



# RPOST

# OPTIMIZE! 2020

## OPTIMIZE! 2020: E-SIGN & E-SECURITY JUNE 18, 2020

### Agenda

Registration: [www.rpost.com/optimize2020](http://www.rpost.com/optimize2020)

### 9am ET Start (2pm UK / 3pm CET)

#### 9am ET (2pm UK/3pm CET) Main Stage Sessions

#### 9am ET: Welcome to OPTIMIZE! 2020 #1 (2pm UK/3pm CET)

1. **Welcome to OPTIMIZE! 2020** (10 minutes)

*What does **OPTIMIZE! 2020** mean? In short, understanding the “art of the possible” with modern and innovative e-sign, e-security, and e-authentication technologies. Optimizing the experience, automation, and affordability around today’s essential technologies.*

**Speaker:** Zafar Khan, RPost CEO

#### 9:10am ET: E-Sign Panel #2 (2:10pm UK/3:10pm CET)

2. **E-Sign Panel: Today’s E-Signatures are More Than a Signature** (20 minutes)

*What are the most important elements of e-signature solutions, and how are users optimizing user experience, automation, and affordability?*

**Moderator:** Zafar Khan, RPost CEO

#### **Panelists:**

- **Jungheinrich:** Global material handling/intralogistics provider, having completed global e-sign RFP, now deployed e-sign across Europe and expanding to 40 countries for heavy equipment leasing contracts.
  - o **Nicole Stiller**, Project Leader, Rental Solutions
- **Impellam:** Global talent acquisition, managed workforce, and staffing provider, recently completed global e-sign RFP to replace two incumbent e-sign providers, one in Europe, one in Americas, with one global e-sign solution.
  - o **Paul Davis**, Commercial Manager
- **London Mutual Credit Union:** Premier UK credit union with integrated e-sign for loan and other applications.
  - o **Shan Godagama**, IT Manager
- **Fern:** UK-based international banking and credit union platform having integrated e-sign and e-forms into platform using APIs, with hundreds of credit unions and bank clients benefiting.
  - o **John McGucken**, Managing Director

**9:30am ET: E-Security Panel #3 (2:30pm UK/3:30pm CET)**

**3. E-Security Panel: Can Email Encryption be Elegant? (20 minutes)**

*What aspects of email encryption make it elegant for users and easy on compliance?*

**Moderator:** Zafar Khan, RPost CEO

**Panelists:**

- **Shell:** Division of global energy company, recently changed email encryption services. Hear why.
  - o **Ann Duggan**, Quality Manager
- **Helmer, Conley & Kasselman:** Law firm automating email encryption by content policy.
  - o **Elmer Bean**, CTO
- **McKay Corporate Brokers:** Insurance broker with built in Registered Email Encryption via Acturis platform.
  - o **Karen Fitzgerald**, Director
- **SG Busby:** Insurance broker with built in Registered Email Encryption using RMail for Outlook integration.
  - o **Val Lawrence**, Director
- **BGI uk:** Insurance and risk management company with built in Registered Email Encryption, LargeMail and Proof
  - o **Nick Elwell**, Managing Director

**Break: 10 minutes**

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## 10am ET (3pm UK/4pm CET) Main Stage Sessions

### 10am ET: What's New & Cool #4 (3pm UK/4pm CET)

#### 4. **What's New & Cool: Showcase of RMail & RSign Innovations** (10 minutes)

*You may have heard of RMail Recommends, RSign Delegation Inbox, RSign Dynamic APIs, Remote Online Notary, and more. Join a 10-minute tour of what's new, and learn where to see more in the conference Demo Lounge and in the Demo Rooms.*

**Speaker:** Alex Khan, RPost VP Global Services

### 10:10am ET: Quick Fix Panel #5 (3:10pm UK/4:10pm CET)

#### 5. **Quick Fix Panel: Minor Adjustments, Major Benefits** (20 minutes)

*Add a button to Outlook, a Chrome extension to G-Suite, a plug-in to Salesforce.com, an app for Xerox, a quick smart-host email routing change. Minor adjustments can make life more secure and a lot easier for staff, whether in the office or in-home office.*

