

Q&A

WITH BOB ZAGAMI

Chair, 2008-2009 AIIM International Board of Directors

Photo by Allan Stein, DataBank IMX



Will Data Security COME TO JUDGE THE QUICK FROM THE DEAD?

» You'd better learn more about SAS 70 Type II and PCI DSS security certifications if you want to stay in business, says Bob Zagami, whose firm, DataBank IMX, is in the vanguard of document conversion services. In this eclectic interview, Zagami also addresses changes at AIIM, staggering market changes in the coming decade, and why he's bullish on 2009.

Infonomics: Bob, you've just returned from AIIM's quarterly board meeting in Miami. What happened?

ZAGAMI: This was our budget meeting, and we emerged with an extremely positive and upbeat consensus that this year will be a reasonably good one for our industry, despite the recession. The products and services our members offer provide clients with a very reliable and justifiable return on investment.

Another important piece of business is a new program we've just announced for AIIM's 34 chapters nationwide, which will allow them to resell many of the products, services, and training courses offered by AIIM.

We added the Western Canadian Chapter, based in Calgary, in 2008, and they are a tremendous addition, very active and highly motivated. The energy they inspire, with their outstanding programs and leaders, is really exciting to watch. I am also proud to note that three more chapters will be joining the AIIM family in 2009—the AIIM Alaska Chapter, the AIIM Nevada Chapter, and the AIIM Columbia River Chapter, serving Oregon.

Infonomics: How is AIIM changing? How will it be different at the end of your term,

one year from now?

ZAGAMI: I can answer in two words: education and infrastructure. We have developed an incredible education program that provides online and classroom certificate training in six critical areas every business is going to have to address in 2009. We just added the Enterprise 2.0 certificate program last year—which has proven to be extremely popular—and we are constantly evolving these programs, refreshing and updating each one at least every three years. We will be adding mini-courses to our portfolio next year—we're calling these "AIIM Essentials"—to provide three-to-four-hour courses on very specific topics of concern to our community. We hope by the end of the year to introduce 15 courses in the "AIIM Essentials" series.

The board has also approved the most significant capital investment in the information management infrastructure in the history of the organization. This will allow us to better customize the information and services we provide to the vast community we serve.

Infonomics: Let's talk about what many would describe as The 800 lb. Gorilla in the Room: Microsoft SharePoint Server.

ZAGAMI: The association has been criti-

cized at times for talking about SharePoint and educating end users. But here's the critical thing: unlike many organizations, AIIM is completely agnostic about SharePoint, just as it is with any other software or technology solution. We can't ignore The 800 lb. Gorilla. It's there, and our community wants more information about it. And that's what we provide, just as we provide information on hundreds of other technology solutions each year in our publications, our programs, and on the AIIM and Infonomics websites (www.aiim.org and Infonomicsmag.com, respectively).

Personally, I don't believe SharePoint is a dirty word, because of what it has brought to hundreds of thousands of small- to medium-size companies that are now real-

focused on vertical markets: government, healthcare, shared services (accounts payable, accounts receivable, and human resources), and higher education and financial services. Understanding a client's application needs is paramount to us.

Infonomics: Can you give us an example?

ZAGAMI: Sure. For colleges and universities, we totally automate the admissions and financial aid process, functioning as a digital mailroom and document processing center. Most of these institutions already have the software; we show them how to get the information into their systems faster for internal processing. But we can also help by installing workflow and document management software that will allow

is certified by a nationally known independent auditing firm.

It's hard to believe, but just 10 or 20 years ago, if you signed a contract to digitize paper, you simply showed up with a truck and the organization handed you, say, several thousand boxes of medical information, credit card data, or financial information, and you loaded up and took off. Oftentimes nobody even asked you for identification, much less to prove a chain of custody. But those days are gone forever.

With SAS Type II certification, you must not only pick up and return the documents in a secure manner, but that information must be maintained at all times during processing in a secure facility, with no one granted unauthorized access. Our access is

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izing the benefits of document imaging. Every company that owns Microsoft products is talking about SharePoint, and we at AIIM want to be the ones talking with them about best practices and helping them scan their paper into SharePoint repositories.

Infonomics: Readers are hungry for insights on leadership and keys to success. Please tell about your business, Bob.

