

Compendium of Key Learnings and Actionable Insights

AIIM GLOBAL SUMMIT 2025: NAVIGATING THE CONVERGENCE OF AI AND INFORMATION MANAGEMENT

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EXECUTIVE SUMMARY

The inaugural AI+IM Global Summit held March 31-April 2, 2025 in Atlanta, brought together information management practitioners, technology leaders, and industry experts to explore the transformative intersection of artificial intelligence and information management. This interactive event featured four learning pathways: Artificial Intelligence, Workflow and Process Automation, Intelligent Information Management and Information Governance, and Leadership and Change Management.

Against the backdrop of rapid AI adoption—with 65% of organizations now regularly using generative AI (Forbes) and AI-driven organizations experiencing 60% higher revenue growth (BCG)—the Summit revealed several crucial insights:

- 1. **The convergence of data and information management disciplines** is accelerating, with traditional boundaries between structured and unstructured data management dissolving as AI capabilities advance.
- 2. **Information quality is paramount** for effective AI implementations. Organizations must focus on data cleansing, normalization, and governance before deploying AI solutions.
- 3. **Human-centric approaches to AI adoption** remain essential despite technological advances. Information professionals' roles are evolving toward strategic oversight, ethical considerations, and value creation rather than disappearing.
- 4. **Balancing compliance and value creation** represents a key challenge, with information management practitioners increasingly serving as bridges between technical implementation and business outcomes.
- 5. **Practical, phased approaches to Al and automation implementations** yield the best results. Organizations should start with well-defined use cases offering high impact for reasonable effort.

The Summit's reimagined format included workshops, interactive sessions, keynotes, and innovative peer-to-peer learning through industry-specific cohorts. It provided a timely forum for discussing how to leverage unstructured data—which represents over 80-90% of enterprise data—while maintaining robust governance and compliance frameworks.

This compendium distills key learnings from the Summit, providing actionable insights for information leaders navigating the evolving landscape of AI and information management, whether just beginning their AI journey or looking to scale existing implementations.

PATHWAY 1: ARTIFICIAL INTELLIGENCE

KEY INSIGHTS

THE EVOLUTION OF AI AND ITS IMPACT ON INFORMATION MANAGEMENT

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The AI pathway sessions highlighted the rapid evolution of artificial intelligence technologies and their increasing integration into enterprise operations. Richard Medina of Doculabs emphasized that "the implementation phase has already started. These systems are now being used to classify, route, redact, summarize, and escalate in live workflows — not just in demo environments or limited pilots." This shift from experimental to operational AI is changing the conversation from model capabilities to operational reliability, traceability, and governance.

Kristi Perdue of AlterBridge Strategies outlined the three waves of AI development relevant to information management:

- Vertical AI Industry-specific solutions tailored with domain expertise and specialized datasets
- Agentic AI Goal-driven systems that work autonomously toward defined objectives
- Autonomous AI Systems that operate independently with minimal human oversight

According to Perdue, vertical AI is already being deployed across industries, with 35% of global venture funding going to industry-specific AI applications as of January 2025. The financial sector leads adoption, with 85% of institutions globally using vertical AI solutions, achieving benefits such as a 70% reduction in time required to document suspicious activity for compliance purposes.

The Summit also explored agentic AI systems—goal-driven autonomous systems that work independently toward defined objectives. These systems are expected to make 15% of daily work decisions autonomously by 2028 (Gartner), representing a significant shift in how organizations approach automation.

The relationship between AI and automation emerged as a critical distinction. Speakers clarified that while automation is rule-based (when X happens, do Y), AI generates results based on learned patterns, contextual retrieval, and probabilistic reasoning. This distinction has profound implications for governance, as AI introduces uncertainty that requires new approaches to logging, validation, and exception handling.

THE EMERGENCE OF RAG FOR ENTERPRISE CONTENT

Multiple sessions, including OpenText's "Prompt Perfect: Mastering AI Inputs for Information Management Success," highlighted Retrieval Augmented Generation (RAG) as a transformative approach for leveraging enterprise information. RAG architecture enhances AI responses by:

- 1. Chunking, embedding, and storing documents in vector databases
- 2. Processing prompts
- 3. Retrieving relevant information
- 4. Generating responses grounded in verified content
- 5. Combining and presenting contextualized answers

This approach significantly improves accuracy while maintaining organizational context and compliance requirements, addressing many of the hallucination concerns associated with general-purpose LLMs.



DATA READINESS AS THE FOUNDATION FOR AI SUCCESS

Multiple sessions emphasized that AI's effectiveness depends entirely on the quality and accessibility of the data feeding it. Dr. Priya Sarathy and Dr. Colin Coleman presented a framework for aligning data to business outcomes, noting that "not all data is created equal" and that the specific use case should determine the "degree of slop" (acceptable margin of error) in data quality.

Their presentation outlined a data supply chain approach:

- 1. Raw data collection Ensuring reliable and compliant data pipelines
- 2. Standardization and structure Implementing enterprise-wide schemas and quality controls
- 3. Interoperability Creating API-driven infrastructure for quick access
- 4. Versioning and lifecycle management Creating immutable data snapshots for training and auditing

Alan Pelz-Sharpe of Deep Analysis noted a critical challenge: "If retrieval is uncontrolled, logging is incomplete, or fallback is missing, the system cannot be governed — no matter how good the model is." This emphasizes that structure and governance are as important as the AI models themselves.

