

September 6, 2023

Dear Conference Attendee,

The Infosource team welcomes you to our 18th annual Capture & IDP Conference at the Eaglewood Resort & Spa just outside Chicago. Continuing the tradition started by Harvey Spencer Associates, it's always our aim to bring together key players and thought leaders in the market for thought provoking presentations and discussions. The end goal, of course, is to drive future business opportunities by examining trends in the market, changing customer requirements, avenues for potential partnerships, and more.

For the most part, concerns about the global pandemic have finally been put to rest, but that does not mean we are still not feeling its effects. One pronounced trend has been the acceleration of hybrid work-from-home arrangements, which has driven digitization initiatives to enable better access to information. It has also accelerated the adoption of virtual meetings, and while we all realize the valuable advantages of in-person interactions, for the third straight year we are offering attendees a virtual conference option. We have invested in a platform that can also be used to download materials, interact with other attendees, take notes, and track your schedule. Please check it out at <https://events.hubilo.com/capture-and-idp-2023>.

When we first started planning the conference shortly after our 2022 event ended, we recognized that AI was going to be an important topic. After all, over the past five years it was responsible for the rise of a dynamic subset of the Capture space known as Intelligent Document Processing. IDP represents the next-level of what we used to call Advanced or Intelligent Capture and is designed to break down barriers to adoption and expand the market by providing a learn-by-example interface that can be configured with minimal coding.

Then, in Q4 of last year, we witnessed a seismic shift in awareness of AI outside of the Capture & IDP space. It started with the introduction of services for automatically generating images based on text prompts and then really exploded in November when OpenAI made ChatGPT available to the general public. Suddenly everyone had access to AI for a number of tasks including writing reports, summarizing documents, and yes, entity extraction! This is where the crossover with Capture begins.

Generative AI and ChatGPT are based on Large Language Models (LLMs), which employ Natural Language Processing (NLP), and NLP has always been a component of Advanced Capture. Is Generative AI a replacement for traditional Capture? If not a complete replacement, where do Generative AI and LLMs fit in the evolving AI-driven Capture & IDP landscape? This is where we expect a lot of the conversation at this week's event to go.

Infosource Senior Software Analysts Ralph Gammon and Petra Beck will weigh in on the topic, as, after a brief welcome Thursday morning, they will get the conference started with a review of Infosource's Capture & IDP market data from 2022, as well as a look into the future with their five-year market forecast. Their presentation will be followed by the keynote from Gary Fowler, a well-traveled entrepreneur and investor who has been named a top 10 Global AI Executive. Fowler will look deeply into the potential of Generative AI and how it will shape the way business processes run, including those related to IDP.

To quote the Spider-Man Comic series, "With great power comes great responsibility," and long-time Capture and ECM marketing executive Andrew Pery, who holds a law degree, will take a look at some of

the ethical challenges associated with the onslaught of AI and how related regulation could affect the market. Finishing up the morning's featured speakers will be Kalpana Mahesh, the head of AI/ML GTM for AWS. She will discuss the intersection of IDP and Generative AI, as her employer brings technologies in both areas to market and is promoting their integration.

The afternoon speakers include Nil Sur, who has spent many years in global digital transformation markets, most recently focused on the financial services sector. He will discuss how the fast-evolving Fintech space is creating new opportunities for Capture & IDP. M&A industry experts Paul Carman and David Gerber will then take the stage for a panel discussion moderated by Infosource's Ralph Gammon. Topics discussed will include how to maximize a company's value in today's landscape of high-interest rates and tight VC funding (unless, of course, you have a good Generative AI story) and how to best execute an acquisition from both the buyer's and seller's side.

Our final featured speaker will be Nathaniel Palmer, Director, Solutions Architecture at Serco, who oversees the U.S. federal government's CMS Eligibility Support Program. Palmer has already helped the program realize 500% efficiency gains, among other benefits, but is not stopping there. He will discuss his ongoing journey in this high-volume, high-pressure environment, where he continues to consider and deploy a range of automation technologies including IDP, AI, Capture, RPA and BPM.

There will also be presentations from sponsors OpenText and the TWAIR Working Group. Like last year, we will consolidate our Q&A sessions into two half-hour slots, one featuring the morning speakers and one, the afternoon speakers. This allows for more diverse and in-depth conversations about topics that have piqued the interest of attendees. We will also turn the tables on attendees at the end of the day, to get an idea of what our "experts in the audience" think are hottest topics in the market.

Meals and networking kick off with Wednesday evening's Welcome Reception, followed by dinner and drinks at Kelgers, an on-site bar, lounge and game room. On Thursday, there will be breakfast, lunch and breaks, followed by a Meet the Speakers cocktail party and dinner to wrap things up.

We look forward to seeing you at the conference at Eaglewood and/or interacting with you through our virtual platform. Event Organizer Erin Dempsey and her team, as well as the Infosource staff, are available for any questions and support you may need.

Best Regards,

Your Infosource Team

