAI, lessons learned, and a unique perspective on the future of enterprise search.

**Attendee Luncheon** ■ In the Enterprise Solutions Showcase

12:45 p.m. – 1:45 p.m.

### Building Our Own M365 Search

1:45 p.m. – 2:30 p.m.

*Stan Vanneste, Manager, delaware*

A few years ago, Microsoft was all about Viva. However, as of last year, we can't read a Microsoft blog without being bombarded with Copilot, which does have some neat features to create content in Word and PowerPoint. From a search point of view, the RAG Copilot offered in Teams is very interesting, particularly in its ability to allow users to ask questions about their documents if they have the proper M365-Copilot license. But not all companies want to (or can) invest in Copilot licenses, or not for all employees. To create an answering engine that can be controlled and tuned, Vanneste extended a custom search application for M365 with GenAI features and building RAG with the (limited, but cheap) search engine of M365 and MS-only building blocks (Azure OpenAI a.o.). How did he do? How do its answers compare to the answers of M365-Copilot? Find out in this session!

### Intelligent Search Within the Enterprise

2:45 p.m. – 3:30 p.m.

*Marianne Sweeny, Principal Consultant, Daedalus Information Systems*

Despite the dramatic introduction of AI to deliver information retrieval relevance, enterprise search remains a silent and significant drain on productivity and revenue. Sweeny explores the root causes of this failure and presents a strategic, results-oriented approach to transforming enterprise search into a powerful tool that delivers on the promise of increased productivity and higher morale within the enterprise. From understanding the problem and moving beyond the misconception that enterprise search is merely a technical or architectural issue, Sweeny takes on how to create a road map for success, build a user-focused experience, and drive continuous improvement.

**Coffee & Networking Break** ■ In the Enterprise Solutions Showcase

3:30 p.m. – 4:15 p.m.

### Managing the Legal Challenges in Ecommerce Search

4:15 p.m. – 5:00 p.m.

*Martin Baumgartel, Senior Product Management Lead, Metagenics*

The best search engine can be helpless if legal rules prevent the return of the most relevant results. Baumgartel provides guidance about how to navigate these challenges and assess pathways to overcome these challenges. He suggests ways to establish common ground among external stakeholders, legal teams, and product executives. The presented results are based on examples he has addressed in ecommerce search, marketplace search, search over user-generated content, and search in areas where the industry is regulated. While potentially a dry subject of legal matters, his examples provide good color and are of general interest.

## NETWORKING HAPPY HOUR

TUESDAY, NOVEMBER 19 | 5:00 P.M. – 6:00 P.M.

Stop by the Enterprise Solutions Showcase after a full day of stimulating sessions to mix and mingle with other attendees, speakers, and our conference sponsors.

Continental Breakfast ■ 8:00 a.m. – 8:30 a.m.

## KEYNOTES



### Value Every Voice: Leading Teams That Thrive

8:30 a.m. – 9:15 a.m.

*Dan Pontefract, Founder & CEO, Pontefract Group, & author, Work Life Bloom, Flat Army, & others*

See page 16 for complete description.



### New KM Practices to Supercharge the Power of AI

9:15 a.m. – 9:30 a.m.

*John Chmaj, Chief KM Strategist, Verint*

See page 16 for complete description.



### Leveraging AI+ for Productivity

9:30 a.m. – 9:45 a.m.

*Devan Dewey, Principal, Chief Technology Officer, NEPC, LLC  
Laura Carson, CMO, M-Files*

See page 16 for complete description.



### Sinequa

9:45 a.m. – 10:00 a.m.

*Jeff Evernham, Chief Strategist & Evangelist, Sinequa*

See page 16 for complete description.

Coffee & Networking Break ■ In the Enterprise Solutions Showcase

10:00 a.m. – 10:45 a.m.

### SharePoint Search Tips and Tricks

10:45 a.m. – 11:30 a.m.

*David Patrick, SME Microsoft Tech, DSA, Inc.*

SharePoint in Microsoft 365 has both a classic and a modern search experience. Microsoft Search in SharePoint is the modern search experience. Both search experiences use the same search index to find results, and you can't enable or disable either search experience. In this talk, Patrick provides some tips and tricks with working with SharePoint search. He shows how to promote search results in the classic experience and how to create pages that allow you to combine search experiences. He reviews metadata use in search and explains the differences in managed metadata versus regular old choice columns and lookups.

### Organon's Enterprise Search Journey

11:45 a.m. – 12:30 p.m.

*David Shapiro, Associate Director, Organon*

When Merck spun off Organon in 2021, it decided not to provide enterprise search technology to the new company. Over the past 3 years, as Organon matured, it became clear that better search tools were required for multiple business needs. Learn from an experienced enterprise search manager about how Organon evaluated different vendors, selected Coveo, and rolled out multiple successful enterprise search solutions, including GenAI. Discover how Organon monitors and evaluates enterprise search, and get a glimpse into its plans for the future of enterprise search.

Attendee Luncheon ■ In the Enterprise Solutions Showcase

12:30 p.m. – 1:30 p.m.

### Has GenAI Removed the Need for Search?

1:30 p.m. – 2:15 p.m.

MODERATOR: *Agnes Molnar, Managing Consultant, Search Explained*

PANELISTS:

*Helen Lippell, Taxonomy, Metadata & Search Consultant, & Chair, Bite-Sized Taxonomy Boot Camp London*

*Eric Pugh, CEO, OpenSource Connections*

*Cedric Ulmer, CEO & Co-Founder, France Labs*

GenAI, in little more than a year, has become one of the biggest news topics in IT. GenAI has a discovery component to it, as well as some overlap with "traditional" search, and the use of RAG to fine-tune results is already widely used. What will happen next? Will traditional search applications disappear, to be replaced by AI? Or will there be further integration? This panel discussion, with panelists from The Search Network, a group of search and taxonomy consultants and specialists who represent a wide range of opinion across the industry and academia, provides a view from both the GenAI and the "traditional" search perspectives, outlining the advantages of each.

### Vector Search & RAG Patterns for Healthcare Applications

2:30 p.m. – 3:15 p.m.

*Jeff Fried, Director of Platform Strategy & Innovation, InterSystems*

Vector search algorithms have advanced substantially in recent years, enabling efficient similarity searches in large datasets and powering RAG for GenAI-powered applications. Fried explores how these technologies can be leveraged to improve diagnostic accuracy, personalize patient care plans, streamline clinical workflows, and ultimately contribute to better health outcomes. Although the examples used are all from the healthcare domain, the patterns themselves are applicable horizontally across different domains.

Coffee & Networking Break ■ 3:15 p.m. – 4:00 p.m.

Last Chance to Visit the Exhibits in the Enterprise Solutions Showcase

### CEOs Talking AI & Search

4:00 p.m. – 5:00 p.m.

*Sid Probst, Founder & CEO, SWIRL*

*Jakub Zavrel, CEO, Zeta Alpha,*

*Dorian Selz, CEO & Co-Founder, Squirro*

We've brought together three very impressive CEOs to present their views on AI and search. SWIRL's Probst thinks that every AI company is a search company. He notes that semantic similarity/vector search alone is insufficient for a robust retrieval system. The future of AI companies lies in a multi-pronged approach. Zavrel's approach at Zeta Alpha relies on his belief that we're moving from chat to AI agents that have KM superpowers. GenAI systems are evolving to include planning, interplay between multiple LLM-based agents, and using internal APIs of different existing applications. Squirro's Selz concentrates on how to apply GenAI to drive better business decisions. Autonomization is the future as GenAI shifts from traditional chat-based interfaces to more autonomous, AI-driven systems.

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[ENTERPRISEAIWORLD.COM](http://ENTERPRISEAIWORLD.COM)

Continental Breakfast ■ 8:00 a.m. – 8:30 a.m.

## KEYNOTES See page 20 for complete descriptions.



### KM, Experts & AI: Learning From KM Leaders

8:30 a.m. – 9:15 a.m.

*Kim Glover, Director, Internal Communications, TechnipFMC*  
*Cindy Hubert, Fellow, KM, APQC, & Author, The New Edge in Knowledge: How KM is Changing Business*



### Achieving GenAI ROI: Clean Data & KM Strategies

9:15 a.m. – 9:30 a.m.

*Patricia Petitt Liang, Product Marketing Manager, Coveo.*



### Protecting Your KM Investment: Navigating the AI Hype

9:30 a.m. – 9:45 a.m.

*Sean Coleman, SVP & GM, Knowledge and Call Center Productivity, Upland Software*



### Capturing Expert Knowledge With GenAI to Scale Transformation

9:45 a.m. – 10:00 a.m.

*Vanessa Liu, Co-Founder & CEO, and*  
*Judith Williams, Co-Founder, Sugarwork*

Coffee & Networking Break ■ 10:00 a.m. – 10:15 a.m.

## Understanding Search Behavior

10:15 a.m. – 11:00 a.m.

*Eric Pugh, CEO, OpenSource Connections*  
*Stavros Macrakis, Senior Technical Product Manager for Open Search, AWS*

Every search professional needs data about users' behavior. Data is fundamental for analyzing user behavior and improving search relevance, both with manual tuning and with machine learning. But until now, collecting user behavior data has been haphazard. Our open-source User Behavior Insights (UBI) system provides a client-side library for instrumenting webpages, a server-side library for collecting data, and analytical tools for understanding it. Critically, it defines a standard schema for behavior data so that the community can contribute additional analytical tools and have it integrated with personalization. With the emergence of even more ways of generating and ranking search results—neural dense search, neural sparse search, model fine-tuning, hybrid search, RAG—choosing the best mix of approaches for your search application becomes even more critical.

## Automated Content Aggregation: The Key to GenAI's Value in Enterprise Applications

11:15 a.m. – 12:00 p.m.

