

CAPTURE & IDP 2023 CONFERENCE AGENDA

Central Daylight Time (CDT)

September 6

6:00 – 7:30 pm	Welcome Reception, sponsored by OpenText	Pavilion
7:30 – 9:00 pm	Dinner, sponsored by TWAIN Working Group	Pavilion
9:00 – 11:00 pm	Join us at Keglers!	Spa building

September 7

7:00 – 8:00 am	Breakfast	Pavilion
8:00 – 8:15 am	Capture & IDP 2023 – What to Expect Today <i>Fabien Disclos, Managing Director, Infosource</i> <i>Ralph Gammon, Senior Analyst, Infosource</i>	Red Oak B/C
8:15 - 9:15 am	Future Opportunities in Capture & IDP <i>Petra Beck, Senior Analyst, Infosource</i> and <i>Ralph Gammon, Senior Analyst, Infosource</i>	Red Oak B/C

Hear findings from Infosource analysts based on year-round research and projects about where the market is going.

9:15 – 10:00 am

AI: Its Importance in IDP and Beyond

Red Oak B/C

*Gary Fowler, President, CEO and Founder,
GSD Venture Studios*

The introduction of AI is transforming the Capture & IDP space, broadening its focus and increasing access to classification and extraction - but this is just the tip of the iceberg. The use of AI is exploding and is soon to reach into multiple elements of business processes. The emergence of ChatGPT is just one example. Our keynote speaker Gary Fowler invests in and develops AI-driven companies globally. He was recently named one of the top 10 global AI executives by Analytics Insight Magazine. He will share his guidance for successfully leveraging AI in your business, today and in the future, as the power of the technology accelerates exponentially. You won't want to miss this session on a topic vital to the future of the market.

10:00 – 10:45 am

**The Inevitable Wave of AI Regulations:
Balancing Utility and Harms**

Red Oak B/C

Andrew Pery, Ethics Evangelist

AI adoption is pervasive and is impacting virtually every dimension of our lives, at work and in our social interactions. The proliferation of AI technologies is reaching a critical inflection point. Goldman Sachs suggests that by 2030 up to 18% of the global workforce, representing some 300 million people could be displaced by advanced technologies, such as conversational AI. On a more positive note, the World Economic Forum projects that AI will add 58 million net new jobs and will contribute \$ 15.7 trillion to the global GDP. While AI is still in a nascent stage, yet it is way too big and potentially dangerous to be left for self-regulation. There is an inevitable AI Regulation wave coming. Its scope is anticipated to be wide ranging impacting AI providers, solution providers and distributors that place AI systems on the market. This session will explore how you can navigate a complex AI regulatory framework.

10:45 – 11:05 am

Break

Red Oak B/C

11:05 – 11:15 am

Sponsor Presentation - Monetizing TWAIN Direct

Red Oak B/C

*Kevin Neal, Marketing Committee Chair
TWAIN Working Group*



11:15 – 12:00 pm

**Transforming Information to Innovation:
Harnessing the Power of Gen AI**

Red Oak B/C

Kalpana Mahesh, Head of AI/ML GTM, Amazon Web Services (AWS)

In today's data-driven world, the abundance of information can be a catalyst for innovation if harnessed and processed with the right tools. Gen AI has emerged as a fantastic tool, empowering organizations to unlock new realms of creativity that go beyond traditional data processing. We will delve in to the real-world applications in the intelligent document processing space where Gen AI has already proven its value, highlighting its ability to drive creativity, enhance decision-making, improve efficiency, and foster unique solutions to complex challenges across diverse industries in a responsible, secure and safe manner. Join us in this exploration of the transformative power of Gen AI as we navigate the path from information to innovation.

12:00 – 12:30 am

Morning Speaker Panel

Red Oak B/C

Ask all your questions from the morning sessions and interact with the speakers for a lively discussion!

12:30 – 1:40 pm

Lunch featuring Topics of Interest Tables

Pavilion

Join speakers for lunch to continue and deepen the discussion about their presentation topic.

1:40 – 1:50 pm

**Sponsor Presentation – Creating Value-Add
for Capture**

Red Oak B/C

*Chris Wynder, Director of Marketing; Developer Cloud
OpenText*

1:50 – 2:25 pm

What's Next for Fintech?