Max Gerrard of SER Group reinforced this point: "Al is only as good as your data. If you add Al on top of bad data, you start making really, really bad decisions."

While many AI developers aim to collect as much data as possible to train models, several participants noted the importance of collecting and curating relevant data. One cohort noted that "AI folks think 'digitize it all so we can use it', but we need to determine what is valuable and what is ROT as it relates to AI initiatives."

Another participant noted that focus must shift to how data will be used. "Focus has been on management and where are we putting information, but we need to be more focused now on who is going to use it."

A key part of data readiness for AI is managing data risks. Christopher Hockey shared a methodology for quantifying data risk that evaluated processes based on three main criteria: data sensitivity, degree of unstructured system usage, and data sharing with third parties. He shared that by quantifying data risk he uncovered major risks, including sensitive data in unsecured storage, limited compliance awareness, lack of disposal procedures, and inconsistent data access management.

EMERGING TRENDS

- 1. Al Governance Frameworks: Organizations are developing comprehensive governance frameworks specific to Al implementations, addressing unique challenges like tracing decision rationales across systems.
- 2. Al-Ready Data Initiatives: 77% of organizations are investing in Al-ready data initiatives, with 64% focusing on data quality and governance (Gartner).



- 3. **Autonomous AI Operations**: By 2030, 70% of enterprise workflows will leverage autonomous AI systems to reduce manual intervention (ARK Invest).
- 4. **Cross-Functional AI Oversight**: Effective AI governance increasingly requires cross-functional teams with domain experts and quarterly compliance audits.

PRACTICAL APPLICATIONS

- **Contract Analysis**: Al systems reviewing legal documents to identify key clauses, obligations, and potential risks, with productivity increases of 38-140%.
- **Healthcare Diagnostics**: Al tools for managing patient records and assisting in diagnostics, improving patient outcomes with a projected market of \$188B by 2030.
- **Financial Compliance**: 85% of financial institutions globally use vertical AI, with 70% reduction in time required to document suspicious activity for compliance.

PATHWAY 2: WORKFLOW AND PROCESS AUTOMATION

KEY INSIGHTS

DEFINING WORKFLOW PROCESS AUTOMATION

Richard Medina presented a useful framework for understanding workflow and process automation in the context of information management: "Workflow consists of work and flow. Work refers to the individual steps or tasks, while flow is the orchestration and movement between the steps."

He outlined a progression of workflow technologies:

- Ad hoc routing (like email)
- Collaboration (like Teams or Box)
- **Document workflows** (traditional ECM)
- Data workflows (database-driven)
- Business Process Management (BPM) (combining multiple capabilities)
- Case management (handling both structured work and collaborative ad hoc work)

Two important capabilities highlighted were Robotic Process Automation (RPA) for task automation and Intelligent Document Processing (IDP) for classifying, extracting, validating, and passing along document data.

The evolution of workflow technologies was outlined, from simple routing to collaboration tools to document workflows to data workflows, culminating in today's case management approaches that combine structured and ad hoc processes.



THE ROLE OF UNSTRUCTURED DATA IN AUTOMATION

Summit speakers highlighted the critical relationship between unstructured data and process automation, noting that over 90% of organizational data is unstructured (PDFs, Word files, spreadsheets, etc.).

"All of this content is pretty much unstructured data. We did a survey study recently with one of the leading analyst firms where most companies say that over 90% of their data is unstructured." — Rand Wacker, Box

Al technologies are transforming how organizations work with unstructured data, enabling automatic extraction of metadata, document summarization, and text analysis that significantly speeds up processes and improves accuracy.

THE TRANSFORMATION OF DOCUMENT PROCESSING

Ron Arden of Fasoo Inc. described how the traditional document capture and processing approach has been revolutionized by AI:

"Earlier models were fixed-function systems — trained to classify or extract within a narrow task. Generative systems produce language output based on input prompts, retrieval content, and internal weights. They can respond flexibly, but their outputs are shaped by variable context."

Tim Davis of IBM and Ryan Trollip of Blue Polaris emphasized the shift from traditional OCR to AI-powered document intelligence, noting the shift from prototype demos to real systems in use. Vendors demonstrated operational deployments with model outputs tied to routing, approval, redaction, or escalation.

Scott Francis's "Digital Transformation Starts at Capture" and Ron Rinner's "Accelerating IDP Implementation with Gen AI" sessions highlighted how Intelligent Document Processing has evolved:

Traditional IDP:

- Relied on template-based extraction
- Required extensive training for each document type
- Limited to structured forms with fixed layouts

AI-Enhanced IDP:

- Handles unstructured and semi-structured documents
- Adapts to document variations without retraining
- Extracts context-aware information from natural language
- Integrates with workflow systems for end-to-end automation



This evolution has dramatically expanded the scope of documents that can be efficiently processed, from invoices and contracts to complex regulatory documents and free-form correspondence.