*David Seuss, CEO, Northern Light*

Just 2 years into the era of commercial GenAI, it is now trivially simple to send text to an LLM with a prompt to generate a machine-authored response. The quality and accuracy of what you get back is still an open question, however. GenAI has caused content aggregation to rise to the top as the hardest problem to solve. Only by meticulously curating the content from which a GenAI response is created can users have confidence in what the machine reports. And since RAG does not rely on an LLM's training data, getting the right content to the GenAI has to happen on-the-fly every time a user asks a question. Seuss explains how business research using GenAI depends on automated content aggregation and shows solutions available to enterprises to implement such automation for both internal and external sources.

## KEYNOTE LUNCHEON & AWARDS

### Pryon

12:00 p.m. – 12:15 p.m.

For keynote updates visit [KMWorld.com/conference](http://KMWorld.com/conference).

### KMWorld Awards

12:30 p.m. – 12:45 p.m.

See page 20 for complete description.

## The Role Taxonomies Can Play in Enterprise Search

1:00 p.m. – 1:45 p.m.

*Michele Jenkins, Senior Consultant, Dovecot Studio*  
*Marjorie Hlava, Chief Scientist, Access Innovations*

Large organizations often turn to enterprise search to solve the challenges of siloed content management systems and fragmented search experiences, but the outcome depends on the quality and consistency of the associated metadata and taxonomy. Believing that a rising tide lifts all repositories, Dovecot's Jenkins discusses how to align and enhance metadata and taxonomy ahead of enterprise search. Developing a semantic layer, including GenAI, auto-classification, mapping, and other business logic, can support a processing layer to harmonize and enhance metadata beyond the capabilities of the individual source repositories. Access Innovation's Hlava provides a case study on search recommendations using taxonomy tags. The McGraw-Hill Access Engineering implementation of search depends on, instead of relevance and co-occurrence, the weighted taxonomy tags applied to the individual pieces of content, the information objects. She outlines the process of taxonomy tagging and the search parameters to achieve amazingly high accuracy and consistency.

## Revisiting Faceted Search

2:00 p.m. – 2:45 p.m.

*Avi Rappoport, Senior Search Consultant, Search Tools Consulting*

Faceted search provided a fresh new approach in the early 2000s, allowing users to see multiple aspects of search results right away and drill down to relevant content. Daniel Tunkelang wrote *The Faceted Search* in 2009, a book that was key in sharing this information across the profession. Given the exponential increase in information since then, we need new techniques and analysis to improve the user experience of search, and a new version of the book. Rappoport is currently co-authoring an update to the book to revisit the challenges and solutions involved with faceted search.

## The Future of Enterprise Search & Discovery

3:00 p.m. – 3:45 p.m.

MODERATOR: *Marydee Ojala, Editor-in-Chief, KMWorld*

PANELISTS:

TBD

What's ahead for enterprise search and discovery? With a plethora of new developments, this panel consults their crystal balls to predict the future, both long and short term. What prognostications will they make that will affect how you do your job and how your job could change? What role will AI play? Come and find out!

## CLOSING KEYNOTES



### Beyond Boundaries: Content Readiness for AI in KM

4:00 p.m. – 4:15 p.m.

*Tim Hill, Director, Product Management, NICE*

See page 22 for complete description.

### KM 2025 & Beyond

4:15 p.m. – 5:00 p.m.

MODERATOR: *Brian Pichman, Director, Strategic Innovation, Evolve Project*  
*Julie Mohr, Principal Analyst, Forrester*  
*Dan Rasmus, Founder & Principal Analyst, Serious Insights, & Author*  
*Dave Snowden, Founder & Chief Scientist, The Cynefin Co*

See page 22 for complete description.

# Text ANALYTICS Forum '24

NOVEMBER  
20–21, 2024

JW MARRIOTT  
WASHINGTON, D.C.

## New Synergies and New Solutions

- What is text analytics & what can it do for me?
- Text analytics & AI: How text analytics adds precision, depth, & truthfulness to Gen AI
- What should you look for in text analytics software?
- New techniques & technologies in text analytics: Gen AI & beyond
- Integrating machine learning & semantic rules: Best of both
- Putting it all together: From semantic foundation to applications
- Data extraction: Feeding analytical applications & making AI smarter



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# Text ANALYTICS Forum '24

NOVEMBER  
20–21, 2024

JW MARRIOTT  
WASHINGTON, D.C.



**CONFERENCE CHAIR**

**Tom Reamy**  
Chief Knowledge Architect,  
KAPS Group, LLC

## New Synergies and New Solutions

Text Analytics has the ability to add depth, meaning, and intelligence to any organization's most under-utilized resource—text. Through text analytics, enterprises can unlock a wealth of information that would not otherwise be available. Join us as we explore the power of text analytics to provide relevant, valuable, and actionable data for enterprises of all kinds.

The Text Analytics Forum invites all who deal with text to take a deep dive into this powerful set of techniques. The Forum has something for all: whether you are new to the field and want to understand how it can add new capabilities or you are an experienced text analyst and want to see what the latest techniques and tools can add to your repertoire.

At the Text Analytics Forum, you'll be able to share ideas and network with peers and get practical advice and thought leadership from experts in the field. You'll learn everything: how to get started, how to make the business case for text analytics, the latest developments, and best practices in the field, and use cases showcasing the cutting edge of myriad applications.

Join us this November in Washington, D.C. for this unique, one-of-a-kind opportunity to explore the world of text analytics.



### WHO SHOULD ATTEND

Text Analytics Forum is designed for anyone who deals with text—it's everywhere. Specifically:

- Text Analysts
- Data Analysts & DBAs
- Content Analysts & Managers
- Information & Knowledge Architects
- Information Professionals
- Search Managers & Designers
- Knowledge Organizers
- Taxonomists & Ontologists
- Librarians
- Intranet & Portal Managers
- SharePoint Developers & Managers
- CIOs & CKOs
- Social Media Analysts
- BI & CI Directors

### PRECONFERENCE WORKSHOPS— MONDAY, NOVEMBER 18

Choose among 20 workshops (see pages 6–8) to concentrate on your special areas of interest.

Taught by experts, the workshops offer you a chance for interactive, small-group learning.

Mix and match morning and afternoon workshops to customize your conference program and jump-start your week.

Lunch is included when you register for a morning and afternoon workshop.

*(Workshops are separately priced or available with Platinum Pass.)*

### ENTERPRISE SOLUTIONS SHOWCASE

The Enterprise Solutions Showcase is a one-stop shop for serious buyers to meet with vendors offering knowledge management, content management, enterprise search, taxonomy, AI, and

intranet-related products and services. If you are looking for a particular product, evaluating competing systems, or keeping up with the latest trends and developments, you need to visit the Enterprise Solutions Showcase.

### SHOWCASE HOURS

**Monday, Nov. 18** .....5:00 p.m. – 6:30 p.m.  
*Grand Opening Reception*

**Tuesday, Nov. 19** .....10:00 a.m. – 6:00 p.m.  
*Networking Happy Hour* ...5:00 p.m. – 6:00 p.m.

**Wednesday, Nov. 20** .....10:00 a.m. – 4:00 p.m.

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### NETWORKING OPPORTUNITIES

Text Analytics Forum offers great opportunities to get acquainted with new colleagues and explore through casual conversation what others are doing in the space.

#### Enterprise Solutions Showcase

**Grand Opening Reception** *Sponsored by eGain*  
Monday, November 18 • 5:00 p.m. – 6:30 p.m.

Celebrate the grand opening of the Enterprise Solutions Showcase. Enjoy drinks and light bites while visiting with conference sponsors.

#### Networking Happy Hour

Tuesday, November 19 • 5:00 p.m. – 6:00 p.m.

Stop by the showcase after a full day of stimulating sessions to mix and mingle with other conference attendees, speakers, and our conference sponsors.

#### Continental Breakfasts, Breaks & Lunches



**CONNECT:**

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# CONFERENCE AT-A-GLANCE

## WEDNESDAY, NOVEMBER 20

8:00 a.m. – 8:30 a.m.	<b>CONTINENTAL BREAKFAST</b>	
8:30 a.m. – 9:15 a.m.	<b>KEYNOTE</b> ■ <b>Value Every Voice: Leading Teams That Thrive</b> ■ Pontefract	
9:15 a.m. – 9:30 a.m.	<b>KEYNOTE</b> ■ <b>New KM Practices to Supercharge the Power of AI</b> ■ Chmaj	
9:30 a.m. – 9:45 a.m.	<b>KEYNOTE</b> ■ <b>Leveraging AI+ for Productivity</b> ■ Dewey & Carson	
9:45 a.m. – 10:00 a.m.	<b>KEYNOTE</b> ■ <b>Sinequa</b> ■ Evernham	
10:00 a.m. – 10:45 a.m.	<b>COFFEE &amp; NETWORKING BREAK</b> in the Enterprise Solutions Showcase	
10:45 a.m. – 11:30 a.m.	<b>WELCOME</b> ■ <b>A Deep Text Look at Text Analytics</b> ■ Reamy	<b>Chat's the Past—Autonomization Is the Future</b> ■ Selz
	<b>TRACK 1</b> ■ Development	<b>TRACK 2</b> ■ Applications
11:45 a.m. – 12:30 p.m.	<b>LLMs, NLP, ML—Oh My!</b> • Downs	<b>Integration of GenAI &amp; Text Analytics</b> Effective Integration and Responsible Use of AI Platforms Into Day-to-Day Text Analytics • Chung Even LLMs Need Metadata ... • Strand & Di Bartolo
12:30 p.m. – 1:30 p.m.	<b>ATTENDEE LUNCHEON</b> in the Enterprise Solutions Showcase	
1:30 p.m. – 2:15 p.m.	<b>Human &amp; Machine Intelligence Working Together</b> • Murray	<b>Text Analytics &amp; GenAI: A Winning Combination for Regulations Analysis</b> • Sabo & McGill
2:30 p.m. – 3:15 p.m.	<b>The Coming Union of Text Analytics &amp; GenAI</b> • Seuss	<b>Are You GenAI Ready? Kick-Start Your Readiness Assessment</b> • Queret
3:15 p.m. – 4:00 p.m.	<b>COFFEE &amp; NETWORKING BREAK</b> in the Enterprise Solutions Showcase	
4:00 p.m. – 5:00 p.m.	<b>Ask the Experts Panel</b>	