ZAGAMI: Databank IMX was formed in 2005 under the direction of two industry veterans, Dick Aschman, chief executive officer, and Chuck Bauer, president and chief operating officer. We're privately held with over 500 employees. I'm general manager of the New England Region. We're a very flat organization without layers of management; I report directly to Dick as do all of our general managers, who have total responsibility for sales and production in their respective regions. Our management team is sales oriented. We spend as much time as possible every day in front of our clients and prospective clients.

Databank is a unique company focused on providing document solutions and conversion services to enable in-house solutions. We also provide Web-hosted storage and retrieval as well as software as a service (SaaS) solutions. We're highly

them to do more with less people and do it faster and more effectively.

DataBank has nine production facilities strategically located throughout the country. We are best defined by the experience of our management team, each of whom has over 25 years of experience in the industry, having moved from microfilm into digital imaging. And we are one of the few conversion companies that have both SAS 70 Type II and PCI DSS security certifications. Our nine facilities are totally integrated and secure. Compliance is critical to our operations; our sites are monitored 24/7, 365 days a year.

Infonomics: Now we're into the heart of the interview: data security. What do those standards signify, and what should every AIIM member know about them?

ZAGAMI: They address process controls and document and data security. As identity theft grows, and governments and industry create more regulations, this has become critical.

SAS stands for Statement on Auditing Standards. SAS 70 Type I says that you have a process and it is documented. But there are no checks and balances. In Type II, however, there is a secure chain of custody for the entire process, and DataBank

monitored locally and nationally, and visitors sign confidentiality agreements and are escorted at all times. The customer's information is protected along the entire chain of custody, every step of the way, until it is returned to the customer in a secure fashion. These stringent controls apply to the clients' information whether it is in hard copy or electronic form, so there is a tremendous, continuing effort by us to design and harden our IT systems.

PCI DSS stands for Payment Card Industry Data Security Standard, and it stipulates a similar chain of custody for credit cards and financial information.

When we look at identity theft, privacy of medical records, and protection of critical data, corporations and enterprises want to do business with solution providers that have installed security processes that are SAS 70 Type II certified and PCI DSS certified.

Requirements for data security certifications are already cropping up in contract language, and eventually firms that do not offer them will not be able to find work. That is the future, and it is a unique opportunity for AIIM.

Infonomics: When did you first join AIIM, and why?

ZAGAMI: I first become involved with the New England Chapter around 1975. In those days it was difficult to win respect from a prospective customer if you were not involved with AIIM, which was then known as The National Microfilm Association (NMA). I worked in microfilm in those days, and you've got to remember that in the mid- to late 1970s, microfilm enjoyed the stature and relevancy in corporations and institutions that document imaging and document solutions enjoy today.

Infonomics: You've given a lot to AIIM over many years. What has it given back?

ZAGAMI: I simply would not have enjoyed the degree of success that I have without AIIM. AIIM is a small nonprofit; the real heavy lifting is done by our end users, because they are the face of AIIM, the people who buy our solutions and our education programs. And when you are intimately involved with the process, you learn a lot.

Infonomics: Tell us about the AIIM board structure.

ZAGAMI: The board is comprised of 20 members who are fully representative of the AIIM community, with trade members, service companies, and end users. It is a leadership opportunity for those who really want to serve the industry and those committed to change. Members typically serve in chapter and committee leadership posts before appointment to the board.

Infonomics: What changes do you foresee over the coming 10 years in ECM?

ZAGAMI: There are going to be huge changes. We will see a continued movement toward SaaS and Web-hosted solutions. In these challenging times, companies will opt for Web-hosted solutions that offer all of the functionality of in-house solutions, but without the need to buy and maintain hardware and software.

Another major trend will be the continued movement of our solutions down

the economic scale to small- and medium-sized businesses. Document imaging and ECM solutions are much more affordable now, and AIIM is going to bring new customers to its trade members.

Next is perhaps our greatest trump card: Green ECM. Everybody in the world is talking about green solutions; well, AIIM was green before Kermit the Frog. We've been offering green technology before the term existed.

We provide the tools that help corporations, institutions, and companies of every size capture, index, store, manage, retrieve, and distribute information electronically. We are providing the green solutions that save millions of trees each year—and we haven't even scratched the surface of our full potential.

The other huge growth market for us is data security, as addressed above. |

BENJAMIN L. HERRING is editor-in-chief of *Infonomics*.

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