**Moderator:** Zafar Khan, RPost CEO

#### **Panelists:**

- **Xerox:** Global workplace solutions and printing technologies company, recently released simple adjustment to scan-to-email process, creating first-ever app to scan-to-encrypted-email directly from the keypad of multi-function printing machines -- HIPAA and GDPR privacy compliance, and protecting the remote worker.
  - o **Dewey Rodgers**, Apps Marketing
- **DocsCorp:** Global security solutions for lawyers adds a simple (newly enhanced) add-in to Microsoft Outlook protects law and other professionals from human error causing data leaks, with other major benefits including simple e-sign and certified mail electronic replacement.
  - o **Ben Mitchell**, VP of Global Commercial Operations
- **Acuity:** European practice management platform built on Salesforce.com, adding simple security enhancement for major privacy, compliance, and accountability benefit. Their solution for consulting companies (i.e. accountancy, lawyers, notaries and business consultancies) is called Tess.
  - o **Ronald Dekkers**, Technical Director
- **Danastar:** European service provider with hundreds of smaller health care clinics communicating among peers and patients using G-Suite with a minor adjustment – adding specialized HIPAA/GDPR complaint email encryption suited for patient correspondence.
  - o **Jonas Seidenfaden**, Technical Specialist

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## 10:30am ET: Compliance Panel #6 (3:30pm UK/4:30pm CET)

### 6. **Compliance Panel: The Importance (and Elegance) of Registered Receipt Proof** (20 minutes)

*The Registered Email™ service has been the gold standard for e-mail proof for two decades. Its Registered Receipt™ record is self-contained evidence, elegantly packaged to support any compliance privacy audit or to solve any question of who sent what to whom and when.*

**Moderator:** Zafar Khan, RPost CEO

**Panelist:**

- **Allianz:** Global insurance provider explains reliance on Registered Email™ track & trace capability for highest level of forensic, authenticatable proof of e-delivery. A discussion with Allianz forensic criminology and data analyst.
  - **Natasja Voorluijs**, MSc Forensic Criminology, Data Analyst
- **Loudoun County, Virginia:** Part of the Washington DC metro area, official government notifications were first converted from paper mail to a standard email, but due to high claims of non-receipt and challenges in verifying fact of content delivered (or not), official notices were then converted to Registered Email™ messages.
  - **Bonnie Brown**, Deputy Treasurer

## Break: 10 minutes

## 11am ET (4pm UK/5pm CET) Main Stage Sessions

### 11am ET: Insights from the Field #7 (4pm UK/5pm CET)

### 7. **Insights from the Field: What Has Been Seen Cannot be Unseen** (20 minutes)

*Did the world change in two months? A global shock has exposed new and not-so-new technologies to those who may be stuck in their ways. Can the world “unsee” this new way of doing business?*

**Moderator:** Zafar Khan, RPost CEO

**Panelists:**

- **Ingram Micro:** World’s largest tech distributor with keen insights as to what has changed in business technology.
  - **Darryl Oliver**, Ingram Micro Cloud Portfolio Manager
- **Frama:** International e-sign, e-security, and transaction provider supporting thousands of clients across Europe.
  - **Volker Sommerfeld**, Product Director
- **Global Micro:** One of the largest Microsoft Hosted Email / Office 365 providers and digital integration specialists.
  - **JJ Milner**, Managing Director
- **SoftwareOne:** The largest software lifecycle management company supporting enterprises in 90 countries.
  - **Ashley Gaare**, North America Leader

### 11:20am ET: Putting the Vegas into Virtual #8 (4:20pm UK/5:20pm CET)

### 8. **Interact: Putting the “Las Vegas” into the Virtual Conference** (10 minutes)

*Did I hear Las Vegas-style cash giveaways? What is a virtual Demo Room and Demo Lounge? What about the BYOB Virtual Reception? A quick tour of what’s next.*

