

HSRAA 2022 CONFERENCE

28-30TH SEPTEMBER | MANCHESTER



PHLEXGLOBAL



DRIVING CONTENT INTELLIGENCE - CURING INFORMATION HEADACHES

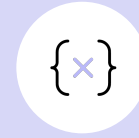
PRESENTED BY:
DAVID GOULD,
ENCOMPAAAS







I am not a Data Scientist or a Lawyer...



I slept through most of
high school algebra



I majored in
Political Science



I have never written
a line of code



I am expert on how enterprises use technology to solve big information management problems

01

For 20 years I have provided solutions to help organizations comply with regulation, compliance and business methodology

02

I have listened to hundreds of customers as it relates to discovering, managing and preserving/disposing of data

03

I have managed analytic products through two generations of AI technology



FUNDAMENTAL QUESTION

Why do you trust AI to change lanes traveling at 75 MPH, yet you are reticent to use AI to classify information?



Exploding the AI myth



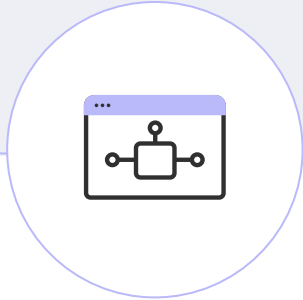
It's a threat to
my job



Humans can do
it better



I don't trust it



It's not just AI, it's any new technology that seems to represent a threat



If software automation can do it, what do I need you for?



I will need to cut my team because the jobs they were doing are being replaced by AI



I have an offshore team
where we can send
20,000 documents
for analysis



There is no way software can
understand my business
better than me or my team



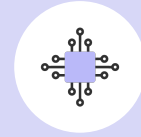
We can train a team on
how to analyze the content
more effectively



I don't trust it



If you want to buy a home, how much do you really need to know about a mortgage process?



Technology vendors have not done a good job on this



AI is now less of a black box and more explainable in its current generation



How does Information Governance fare, coming out of the pandemic?



Pre-existing COVID conditions around data velocity, silos and scope are even more intense



Accelerating an already accelerated Digital Transformation journey

Solutions implemented by necessity, not strategy



New decision-making platforms are firmly rooted that create new information governance challenges



A couple of additional post-pandemic thoughts



EDRMS is dead as a concept.
So is ECM.

We don't see many successful business cases for investing in new records management solutions.

As for ECM, even Gartner has thrown in the towel



There is a new, higher level calling for information management, not focused on records and governance

Key focus is on business decision making based on accurate, timely information at scale



Introducing: Content Intelligence

01

Next wave of information management, driven by AI

02

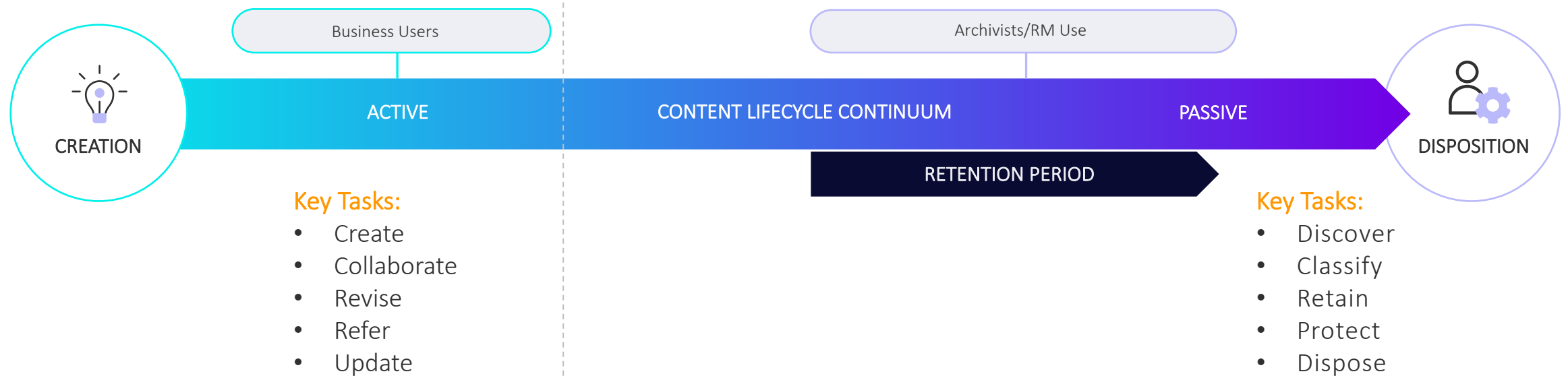
Key objective: **Finding, analyzing** and **enriching** content to support better decision-making and business results