## THURSDAY, NOVEMBER 21

8:00 a.m. – 8:30 a.m.	<b>CONTINENTAL BREAKFAST</b>	
8:30 a.m. – 9:15 a.m.	<b>KEYNOTE</b> ■ <b>KM, Experts &amp; AI: Learning From KM Leaders</b> ■ Glover & Hubert	
9:15 a.m. – 9:30 a.m.	<b>KEYNOTE</b> ■ <b>Achieving GenAI ROI: Clean Data &amp; KM Strategies</b> ■ Liang	
9:30 a.m. – 9:45 a.m.	<b>KEYNOTE</b> ■ <b>Protecting Your KM Investment: Navigating the AI Hype</b> ■ Coleman	
9:45 a.m. – 10:00 a.m.	<b>KEYNOTE</b> ■ <b>Capturing Expert Knowledge With GenAI to Scale Transformation</b> ■ Liu & Williams	
10:00 a.m. – 10:15 a.m.	<b>COFFEE &amp; NETWORKING BREAK</b>	
	<b>TRACK 1</b> ■ Development	<b>TRACK 2</b> ■ Applications
10:15 a.m. – 11:00 a.m.	<b>GenAI &amp; Text Analytics in the Enterprise: Building an Application Platform</b> • Reamy	<b>Use Cases</b> Improved Regulatory Recommender in Healthcare: Right Training, Right Place, Right Time • Rodriguez & Nagy Hybrid Approaches to Green Information Management: A Case Study • Majumder & Spoelker
11:15 a.m. – 12:00 p.m.	<b>Genius Without the Gibberish: How RAG &amp; Text Analytics Boost GenAI Reliability</b> • Gross	<b>Tools &amp; Techniques</b> Enhancing Content Strategy Information Management With LLMs & Symbolic AI: Techniques & Tools for Efficient Annotation and Indexing • Gabler If the Enterprise Knew What the Enterprise Knows • Popov
12:00 p.m. – 1:00 p.m.	<b>KEYNOTE LUNCHEON &amp; AWARDS</b> ■ Pryon	
1:00 p.m. – 1:45 p.m.	<b>Intelligent Terminology Matching Using a Knowledge Graph &amp; Vector Database</b> • Aasman	
2:00 p.m. – 2:45 p.m.	<b>Tutorial: Building Your First GenAI Solution &amp; Enhancing Its Value With Text Analytics</b> • Ananyan	
3:00 p.m. – 3:45 p.m.	<b>From Prototype to Production: Navigating the Challenges of Implementing GenAI</b> • Barrera	
4:00 p.m. – 4:15 p.m.	<b>KEYNOTE</b> ■ <b>Beyond Boundaries: Content Readiness for AI in KM</b> ■ Hill	
4:15 p.m. – 5:00 p.m.	<b>CLOSING KEYNOTE</b> ■ <b>KM 2025 &amp; Beyond</b> ■ Pichman, Mohr, Rasmus, & Snowden	

Continental Breakfast ■ 8:00 a.m. – 8:30 a.m.

## KEYNOTES



### Value Every Voice: Leading Teams That Thrive

8:30 a.m. – 9:15 a.m.

Dan Pontefract, Founder & CEO, Pontefract Group, & author, *Work Life Bloom, Flat Army, & others*

Today's business landscape is changing faster than ever before in history. The power of inclusive engagement and collaborative curiosity cannot be overstated. Join leadership strategist and award-winning author Dan Pontefract as he unveils essential techniques to cultivate a culture where every voice is valued and heard. Drawing on global primary research and more than 25 years of experience with leading organizations, he shares actionable insights and transformative strategies that empower KM teams to work better together. Gain expert tips on creating an environment where collaboration prospers, every team member feels genuinely valued, and the opportunity to bloom is open to all.



### New KM Practices to Supercharge the Power of AI

9:15 a.m. – 9:30 a.m.

John Chmaj, Chief KM Strategist, Verint

As organizations integrate AI into their product ecosystems, innovative KM practices are essential to keep information relevant and useful. In the age of GenAI and LLMs, the principle of "garbage in, garbage out" remains true—AI systems are only as effective as the data they process. Chmaj discusses emerging content models, new competencies, advanced authoring techniques, and governance practices that are transforming the KM landscape. It's vital that companies evolve their technology, resources, and strategies to unlock the full potential of AI-driven KM capabilities. In this dynamic and complex AI landscape, content remains king! Get lots of insights and ideas from our experienced KM leader.



### Leveraging AI+ for Productivity

9:30 a.m. – 9:45 a.m.

Devan Dewey, Principal, Chief Technology Officer, NEPC, LLC  
Laura Carson, CMO, M-Files



The productivity of knowledge workers is critically important to the growth and profitability of businesses. However, they remain weighted down, spending nearly half their time on mundane tasks, leaving less time for the work that matters most. An organization's information is the lifeline that provides the insights required to gain collective intelligence. Speakers discuss how organizations can gain a strategic, competitive advantage by leveraging knowledge work automation. They share actionable insights on harnessing the power of automation and AI to eliminate information chaos, improve productivity, and reduce business risk to enable knowledge workers to thrive.



### Sinequa

9:45 a.m. – 10:00 a.m.

Jeff Evernham, Chief Strategist & Evangelist, Sinequa

As a thought leader in applying search, AI, and LLMs to solve business problems so companies use their information assets to accelerate innovation, inform decision making, and improve outcomes, our speaker shares insights, ideas, and real-world case studies of how organizations successfully do this.

Coffee & Networking Break ■ In the Enterprise Solutions Showcase

10:00 a.m. – 10:45 a.m.



### Welcome: A Deep Text Look at Text Analytics

10:45 a.m. – 11:15 a.m.

Tom Reamy, Chief Knowledge Architect, KAPS Group, & Text Analytics Forum 2024 Program Chair

What are the current and future trends for the field of text analytics? Join program chair Tom Reamy for an overview of the conference themes and highlights and a look at what is driving the field forward. The theme this year is New Synergies, New Solutions. As the hype around GenAI subsides somewhat, people are asking about how to build solutions that deliver real business value. Join us as we explore how text analytics is an essential tool for adding accuracy and depth to GenAI and opening up new possibilities. We are also bringing back our popular Ask the Experts panel.



### Chat's the Past—Autonomization Is the Future: How to Apply GenAI to Drive Better Business Decisions

11:15 a.m. – 11:30 a.m.

Dorian Selz, CEO & CO-Founder, Squirro

This presentation explores the transformative potential of GenAI in business decision-making. It highlights the shift from traditional, chat-based interfaces to more autonomous, AI-driven systems, demonstrating how businesses can leverage this technology to enhance efficiency, accuracy, and strategic insight.

## TRACK 1 ■ Development

### LLMs, NLP, ML—Oh My!

11:45 a.m. – 12:30 p.m.

Sarah Downs, Director of Client Solutions, Synptica

Which algorithm is right for you? The one that gets the job done. Technologies are only as good as their results, and this requires fitting the right approach for your problem. Downs demonstrates the ways in which you can assemble a diversity of human-curated and machine learning tools at your fingertips, selecting the right tool for your task. Use cases explored include assembling enterprise taxonomies, NLP-driven text analytics, and LLMs to create associations between concepts and content, including novel entity extraction; marrying enterprise ontologies and knowledge graphs with LLMs to power retrieval augmented generation (RAG) to support business process automation; and storing outputs of machine tagging on content-aware knowledge graphs for further functionality and insight.

Attendee Luncheon ■ In the Enterprise Solutions Showcase

12:30 p.m. – 1:30 p.m.

### Human & Machine Intelligence Working Together

1:30 p.m. – 2:15 p.m.

Art Murray, CEO, Applied Knowledge Sciences, Inc.

As GenAI continues its rapid evolution, the extent of its impact and the number of industries disrupted are increasing at an equally rapid pace. Whether the disruption represents a crisis or opportunity is up to us. But first, we need to step away from the hype, take a look under the hood, and see what's really going on inside. Only then can we rationally think about how it might fit into the big picture. That picture includes not only generative and extractive AI, but also text and data analytics, graph databases and knowledge graphs, layered ontology, and the all-important but often-neglected incorporation of human intuition, sense-making and expertise. By carefully stitching all of these components together, major leaps in performance can be achieved. This session presents a pilot configuration along with the data and knowledge flows among these various components, test results showing problems encountered and how AI can learn from humans and vice versa, and plans for future enhancements.

### The Coming Union of Text Analytics & GenAI

2:30 p.m. – 3:15 p.m.

David Seuss, CEO, Northern Light

Text analytics has been around a lot longer than GenAI, and the technologies serve different purposes. But the combination of the two offers exciting potential for businesses. For instance, consider the possibilities of marrying the trend analysis and insight extraction capabilities of text analytics to GenAI's text summarization



capabilities. The result might be thought of as a "consultant in a box"—a powerful fusion that promises to dramatically enhance productivity in functions like strategic analysis and planning. In this session, Seuss paints a picture of a future in which GenAI reports on the insights that text analytics generates.