IDENTIFYING AND PRIORITIZING AUTOMATION OPPORTUNITIES

Multiple sessions addressed how organizations should prioritize automation opportunities. The workshop led by Petra Beck recommended using an impact versus effort matrix to identify automation candidates. This approach helps organizations categorize potential projects in a structured way to maximize return on investment for IDP and Al-powered automation initiatives.

- Quick wins High impact, low effort tasks
- Strategic initiatives High impact, high effort tasks
- Fill-in projects Low impact, low effort tasks
- Avoid/reconsider Low impact, high effort tasks

Peter Schweiss and Rand Wacker outlined practical frameworks for identifying automation opportunities based on impact vs. effort:

High-Impact, Low-Effort Opportunities:

- Documents requiring manual metadata tagging
- Approval processes trapped in email
- Contract review and extraction of key terms
- Loan application processing
- Document classification and routing

The most compelling use cases were those where inference is tightly integrated into execution, such as document classification that triggers routing or approval, summarization used in regulated reporting, and extraction feeding structured systems. Characteristics of good automation candidates include:

- Repetitive, high-volume tasks
- Processes with high error rates
- Manual, labor-intensive activities
- Work requiring frequent rework
- Processes with bottlenecks
- Tasks requiring multiple systems or information sources

Rand Wacker of Box added that organizations should also consider revenue and innovation opportunities: "There's a ton of processes on the back end that are going to be cut and dried and always the same, and those are definitely useful to automate."



According to Petra Beck, organizations should first identify processes at different automation levels (from manual to fully automated) using the automation maturity model presented. She emphasized that GenAl is advancing IDP toward autonomous end-to-end process automation, with case management showing the largest expected growth. Key characteristics of good automation candidates align with the presentation's focus on identifying pain points, considering technical feasibility, and evaluating data quality requirements.

The workshop presented a comprehensive implementation planning framework covering six phases: defining objectives and use cases, assessing and selecting technologies, preparing quality data, training and testing, implementation with pilot projects, and continuous improvements.

Critical success factors highlighted included honest assessment of digital maturity, solid data quality, customer experience integration, vendor partnerships, and regulatory compliance.

EMERGING TRENDS

- 1. **AI-Driven Intelligent Document Processing (IDP)**: The combination of AI with document processing has seen significant advances, with particularly notable jumps in capability in 2017 and again in 2022-2023 with the emergence of large language models.
- 2. Services as Software: An emerging paradigm where AI tools facilitate the work of subject matter experts, creating new efficiency in specialized domains.
- 3. **Expanded Metadata Extraction**: All is radically reducing the cost of extracting metadata from documents, allowing organizations to scale this process and extract more complex information.
- 4. **Cross-Organizational Workflows**: Increasing emphasis on workflows that span organizational boundaries, connecting internal systems with customers, vendors, and partners.

PRACTICAL APPLICATIONS

- **Email-Based Approval Workflows**: Replacing manual email-based approvals with automated workflows to prevent documents from getting lost and streamline processes.
- **Contract Management**: Automatically extracting key information from contracts (parties, value, renewal dates) without manual intervention or pre-training.
- **Loan Processing**: Financial institutions implementing AI tools in workflow systems to improve processing speed and accuracy, resulting in higher revenues and better customer service.
- **Calendaring and Scheduling**: Using AI and automation to reduce missed appointments and improve customer engagement through automated scheduling processes.

PATHWAY 3: INTELLIGENT INFORMATION MANAGEMENT AND INFORMATION GOVERNANCE

KEY INSIGHTS



THE EVOLUTION FROM INFORMATION MANAGEMENT TO INTELLIGENT INFORMATION MANAGEMENT

Speakers emphasized the shift from traditional information management to "intelligent" information management that adds tangible business value beyond compliance.

"Ten years ago, John Mancini wrote an article on overcoming the information chaos... and we're 10 years further along, and with the pace of innovations, automation, and AI, we have to be more intelligent [when looking] at our information." — Pieter Lokker, Shell

This transition reflects a broader shift in priorities, with information management professionals increasingly focused on demonstrating how information assets contribute to bottom-line results rather than just meeting regulatory requirements.

THE CONVERGENCE OF STRUCTURED AND UNSTRUCTURED DATA MANAGEMENT

A recurring theme across sessions was the growing convergence of previously separate disciplines. Speakers noted the traditional separation between data management (structured data) and information management (unstructured data) is becoming unsustainable in the AI era. This convergence is being accelerated by AI capabilities that can bridge structured and unstructured data.

"One of my goals in the next 2-3 years is to start moving those two worlds together. If you want to fully utilize AI capabilities now, but also in the near future, I think there's no structured or unstructured world anymore. It's just data that we want to use for our own benefits." — Pieter Lokker, Shell

This convergence is driving changes in organizational structures, technology stacks, and governance approaches, requiring new skill sets and closer collaboration between previously siloed teams.

INFORMATION GOVERNANCE IN THE AI ERA

Richard Medina emphasized that governance must extend to the entire AI workflow: "Without complete records of what content was retrieved, how prompts were constructed, what models produced, and what actions followed — outcomes are unverifiable."