03

Achieves the promise that “information is your most important asset”

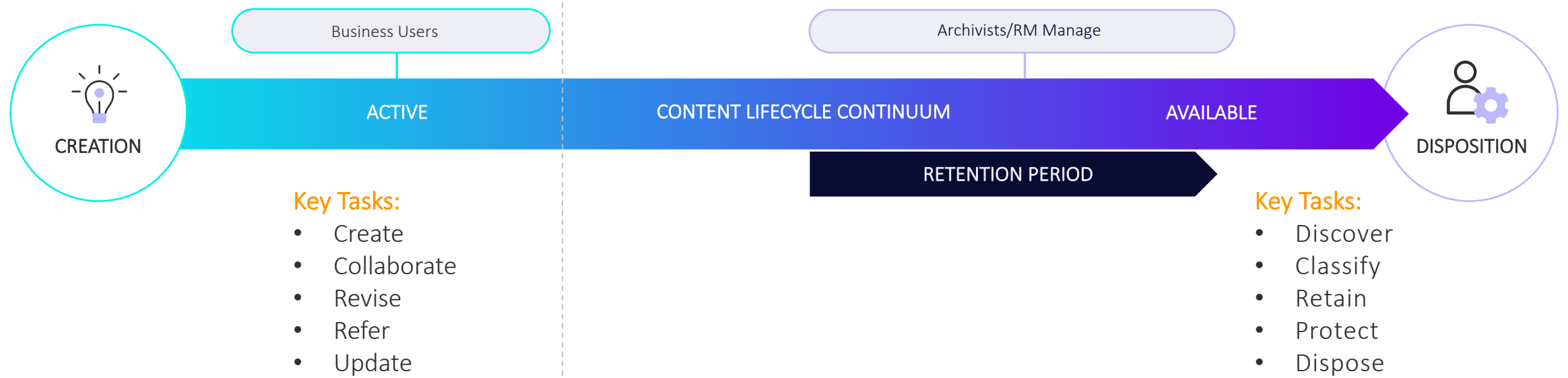


In the legacy world





In the new world





- **Data insight is not just limited to rows-columns based information**



This is Mr Smith from Big Data Mining.
He says he's found an insight.

A significant portion of corporate “intelligence” is found in unstructured data

A significant portion of information risk is found in unstructured data

With Content Intelligence, information is fully managed throughout lifecycle. It is also fully accessible and fully usable



○ The New World Presents Interesting Challenges and Significant Opportunity



When does retention and archiving start with content always in use?