**Speaker:** Jake Finnell, RPost VP Business Development

## 11:30am ET (4:30pm UK/5:30pm CET) Breakout Sessions or Visit Demo Lounge and Demo Rooms

### 11:30am ET: Demo Lounge & Rooms Open #9 (4:30pm UK/5:30pm CET)

#### Breakout Sessions – Track 1

### 11:30am ET: Breakout Sessions Track 1 #9 (4:30pm UK/5:30pm CET)

#### 9. **Country & Industry Expert Perspectives:** (30 minutes – simultaneous virtual breakout rooms)

*E-Sign and E-Security tools and tips from experts and your peers in the insurance, legal, wealth management, banking, and health care sectors by country or region.*

### 11:30am ET: Breakout Track 1 Room 1 - Law #9 (4:30pm UK/5:30pm CET)

- **Room 1: Law Sector Exclusive** (*DocsCorp Sponsored Session in English*)

Moderator: Ben Mitchell, DocsCorp Vice President of Global Commercial Operations

Panelists:

- **DocsCorp** – Showcasing the new cleanDocs + RMail + RSign; elegantly integrated recipient checking, metadata cleaning, email encryption, e-signature, Registered Email™ track & prove.
  - **Paul Darby**, Global Vice President, Technical
- **Dickinson Law** - Dickinson, Mackaman, Tyler & Hagen PC, a premier regional law firm, discusses some of their e-security tools and experiences.
  - **Branden Haines**, CTO
- **International law firms** providing a perspective on why elegant integrations make life better.
- **RPost** - Showcasing the new RMail + RSign part of the new cleanDocs.
  - **Alex Khan**, Vice President Global Services

### 11:30am ET: Breakout Track 1 Room 2 - UK #9 (4:30pm UK/5:30pm CET)

- **Room 2: United Kingdom** (*Frama UK Sponsored Session in English*)

Moderator: Mike Roberts, Frama UK Business Manager

Panelists:

- **Positive Lifestyle Rewards Limited** – Providing a UK insurance broker perspective
  - **Angela Pendlebury**, Managing Director
- **Boston limited** – Providing a UK wealth management provider perspective
  - **Rachel Hughes**, Business Development Manager
- **Cyber Trauma, Clinical Researcher** – Providing a UK health care provider perspective
  - **Catherine Knibbs**, Director
- **Ward Hadaway** – Leading UK law firm providing a perspective from the legal sector
  - **Emma Digby**, Partner

### 11:30am ET: Breakout Track 1 Room 3 - Netherlands #9 (4:30pm UK/5:30pm CET)

- **Room 3: Netherlands/BENELUX** (*RPost Netherlands Sponsored Session in Dutch*)

Moderator: RPost Netherlands

Panelists:

- **Allianz:** Global insurance provider explains reliance on Registered Email™ track & trace capability for highest level of forensic, authenticatable proof of e-delivery.
  - **Natasja Voorsluijs**, MSc Forensic Criminology, Data Analyst
- **Acuity:** Accountancy customer management system, Tess, based on Salesforce.com.
  - **Ronald Dekkers**, Technical Director
- **Staedion:** Housing cooperative, user of the Visma product for human resource functions.
  - **Mohammed Zizaoui**, Functional Administrator
- **Credifin:** Receivables management and collections agency.
  - **Andreas Lokin**, Director
- **Thuiszorg West Brabant:** A home care organization that provides appropriate care and support so that our clients can live longer and safely in their familiar environment.
  - **Glenn van Bavel**, I&A Specialist

### 11:30am ET: Breakout Track 1 Room 4 – Germany #9 (4:30pm UK/5:30pm CET)

- **Room 4: German/DACH** (*Frama Sponsored Session in German*)

Moderator: Volker Sommerfeld, Frama Germany, Product Director

Panelists:

- **Jungheinrich AG Hamburg:** Global material handling/intralogistics provider, having completed global e-sign RFP, now deployed e-sign across Europe and expanding to 40 countries for heavy equipment leasing contracts.
  - **Nicole Stiller**, Project Leader, Rental Solutions
- **TÜV-IT:** IT security, data protection consultancy
  - **Christian Schneider**, Certified Data Protection Officer