His presentation outlined key governance requirements for AI systems:

- 1. **Prompt logging** Recording the questions asked of AI systems
- 2. Retrieval indexing Tracking what information was used
- 3. Output traceability Linking AI outputs to downstream actions
- 4. Fallback mechanisms Procedures for when AI fails or produces questionable results



Several sessions addressed the challenge of records management in the age of AI, with presenters noting that organizations must now track not just the inputs and outputs of AI systems, but also the decision processes themselves.

EMERGING TRENDS

- 1. **Maturity Models for Information Management**: Organizations are developing sophisticated maturity models to assess their information management capabilities across dimensions such as governance, adoption, and technology innovation.
- 2. **Proliferation of Information Management Systems**: Research indicates most organizations now have at least 10-11 systems devoted to information management, creating challenges for establishing a single source of truth.
- 3. **People-Centric Approaches to Change**: Information management professionals increasingly recognize that technology changes can be implemented relatively quickly, but people and organizational changes require more time and careful management.
- 4. **Metadata Automation**: Al is enabling more automated approaches to metadata tagging, potentially reducing the burden on users while maintaining or improving information quality.

PRACTICAL APPLICATIONS

- Information Management Maturity Assessment: Annual processes for evaluating information management maturity across dimensions like governance, adoption, and innovation, with spider web visualizations showing progress and benchmarking against other business units.
- **User Experience Studies**: Shifting from "compliance stick" approaches to understanding user pain points and streamlining information access and workflows.
- **Power Apps for Process Automation**: Using low-code tools to automate manual processes like compliance score capturing, eliminating steps and generating measurable ROI.
- **Metric-Based Value Demonstration**: Developing simple calculations to demonstrate time and cost savings from information management improvements, avoiding complex business cases in favor of clear, tangible benefits.

PATHWAY 4: LEADERSHIP AND CHANGE MANAGEMENT

KEY INSIGHTS

DRIVING AI ADOPTION AND TRANSFORMATION

Sessions in the Leadership and Change Management pathway emphasized that technology implementation is only part of the challenge—organizational and cultural factors are equally important.



Donda Young, CIP and Sarah Sheffield, CIP presented a session titled "Resistance is Futile: Assimilating Open Access Policies and Procedures," which explored different forms of resistance to change:

- Organizational resistance Threat to jobs and established processes
- Cultural resistance Challenges to positions of power

They recommended strategies including involving employees in the change process, fostering open communication channels, leading by example, and demonstrating authentic embrace of change through town halls and feedback sessions.

Speakers consistently emphasized that while technology changes can happen quickly, people change takes time and requires dedicated effort and understanding. The Summit highlighted that technology and data silos often originate with people who feel ownership over specific domains, requiring change management approaches that address psychological barriers to sharing and collaboration.

STORYTELLING AS A CHANGE MANAGEMENT TOOL

Effective communication emerged as a crucial element of successful AI and information management initiatives. Speakers stressed the importance of storytelling to articulate the vision, challenges, and benefits of new approaches.

"It's all about storytelling. It helps me in building the story for the different businesses, or it helps me in making an enterprise IM story of where we are, where we want to go to, what the conflict is, why we're doing that, and what the end stage could be." — Pieter Lokker, Shell

This storytelling approach needs to be tailored to different audiences within the organization, including executive leadership, IT stakeholders, and end users.

DOCUMENTATION IN THE AGE OF AI

Adrienne Bellehumeur's "Rethinking Documentation in the Age of AI" session explored how knowledge capture and documentation practices must evolve in response to AI capabilities. She distinguished between "Big D" documentation (formal policies, procedures, and records) and "Little d" documentation (emails, meeting notes, personal workflows), emphasizing that "'Little d' eats 'Big D' for lunch" in terms of day-to-day impact.

Bellehumeur outlined a framework for effective documentation in the AI era:

- **Capturing Information**: Using both traditional methods (notes, mind mapping) and AI tools (transcription, summarization)
- Structuring Information: Building frameworks that AI can enhance rather than replace
- Personal Branding: Leveraging AI-enhanced documentation to showcase expertise and value



LEADERSHIP IN THE ERA OF AI

Jacqueline Stockwell, Leadership Through Data shared a structured approach to decision-making in Al implementation during her workshop. Team members are encouraged to adopt a persona different from their own and then discuss the problem or decision.

- Blue Hat (Process): Manage the thinking process
- White Hat (Information): Focus on facts and data
- Red Hat (Emotions): Express feelings and intuition
- Black Hat (Caution): Identify risks and problems
- Yellow Hat (Optimism): Find opportunities and benefits
- Green Hat (Creativity): Generate new ideas and approaches

This framework was applied to a case study on implementing Microsoft Copilot, demonstrating how it could be used to navigate complex AI adoption decisions.

Jeff Lewis presented on "Leading with Inclusion," highlighting the importance of diverse perspectives in AI implementation. He emphasized that "the only way to be innovative is to have diverse ideas which leads to diverse solutions."

MEASURING SUCCESS AND ROI

Ryan O'Connell of M-Files emphasized the importance of establishing clear metrics and baselines for AI and information management initiatives:

"Define your metrics to find where you want to be and be comfortable being uncomfortable, talking about maybe how miserable some of your processes are... It's important to know where you are, know how good or how tough things are, so that way, when you put in your roadmap and you present your plan, and as you're moving through your phases, you can declare victory."