**Coffee & Networking Break** ■ In the Enterprise Solutions Showcase  
3:15 p.m. – 4:00 p.m.

## TRACK 2 ■ Applications

### Integration of GenAI & Text Analytics

11:45 a.m. – 12:30 p.m.

#### Effective Integration & Responsible Use of AI Platforms Into Day-to-Day Text Analytics

*Alice Chung, Senior Analytics Manager—Medical Insights Lead, Genentech*

With the revolution and continuous introduction of AI technologies (e.g., ChatGPT, LLM), how should one consider an effective integration and responsible use in day-to-day effort for text analysis? What are some of the synergies and watchouts that one should consider to deliver greater value and efficiencies for effective decision making. This session talks about how best to adopt the hybrid text analytics (the intelligent interplay of human and software) and mindset to achieve the optimal outcome in a responsible way.

#### Even LLMs Need Metadata ...

*Kyle Strand, Lead KM Specialist and Head of Library, Inter-American Development Bank (IDB)*

*Fabiola Di Bartolo, Senior Associate, Inter-American Development Bank*

This presentation focuses on the application of LLM-powered GenAI in improving knowledge discovery within our open access publications catalog. The integration of this technology facilitates more intuitive and effective interactions with our extensive corpus of over 13,000 publications. The LLM plays a role similar to that of a generalist, providing broad overviews and insights across a wide array of topics. However, achieving precision and accuracy necessitates the detailed contextualization that metadata and knowledge graphs provide. These elements provide context akin to that of specialists, ensuring each piece of information is accurately contextualized and enhancing the overall reliability of the discovery process. We use a retrieval-augmented generation (RAG) approach, leveraging advanced metadata and knowledge graphs to enrich AI-generated responses with relevant context to make sure users receive appropriate insights that reflect the nuances and complexities inherent in our publication corpus. We highlight specific examples of how this approach underscores the complementary roles of the LLM and metadata, exemplified in the specific case of our publications catalog. The LLM's broad capabilities work together with the detailed, contextual expertise provided by metadata and knowledge graphs to deliver a more precise, accurate, and "truthful" discovery experience.

**Attendee Luncheon** ■ In the Enterprise Solutions Showcase  
12:30 p.m. – 1:30 p.m.

### Text Analytics & GenAI: A Winning Combination for Regulations Analysis

1:30 p.m. – 2:15 p.m.

*Tom Sabo, Advisory Solutions Architect, SAS*

*Meredith McGill, Senior Associate Technical Consultant, SAS*

Government organizations are responsible for reviewing public commentary to proposed regulations and responding to all comments, which can take thousands of hours. This presentation offers a solution to address this challenge by automating the process with text analytics and GenAI. It highlights how text analytics serves as a method to calibrate the data which is fed into GenAI models to enhance accuracy and time to value and provides a layer of traceability to summaries. It also highlights how the process can apply to any number of commercial and public sector use cases.

### Are You GenAI Ready? Kick-Start Your Readiness Assessment

2:30 p.m. – 3:15 p.m.

*Charity Queret, Chief GenAI Consultant, GenIQ Advisors*

GenAI is poised to revolutionize industries, but are you ready to harness its potential? This session goes beyond the hype, equipping you with a practical framework to assess your organization's GenAI readiness. In this interactive session, attendees discover why a thorough readiness assessment is the secret weapon of successful GenAI adopters; gain crucial insights into the data management, AI capabilities, and technological infrastructure needed for a smooth transition; unveil a structured framework to evaluate their organization's preparedness across these key metrics; identify strengths to build on and weaknesses to address before GenAI implementation; turn challenges into opportunities; and learn how to bridge identified gaps and set your organization on a path to leverage GenAI for a sustainable competitive advantage. Attendees walk away with the tools and knowledge to confidently assess their GenAI readiness and propel their organization toward a data-driven, AI-powered future.

**Coffee & Networking Break** ■ 3:15 p.m. – 4:00 p.m.

Last Chance to Visit the Exhibits in the Enterprise Solutions Showcase

## ASK THE EXPERTS PANEL

4:00 p.m. – 5:00 p.m.

A panel of four text analytics experts answer questions that have been gathered before the conference, during the conference, and some additional questions from the program chair. This has always been one of our most popular features, so come prepared with your favorite questions and be ready to learn.

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**Text Analytics Forum '24**

Continental Breakfast ■ 8:00 a.m. – 8:30 a.m.

Coffee & Networking Break ■ 10:00 a.m. – 10:15 a.m.

## KEYNOTES



### KM, Experts & AI: Learning From KM Leaders

8:30 a.m. – 9:15 a.m.

*Kim Glover, Director, Internal Communications, TechnipFMC*  
*Cindy Hubert, Fellow, KM, APQC, & Author, The New Edge in Knowledge: How KM Is Changing Business*



In today's landscape, the airwaves resonate with discussions about AI. Embracing emerging technologies has elevated KM efforts. From the early days of portals and expertise location to the collaborative power of wikis and shared spaces, technology has consistently given KM a much-needed boost. This conversation begins with Hubert discussing how experts fit into the AI equation with knowledge creation, capture, and seamless transfer. Given observations from today's breakneck speed of business, the challenges have only gotten more daunting and the need for tapping into expertise is needed even more. She shares a model for thinking of how to enable AI using the skills of experts. In the dynamic interplay between human expertise and AI, she provides a path to unlock the potential for groundbreaking insights that lead us into uncharted territories of new knowledge. As we navigate this synergistic landscape, both seasoned experts and the KM programs that bolster their efforts must seize the opportunity to capitalize on their collective wisdom. Those who work smarter, fearlessly embracing collaboration with AI, are poised for success.



### Achieving GenAI ROI: Clean Data & KM Strategies

9:15 a.m. – 9:30 a.m.

*Patricia Petit Liang, Product Marketing Manager, Coveo*

Is your enterprise experimenting with generative answering, but facing significant challenges with data cleanliness? Liang shares best practices and discusses the strategic role KM plays in delivering effective GenAI. Get proven strategies for refining generative outputs and practical insights from enterprise customers including Xero, F5, and Forcepoint. Uncover proven metrics and KPIs to ensure accurate, relevant, and safe generated answers, optimizing your knowledgebases. Enhance productivity, proficiency, and decisionmaking with curated generative answering.



### Protecting Your KM Investment: Navigating the AI Hype

9:30 a.m. – 9:45 a.m.

*Sean Coleman, SVP & GM, Knowledge and Call Center Productivity, Upland Software*

Coleman cuts through the chaos and offers a practical road map for KM teams grappling with the AI revolution. He discusses three key steps to make no-regrets AI investments while safeguarding your hard-earned KM progress: how to separate AI fact from fiction; how to identify AI opportunities that actually complement your existing KM ecosystem; and how to implement a measured, value-driven approach to AI adoption. Get actionable insights to navigate the next phase of KM with confidence.



### Capturing Expert Knowledge With GenAI to Scale Transformation

9:45 a.m. – 10:00 a.m.

*Vanessa Liu, Co-Founder & CEO, and*  
*Judith Williams, Co-Founder, Sugarwork*

We have all been wowed by amazing examples of GenAI. But beyond the headlines, things look a little different. While employees are leveraging GenAI to increase productivity on individual and team levels, enterprises are frequently not yet using GenAI in a structured manner across their organizations, mainly due to the lack of private enterprise data. Capturing tacit expert knowledge is where big quantifiable gains can be made. The founders of Sugarwork share a customer case study to highlight the productivity gains the business experienced when it captured and deployed tacit expert knowledge at scale using GenAI.

## TRACK 1 ■ Development

### GenAI & Text Analytics in the Enterprise: Building an Application Platform

10:15 a.m. – 11:00 a.m.

*Tom Reamy, CEO and Founder, KAPS Group*

For all the success that GPT has accomplished in the public sphere, it has a number of limitations within the enterprise that text analytics can overcome—if done correctly. This session describes how text analytics' auto-categorization and data extraction can overcome the five well-known limitations of GenAI and, at the same time, shows how the combination can greatly enhance a wide range of enterprise applications. For example, while RAG can help with hallucinations, the search component is only as good as the basic enterprise search, which we've seen needs text analytics to really shine. We cover how to develop a multidimensional platform that can be used to build multiple applications that reflect your world, not a generic and overly simplistic public world, fact-check hallucinations, provide human-understandable explanations, check security, and create a highly accurate training set for enterprise LLMs.

### Genius Without the Gibberish: How RAG & Text Analytics Boost GenAI Reliability

11:15 a.m. – 12:00 p.m.

*Mark Gross, President, Data Conversion Laboratory*

LLMs like GPT-3 or Llama have demonstrated remarkable capabilities in generating text on a wide range of topics. However, these models are not without limitations. A major challenge is ensuring that the information generated is accurate and up-to-date, especially for rapidly changing or highly specialized domains. While "slightly inaccurate" information can be OK in some areas, it can be disastrous in medicine, law, engineering, and other fields in which accuracy is mission-critical; these are areas in which the nightmare scenario of LLMs hallucinating and providing false information isn't only annoying, it can be deadly. Retrieval-augmented generation (RAG) is a technique that allows LLMs to incorporate external information from a corpus of documents during the text generation process. RAG mitigates the hallucination problem by grounding LLM responses in verified data sources. The key components of text analytics—text preprocessing, natural language processing, entity extraction, and structuring data—play a critical role in this process. These techniques ensure that data fed into an LLM is clean, relevant, and structured to maximize the accuracy and reliability of the responses. By leveraging organizational knowledge and domain-specific datasets, RAG significantly enhances the performance and trustworthiness of LLM outputs. This presentation examines the intricacies of data and content preparation within the RAG architecture to improve LLM performance. Gross walks through a data scenario, illustrating the step-by-step process of how data is preprocessed, structured, and integrated into the RAG framework. Attendees gain insights into best practices for data preparation, the benefits of integrating text analytics into AI workflows, and practical strategies for deploying RAG to enhance the accuracy and reliability of GenAI systems.

