



## Greetings!

AllIM Florida Chapter works hard to provide Intelligent Information Professionals up-to-date information on the latest information management technologies and providers, through continuous research, consulting, collaboration, regular educational events and communications. The AllIM Florida Chapter, formerly known as the AllIM Gulf Coast Chapter, is one of the key AllIM Chapters worldwide.

**Please read on for a recap of the last quarter webinars, reflections on the Latin America market, help us celebrate a recent anniversary, remember an industry friend and learn about upcoming events you should not miss.**

*AllIM Florida Chapter thanks you for your kind support in 2023 and wishes you the happiest holiday season. We're looking forward to bringing you great programs and activities in 2024!*

We are pleased to offer a Spanish version of this newsletter as well on our [website](#).

Enjoy!

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## A Letter From Our President



Hello to our Members and Friends of the AllIM Florida Chapter,

It's the most wonderful time of the year. It really is. It's that time where we can truly reflect on what the past 11 months have brought for the AllIM Florida Chapter. It's

where we can recognize all of the great effort put forth by our talented Florida Chapter leaders in conjunction with all of the talent from AIIM HQ that goes into our industry association.

In the coming year, AIIM, as an international organization, will reach the pinnacle of 80 years. We all know that the first part of those years were as the National Microfilm Association. What was not known then was all that was going to take place in the reshaping of what we call work. Nor was it known about remote work and how job functions are now carried out. The World Wide Web, Mobile technologies, Cloud automation and now with AI as the driving force, we have been jettisoned into a new era.

This coming year, 2024, I'll have been involved with document and imaging



technologies for 30 years. I even have to pinch myself when I write that. It's a long time considering the age of our Association. It's even half of the number of years of the Company of Fellows that I Chair. Most importantly, the results and satisfaction across those years are huge due to knowing that what drives my desire to serve across multiple responsibilities with AIIM local and internationally, is entirely based on the personal side of how we function. The technological aspect of what we do is great, however the humanity of all involved in this organization is outstanding.

Please know that there are so many people that, daily, are trying to do their utmost in making sure the AIIM is serving our true constituency...you.

We can be retrospective about technology, however what we are always trying to do is about you. It is not lost on us here in the Florida Chapter, that we are something different given that we operate first with users of the technology and members in mind with the goal of everyday, expanding the AIIM message to all.

For that, we are so very grateful for her arrival to the Organization and for all that our AIIM President and CEO, Tori Miller Liu has brought in support to AIIM Florida. As you read through the newsletter, you'll find this to be an issue of highlighting the valued assistance Tori and her great team bring to us as well as recognizing the ever-present support of our sponsors who know that while AIIM Florida is not a marketing machine, that with their help, we are able to expand the messaging of supporting and creating a difference in the way that the work process takes place and in the future of work. Our continuous webinars and the October Solution Showcase & Strategy Summit in Tampa really convinced (possibly, reconvinced) many of the value of AIIM at the local, community level.

In 2024, please consider AIIM Florida Chapter activities in your mission to relevance in our industry and your willingness to support our self-funded Chapter so that we can continue the community effort. Our appreciation for your paid sponsorship is what drives us forward.

Finally, my greatest thanks to all of the Florida Chapter Guardians that continually ensure that all Guardians of information are the beneficiaries of the information and updates provided.

Erin Dempsey (rockstar-we really could not do this without you) B. John Masters (your years of appreciated knowledge and dedication) Elisabetta Pedersini (keeping us at the forefront in the socials), Peter Klentos (always great insights) Patrick White (your love for this industry and the organization does not go unnoticed) Alvaro Arias (our keeper of the Latin America gateway) and never last and never least, Bob Larrivee (thank you for what you have given from over 30 years back when we first met and who you are along with our fervent prayers for your improved health).

What a wonderful time of the year. Appreciate it and enjoy it. Happy Holidays to all!

Sincerely,

Craig

AIMM Florida Chapter Board of Directors:

Craig Laue – President  
B. John Masters – Vice President  
Erin Dempsey – Director of Communications and Marketing  
Elisabetta Pedersini – Director of Social Media and Secretary  
Alvaro Arias – Director at Large – LATAM Focus  
Bob Larrivee – Director - Past President - Advisor to the Board  
Patrick White – Director at Large  
Peter Klentos – Director at Large

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## In Case You Missed It...