Common metrics for measuring AI and automation success included:

- Process time reduction
- Error rate reduction
- Cost savings
- Compliance improvement
- User adoption and satisfaction

BUILDING COMMUNITIES OF PRACTICE



Jesse Wilkins of Athro Consulting presented on "Building Communities of Practice: Creating an Information Management Movement," defining communities of practice as "groups of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly." Benefits of communities of practice include:

- Making tacit knowledge explicit
- Sharing lessons learned
- Decreasing the learning curve for new employees
- Reducing rework and "reinventing the wheel"
- Sparking new ideas and approaches
- Identifying issues to be raised to management

EMERGING TRENDS

- 1. **Change Management as Core IM Skill**: Change management is increasingly recognized as a core information management skill rather than a separate discipline, with IM professionals expected to lead adoption efforts.
- 2. **Cohort-Based Learning**: Organizations are forming industry-specific learning cohorts to share knowledge and provide peer support during digital transformation efforts.
- 3. **Emotional Framework for Adoption**: Change management approaches increasingly acknowledge the emotional aspects of user adoption, framing benefits in terms that resonate on a personal level.
- 4. **Formalized Stakeholder Management**: More structured approaches to identifying and addressing the needs of different stakeholder groups, recognizing that each has unique priorities and concerns.

PRACTICAL APPLICATIONS

- Impact vs. Effort Matrices: Using structured frameworks to evaluate and prioritize AI and automation initiatives based on business impact and implementation effort.
- **Maturity Models**: Implementing annual assessments of information management maturity to track progress and prioritize improvements.
- **User-Centric Value Propositions**: Framing automation benefits in terms of personal impact, such as avoiding working through lunch or staying late on Fridays.
- **Cohort-Based Implementation Teams**: Creating cross-functional teams with representation from IT, business units, and compliance to ensure balanced perspectives.

CROSS-CUTTING THEMES AND CONCLUSIONS

THE THREE C'S OF EFFECTIVE AI AND INFORMATION MANAGEMENT



Across all pathways, speakers emphasized what Ryan O'Connell from M-Files called "the three C's" essential for effective AI implementation:

- **Connectivity**: Ensuring AI has access to the right resources and information sources, with appropriate integrations to relevant systems.
- **Confidentiality**: Implementing proper security controls so AI systems maintain appropriate access limitations based on roles and requirements.
- **Curation**: Making sure the information accessed is relevant, up-to-date, and properly maintained to avoid decisions based on outdated or incorrect information.

THE EVOLVING ROLE OF INFORMATION MANAGEMENT PROFESSIONALS

A dominant theme across pathways was how the role of information management professionals is evolving in response to AI. As Pieter Lokker remarked, "It's my role to get that IM strategy there, that we will have a consensus of what we're going to do in the coming years, how we're going to look at value, how we're going to establish the compliance baseline."

Information managers are increasingly positioned as bridges between:

- Business and IT departments
- Compliance requirements and value creation
- Technical capabilities and business needs
- Data quality and AI implementation

Alan Pelz-Sharpe noted that information managers have unique skills that are increasingly valuable: "The skills we have are not outdated. The skills we have now are just as relevant now as they ever were. It's just we've got to add some new skills on top."

Rather than being replaced by AI, information management professionals are seeing their roles evolve to become more strategic, focusing on governance, ethical considerations, and value creation rather than manual processes.

As Richard Medina observed, "The model is not the system. Structure — not intelligence — defines reliability. If you can't trace what was retrieved, how the prompt was built, what the model returned, and what action followed, you don't have a system. You have risk."

This evolution requires new skills, including understanding AI capabilities, prompt engineering, and the ability to bridge technical and business perspectives.

David Robinson's presentation on "Job Crafting" emphasized how professionals can reshape their roles in this changing landscape. He highlighted how information managers can:

Assess their current situation and identify opportunities within changing environments



- Redefine their roles to align with new organizational needs
- Communicate their value through personal storytelling that connects individual contributions to organizational goals
- Build new skills that complement technological changes rather than competing with them

Robinson demonstrated how information professionals can transition from reactive document management to proactive information strategy roles, noting that the way professionals frame their contributions significantly impacts how their value is perceived.

THE NEED FOR BALANCED AND ETHICAL AI GOVERNANCE

A recurring theme was the need for governance approaches that balance innovation with control, particularly as AI capabilities evolve rapidly.

Different stakeholders often have conflicting priorities—with compliance officers wanting 80% compliance and 20% value, while business units prefer the reverse ratio. Information management practitioners increasingly serve as bridges between these perspectives, developing strategies that satisfy both compliance needs and business objectives.

"AI needs to be governed and we need to have checks and controls in place to make sure that we do the right thing with our AI capabilities." — Pieter Lokker, Shell

Effective governance frameworks need to incorporate elements of technical oversight, ethical considerations, compliance requirements, and business value, with clear accountability and traceability throughout AI systems.

AI ETHICS

Kenneth Atuma from the University of Manchester presented on ethical AI frameworks in information governance, highlighting four core principles:

- Transparency AI decisions should be explainable and understandable
- Fairness AI models must minimize bias and ensure equitable treatment
- Accountability Organizations should take responsibility for AI-driven outcomes
- Privacy AI must respect user rights and legal frameworks

The ethical dimensions of AI governance received significant attention, with global regulatory frameworks emerging as a key consideration. Organizations must navigate diverse approaches to AI regulation across regions but should not solely rely on regulations to guide their approach to AI ethics.