## TRACK 2 ■ Applications

### Use Cases

10:15 a.m. – 11:00 a.m.

### Improved Regulatory Recommender in Healthcare: Right Training, Right Place, Right Time

*Laura Rodriguez, Knowledge Manager, HealthStream*  
*Helmut Nagy, CPO, Semantic Web Company GmbH*

HealthStream maintains a dataset of regulatory requirements for professional licensing for healthcare professionals and provides courses to meet many of these requirements. It wants to explore a regulatory recommender that would use the tags applied to courses and regulations to pair an individual with the appropriate training material specific to their license, care setting, and state. This is being built in collaboration with Semantic Web Company, utilizing its LLM-based Taxonomy Advisor and Recommender feature to extend the taxonomy and its Semantic Integrator technologies to power the recommendations. The primary objective for this recommender is that its architecture be easily understandable and maintainable by our knowledge management team. A previous attempt to build such a recommender

was too complex, leading to unexplainable results and an inability to fine-tune the recommendations based on feedback. It is critical that these recommendations be accurate, as this is legal content that has implications for professionals maintaining licensure if incorrect courses are suggested to fulfill the requirements.

## Hybrid Approaches to Green Information Management: A Case Study

*Urmi Majumder, Principal Data Architecture Consultant, & Nina Spoelker, KM Consultant, Enterprise Knowledge, LLC*

Today, enterprises have more tools to create and share information than ever, leading to significant challenges in managing duplicate content. This session explores how a large supply chain organization implements green information management to support sustainability goals. Presenters from Enterprise Knowledge showcase a hybrid AI framework, combining heuristic and LLM-based approaches to effectively analyze and reduce duplicate content across enterprise repositories at scale. This approach identifies duplicates and near-duplicates and enhances content retrieval, ensuring information accuracy and reducing storage costs. By leveraging AI for content analysis, organizations can streamline their data management processes and contribute to their environmental, social, and governance (ESG) goals by minimizing the carbon footprint associated with redundant data. The presentation demonstrates the environmental benefits of reducing duplicate content, focusing on carbon footprint reduction. It also addresses how this information generates aggregate statistics and resultant carbon footprint, pushing for a cultural shift toward greener information management. Attendees gain insights into the practical implementation of AI-driven content analysis frameworks, the environmental impact of effective data management, and the importance of integrating ESG goals into information management strategies. This approach promotes a cultural shift toward sustainable data practices, significantly improving data management efficiency. Attendees learn how modern AI techniques can transform their enterprise's data practices and support a sustainable future.

## Tools & Techniques

11:15 a.m. – 12:00 p.m.

### Enhancing Content Strategy Information Management With LLMs & Symbolic AI: Techniques & Tools for Efficient Annotation & Indexing

*Sebastian Gabler, Chief Customer Officer, Semantic Web Company*

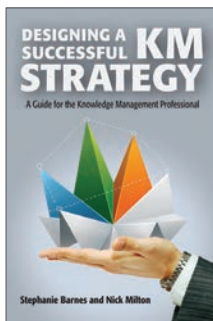
Classifying content based on thesauri is an established method in content strategy and information management. Knowledge representation, including formal logic and terminology control, provides precise and consistent indexing, enhancing information retrieval. The advent of LLMs has given these approaches a significant boost. Effective GenAI strategies, as suggested by Gartner and other analysts, now require efficient and accurate labeling of corpora at unprecedented volumes and speeds. Addressing the challenges of unlocking unknowns from latent content, guiding users in discovering new insights, and preventing hallucinations in GenAIs have become increasingly critical. As enterprises explore merging LLMs with symbolic AI, graph grounding—the formal representation of information and data—emerges as a pivotal challenge. This session introduces key concepts and presents interactive and automated tools for annotating, classifying, and indexing unstructured text and documents. A central concept is inference tagging, a method that extends document annotation beyond explicit concepts by deriving new information from ontologies and rules. Gabler showcases use cases demonstrating how content can drive risk identification, personalized recommendations, and decision support, highlighting the practical applications and benefits of these advanced techniques.

### If the Enterprise Knew What the Enterprise Knows

*Peio Popov, SVP Financial Services, Ontotext*

This case study outlines the development of an information discovery application that integrates a knowledge graph with an LLM. The presentation focuses on demonstrating how well-established knowledge management techniques can enhance the effectiveness and user-friendliness of contemporary retrieval-augmented generation (RAG) information retrieval systems. Additionally, it highlights how the application meets the stringent production requirement typical for regulated enterprises, en-

## Essential Resources for the KM Professional



Here is a practical, step-by-step guide to crafting a knowledge management strategy that aligns with your organization's larger business strategy. The Barnes-Milton approach prepares KM professionals to identify strategic knowledge areas, define program scope and vision, obtain stakeholder input and buy-in, select winning pilots, apply change management principles, build a sound knowledge management framework, manage content and

technology, assemble and lead an implementation team, and—most importantly—connect KM strategy to business realities.

Price: \$59.50  
ebook also available



In *Deep Text*, author Tom Reamy offers an approach to text analytics that adds depth and intelligence to our ability to utilize a growing mass of unstructured text the world is drowning in. Reamy explains what deep text is and surveys its many uses and benefits. He describes applications and development best practices, discusses business issues including ROI, provides how-to advice and instruction, and provides

guidance on selecting software and building a text analytics capability within an organization.

Price: \$59.50  
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suring relevance, compliance and security. It focuses on the innovative techniques to overcome traditional obstacles in information retrieval. These challenges arise primarily because users frequently submit (natural language) queries that are poorly constructed, vague, ambiguous, lack clear and adequate context, and/or contain narrow, domain-specific terminology. By addressing these issues, the applied approach is able to measurably improve the discovery of relevant information while at the same time increasing the ease of use. At its conclusion, an overview is shared of the measured business and user benefits from the increased findability, understanding, trust, and ease of use of the assets of the organization and how their increased reuse and repurpose capabilities affect the daily work of both knowledge workers and specialists.

## KEYNOTE LUNCHEON & AWARDS

### Pryon

12:00 p.m. – 12:15 p.m.

For keynote updates visit [KMWorld.com/conference](https://kmworld.com/conference).

### KMWorld Awards

12:30 p.m. – 12:45 p.m.

KMWorld magazine is proud to sponsor the 2024 KMWorld awards, KM Promise & KM Reality, which are designed to celebrate the success stories of knowledge management. Information Today, Inc. is excited to introduce and present a new award: KM Community Award recognizes an individual who has made a significant impact in the KM community. The awards will be presented along with Step Two's Digital Awards, where you get a sneak peek behind the firewall of these organizations. Find out more—[kmworld.com/Conference/2024/Awards.aspx](https://kmworld.com/Conference/2024/Awards.aspx)

## Intelligent Terminology Matching Using a Knowledge Graph & Vector Database

1:00 p.m. – 1:45 p.m.

Jans Aasman, CEO, Franz Inc.

In the era of big data and AI, accurate and efficient terminology matching is critical for numerous applications, including information retrieval, data integration, and semantic search. This presentation introduces an innovative approach to intelligent terminology matching by leveraging a knowledge graph in conjunction with a vector database. Our method addresses the challenges of synonymy, polysemy, and contextual relevance in terminology matching. A knowledge graph provides a structured and semantically rich representation of entities and their interrelationships, offering a powerful foundation for understanding and disambiguating terms. By integrating a vector database, the system's ability to capture semantic nuances is enhanced through high-dimensional vector embeddings. These embeddings are generated using advanced natural language processing techniques, such as transformer models, to encode the semantic content of terms within a multidimensional space. This approach consists of three main components: 1) constructing and enriching the knowledge graph with domain-specific terminology and relationships, 2) generating vector embeddings for terms using pretrained language models, and 3) performing similarity computations to match terms based on their semantic proximity within the vector space. This combination enables precise and context-aware terminology matching, significantly improving the accuracy and relevance of results compared to traditional keyword-based methods. Aasman discusses the effectiveness of our method across various domains, highlighting best practices in handling complex and diverse terminologies. Attendees gain insights into the technical details, practical implementation, and potential applications of this cutting-edge approach to terminology matching.

## Tutorial: Building Your First GenAI Solution & Enhancing Its Value With Text Analytics

2:00 p.m. – 2:45 p.m.

Sergei Ananyan, CEO, Megaputer Intelligence

Ananyan provides a step-by-step tutorial demonstrating the creation of a GenAI-based solution for VoC data analysis. Attendees learn the basics of prompt engineering, see how to adjust prompts to improve quality of results, what techniques help eliminate hallucinations, how to enhance the value of results with text analytics, and what additional engines can be used to produce an easy-to-comprehend summary of results for decision makers.

## From Prototype to Production: Navigating the Challenges of Implementing GenAI

3:00 p.m. – 3:45 p.m.

Fernando Rejon Barrera, CTO, Zeta Alpha

Embark on a journey through the highs and lows of developing GenAI for the enterprise in an era where technology moves at breakneck speed. Zeta Alpha dove headfirst into GenAI. By January 2023, it had successfully deployed features into production. Yet, this journey was not without its challenges and invaluable lessons. Join our speaker as he shares insights from his own development of Zeta Alpha's public Discovery platform in AI R&D, as well as from assisting enterprise clients across diverse sectors like chemical, HR, high-tech industrial, and regulatory industries on their path from prototype to production. Discover the pitfalls in treating GenAI projects as standard software development endeavors and learn how to avoid wasted effort on solutions that will soon be provided by LLM vendors. Explore the nuances of collaboration with business stakeholders to ensure that the GenAI features you develop are both cutting-edge and genuinely beneficial for their operations. Gain insights into expectation management, strategic technology selection, and the pivotal role of business alignment in project success. Don't miss this opportunity to learn from Zeta Alpha's journey and equip yourself with strategies to navigate the complexities of putting GenAI into production, steering clear of potential pitfalls along the way.