### **Webinar: Practical Use Cases for AI in Document Processing with DocuNECT**

Digital document processing has become a necessity for FinTech and other industries looking to provide services now and in the future. DocuNECT provides a powerful platform to support the spectrum of document use cases to make sure that companies implement a foundation for the future.

This webinar explores where AI and document processing can add value to allow your organization to increase efficiencies.

Presented by Bruce Bolton, Executive Vice President – Technology and Consulting, Portford Solutions Group, Inc.

Watch the recording [here](#)



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### **Webinar: AIIM Florida Chapter Solutions Showcase**

A great group of Information Management professionals and vendors gathered October 3-4 for an amazing event at the Centre Club in Tampa. Much was covered around all things AI and Generative AI, Process Automation, Intelligent Information, Cloud, Storage and Data, and how it will directly affect information management providers and users. If you were able to attend, we thank you!

Although we cannot recreate the experience of attending in person, we wanted to give those that were unable to attend the Tampa event an opportunity to hear about the solutions and ideas that were presented.

There were some very important takeaways from the strategy sessions in Tampa, and we are so pleased that Tori Miller Liu, AIIM International President, was able to present these findings during her webinar presentation, along with our other valued partners.

Read Tori's blog post [here](#)

This webinar all is about groups of experts coming together for engagement on all things AI and other technologies that are making the work process easier, intelligent information and documents even smarter, and how the Future of Work and informational data will change in the next 5 to 10 years.

Presenting companies included:



View the recording [here](#)

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## The Technology Gap in Document Management in Latin America: A reflective view

By Alvaro Arias Cruz. Director of the Bogotá Archive, Colombia

The digital transformation has allowed us to see not only for its own sake, but also because every time the trends in technology generate new possibilities of application to the document management process. Today, cloud storage, new hardware and software products, artificial intelligence, data analytics, big data and many others continue to show us that technology will continue to advance rapidly, while in Latin America, decisions about document management are moving much more slowly and in some cases insecurely, without a clear focus that would allow us to see an evolution in the right direction.

Despite all these possibilities offered by technologies, the reality in private companies and public entities in Latin America in relation to the modernisation or automation of document management processes is very broad, diverse, disorganised and without much impact. Of course, those companies with a multinational profile that have operations and offices in Latin America are outside this scope, as their document management processes depend on the policies and systems of the parent company.

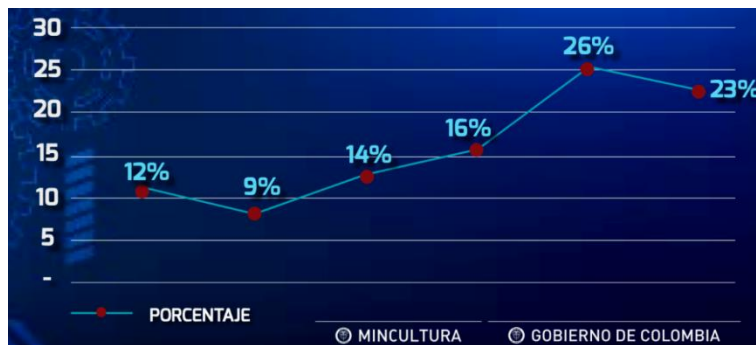
The application of technology to processes in general is a growing trend, but when it comes to applying technology to the document management process, the reality is different, and this is where the gap on which this reflection is based is most noticeable.

Nowadays, the application or appropriation of technology in the document management process is found in very basic things, such as the filing of correspondence. In Colombia it is one of the most popular and certainly for many countries such as Uruguay, Peru and Ecuador. Latin American organisations think

that the filing of correspondence is the first step towards the automation of archives, and there has been a lot of progress in this area, but it is really a very distant step in the face of the technological trends mentioned above.

In addition to this particularity is the production of documents in electronic format on digital media, which is increasingly exponential in the growth of high volumes of documents generated in electronic and digital formats, diminishing the production of documents on physical or analogue media. This equation has changed a lot in Latin America, but we are not yet at the point where we can develop fully automated document management processes.

Based on the results of a survey conducted by Archivo General de la Nación de Colombia in 2018, the main problems for the development of technology projects identified by the entities are: lack of budget and lack of staff corresponds to 76% while the remaining 24% corresponds to the lack of support from management and decision makers, as well as lack of knowledge of standards and guidelines. If there is no management awareness of the importance of business archiving and document management as an asset, then as a consequence not enough resources are allocated to it or because it is not recognised as a priority issue.