"Not everything unethical is illegal." – Peter Vennel, Equifax



AI REGULATORY LANDSCAPE

The regulatory landscape for AI is evolving rapidly, with different approaches emerging across regions. Atuma's presentation compared AI regulations across multiple jurisdictions:

Region	Key Regulation	Focus Areas
EU	Al Act	Risk-based classification, compliance obligations
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US	NIST AI Risk Management Framework	Al trustworthiness, bias mitigation
Global South	Various emerging laws	Data sovereignty, ethical AI deployment

There is a need for proactive ethical risk assessment when implementing AI systems. Speakers emphasized that ethical considerations cannot be separated from technical implementation, and should be integrated into governance frameworks from the beginning.

ROLE OF INFORMATION MANAGEMENT IN AI GOVERNANCE

Lewis Eisen and Michael Landau explored key governance considerations for AI implementation, including data considerations (emphasizing that organizational data is often biased), provider concerns (such as vendor data access policies), and automation, reporting, and alerting capabilities (which require clear ownership and retention policies). In their workshop, they stressed that "information" must be understood to include both the inputs to AI systems and their outputs, highlighting the importance of comprehensive governance approaches that cover the entire information lifecycle.

Information management practitioners should proactively engage in AI governance discussions rather than leaving these critical decisions solely to technical teams or external authorities.

THE BALANCE BETWEEN STRUCTURE AND FLEXIBILITY

Sessions across pathways highlighted the tension between structured governance and innovation-enabling flexibility. This dynamic was captured in Susan Gleason, CIP's presentation, which emphasized how organizations face dynamic business environments, shifting organizational goals, and unexpected challenges requiring both clear frameworks and adaptability. When priorities change, rigid structures can cause workflow disruption and frustration among team members.

As Ryan O'Connell noted, "You don't want to overrestrict access to information. You don't want to make it limiting to the people in your organization when it comes to accessing the information they need to do their job."

Employ practical solutions to maintain this balance:



- effective communication through regular updates
- clear expectation-setting,
- prioritization techniques, and
- collaborative delegation of responsibilities.

Rather than viewing structure and flexibility as opposing forces, successful organizations embrace them as complementary elements. By developing a "positive mindset" toward change and using it as "an opportunity for growth," teams can maintain governance frameworks that provide direction while allowing for necessary pivots when faced with shifting priorities in information management.

FROM TECHNOLOGY-FIRST TO PROBLEM-FIRST APPROACHES

A consistent message across sessions was the importance of starting with business problems rather than technology solutions. Max Gerrard of SER Group noted, "Sometimes when I'm speaking to people, I won't use the word AI. I will start talking about here's the outcome that you can go and get by implementing something, because sometimes AI really scares people."

Similarly, Dr. Priya Sarathy emphasized: "85% of the AI projects fail because business goals were not identified properly!"

Multiple speakers advocated for a modular, "Lego-like" approach to technology architecture that allows organizations to maintain stable platforms while incorporating rapidly evolving AI capabilities. As Richard Medina explained, "Make sure that whatever your platform that it's stable and able to plug into the dynamic pieces as they emerge, whether it's different AI engines or different types of RPA, or other types of orchestration pieces."

Caleb Gattegno, CIP emphasized that automation should be viewed as a gradual process that evolves over time rather than an all-or-nothing approach. Key strategies include homogenizing data across input channels, using decision management to capture institutional knowledge, designing solutions with scalability in mind, and measuring results through robust reporting. Different organizations have varying needs based on their complexity, customer base, volume, and budget.

ACTIONABLE TAKEAWAYS

FOR INFORMATION MANAGEMENT LEADERS

- 1. **Develop a comprehensive AI governance framework** that addresses prompt logging, retrieval indexing, output traceability, and fallback mechanisms.
- 2. **Initiate data quality assessments** to identify where improvements are needed before implementing Al solutions. As Alan Pelz-Sharpe noted, "It's easy to change a checkbox in a system, but the impact of changing one checkbox in the system, well, in Shell, it impacts 80,000 people."



- 3. **Create a maturity assessment model** for your organization to track progress in information management capabilities. Following Shell's example, this should encompass dimensions such as adoption, governance, and technology innovation.
- 4. Implement the "three Cs" framework from M-Files:
 - a. Connectivity: Ensure AI has access to the right systems and information
 - b. Confidentiality: Apply appropriate security and compliance controls
 - c. Curation: Ensure information is relevant and up-to-date
- 5. **Establish communities of practice** for knowledge sharing around AI and information management, ensuring they have the three key elements: domain, community, and practice.