## CLOSING KEYNOTES



### Beyond Boundaries: Content Readiness for AI in KM

4:00 p.m. – 4:15 p.m.

Tim Hill, Director, Product Management, NICE

This session tackles the crucial role of content preparation for AI in KM. Discover strategies for optimizing content for AI-powered features such as generative search. Hill delves into everything from data structuring to crafting effective prompts equipping you to unlock your knowledgebase's true potential. See AI in action with a compelling case study showcasing a real-world application of generative search and its significant impact. Learn how to transform knowledge boundaries into a springboard for limitless growth.

### KM 2025 & Beyond

4:15 p.m. – 5:00 p.m.

MODERATOR: Brian Pichman, Director, Strategic Innovation, Evolve Project

Julie Mohr, Principal Analyst, Forrester

Dan Rasmus, Founder & Principal Analyst, Serious Insights, & Author

Dave Snowden, Founder & Chief Scientist, The Cynefin Co.

Where is KM going with all the AI developments for the enterprise? How are our organizations responding to the social structures and changes in our world? How are they innovating and exceeding customer expectations? Get inspiration from our practitioners and futurists and be ready for KM in 2025.

# ENTERPRISE AI World

NOVEMBER 20–21, 2024

JW MARRIOTT | WASHINGTON, D.C.

## Crossing the Chasm in the New Era of AI

- AI definition, applications, & strategic approaches.
- Rapid adoption of AI & machine learning in mainstream businesses.
- Impact on operations, processes, & security.
- Unlocking organizational knowledge & fostering innovation with AI.
- Insights on key AI technologies & strategies.
- Explore issues & challenges of AI for successful implementation.
- Aligning AI-based solutions with enterprise goals.
- Ethical considerations in AI decision making & responsible AI development.
- Knowledge models & GenAI for better search results.
- Future perspectives & visions for enterprise AI development.



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# ENTERPRISE AI World

NOVEMBER  
20–21, 2024

JW MARRIOTT  
WASHINGTON, D.C.

## Crossing the Chasm in the New Era of AI

The rapid adoption of AI and machine learning technologies has caught the attention of the world and is now becoming mainstream in businesses hungry for greater automation and intelligence. Innovative AI use cases continue to spread across every industry, and IT and business leaders alike are embracing the promise of greater efficiency, agility, and innovation through the ability to unlock insights from information at unprecedented speed and scale.

No matter what your industry is, AI applications can impact your operations by streamlining processes, increasing security, improving customer interactions, unlocking organizational knowledge, fostering innovation, and much more. The potential of AI to transform an enterprise and gain competitive advantage is an opportunity that organizations must explore, or risk being left behind.

This 2-day event, Enterprise AI World, offers an immersive look at AI by diving into key technologies and strategies being leveraged by top enterprises today, identifying industry leaders and providing the opportunity for them to share their knowledge and ideas, examining the issues and challenges of AI, and preparing attendees to move forward with AI successfully in their organizations. AI-based solutions should align with enterprise goals and this event gives you the foundation to find a strategic fit for AI in your organization. Join us this November and discover how AI applications can transform your enterprise today and in the future.



### CONFERENCE PROGRAM HOST

**Beth Rudden**  
CEO, Bast.ai



### WHO SHOULD ATTEND

Enterprise AI World 2024 is designed for anyone involved in using artificial intelligence to transform the enterprise, including:

- Chief AI Officers
- Chief Data Scientists
- Chief Knowledge Officers
- CIOs, CTOs, CDOs, CEOs
- Heads/VPs of AI/ML
- Information Architects
- Heads of Innovation
- IT Managers
- Heads of Analytics
- And anyone involved in using artificial intelligence to transform the enterprise

### PRECONFERENCE WORKSHOPS— MONDAY, NOVEMBER 18

Choose among 20 workshops (see pages 6–8) to concentrate on your special areas of interest.

Taught by experts, the workshops offer you a chance for interactive, small-group learning.

Mix and match morning and afternoon workshops to customize your conference program and jump-start your week.

Lunch is included when you register for a morning and afternoon workshop.

*(Workshops are separately priced or available with Platinum Pass.)*

### ENTERPRISE SOLUTIONS SHOWCASE

The Enterprise Solutions Showcase is a one-stop shop for serious buyers to meet with vendors offering knowledge management, content management, enterprise search, taxonomy, AI,

and intranet-related products and services. If you are looking for a particular product, evaluating competing systems, or keeping up with the latest trends and developments, you need to visit the Enterprise Solutions Showcase.

### SHOWCASE HOURS

**Monday, Nov. 18** ..... 5:00 p.m. – 6:30 p.m.  
*Grand Opening Reception*

**Tuesday, Nov. 19** ..... 10:00 a.m. – 6:00 p.m.  
*Networking Happy Hour* .... 5:00 p.m. – 6:00 p.m.

**Wednesday, Nov. 20** ..... 10:00 a.m. – 4:00 p.m.

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### NETWORKING OPPORTUNITIES

Enterprise AI World offers great opportunities to get acquainted with new colleagues and explore through casual conversation what others are doing in the space.

#### Enterprise Solutions Showcase

**Grand Opening Reception** *Sponsored by eGain*  
Monday, November 18 • 5:00 p.m. – 6:30 p.m.

Celebrate the grand opening of the Enterprise Solutions Showcase. Enjoy drinks and light bites while visiting with conference sponsors.

#### Networking Happy Hour

Tuesday, November 19 • 5:00 p.m. – 6:00 p.m.

Stop by the showcase after a full day of stimulating sessions to mix and mingle with other conference attendees, speakers, and our conference sponsors.

#### Continental Breakfasts, Breaks & Lunches



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# CONFERENCE AT-A-GLANCE

## WEDNESDAY, NOVEMBER 20

8:00 a.m. – 8:30 a.m.	<b>CONTINENTAL BREAKFAST</b>
8:30 a.m. – 9:15 a.m.	<b>KEYNOTE</b> ■ Value Every Voice: Leading Teams That Thrive ■ Pontefract
9:15 a.m. – 9:30 a.m.	<b>KEYNOTE</b> ■ New KM Practices to Supercharge the Power of AI ■ Chmaj
9:30 a.m. – 9:45 a.m.	<b>KEYNOTE</b> ■ Leveraging AI+ for Productivity ■ Dewey & Carson
9:45 a.m. – 10:00 a.m.	<b>KEYNOTE</b> ■ Sinequa ■ Evernham
10:00 a.m. – 10:45 a.m.	<b>COFFEE &amp; NETWORKING BREAK</b> in the Enterprise Solutions Showcase
10:45 a.m. – 11:30 a.m.	In the Age of AIs, What Is Human Knowledge Good For? • Rainie
11:45 a.m. – 12:30 p.m.	Sparking Enterprise Creativity With AI • Mairn & Pichman
12:30 p.m. – 1:30 p.m.	<b>ATTENDEE LUNCHEON</b> in the Enterprise Solutions Showcase
1:30 p.m. – 2:15 p.m.	Enterprise Approach to AI • Chhabaria & Moore
2:30 p.m. – 3:15 p.m.	AI Readiness & Confidence • Queret & Hahne
3:15 p.m. – 4:00 p.m.	<b>COFFEE &amp; NETWORKING BREAK</b> in the Enterprise Solutions Showcase
4:00 p.m. – 5:00 p.m.	Industry AI Insights

## THURSDAY, NOVEMBER 21

8:00 a.m. – 8:30 a.m.	<b>CONTINENTAL BREAKFAST</b>
8:30 a.m. – 9:15 a.m.	<b>KEYNOTE</b> ■ KM, Experts & AI: Learning From KM Leaders ■ Glover & Hubert
9:15 a.m. – 9:30 a.m.	<b>KEYNOTE</b> ■ Achieving GenAI ROI: Clean Data & KM Strategies ■ Liang
9:30 a.m. – 9:45 a.m.	<b>KEYNOTE</b> ■ Protecting Your KM Investment: Navigating the AI Hype ■ Coleman
9:45 a.m. – 10:00 a.m.	<b>KEYNOTE</b> ■ Capturing Expert Knowledge With GenAI to Scale Transformation ■ Liu & Williams
10:00 a.m. – 10:15 a.m.	<b>COFFEE &amp; NETWORKING BREAK</b>
10:15 a.m. – 11:00 a.m.	GenAI's Impact on KM & the Enterprise of the Future • Mohr
11:15 a.m. – 12:00 p.m.	Enhancing AI With Human Intelligence: Better Business Decisions • Selz, Pashcal, & Resch
12:00 p.m. – 1:00 p.m.	<b>KEYNOTE LUNCHEON &amp; AWARDS</b> ■ Pryon
1:00 p.m. – 1:45 p.m.	AI Knowledge-Powered Customer Service Transformation • Durst & Sahni
2:00 p.m. – 2:45 p.m.	Leveraging AI: The Journey From Hype to Reality • Pullin, Karawani, & Lila
3:00 p.m. – 3:45 p.m.	AI Developer Insights
4:00 p.m. – 4:15 p.m.	<b>KEYNOTE</b> ■ Beyond Boundaries: Content Readiness for AI in KM ■ Hill
4:15 p.m. – 5:00 p.m.	<b>CLOSING KEYNOTE</b> ■ KM 2025 & Beyond ■ Pichman, Mohr, Rasmus, & Snowden

Continental Breakfast ■ 8:00 a.m. – 8:30 a.m.