### 11:30am ET: Breakout Track 1 Room 5 – Denmark #9 (4:30pm UK/5:30pm CET)

- **Room 5: Denmark/NORDICS** (*Danastar Sponsored Session in Danish*)

Moderator: Jonas Seidenfaden, Danastar, Technical Specialist

Panelists:

- **Røntgen og IT Danmark:** IT specialist with strong experience in IT solutions and IT security implementation in the Dental Business.
  - **Bo Trusbak**, CEO
- **Himmelev Tandlægehus.** Dentist and IT specialist, teaching IT solutions and IT security in the Dental Business including automation with RMail.
  - **Jens Lætgaard**, Dentist and IT Specialist
- **Danastar:** Nordic e-security and e-sign software service provider.
  - **Kurt Madsen**, Network Engineer

## 12pm ET (5pm UK/6pm CET)

### 12pm ET: Virtual BYOB Reception #10 (5pm UK/6pm CET)

Reception or Visit Demo Lounge and Demo Rooms

#### 10. Virtual BYOB Reception for UK, Europe, Middle East, and Africa

For those ending their day, join our country hosts for a BYOB toast and cash giveaways.

- **Room 1: United Kingdom** (Session in English)
  - Hosted by RPost UK
- **Room 2: German/DACH** (Session in German)
  - Hosted by Frama Germany
- **Room 3: Netherlands/BENELUX** (Session in Dutch)
  - Hosted by RPost NL
- **Room 4: Denmark** (Session in Danish)
  - Hosted by Danastar
- **Room 5: Partner with RPost – Int’l Partners Welcome**
  - Hosted by RPost Global

## 12pm ET (9am PT) Main Stage Sessions

### 12pm ET: West Coast Welcome #11

11. **Welcome West Coast to Optimize! 2020** (5 minutes)

*Speaker: Zafar Khan, RPost CEO*

### 12:05pm ET: What’s New & Cool #12

12. **What’s New & Cool: Top Three RMail & RSign Innovations** (10 minutes)

*Showcase RMail Predictive Security for Outlook, Security Automation Gateway, RSign E-Signatures, Dynamic APIs, and Remote Online Notary. Join a 10-minute tour of what’s new and learn how to see more in the conference Demo Lounge and Demo Rooms.*

*Speaker: Alex Khan, RPost VP Global Services*

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### 12:15pm ET: E-Sign Panel #13

#### 13. **E-Sign Panel: What is E-Sign Bliss** (20 minutes)

*How to (affordably) automate entire workflows with e-signatures and digital forms. How are companies optimizing e-sign user experience, automation, and affordability?*

**Moderator:** RPost CEO

**Panelists:**

- **Coca-Cola:** Evolved e-signature functionality to manage critical operational functions.
  - o **Mark Buchanan**, Procurement Specialist
- **TPx Communications:** Completed a national search for an e-sign provider for its more than 1000 sales and service staff. Deployed e-sign successfully, continuing to seek e-sign bliss with more automation. Formerly Telepacific.
  - o **Kristi Schmidt**, Business Analyst
- **Mercury Insurance:** Over a million auto-claims elegantly processed coordinating with regulators and consumers.
  - o **Heather Dunn**, Claims Supervisor
- **Durham and Bates Insurance:** Insurance broker achieves combo of e-security & e-sign automation.
  - o **Ingo Wittig**, IT Manager

### 12:35pm ET: Optimizing from a CRM #14

#### 14. **Optimizing from a CRM: Optimal Integrations** (20 minutes)

*Whether it's pre-built integrations or custom, learn from your peers what is possible and easy to achieve out-of-the-box while being affordable. Hear about some model integrations that use RMail APIs, RMail Outlook API, RMail and RSign for Salesforce.com, and RSign APIs.*

**Moderator:** RPost CEO

**Panelist:**

- **Fern Software:** International bank & financial services business management platform, coverage in 40 countries.
  - o **John McGucken**, Managing Director
  - o **Ciaran Lagan**, Technical Business Analyst

**Break: 5 minutes**

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## 1:00pm ET (10am PT) Main Stage Sessions