Source: Subdirección de tecnologías de la información archivística y documento electrónico. General Archive of the Nation. Colombia. 2018

Additionally, this survey shows that the percentage of entities that apply some type of technology associated with the management of their archives, both physical and electronic, in the last five years ranges between 10% and 26% with an annual variation between 3% and 6%. This indicates that the reality in the Colombian case shows that progress in the application of technologies is too slow. Although only one country's data is available, in general this behaviour is not very different in Latin America.

A practical example of this is the use of databases for document management, which is not a novelty, since databases have existed for many years within the technological development of an entity and are a fundamental tool used to support many processes. However, in terms of document management, I believe that there is a lack of awareness and it seems to me that this is a great opportunity for improvement that is easy, practical and with quick results. With the use of a database it is possible to perfectly collect the inventory records of archives, since an

inventory record is a set of metadata that describes a documentary unit called file, folder, folder as the minimum unit of a file. A document management software that has a database can help automate quickly and easily a basic document management process in an organisation.

So simple things like this are a good point of reflection for Latin America to start thinking in a different way. In reality, thinking about implementing cloud storage processes, digitisation of files and that sort of thing, without having been aware that one of the first steps to develop an automated file system starts with a database that contains at least the file inventories, does not make much sense without having a more real and logical plan.

So this reflection is important because the application of technologies to the document management process poses challenges that perhaps go unnoticed by organisations in the face of the vast possibilities for the use of technologies for improvement, productivity and greater impact on response times and better information access services in companies. It is undoubtedly recognised, but there is perhaps a lack of awareness that the use of technology can be a great opportunity to improve the document management process, but consideration needs to be given to changing the approach and for senior management decisions to include in their business architecture both the process and the systems required to optimise and automate document management, along with the necessary budget.

We could be facing technological implementation processes on bridle paths that have not even been paved, which reveals the large gaps and loopholes that open up the gaps that keep us from achieving better results and progress in the right direction, perhaps because there is a lack of good document management planning.

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## **AllM International News**

### **Congratulations Tori Miller Liu on your one year anniversary and Certified Information Professional qualification!**

In Tori's words, *"Today marks my one year anniversary at AllM International and as an association CEO. It has been an incredible year of learning and growth for me and the organization. We developed a new strategic plan, launched an updated certification, reorganized, crafted new norms and values at the board and staff level, hosted a successful annual conference, hosted great events in London and Tampa; and crafted a roadmap for the future of AllM. I am very excited for the year ahead!"*. Read [more](#)

AIIM Florida Chapter applauds your capable, thoughtful and supportive leadership - we're very excited to work with you on future initiatives!



**Welcome back Ally Norat! Ally rejoins AIIM International as Membership Manager after a short hiatus.**

*"AIIM has always been a special place for me, and I am genuinely looking forward to reconnecting with all the fantastic individuals who make up this vibrant network. Your passion for information management and your commitment to staying at the forefront of our rapidly evolving industry continue to inspire me."*

Read [more](#)



**Join AIIM Florida Chapter at AIIM24 in San Antonio, Texas on April 3-5, 2024 for an unparalleled experience in information management!**

Here are 5 benefits you won't want to miss:

- Network with industry experts and expand your professional circle.
- Gain cutting-edge insights into AI, data governance, and more.



- Enhance your skills with hands-on workshops and training sessions.
- Explore the latest industry solutions and innovations.
- Elevate your career through certifications and continuing education.

Book your spot [now!](#)

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## Crawford Technologies' Scott Baker Honored Posthumously with the Xplor 2023 Lifetime Achievement Award



December 5, 2023, Toronto, ON – Crawford Technologies, provider of innovative document solutions that streamline, improve and manage customer communications, today announced that Scott Baker was honored posthumously with the Xplor 2023 Lifetime Achievement Award on November 14, during the Xplor Customer Communications Management (CCM) Summit. Baker, a pioneering leader in technology marketing, served as executive vice president at Crawford Technologies until he passed away on June 29, 2023. Read [more](#)

*Scott was a lifetime industry visionary and great supporter of the AIIM Florida Chapter – he will be missed by all.*

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## A Special Thanks To Our 2023 Sponsors





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## Would you like to partner with AllM Florida in 2024?

Support AllM Florida as a sponsor! Gain valuable leads and get great exposure to the AllM Florida community through a presence on our website, newsletter, webinars and on-site events.

Learn [more](#)

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Interested in past webinars and activities? Visit our website video page [here](#)

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