

Robert Smallwood

Overview

Mr. Smallwood has been a leading independent consultant since 1991, and has an outstanding international reputation. He has been recognized as one of the "25 Most Influential People" and "Top 3 Independent Consultants" by *KM World* magazine. He has published more than 100 articles and given more than 50 conference presentations on document, content and knowledge management. He has had national, regional and local TV and radio appearances.

Mr. Smallwood has consulted for *Fortune 500* companies including AT&T, Xerox, Bank of America and McKesson. He served on the Board of Directors, and was elected to the Executive Committee of AIIM International in the late 1990's. He was influential in the early years of the document imaging and computer systems industry while he worked for Unisys and Wang Labs.

Mr. Smallwood consults for end-user organizations to evaluate project requirements and select vendors through structured RFP processes. He also assists vendor organizations in competitive strategy, and investment banking firms regarding potential acquisitions. He has special expertise in the financial services and healthcare industries, and is especially skilled at negotiating technology procurement contracts. He has been recognized as an AIIM Master and Laureate of Information Technology, and holds an MBA from Loyola University.

Significant Projects



AT&T – Evaluated a wide range of vendors for knowledge and document management, workflow and web content management solution in a key financial area. Saved client over \$1M in costs.

Completed engagement for AT&T headquarters Tax Department to prepare for \$50 billion acquisition of Media One. Alternatives were evaluated for a \$2.1 million content and knowledge management project.



CellularOne - evaluated requirements and vendors for an enterprise imaging system.



Federal Reserve Bank, New Orleans branch – Managed needs in high-volume item processing.

FileNET – Conducted market research in a key industry segment and advised on market strategy.



First Interstate Bank – Conducted initial feasibility of imaging systems.

Hibernia National Bank – Managed extensive negotiations for image/workflow system.



McKesson HBOC – Directed market research and advisory services for healthcare market strategy.



Professional
Experience

Ochsner Foundation Clinic – Evaluated alternatives and managed prescription refill automation.

Staffware, plc – Led market strategy for U.K.-based software company for U.S. market penetration.

Xerox Business Services – Analyzed initial system alternatives for new services venture.

IMERGE Consulting, New Orleans, LA (10/03 to present)

Partner

Mr. Smallwood rejoined IMERGE in October of 2003.

Document content & knowledge technologies consultancy. Conducted sales and business development activities. Sold competitive analysis to prospects including major vendors: FileNET, McKesson/HBOC, Staffware, Tower Technology, Smart Corporation and Lason. Also sold project evaluation and management services to end user clients such as Navistar (International Harvester), Clarksville Memorial, St. Francis Medical Center. Promoted company through speaking engagements and publications. Maintained senior Board position with international industry trade association (AIIM). Achieved consulting billing rate of \$2,500/day

Smallwood International New Orleans, LA (1999 to 2001)

President

Complete sales, marketing and project management responsibilities. Completed engagement for AT&T headquarters Tax Department to prepare for \$50 billion acquisition of Media One. Alternatives were evaluated for a \$2.1 million content and knowledge management project. Conducted detailed contract and requirements evaluation for major Eastern U.S. nuclear power facility where first phase budget exceeded \$1 million. Conducted process re-design and research to evaluate and recommend unique interfaced system to streamline business processes for large health care delivery network and conducted project oversight. Designed and promoted first annual RESULTS Conference, including: website development, web-based marketing, ads and direct promotion. Acquired sponsors including IBM, Lotus and Eastman Software, recruited expert speakers.

Image Associates Consulting New Orleans, LA (1991-1997)

President

Document imaging consulting firm. Sold and delivered consulting services to end-user clients for document imaging projects including Hibernia National Bank, CellularOne, General Health, Southern Farm Bureau Insurance, Louisiana Workers' Compensation Corporation, LSU Medical Center. Projects ranged from \$300,000-\$1M+ in value. Conducted prospecting seminars in Dallas, D.C. Houston and Atlanta. Sponsors included Microsoft, IBM.