FOR IMPLEMENTATION TEAMS

- 2. Use impact vs. effort matrices to identify and prioritize automation opportunities, focusing first on highimpact, low-effort "quick wins."
- 3. **Apply a staged approach to Al integration**, starting with limited pilot projects that can demonstrate clear value and build organizational confidence.
- 4. Implement comprehensive logging of AI system operations, including:
 - a. Prompt input
 - b. Retrieved content
 - c. Retrieval index version
 - d. Model output
 - e. Triggered system action
- 5. **Develop clear metrics** for AI and automation initiatives, capturing both baseline performance and improvement targets based on process time reduction, error rate reduction, cost savings, and user satisfaction.
- 6. **Build a "Lego platform" approach** to technology integration, as described by Richard Medina, with a stable base that can accommodate rapidly evolving AI components.

FOR GOVERNANCE & COMPLIANCE TEAMS

- 1. **Update records management policies** to incorporate AI-generated content and decision logs, ensuring traceability of automated decision-making.
- 2. **Develop ethical AI guidelines** based on the four principles outlined by Kenneth Atuma: transparency, fairness, accountability, and privacy.
- 3. **Create processes for regular AI system audits** to detect bias, privacy issues, and compliance gaps, using tools like logging and confidence thresholds.
- 4. **Establish cross-functional oversight committees** with domain experts and conduct quarterly compliance audits for AI systems.
- 5. **Implement mandatory decision logs** with technical documentation and clear ownership of high-impact areas.



FOR CHANGE MANAGEMENT

- 1. **Involve employees early in AI transformations**, through town halls, feedback sessions, and participatory design processes.
- 2. **Develop comprehensive training programs** that address both technical skills and emotional responses to AI adoption.
- 3. **Create and communicate clear value narratives** that emphasize how AI will enhance rather than replace human work.
- 4. **Implement phased change roadmaps** with clear milestones and success metrics to build confidence and momentum.
- 5. **Foster open communication channels** and lead by example in AI adoption to overcome cultural resistance.

FUTURE RESEARCH AND EXPLORATION

The AI+IM Global Summit identified several areas requiring further research and exploration:

EMERGING GOVERNANCE FRAMEWORKS

- 1. Al Act implementation strategies As the EU AI Act takes effect, organizations need practical frameworks for compliance across global operations.
- 2. **Standardized prompt logging formats** There is a need for industry standards on how to log and audit prompts and Al interactions.
- 3. **Cross-organizational governance models** As AI increasingly operates across organizational boundaries, governance frameworks that span multiple entities are needed.

TECHNICAL CHALLENGES

- 1. **Memory boundaries in multi-agent systems** How can enterprises enforce appropriate limitations on what information agents can access and share?
- 2. **Testing retrieval behavior at scale** Methods for systematically evaluating how AI systems retrieve and utilize information from large repositories.
- 3. **Degraded-mode operation in agent chains** Developing robust fallback mechanisms when AI agents fail or produce unreliable results.

ORGANIZATIONAL TRANSFORMATION

1. Al skills development models - Frameworks for upskilling information management professionals for the Al era.



- 2. **Reorganization of data and information governance functions** Organizational models that reflect the converging responsibilities of previously separate teams.
- 3. **Metrics for measuring Al-driven information management improvements** Standardized approaches for quantifying the value of Al in information contexts.

ETHICAL AND SOCIAL CONSIDERATIONS

- 1. **Responsibility frameworks for autonomous AI** As systems become more autonomous, clearer frameworks for assigning responsibility are needed.
- 2. **Bias detection and mitigation strategies** More sophisticated approaches to identifying and addressing bias in AI systems that work with diverse information sources.
- 3. **Privacy-preserving AI techniques** Methods for allowing AI to work with sensitive information while maintaining privacy and compliance.

CONCLUSION

The inaugural AI+IM Global Summit 2025 marked a significant milestone in the integration of artificial intelligence with information management practices. Successful AI implementation depends as much on governance, structure, and process as it does on technological sophistication.

The summit revealed an industry in transition, with the boundaries between data management, information governance, and AI implementation increasingly blurring. Information management practitioners are evolving into crucial bridge-builders, connecting technical capabilities with business needs while ensuring compliance and governance requirements are met.

The event highlighted both the immense potential of AI to transform information management practices and the significant challenges organizations face in implementation. From ensuring data quality to building effective governance frameworks, from measuring ROI to managing organizational change, the path forward requires thoughtful navigation of complex technical and human factors.

As the field continues to evolve, the insights and frameworks shared at the summit provide a valuable foundation for organizations seeking to leverage AI while maintaining robust information governance. The importance of communities of practice, shared learning, and ongoing adaptation was emphasized throughout, recognizing that no organization can navigate this transformation alone.

The AI+IM Global Summit 2025 thus serves not as a definitive statement on AI in information management, but rather as an important waypoint in an ongoing journey—one that will continue to transform how organizations create, manage, and derive value from information in the years ahead.

CONTRIBUTORS



This compendium represents the collective wisdom shared during the summit and aims to provide actionable insights for all information management professionals navigating the evolving landscape of AI and information management.

To create this compendium, AIIM staff used the premium version of Anthropic's Claude.ai to create a project and knowledge base based on social posts, slide decks, and notes from the event as well as transcripts from presummit webinars. Through a series of prompts, staff worked with AI to produce the compendium and then carefully reviewed output.

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- Kenneth Atuma
- Chris Foley
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SPEAKERS AND SESSIONS

AllM is particularly grateful to the talented professionals who shared their time and knowledge with participants at the Al+IM Global Summit.