Or are these outmoded concepts in the age of Content Intelligence



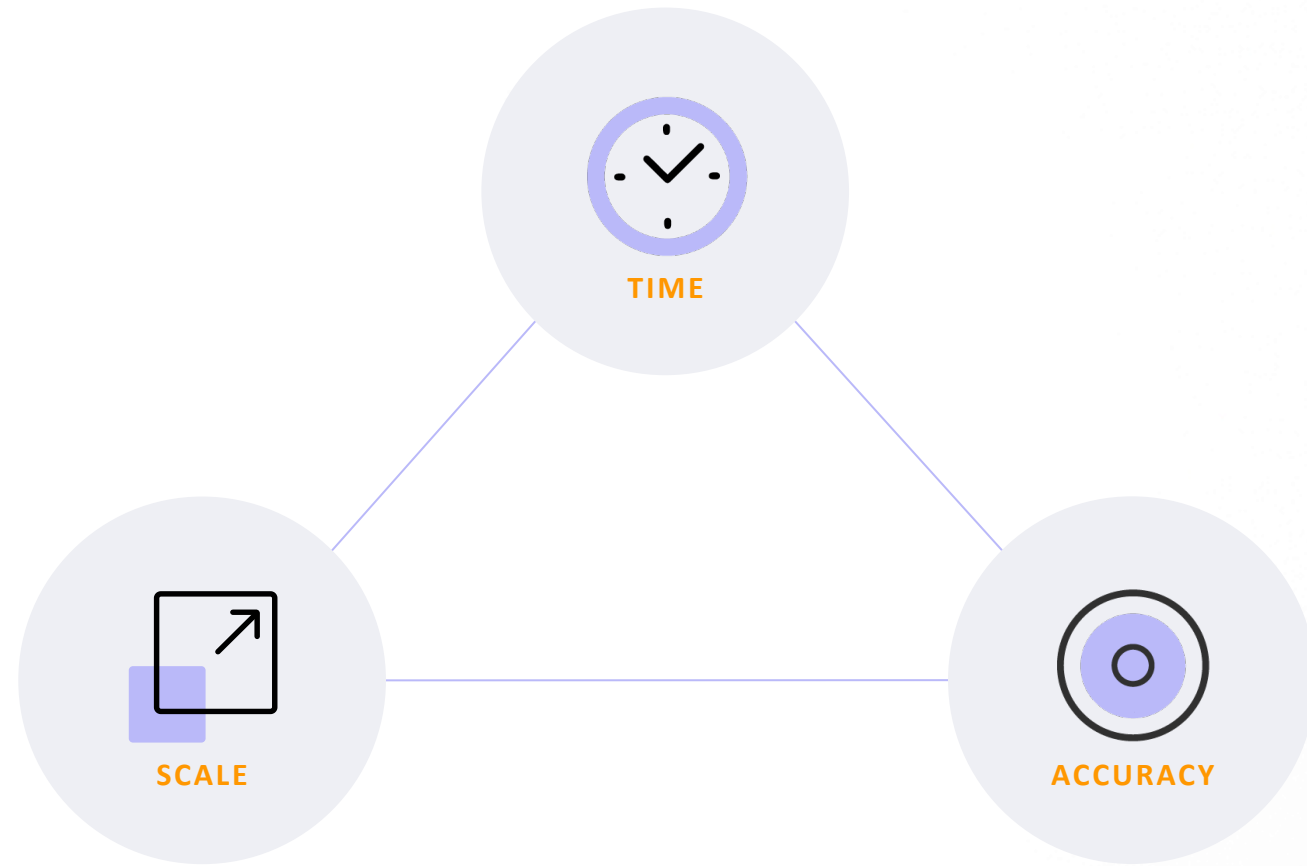
Yes, you have to retain



New capabilities to use a greater percentage of historical content for analytic purposes



New technologies driven by AI make it possible to identify, extract, analyze, calculate and report on key performance metrics



How Content Intelligence is being used to manage rebate performance

CASE STUDY



○ Rebate Management and Performance



One of the world's largest pharmaceutical manufacturers has been seeking for three years to understand rebate contract calculated value



They want to relate performance data stated in Contracts to business performance at the sales levels



They have been looking to discover, extract and analyze literally 10,000 or more contracts



Key questions answered using sophisticated content cognition software that locates, identifies, extracts and calculates values in rebate contracts



○ The Contract



Here is a single executed contract. It contains a Force Majeure clause. The assignment from corporate real estate is to determine whether the clause can support a case for closing down offices, post pandemic, without penalty.