## KEYNOTES



### Value Every Voice: Leading Teams That Thrive

8:30 a.m. – 9:15 a.m.

Dan Pontefract, Founder & CEO, Pontefract Group, & author, *Work Life Bloom, Flat Army, & others*

Today's business landscape is changing faster than ever before in history. The power of inclusive engagement and collaborative curiosity cannot be overstated. Join leadership strategist and award-winning author Dan Pontefract as he unveils essential techniques to cultivate a culture where every voice is valued and heard. Drawing on global primary research and more than 25 years of experience with leading organizations, he shares actionable insights and transformative strategies that empower KM teams to work better together. Gain expert tips on creating an environment where collaboration prospers, every team member feels genuinely valued, and the opportunity to bloom is open to all.



### New KM Practices to Supercharge the Power of AI

9:15 a.m. – 9:30 a.m.

John Chmaj, Chief KM Strategist, Verint

As organizations integrate AI into their product ecosystems, innovative KM practices are essential to keep information relevant and useful. In the age of GenAI and LLMs, the principle of "garbage in, garbage out" remains true—AI systems are only as effective as the data they process. Chmaj discusses emerging content models, new competencies, advanced authoring techniques, and governance practices that are transforming the KM landscape. It's vital that companies evolve their technology, resources, and strategies to unlock the full potential of AI-driven KM capabilities. In this dynamic and complex AI landscape, content remains king! Get lots of insights and ideas from our experienced KM leader.



### Leveraging AI+ for Productivity

9:30 a.m. – 9:45 a.m.

Devan Dewey, Principal, Chief Technology Officer, NEPC, LLC  
Laura Carson, CMO, M-Files



The productivity of knowledge workers is critically important to the growth and profitability of businesses. However, they remain weighted down, spending nearly half their time on mundane tasks, leaving less time for the work that matters most. An organization's information is the lifeline that provides the insights required to gain collective intelligence. Speakers discuss how organizations can gain a strategic, competitive advantage by leveraging knowledge work automation. They share actionable insights on harnessing the power of automation and AI to eliminate information chaos, improve productivity, and reduce business risk to enable knowledge workers to thrive.



### Sinequa

9:45 a.m. – 10:00 a.m.

Jeff Evernham, Chief Strategist & Evangelist, Sinequa

As a thought leader in applying search, AI, and LLMs to solve business problems so companies use their information assets to accelerate innovation, inform decision making, and improve outcomes, our speaker shares insights, ideas, and real-world case studies of how organizations successfully do this.

Coffee & Networking Break ■ In the Enterprise Solutions Showcase  
10:00 a.m. – 10:45 a.m.

## In the Age of AIs, What Is Human Knowledge Good For?

10:45 a.m. – 11:30 a.m.

Lee Rainie, Director, *Imagining the Digital Future Center, Elon University, & Former Director, Pew Research Center*

The rapid growth of public usage of LLMs such as ChatGPT, Gemini, and Claude has surpassed the classic tipping point in technology adoption that usually comes after so-called "early adopters" embrace an innovation. Our knowledgeable and popular speaker shares research and insights from recent studies that explore the impact and consequences of the spread of AI systems into usage by the general public. About a quarter of American adults now use such models. The progress of those models in meeting or surpassing human intelligence raises big questions for enterprises. Rainie discusses the latest research about the rapid development and adoption of AI in the enterprise.

## Sparking Enterprise Creativity With AI

11:45 a.m. – 12:30 p.m.

Chad Mairn, Innovation Lab, St. Petersburg College  
Brian Pichman, Director, Strategic Innovation, Evolve Project

How do people translate complex human thoughts into machine-readable formats? What can we learn from AI and the arts? This session looks at how artificial creativity can redefine knowledge sharing in our digital age. It discusses ethical virtual zoos and aquariums, conversational avatars, and van Gogh and other chatbots. It shows the power of LLMs and embodied AI in capturing and helping preserve our culture. AI not only showcases technology's potential for storytelling and education, but it also illustrates how AI can breathe new life into the narratives of historical and expert figures, opening up new possibilities for AI as a tool for cultural preservation and enrichment, and demonstrating its potential to create immersive and interactive experiences that resonate with organizations. Get lots of ideas for your enterprise and be inspired to look at AI in a different light.

Attendee Luncheon ■ In the Enterprise Solutions Showcase  
12:30 p.m. – 1:30 p.m.

## Enterprise Approach to AI

1:30 p.m. – 2:15 p.m.

Kunal Sunil Chhabaria, Senior Product Manager, Walmart  
Shannon Moore, Senior Taxonomy Analyst, Electronic Arts & Associates  
Our practitioners share how their organizations are dealing with AI.

## AI Readiness & Confidence

2:30 p.m. – 3:15 p.m.

Charity Queret, Chief GenAI Consultant, GenIQ Advisors  
Brett Hahne, Chief Technology/AI Officer, LabSavvy

Queret presents a practical framework to assess your organization's GenAI readiness, the secret weapon of successful GenAI adopters. Gain crucial insights into the data management, AI capabilities, and technological infrastructure needed for a smooth transition. Identify strengths to build on and weaknesses to address before GenAI implementation. Get tools and knowledge to confidently assess your GenAI readiness and propel your organization toward a data-driven, AI-powered future. Hahne references the tools learned via the Imitation Game, which was created by Alan Turing in 1950, to distinguish between a human and a computer. The Turing model utilizes a combination of a human interrogator, a human respondent, and a computer respondent, which provides a framework for the computer respondent to convince the interrogator that it is human. He presents his take on the Turing Test within the application of the open trichotomy model, a modeling technique that allows for "situational analysis" to be conducted while evaluating combinations of scenarios and relationships to arrive at a mathematical outcome supporting a reached conclusion. The model provides a means to "prove out" the Imitation Game and conclude whether information shared emanates from a human or a computer.

Coffee & Networking Break ■ 3:15 p.m. – 4:00 p.m.

Last Chance to Visit the Exhibits in the Enterprise Solutions Showcase

## Industry AI Insights

4:00 p.m. – 5:00 p.m.

This session shares insights of industry leaders who have developed, used, or experimented with AI solutions.



Continental Breakfast ■ 8:00 a.m. – 8:30 a.m.

## KEYNOTES See page 20 for complete descriptions.



### KM, Experts & AI: Learning From KM Leaders

8:30 a.m. – 9:15 a.m.

*Kim Glover, Director, Internal Communications, TechnipFMC*  
*Cindy Hubert, Fellow, KM, APQC, & Author, The New Edge in Knowledge: How KM Is Changing Business*



### Achieving GenAI ROI: Clean Data & KM Strategies

9:15 a.m. – 9:30 a.m.

*Patricia Petit Liang, Product Marketing Manager, Coveo.*



### Protecting Your KM Investment: Navigating the AI Hype

9:30 a.m. – 9:45 a.m.

*Sean Coleman, SVP & GM, Knowledge and Call Center Productivity, Upland Software*



### Capturing Expert Knowledge With GenAI to Scale Transformation

9:45 a.m. – 10:00 a.m.

*Vanessa Liu, Co-Founder & CEO, and*  
*Judith Williams, Co-Founder, Sugarwork*

Coffee & Networking Break ■ 10:00 a.m. – 10:15 a.m.

## GenAI's Impact on KM & the Enterprise of the Future

10:15 a.m. – 11:00 a.m.

*Julie Mohr, Principal Analyst, Forrester*

GenAI is having a profound impact on the knowledge economy and knowledge work with the promise of improved productivity for knowledge workers. As we embrace these transformative forces, organizations must go beyond mere AI integration into existing workflows and reimagine how work is performed. GenAI should empower the GenAI worker—the curious questioner who drives a learning organization—transcending mundane tasks and fostering creativity and innovation. Knowledge improves the human ability to create and engage in innovation. Now is the time to build knowledge capacity and harness GenAI wisely, bridging the gap and propelling us toward a future in which AI truly becomes our advantage. Our experienced analyst and researcher shares trends, strategies, and practices to future-ready your enterprise with GenAI.

## Enhancing AI With Human Intelligence: Better Business Decisions

11:15 a.m. – 12:00 p.m.

*Dorian Selz, Co-Founder & CEO, Squirro*  
*Taylor Pashcal, KM Consultant, Enterprise Knowledge, LLC*  
*Rebecca Kirstein Resch, CEO, inqli*

In the rapidly evolving digital landscape, the integration of human intelligence with AI has become a crucial factor for success. Selz explores the transformative potential of GenAI in business decision making. He highlights the shift from traditional, chat-based interfaces to more autonomous, AI-driven systems, demonstrating how businesses can leverage this technology to enhance efficiency, accuracy, and strategic insight. Using real-world examples, he illustrates the power of GenAI in making business decisions. Our second speakers explore the concept of "human in the loop" and its significance in creating robust AI solutions. They discuss how incorporating human insights can drive more accurate, effective, and ethical AI applications; the benefits and challenges of human-AI collaboration, and the critical impact of tacit knowledge on decision making. Through interactive scenarios and real-world examples, they illustrate how behavioral aspects of knowledge sharing can support the design of effective processes and systems. Get actionable insights and inspiration to implement human-sustainability-focused metrics, leading to greater innovation and long-term success in the enterprise.

## KEYNOTE LUNCHEON & AWARDS

**Pryon**

12:00 p.m. – 12:15 p.m.

For keynote updates visit [KMWorld.com/conference](http://KMWorld.com/conference).

**KMWorld Awards**

12:30 p.m. – 12:45 p.m.

See page 20 for complete description.

## AI Knowledge-Powered Customer Service Transformation

1:00 p.m. – 1:45 p.m.