Title	Speakers
A Practical Approach to Transforming Your Customer Service with Workflow and Process Automation	Caleb Gattegno
Accelerating IDP Implementation with Generative AI: From Months to Minutes	Bart Peluso
Accelerating Process in the Age of Content and Al	Rand Wacker, William Higgins
AI for Information Management – What to Do and What NOT to DO	Chris McNulty
Artificial Intelligence & Workflow and Process Automation Learning Pathways Capstone	Alan Pelz-Sharpe, Richard Medina
Artificial Intelligence vs. Robotic Process Automation: Making an Informed Decision when it comes to Automation	Brent Wesler
Beyond Guesswork: An Approach to Data Risk Quantification	Chris Hockey, IGP, CIPP/US
Bridging Strategy and Execution: Your Pathway to Intelligent Document Processing & AI-Powered Automation	Petra Beck, Nina Carter
Building Communities of Practice: Creating an Information Management Movement	Jesse Wilkins, CIP, CIPP/US, CIPM, IGP, CRM, CIGO, ICE-CCP
Cancelled - Turning Documents into Decisions: Capture, Process, and Power Your Workflow	Jeremy Smith
Claim Your Seat at the AI Governance Table: Collaborating on Development of Policy and Standards	Lewis Eisen, JD, CIP, Michael Landau
Co-Presented by AI: A Human & AI Guide to Organizational AI Readiness	Geoff Ables



Title	Speakers
Collecting Accurate Information in the AI Era: The Next Step in the Process Automation Journey	Sally Schulte
Convergence by Design: Unifying AI, Data, and Information Governance for the Intelligence Era	Marcy Cunningham, Peter Vennel, Beverly Wright, PhD, CAP, Dr. Junda Zhu
Data and Information Management: Pillars of AI Strategy Execution	Priya Sarathy, PhD, CDMP, Colin Coleman, PhD
Digital Transformation Starts at Capture: Converting Paper into Al-Ready Data	Scott Francis
Digitization: The On-Ramp to AI-Driven Document Intelligence and Data Automation	Pete Schweiss
EMPOWER Your AI Implementation: From Change Management Theory to Reality	Jacqueline Stockwell, BA HONS, MSC
Ethical AI in Information Governance: Shaping the Future of Information Management	Kenneth Atuma
From Dusty Ephemera to Digital Archives	Natalie Austin, Elliot McNally
From Manual to Automated: Revolutionizing Records Management at Harvest Midstream	Meredith Duggar, MBA, Ryan O'Connell
From Silos to Synergy: Prudential's Journey to Cloud-Based Content Services & Al Readiness	Anna Davis
Fueling Agentic AI: Unlocking the Power of Unstructured Data	Alan Pelz-Sharpe, Rohan Vaidyanathan
Getting Started with Data Extraction and AI: A Hands-On Workshop	Brent Wesler
How to Navigate AI Compliance Challenges (CANCELLED)	Marcia Douglas
Hype or hyperbole? Crack the code on winning strategies for Al information management	Alison Clarke, Tracy Caughell, Sheila Woo, Driss Chahboune
I Didn't See that ComingHow Do I Pivot and Shift?	Susan Gleason, CIP, CRM/CIGO, IGP
Intelligent Information Management and Information Governance & Leadership and Change Management Learning Pathways Capstone	Pieter Lokker, CIP, Candace McCabe, CIP, CIPM
Is Your Unstructured Data AI-Ready? A Practical Assessment Framework	Robert Bogue
Job Crafting: Get the Job You Want in the Job You Have!	David Robinson
Knowledge Work Automation: Building Your AI-Enhanced Workflow Roadmap	Ryan O'Connell, Frank Taliano
Leading with Inclusion: Leveraging AIIM's BIPOC Network to Build Stronger Teams	Jeffrey Lewis, CRM, CIP, MLS
Next Wave AI: Vertical, Agentic & Autonomous Systems in Information Management	Kristi Perdue, CAIO
Prepare Your Data for AI: Essential Management and Governance Strategies	Ron Arden
Prompt Perfect: Mastering Al Inputs for Information Management Success	Driss Chahboune, Sheila Woo
Resistance is Futile: Assimilating Open Access Policies and Procedures to Evolve an Information Management Program	Sarah Sheffield, CIP, Donda Young, CIP
Rethinking Documentation in the Age of AI: Essential Practices to Leverage Your Knowledge	Adrienne Bellehumeur
Stop the DIET Cycle and Boil the Ocean!	Gabrielle Spurlin
The Digital Mail imperative in the AI Era: Fixing the Biggest Bottleneck in Information Management	Tim Osman, Brad Jenkins, CIP, CDIA+, EMCM, ERMP



Title	Speakers
Unlock Insights for Quick, Confident Decisions with Agentic Al	Michael Monteiro, Matt Vest, Brandon Swink
Unlock the Power Of AI To Automate Workflows and Transform Your Business	Allison Stilley, William Higgins
Unlocking AI Productivity through Data with Blue Polaris	Timothy Davis, Ryan Trollip
Unlocking Unstructured Data: Finding New Value in the AI Era	Tori Miller Liu, MBA, FASAE, CAE, CIP, Warren Hearnes, PhD



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