5000 contracts multiplied by **30 minutes** per document

150,000 minutes divided by 60 = **2,500 hours**

2,500 hours @ 8 hours per day = **312 days** to answer the question

2,500 hours spent @ \$95/hour = **\$237,500** to answer the question

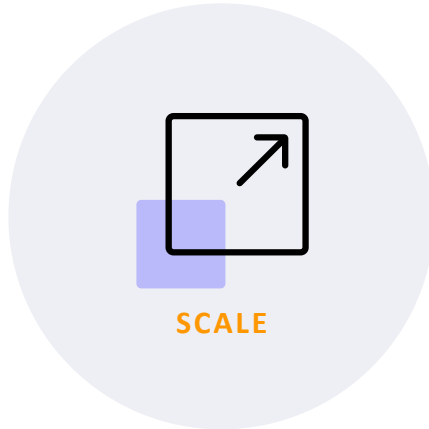
30
PAGES

The average contract review length



30
MINS

Time it takes a paralegal to review, looking for clause and related elements, highlight it and extract the information to a spreadsheet



SCALE

Without AI driven analysis, how do you guarantee that you have **discovered** and analyzed all contracts?



TIME

Can your organization **wait** 312 days or afford to spend \$237,500 to answer the question?



ACCURACY

How do you assure the same exact analysis is conducted on all 5000 contracts? What if the person doing the work is tired? Or do you need to **train** more people – then what happens to accuracy?



THIRD AMENDMENT TO PURCHASE AND SALE AGREEMENT

This Third Amendment to Purchase and Sale Agreement (this “Amendment”) dated as of the Effective Date (as hereinafter defined) is by and between ABP IL (UNIVERSITY PARK) LLC, a Delaware limited liability company (“Seller”), and BIG ACQUISITIONS LLC, an Illinois limited liability company (“Buyer”).

RECITALS:

- A. Seller and Buyer are parties to that certain Purchase and Sale Agreement dated as of March 19, 2019, as amended by that certain First Amendment to Purchase and Sale Agreement dated April 29, 2019 and that certain Second Amendment to Purchase and Sale Agreement dated April 30, 2019 pertaining to the proposed sale by Seller to Buyer of certain real property more particularly described therein (collectively, the “Agreement”).
- B. The parties desire to amend certain provisions of the Agreement regarding the pre-closing inspection of the Property and the Lease.

OPERATIVE TERMS:

NOW, THEREFORE, for and in consideration of the foregoing recitals, the mutual covenants set forth in the Agreement and in this Amendment, Ten Dollars (\$10.00) and other good and valuable consideration in hand paid, the receipt and sufficiency of which are hereby acknowledged, Seller and Buyer hereby agree as follows:

1. Recitals; Defined Terms. The foregoing recitals are true and correct in all material respects. Capitalized terms and phrases used but not otherwise defined in this Amendment shall have the meanings ascribed to such terms and phrases in the Agreement. Unless the context clearly indicates otherwise, all references to “this Agreement” in the Agreement and in this Amendment shall hereinafter be deemed to refer to the Agreement, as amended hereby. As used in this Amendment (but not for purposes of the Agreement, in which context the definition of the term “Effective Date” shall remain unchanged), “Effective Date” shall mean the date on which Seller or Buyer shall have executed this Amendment, as indicated under their respective signatures, whichever is the later to do so.
2. Waiver of Due Diligence Termination Right. Buyer acknowledges that Buyer has completed all Due Diligence Buyer has deemed necessary or appropriate, and, subject to the Seller’s Warranties, Buyer has confirmed to its satisfaction all information that it considers material to its purchase of the Property or the Transaction. Accordingly, Buyer waives any right it may have had to Terminate the Agreement pursuant to Paragraph 4.3 or 4.5 thereof, which waiver is in part based on the modifications to the Agreement set forth in this Amendment.
3. Closing Deadline. The definition of “Closing Deadline” in Schedule A to the Agreement is hereby deleted in its entirety and replaced with the following definition: “**‘Closing Deadline’** shall mean May 16, 2019.”