### 1pm ET: E-Security Panel #15

#### 15. **E-Security Panel: The Human Factor... Horror Stories** (20 minutes)

*Understanding the Human Factor in e-security opens one's eyes to IT challenges in today's remote-work world. Simple mistakes can embarrass or worse. Hear about the latest email impostor tactics that can easily result in your team sending (lots of) money direct to impostors.*

**Moderator:** RPost CEO

**Panelists:**

- **DocsCorp:** Global technology firm describes the perils of email address auto-complete and more.
  - o **Bob Moore**, VP - Americas
- **Xerox:** global workplace solutions company, discusses easing security for clients in the scan-to-email process
  - o **Dewey Rodgers**, Apps Marketing

### 1:20pm ET: Automating with Email Routing #16

#### 16. **Automating with Email Routing: Easy Automation Examples** (20 minutes)

*API integrations are becoming easier, but when used for sending email, they bypass important outbound email scanning and archiving tools. Hear about novel (and simple) ways to automate email encryption, wire-fraud protection, e-delivery proof, email tracking, and e-sign via email routing rules.*

**Moderator:** Alex Khan, RPost VP Global Services

**Panelists:**

- **Tata Communications:** World's largest international telecom carrier by capacity discusses how manage rate change notifications with customers and trading partners in nearly every country, through automation and electronic messaging.
  - o **Maria Teyssier**, Pricing Manager
- **N&D Group insurance: Norfolk & Dedham Mutual Fire Insurance, Fitchburg Mutual Insurance and Dorchester Mutual Insurance,** regional insurance carrier group discusses simple way to automate e-policy delivery with proof of delivery of disclosures and waivers, and security.
  - o **Shashi Ayachitam**, IT Director

**Break: 20 minutes**

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## 2:00pm ET (11am PT) Simultaneous Industry Sessions, Demo Rooms

### 2pm ET: Demo Lounge & Rooms Open #17

#### Breakout Sessions – Track 2 (45 minutes)

### 2pm ET: Breakout Sessions Track 2 Open #17

#### 17. **Industry Expert Perspectives:** (45 minutes – simultaneous virtual breakout rooms)

*E-Sign and E-Security tools and tips from experts and your peers in the insurance, legal, wealth management, banking, and health care sectors.*

### 2pm ET: Breakout Track 2 Room 1 – Insurance #17

- **Room 1: Insurance**

*Moderator: Jake Finnell, RPost US Vice President*

*Panelists:*

- **Exclusive by Steve Anderson:** *Insurance technology expert and author*
- **Marshall & Sterling:** *Leading U.S. insurance company*
  - **Jim Dahoney,** *SVP, Chief Information Officer, Director of Strategic Acquisitions*
- **Jones Group:** *Leading US insurance and financial services company*
  - **Cari Schoepf,** *Manager*
- **Tracy-Driscoll & Co:** *Leading U.S. insurance company*
  - **Rebecca Doyle,** *Manager*
- **Aitken & Ormond Insurance:** *Leading U.S. insurance and risk management company*
  - **Patricia Lisi,** *Manager*

### 2pm ET: Breakout Track 2 Room 2 – Self Storage #17

- **Room 2: Self Storage**

*Moderator: Zafar Khan, RPost CEO*

*Panelists:*

- **Self-Storage Legal Network:** *Exclusive discussion with Self Storage Legal Network lawyers and industry experts on impact of COVID – auctions and remote electronic contract e-signing.*
  - **Scott Zucker,** *Legal Counsel to the Self-Storage Industry*
  - **Carlos Kaslow,** *Attorney*
- **Storage Commander:** *International property management platform, focus on self-storage.*
  - **Kevin Kerr,** *Manager*
- **Watkinsville Storage:** *Self storage operator.*
  - **Casey Evans,** *Manager*

### 2pm ET: Breakout Track 2 Room 3 – Real Estate/Title #17

- **Room 3: Real Estate / Title**

*Moderator: Alex Khan, Vice President Global Services*

*Panelists:*

- **Adeptive Software:** *makers of ResWare, the most powerful title and escrow production software available in the real estate industry.*
  - **Terri Hansen,** *Vice President, Account Services*
- **RPost:** *Remote Online Notary, Wire Fraud Protection, E-Sign, Email Encryption*