Wang Labs New Orleans, LA (1987-1990)

Account Representative

Sales and project management of minicomputer and imaging systems. Sold first Wang imaging installation at a U.S. university (Tulane University), sold first new manufacturing account in branch territory in 5 years, a competitive replacement of IBM at Jordache Jeans manufacturing plants, total deal over \$700,000. Also sold \$1M+ LAN deal in major law firm. Published "A Banker's Guide to Imaging in Banking" internally. Offered a World Headquarters position managing third-party software relationships for financial services industry.

Shared Medical Systems New Orleans, LA (1987)

Account Executive

Sales of mainframe-based Healthcare Information Systems for leader in the healthcare IT industry (now owned by Siemens). Responsible for sales of software systems for Financial and Clinical Management applications

Burroughs/Unisys Corp. New Orleans, LA (1982-1986)

Account Representative

Over 1,000 hours of technical sales training. Sales of mainframe-based banking and item processing systems to commercial banks in Louisiana. Account management of Federal Reserve Bank branch and installed base. Sold first Burroughs ATM units in territory. Sold conversion to in-house system to Bank of St. Charles (\$500,000), Gulf South Bank (\$600,000) and First Federal Savings (\$1.1 million). Top Account Representative in sales. Trained in manufacturing MRP software systems.

**Awards and
Certifications**

MIT – Master of Information Technology through AIIM (1998)
Laureate in Document Management (1999)

Publications

Mr. Smallwood has published more than 100 articles in various publications.

“Green IT: Soon, Not Optional,” KMWorld, July, 2008
“E-DRM Plugs ECM Security Gap,” KMWorld, April, 2008
“Web 2.0 Pressures IT, Shows Benefits,” KMWorld, November, 2007
“The Fast Moving Email Management Market,” KMWorld, May, 2007
“Email Management Comes of Age,” KMWorld, April, 2007
“What is Recordless Email?” KMWorld, April, 2007
“How the Amendments to the FRCP are Impacting Email Management,” KMWorld, April, 2007
“Controlling the Electronic Messaging Chaos,” DOCUME.NT Magazine, December, 2006
“Intelligent Data Capture: A Trend Only Beginning,” KMWorld, July, September, 2006
“E-mail News from IBM & Microsoft,” KMWorld, September, 2006
“E-mail Archiving and Management: From Niche to Core Component, KMWorld, April, May, 2006
“Surveying the State of Electronic Records Management,” KMWorld, January, 2006
“DRM in ERM: Know Your Rights Providers,” eContent Magazine, September, 2005
“Enterprise Rights Management Heats Up,” KMWorld, September, 2005
“Solutions in Pharma: Prescription for Compliance,” KMWorld, June, 2005
“Collaborative Tools: Records Management Challenges,” e-Doc Magazine, June, 2005
“Finding A New Groove,” (Microsoft Buys Groove Networks) KMWorld, May, 2005
“Email Management Takes Center Stage, Part I & II” KM World, March, April 2005
“ARMA Breaks Records,” Cover Story, KM World, November, 2004
“Project Management – Tips from the Road,” KMWorld Online, September, 1999
“Distribute your Capture,” Cover Story, Imaging & Document Solutions, co-author, May, 1999
“The Application Services Provider Revolution,” Cover Story, Solutions Integrator, February, 1999
“KM – The Year in Review,” KM World Magazine, January, 1999
“Enterprise Imaging, (A Review of Major Vendors),” Imaging & Document Solutions, December, 1998
“Imaging in Transportation,” Imaging & document Solutions, November, 1998
“International Relations – How Vendors Are Using Strategic Alliances,” Inform, October, 1998
“Departmental Imaging Solutions,” Feature Article, Imaging Magazine, October, 1998