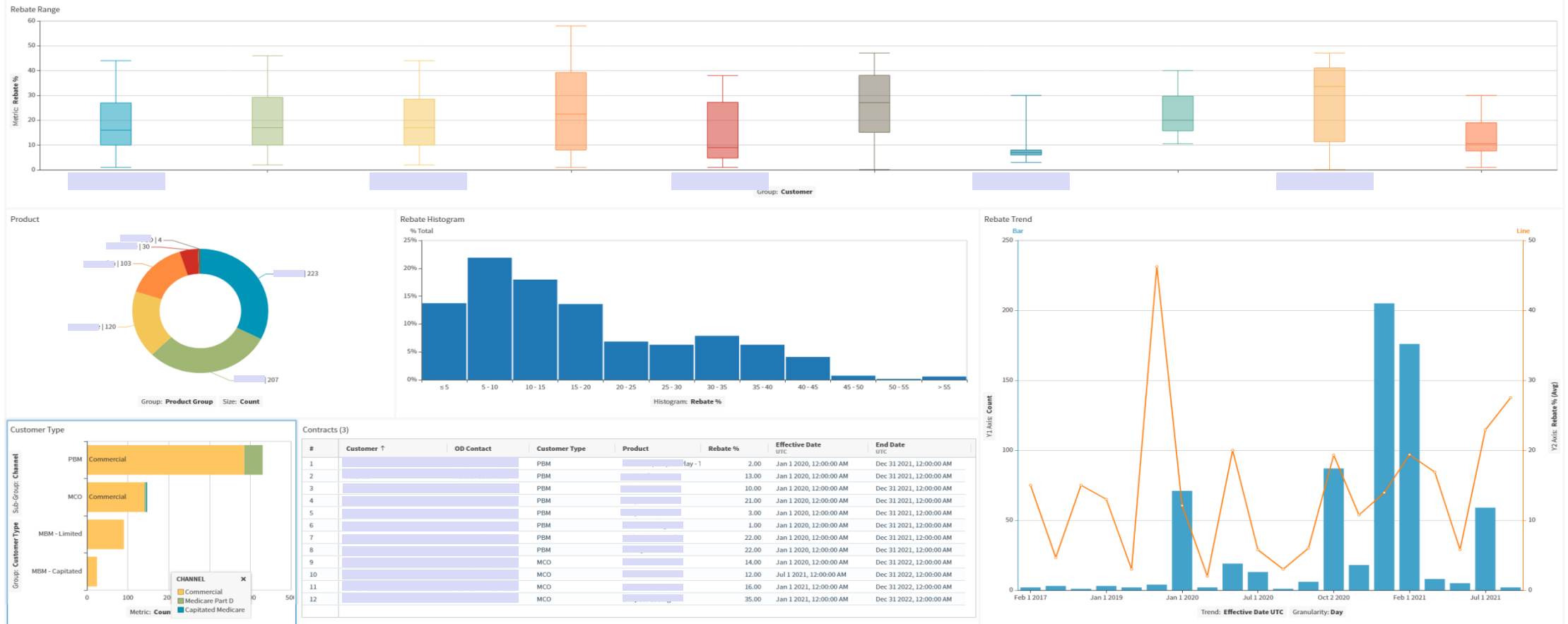
What a lawyer sees
in a contract



Visualizing and using data

Transforming contract data into actionable business analytics in support of key business processes

WHAT A BUSINESS USER WANTS TO SEE WITH A COLLECTION OF CONTRACTS





What does AI look like?



Developing a policy that tells the AI-driven search what to do

The screenshot displays the EncompaaS interface for configuring a policy. The top navigation bar includes 'Discovery', 'Analysis', 'Retention', 'Search', 'Connection', and 'Admin'. Below this, there are tabs for 'Perspectives' and 'Policies'. A toolbar offers actions like 'Zoom In', 'Zoom Out', 'Fit Window', '1:1 Original', and 'Reset Layout'. On the left, an 'Overview' panel shows a grid of data. The main workspace features a workflow diagram with the following steps:

- Trigger:** ALL HIGH CONFIDENCE (30+/20+) WARRANTY DEED SUGGESTIONS WITHOUT A BUSINESS TYPE
- Frequency:** EVERY 1 MINUTE
- Action:** ASSIGN THE WARRANTY DEED BUSINESS TYPE

A 'NOTES' box provides details: "Looks for all items without a Business Type but with a Warranty Deed Business Type Suggestion, with over 30% confidence and over 20% separation, and assigns the Warranty Deed Business Type to the results".