## 2pm ET: Breakout Track 2 Room 4 – Latin America #17

- **Room 4: Latin America (Session in Spanish)**

*Moderator: Luis Zambrano, RPost Latin America*

*Panelists:*

- **Certicámara Case Study:** *Certified Email Notifications & Electronic Signatures in Latin America, a case study format discussing automation at Latin American operations at companies including **Telefónica, América Móvil Claro, AT&T Direct TV, Aon, MetLife,** and various government departments.*
  - **David Kummers**, Network Security Specialist
- **RPost LATAM:** *RPost operations in Latin America*
  - **Adrian Velazquez**, Lawyer and Business Director

## 2pm ET: Breakout Track 2 Room 5 – RPost Partners #17

- **Room 5: RPost Partner Program**

*Moderator: Sean Walsh, RPost Director MSP-Partner Program*

*Panelists:*

- **Managed Service Providers:**
  - **Forrest Consulting**
    - **David Forrest**, Owner
  - **Larry the Computer Guy**
    - **Larry Forsyth**, Owner

**Break 15 minutes**

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## 3:00pm ET (12pm PT) Breakout Sessions or Visit Demo Lounge/Rooms

### 3pm ET: Demo Lounge & Rooms Open #17

Breakout Sessions – Track 3 (45 minutes) --- (**AMA = ASK ME ANYTHING**)

### 3pm ET: Breakout Sessions Track 3 Open #17

#### 3pm ET: Breakout Track 3 Room 1 – E-Sign #17

- **Room 1: AMA – E-Sign**  
*Ask me which e-sign features I should use for my specific needs.*

#### 3pm ET: Breakout Track 3 Room 2 – Security Automation #17

- **Room 2: AMA – Security Automation**  
*Ask me how best to automatically encrypt based on my email setup.*

#### 3pm ET: Breakout Track 3 Room 3 – API Integration #17

- **Room 3: AMA – API Integration**  
*Ask me what we can help you with, using our vast API solution sets.*

#### 3pm ET: Breakout Track 3 Room 4 – Salesforce.com #17

- **Room 4: AMA – Salesforce.com**  
*Ask me what's new with e-delivery proof, encryption and e-sign integrated.*

#### 3pm ET: Breakout Track 3 Room 5 – Partners #17

- **Room 5: AMA - RPost Partner Program**  
*Ask me how our partners benefit from working with us.*

## Break 15 minutes

## 4:00pm ET (1:00 PT) Main Stage

### 4pm ET: Integration #18

#### 18. **Integration: In Pursuit of Operational Elegance** (5 minutes)

*RPost unveils its new Developer Center – the most comprehensive set of email security and e-signature APIs that are simple, modern, and packaged in sets as solutions.*

*Speaker: Zafar Khan, RPost CEO*

#### 4:05pm ET: Time to Upgrade #19

19. **Time to Upgrade: The NEW RMail for Outlook Office 365** (20 minutes)

*RPost's most popular all-in-one interface, RMail makes Microsoft better for business. Better encryption, unique Registered Email™ track and prove, one-click e-signatures, file share, and much more.*

**Speaker:** Alex Khan, RPost VP Global Services

#### 4:25pm ET: Meet the Experts Live #20

20. **Meet the Experts Live: Preview of (BYOB) Receptions** (5 minutes)

### 4:30pm ET (1:30 PT)

#### 4:30pm ET: Virtual (BYOB) Reception Live #21

21. **Virtual (BYOB) Reception for the Americas**

*For those ending their day, join our country hosts for a BYOB toast and **cash giveaways**.*

- **Room 1: Security Automation Experts**
  - *Hosted by RPost Global*
- **Room 2: E-Sign Experts**
  - *Hosted by RPost Global*
- **Room 3: Customer Success Team**
  - *Hosted by RPost Global*
- **Room 4: Sales Team**
  - *Hosted by RPost Global*
- **Room 5: Partner with RPost – Partners Welcome**
  - *Hosted by RPost Global*

### 5:00pm ET (2:00 PT) – Conference Ends