*Amy Durst, Assistant VP, Internal Support, Rogue Credit Union*  
*Sanjeev Sahni, Senior Director, eGain*

Credit unions are in a pitched battle with large financial institutions and online banks. There is nothing more mission-critical than member service for their differentiation and very survival. At the same time, credit unions need to reduce service costs, a secular pattern across all industries. Durst talks about how her organization is harnessing the power of eGain's KM capabilities to elevate member service by delivering trusted answers while controlling costs. Since employing go-live, Rogue's answer effectiveness has surged by 47% and agent adoption by 40%. Learn more about their journey and experiences and get tips and ideas that you can apply to your business!

## Leveraging AI: The Journey From Hype to Reality

2:00 p.m. – 2:45 p.m.

*Sarah Pullin, Global Director, Knowledge, Baker McKenzie*  
*Gabriel Karawani, Co-Founder, ClearPeople*  
*Muhammad Lila, CEO & Founder, Goodable, & Veteran Warzone Correspondent*

Pullin shares how her global legal firm is embracing AI through a robust KM and content strategy and an intelligent knowledge platform. Stakes and risks are high. That's why it is prudent to learn from leading organizations like Baker McKenzie, which are garnering real-world AI experience, separating hype from reality. Lila discusses the challenge for organizations as they recognize the importance of a positive work culture for employee retention, engagement, and productivity, but often struggle to find effective strategies to shield their teams from the adverse effects of negative news and foster an atmosphere of positivity and optimism. Discover how leveraging AI to sift through the noise to curate positive news not only uplifts spirits but also promotes a healthier workplace. Lila offers HR experts practical insights on integrating positivity into their wellness programs to boost morale, reduce stress, and improve overall employee satisfaction. Get a sneak peek into the technology behind Goodable, illustrating how AI can be a powerful tool in transforming landscapes for the betterment of workplace well-being.

## AI Developer Insights

3:00 p.m. – 3:45 p.m.

Our AI developers share where they see their organizations and the KM community going in the next year. Those at the leading edge stimulate our imagination about the possibilities for your enterprises and world. Get lots of ideas for possible directions and pathways.

## CLOSING KEYNOTES



### Beyond Boundaries: Content Readiness for AI in KM

4:00 p.m. – 4:15 p.m.

*Tim Hill, Director, Product Management, NICE*

See page 22 for complete description.

### KM 2025 & Beyond

4:15 p.m. – 5:00 p.m.

**MODERATOR:** *Brian Pichman, Director, Strategic Innovation, Evolve Project*  
*Julie Mohr, Principal Analyst, Forrester*  
*Dan Rasmus, Founder & Principal Analyst, Serious Insights, & Author*  
*Dave Snowden, Founder & Chief Scientist, The Cynefin Co*

See page 22 for complete description.

# OUR MOST POPULAR PASSES!

Register Worry-Free Through September 1st!

## PLATINUM PASS—BEST DEAL!

NOVEMBER 18–21, 2024

### INCLUDES ACCESS TO:

- KMWorld, Enterprise Search & Discovery, Text Analytics Forum, and Enterprise AI World sessions
- Enterprise Solutions Showcase, including breaks, opening reception, and happy hour
- Keynotes, light continental breakfast, and lunches daily
- PLUS Taxonomy Boot Camp OR two preconference workshops

**\$2,195**

Early Bird Rate only  
**\$1,995** (ends 10/18)

## GOLD PASS

NOVEMBER 19–21, 2024

### INCLUDES ACCESS TO:

- KMWorld, Enterprise Search & Discovery, Text Analytics Forum, and Enterprise AI World sessions
- Enterprise Solutions Showcase, including breaks, opening reception, and happy hour
- Keynotes, light continental breakfast, and lunches daily

**\$1,795**

Early Bird Rate only  
**\$1,595** (ends 10/18)

ADDITIONAL PASS OPTIONS	By 10/18	After 10/18	Sessions for Selected Event	Selected Workshops	Keynotes	Networking	Showcase
	KMWorld Conference Pass   November 19–21	\$1,495	\$1,695	x		x	x
KMWorld Conference Pass PLUS Workshops   November 18–21	\$1,895	\$2,095	x	x	x	x	x
Enterprise Search & Discovery Conference Pass   November 19–21	\$1,295	\$1,495	x		x	x	x
Enterprise Search & Discovery Conference Pass PLUS Workshops   November 18–21	\$1,595	\$1,795	x	x	x	x	x
Taxonomy Boot Camp Conference Pass   November 18–19	\$995	\$1,195	x		x	x	x
Text Analytics Forum Conference Pass   November 20–21	\$995	\$1,195	x		x	x	x
Enterprise AI World Pass   November 20–21	\$995	\$1,195	x		x	x	x
Workshops*   November 18	\$295/\$395	\$495/\$595		x		x**	x
Showcase**   November 18–20	FREE	\$25				x**	x

\*Price reflects the rate for one or two workshops. \*\*Includes networking events taking place in the Showcase area only. Does not include lunches.

## GENERAL INFORMATION

### HOTEL RESERVATIONS

JW Marriott Washington DC

1331 Pennsylvania Avenue NW, Washington, DC 20004

Discounted guest room rates of \$309 for a single/double room have been arranged for attendees who book on or before October 25, 2024, through Meeting & Travel Consultants, Inc. (MTC), the official housing bureau. Please note that the discounted room block is subject to availability and therefore is not guaranteed, so please book early! As a special consideration guest room WIFI is included in the discounted guest room rate.

Make your hotel reservation today!

ONLINE: [www.mtcreservations.com](http://www.mtcreservations.com)

EMAIL: [bookit@mtcreservations.com](mailto:bookit@mtcreservations.com)

PHONE: (201) 675-1196 or 0354

### GROUP DISCOUNT PROGRAM

Organizations sending more than one registrant can benefit greatly from our group discount program. To receive your Group Discount Code please contact our registrar, Joan Weiss ([jweiss@infotoday.com](mailto:jweiss@infotoday.com)) BEFORE registering.

- 2-4 registrants from the same company: Receive a \$100 discount per person on Platinum or General Conference Passes.
- For groups of 5 or more from the same company: Receive a \$200 discount per person on Platinum or General Conference Passes.

All registrations for group discounts must be from the same company and submitted at the same time. Please note that we are unable to apply discounts to existing registrations. Additionally, discounts are not applicable for preconference workshops unless as part of a Platinum Pass.

### CANCELLATION, SUBSTITUTIONS, & REFUNDS POLICY

Registration cancellations received on or before September 1, 2024, will receive a full refund with no fees. Registration cancellations received between September 2, 2024, and October 18, 2024, are subject to a \$150 administrative fee, although you can substitute another attendee in your place. After October 18, no refunds will be issued.

# KMWWorld<sup>2024</sup>

## November 18–21

### JW Marriott | Washington, DC

CO-LOCATED WITH

Enterprise Search  
& Discovery 2024

Text  
ANALYTICS  
Forum '24

ENTERPRISE  
AI World

taxonomy  
BOOT CAMP >>>>

Unlocking Powerful  
Knowledge-Sharing  
Solutions by Harnessing  
Search, Discovery,  
Analytics, Taxonomy, & AI

**FIVE** Events.  
**ONE** Location.

#### ALL CONFERENCE REGISTRATIONS INCLUDE:

- Access to Keynotes & Conferences Sessions  
*(subject to pass type selected)*
- Admission to the Enterprise Solutions Showcase
- Light Continental Breakfast each morning
- Morning & Afternoon Breaks
- Lunch each day
- Enterprise Solutions Showcase Grand Opening Reception on Monday
- Networking Happy Hour in the Enterprise Solutions Showcase on Tuesday
- Access to the Conference Presentations Online

#### CONFIRMATION

All registrants will receive confirmation of their registration by email unless otherwise requested. Registration packets may be picked up at the Registration Desk located on the Ballroom Level of the JW Marriott beginning at 7:30 a.m. on Monday, November 18.

#### CODE OF CONDUCT & PRIVACY POLICY

Information Today, Inc. is dedicated to providing an enjoyable conference experience for all participants. By registering, you understand and agree to our Code of Conduct ([kmworld.com/2024/CodeOfConduct.aspx](http://kmworld.com/2024/CodeOfConduct.aspx)) and Privacy Policy ([infotoday.com/privacy.shtml](http://infotoday.com/privacy.shtml)).

**NOTE:** The sponsors and management of this event reserve the right to make necessary changes in this program. Every effort will be made to keep presentations and speakers as represented. However, unforeseen circumstances may result in substitution and/or cancellation of a presentation topic and/or speaker. Information Today, Inc. assumes no liability for the acts of their suppliers nor for the safety of any conference participant while in transit to or from this event. The total liability during the precise hours of the meeting will be limited to a refund of the registration fee.

## 2 EASY WAYS TO REGISTER

#### PHONE:

(800) 300-9868 or (609) 654-6266

#### ONLINE:

[KMWORLD.COM/CONFERENCE](http://KMWORLD.COM/CONFERENCE)  
[TAXONOMYBOOTCAMP.COM](http://TAXONOMYBOOTCAMP.COM)  
[ENTERPRISESEARCHANDDISCOVERY.COM](http://ENTERPRISESEARCHANDDISCOVERY.COM)  
[TEXT-ANALYTICS-FORUM.COM](http://TEXT-ANALYTICS-FORUM.COM)  
[ENTERPRISEAIWORLD.COM](http://ENTERPRISEAIWORLD.COM)

When registering on the website, please refer to the promo code above your name on your mailing address label.

# KMWWorld<sup>2024</sup>

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*Enterprise Search  
& Discovery 2024*

**Text**  
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**5** Related Conferences

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**20** Preconference Workshops

**200+** Knowledgeable Speakers

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Register on or before October 18th and  
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