On the right, a 'PALETTE' contains several action buttons: NEW SCOPE, NEW DECISION, NEW ACTIVITY, NEW SCHEDULE, and a 'NOTES' section with a 'New Note' field.



Discovery Analysis Retention Search Connection Admin
 Repository Explorer

St. James Parish, Vernal Pari
 SharePoint Online Teams Sit 5-25436

ITEM SUMMARY ^

- Anderson - Johnso
- Lee-Bednarz Soun
- Schumacher - Bish
- St. James Parish, V
- St. James Parish, V

1 of 2

Page view Read aloud Add text Draw Highlight Erase

WARRANTY DEED

CLYDE S. JOHNSON and ISABELLE JOHNSON, husband and wife, grantors, of Vernal, County of Uintah, State of Utah, hereby convey and warrant to ROMAN CATHOLIC BISHOP OF SALT LAKE, a corporation sole, grantee, for the sum of Four Thousand Five Hundred and no/100ths (\$4,500.00) Dollars and other valuable considerations, receipt of which is hereby acknowledged, the following described tract of land situate in Vernal City, Uintah County, Utah, to-wit:

Beginning at the Southwest corner of Lot 3, Block 3, Plat "A" Vernal City Utah, thence running North 214.5 feet to the Northwest corner of said Lot 3, thence East 144.5 feet, thence South 214.5 feet, thence West 144.5 feet to beginning.

WITNESS the hand of said grantors this *3rd* day of *September* 1947.

Signed in the presence of:
E. Lyle B. Richards *Clyde S. Johnson*

1 - 5 of 5



Discovery Analysis Retention Search Connection Admin

Repository Explorer

St. James Parish, Vernal Parish and Rectory 138 North 100 West (Property Records) (5)
SharePoint Online > Teams Sites > Real Estate > Documents > Deeds

ITEM SUMMARY	CREATED BY	DATE CREATED
Anderson - Johnson Recorder's Office Uintah Count...	Tiffany Pycroft	03/15/2022 5:58 PM
Lee-Bednarz Sounds of Medjugorje Tour 98 1998063...	Tiffany Pycroft	03/15/2022 5:58 PM
Schumacher - Bishop Received Abstracts of Vernal ...	Tiffany Pycroft	03/15/2022 5:58 PM
St. James Parish, Vernal Warranty Deed 19470903_0...	Tiffany Pycroft	03/15/2022 5:58 PM
St. James Parish, Vernal, Abstract of Title, Undated_...	Tiffany Pycroft	03/15/2022 5:59 PM

St. James Parish, Vernal Warranty Deed 19470903_0001

SUMMARY INSIGHTS GOVERNANCE EXAMPLE OF

- Content Part - Content
- Content Part - Heading
- Content Part - Purpose
- Content Part - Title

Perspective Suggestions

71%	Warranty Deed Business Types	45% Separation
57%	Warranty Deed	Description
86%	Warranty Deed	Title
26%	Invoice Business Types	
9%	Court Orders Business Types	
8%	Contract Business Types	
7%	Court Decision Business Types	