Red Oak B/C

Nilanjan Sur, FinTech Industry Consultant

The growth of Fintech has been a hot topic over the past five years, but with high interest rates slowing down investment and reducing the number of financial transactions, Fintechs have suddenly come under increasing pressure. Capture & IDP has been key to enabling both start-ups and established financial institutions compete in the Fintechs, but how can they leverage the technology now to continue to thrive in the changing landscape of the market? Nil Sur is a veteran B2B sales leader and solutions consultant with a global resume, focusing on

Digital Transformation & Intelligent Automation in the Financial Services market. He will help guide you towards the current and future opportunities for Capture, IDP, and AI technologies in the evolving Fintech market.

2:25 – 3:10 pm

Panel Discussion: How To Stay On Top of the Rapidly Evolving M & A and Fundraising Landscape

Red Oak B/C

Paul Carman, President & CEO, Xamcor, Inc.

David Gerber, Vice President Tech M & A, Corum Group, Ltd.

From 2016 through 2021, we saw unprecedented investment in companies in the Capture & IDP market—to the tune of more than \$1.5B spread over a few dozen companies. In 2022, as interest rates rose, we saw investors become more selective and willing to take less risk. And in 2023, Generative AI seems to have replaced IDP as the hot new AI application. So, is it time for Capture & IDP vendors to panic, or are there increased opportunities for M&A and raising money in this still dynamic market? And what should you be focusing on to drive a higher valuation of your business? We have two experts in the area of M&A, fundraising and business valuation to help answer these questions and others. Last year's keynote speaker, David Gerber, VP, Tech M & A, for the Corum Group, will be returning to update us on what he is seeing, and long-time conference participant Paul Carman, President and CEO of the Xamcor Group, will join him for what should be a lively, entertaining, and informative discussion moderated by Infosource Senior Software Analyst Ralph Gammon.

3:10 – 3:30 pm

Break

Red Oak B/C

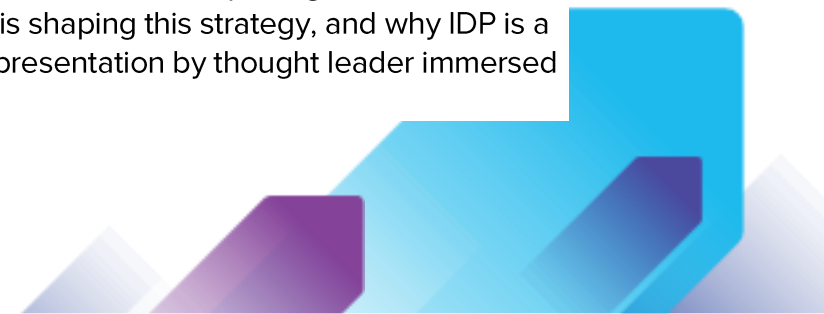
3:30 – 4:15 pm

Re-examining IDP in a World of AI, Robots and Chat GPT

Red Oak B/C

Nathaniel Palmer, Chief Architect, Serco CMS Eligibility Support Program

As adjudicator for the U.S. Government's Healthcare.gov Marketplace, Serco holds responsibility for ensuring millions of American consumers can access affordable health insurance. Led by its Chief Architect Nathaniel Palmer, the transformation of this operation has realized efficiency gains exceeding 500% along with a better consumer experience and stability in a once chaotic environment. Nathaniel will discuss the key role IDP in their journey, incorporating Capture, RPA, and BPM, along with AI and decision automation. Exploring both the last 5 years of their journey and his vision for the next 5 – he will show how AI is shaping this strategy, and why IDP is a critical leverage point for making it a reality. You won't want to miss this presentation by thought leader immersed every day in Capture, IDP and automation.



4:15 – 4:45 pm

Afternoon Speaker Panel

Red Oak B/C

Ask all your questions from the afternoon sessions and interact with the speakers for a lively discussion!

4:45 – 5:15 pm

Ask the Experts: Turning the Table on the Audience

Red Oak B/C

After a full day of presentations we want to hear your thoughts on the evolving Capture & IDP market and where you see AI taking you. Infosource staff will turn the tables on our room full of experts to hear their thoughts before we break for the day.

5:15 – 5:20 pm

Closing

Red Oak B/C

6:00 – 9:00 pm

“Meet the Speakers” - Cocktails and Dinner

Prairie River

Join conference speakers for dinner to continue discussions about presentation topics.