1 - 5 of 5

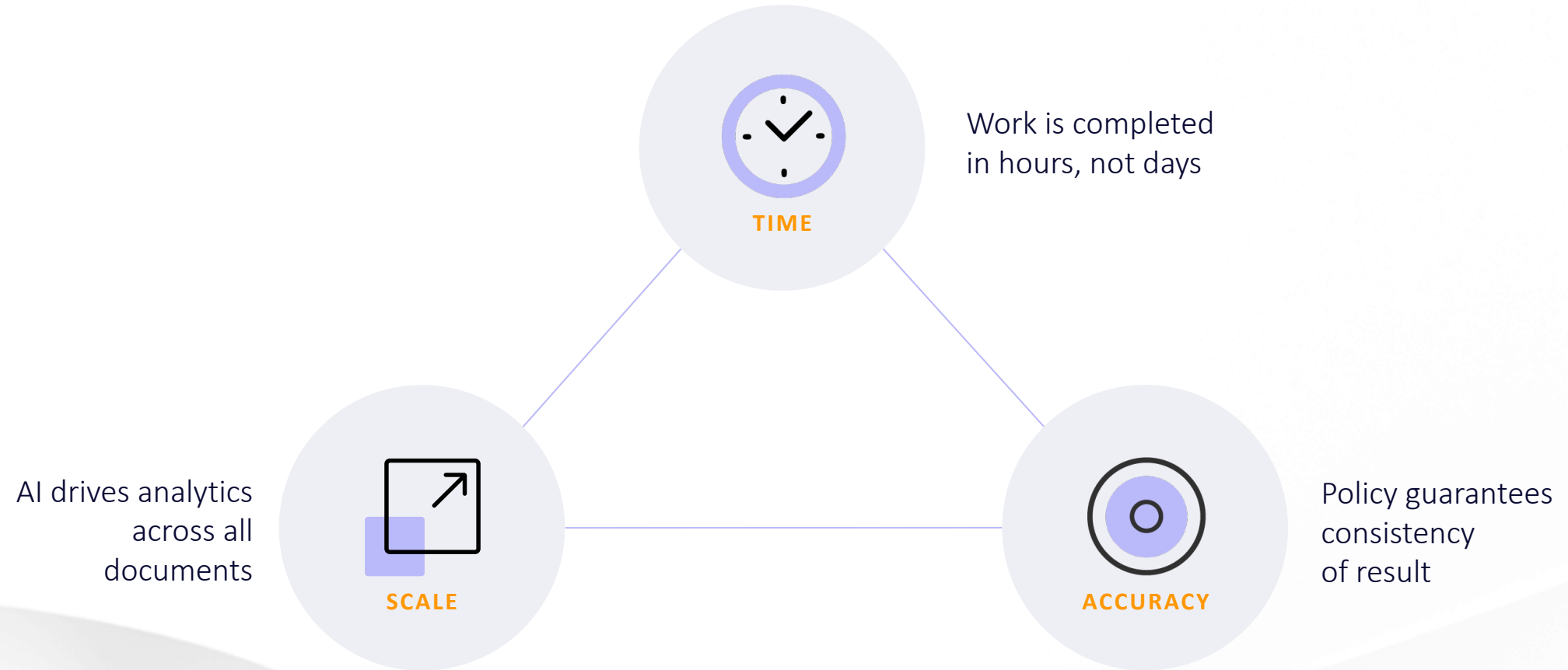


○ What machine learning does in the background

	Document	St. James Parish, Vernal Warranty Deed 19470903_0001	Kurt Bullard
	Document	St. James Parish, Vernal Warranty Deed 19470903_0001	Assign the Warranty Deed Business Type to high confide...
	Document	St. James Parish, Vernal Warranty Deed 19470903_0001	Get Business Type Suggestions for the Real Estate Team
	Document	St. James Parish, Vernal Warranty Deed 19470903_0001	Extract Text from Images: Azure Machine Learning
	Document	St. James Parish, Vernal Warranty Deed 19470903_0001	Discover SharePoint Online: Microsoft 365 SharePoint On...
	Document	St. James Parish, Vernal Warranty Deed 19470903_0001	Discover SharePoint Online: Microsoft 365 SharePoint On...



With Content Intelligence....





What does your Business need from you?



Enriched information to make better decisions

- This should be the core competency of any information management organization
- Producing the right answers to support critical business decision making



Transforming Information Management

Key Business Services and Opportunities

Operationalise Obligations

- Operationalise compliance & recordkeeping obligations so it's always done
- A central records management strategy supervising on-premises and cloud systems
- Automate regulations PII/GDPR/Retention
- Take action on risks and standardize reporting for audit and inquiries

Deep Data Insights

- Automate the categorisation of items, particularly where there is low/no control on titling or where information is saved
- Automate data extraction from items
- See instant risks and opportunities
- Automate business policies and trigger actions

01

OPERATIONALISE
OBLIGATIONS

02

BUSINESS & DIGITAL
TRANSFORMATION

03

DEEP DATA
INSIGHTS

04

COMPLIANCE
WITH/OUT YOUR ECM

Business & Digital Transformation

- Discover and archive legacy system content
- Wind back usage of legacy systems
- Transition staff to new systems, relocating active content
- Machinery of Government management
- Remediation


Compliance with/out your ECM

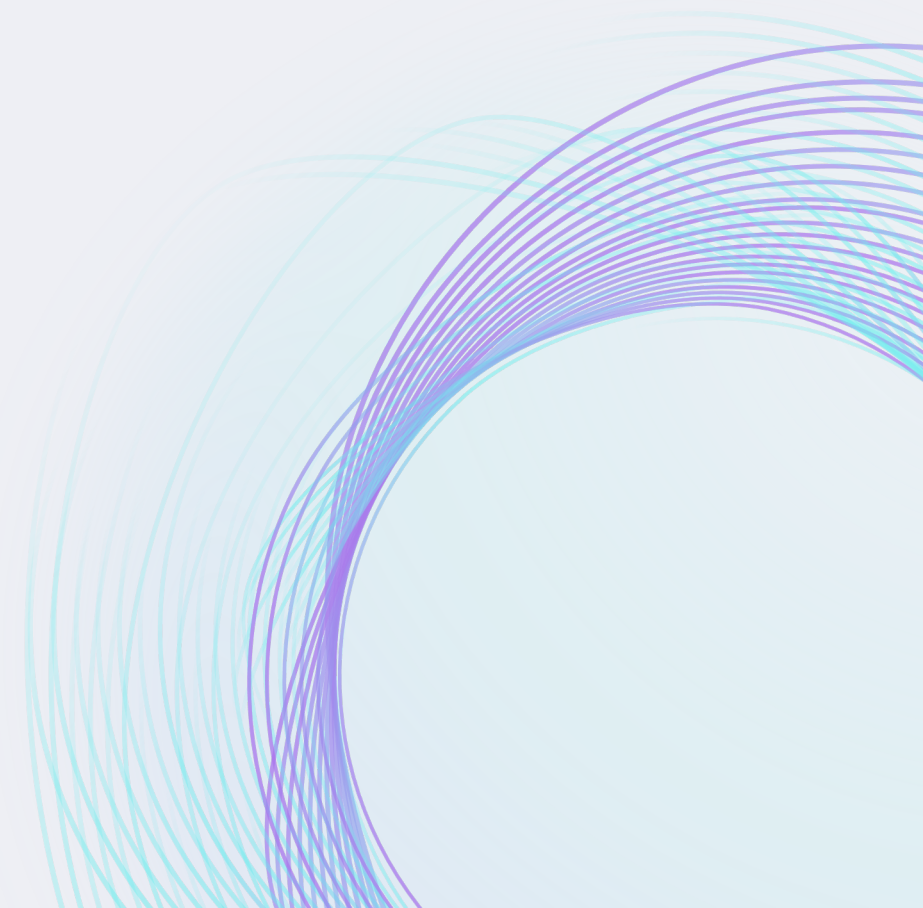
- Connect to your existing ECM
- Automate the synchronisation or relocation of content
- Enable staff to work where they need with compliance automated behind the scenes
- Ease off use of your ECM by supervising content in place

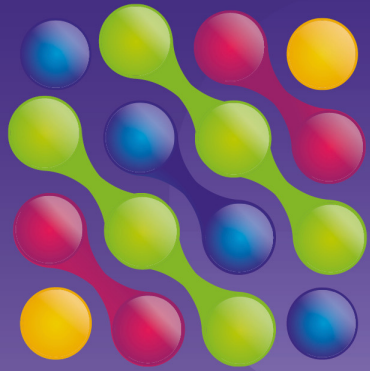
Thank you

David Gould

Chief Customer Officer, EncompaaS

 david.gould@encompass.cloud





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LUNCH