"Shared Document Management Services – Is This A Trend?" Cover Story, *KM World*, May, 1998
 "Valuing & Managing Knowledge," *KM World*, March, 1998
 "IDN's Confront Complex Knowledge Sharing Challenges," *KM World*, February, 1998
 "Electronic Document Management Today," *ENT Magazine*, October, 1997
 "What Healthcare REALLY Needs To Know," *Healthcare Informatics*, October, 1997
 "Comparing PC DOCS and Saros," (co-authored with Jeetu Patel, Doculabs) *Network World*, June 1997
 "Imaging – The VAR Opportunity," *Reseller Management* magazine, August, 1997
 "The Importance of Intranets in Business Processes," (co-author) *Imaging World*, April, 1997
 "Claim A Slice of the (Imaging) Pie," *Reseller Management*, April, 1997
 "1996 – The Year in Business," *Imaging World*, Feature Article, January, 1997
 "Back To The Future," Cover Story, *Imaging Business*, January, 1997
 "Imaging's Big Picture," Cover Story, *Reseller Management*, January, 1997
 "The DM & Workflow Challenge in Manufacturing," Supplement to *DM Magazine*, January, 1997
 "Developing An Effective Information Strategy," Supplement to *Healthcare Informatics*, August, 1996
 "No Company is an Island (An Analysis of Strategic Alliances), *Imaging World*, September 1996
 "When is an Alliance Not an Alliance?" *Imaging World*, September, 1996
 "Recent Research Reports: Encouraging, Surprising and Mostly Wrong," *Imaging World*, Sept., 1996
 "Understanding the Turbulent DM Marketplace," *Imaging World*, September, 1996
 "CD-R's Bright Future," *Imaging World*, September, 1996
 "Reengineering," *INFORM* magazine, October, 1996
 "Component Imaging," *Imaging World*, November, 1996
 "Why ISO 9000 is More Than a Standard," *Document Management*, November, 1996
 "What is ISO 9000?" *Document Management*, November, 1996
 "Imaging & Workflow: Making the Right Decision," *Healthcare Informatics*, November, 1996
 "CD-Recordable Breakthrough Creates New Applications," *Healthcare Informatics*, November, 1996
 "The Imaging Market in Mexico," *IMC Journal*, Spring, 1993
 "Imaging in Banking," *Illinois Banker*, March 1988
 "Image Processing, Profit Tool?" *Louisiana Banker*, December, 1987

Television & Radio Appearances

BBC Radio (Southern Counties), London, UK, August 2007
 WWL-TV (CBS) Morning Show, New Orleans, November, 2006
 WWL Radio (CBS), Garland Robinette Show, New Orleans, November, 2006
 WWNO (NPR) New Orleans, interview, New Orleans, November, 2006
 99.5 FM Radio (Fox), Jim Brown Show, New Orleans, November, 2006
 WWOZ Radio, Bob French Show, New Orleans, November, 2006
 C-SPAN2 (Book TV) national broadcast, August, 2006
 CBS-5 TV, Weekend Early Edition, San Jose, California, August, 2006
 NBC-11 TV, news interview, San Francisco, August, 2006
 KPIX TV 5 (CBS), San Francisco, August 2006
 KGO Radio Talk Radio (ABC), Pete Wilson Show, San Francisco, August, 2006
 KNTV 11 (NBC), San Jose August 2006
 WOAI-TV (NBC), Good Morning San Antonio, August, 2006
 Texas Public Radio, (NPR), interview, San Antonio, August, 2006
 WLOX-TV (ABC) Good Morning Mississippi, Biloxi, August, 2006

KVOL, Jeff Crouere Show, radio talk show, New Orleans, November, 2005
Ringside Politics, WLAE-Channel 32 TV New Orleans; IT and Government, March, 2005
Politics with a Punch, radio talk show, New Orleans, August, 2003
New Orleans local news: interviews on local Fox, NBC on City of New Orleans IT contract, July, 2003
United Way Public Service Announcement, New Orleans network affiliates

Major Media Mentions

Wall Street Journal, Chicago Sun-Times, ABCNews.com, MSNBC.com August 29, 2007
NY Post "Protests Planned on 2nd Hurricane Katrina Anniversary," August 29, 2007
AlterNet.org, "Mardi Gras in the Murder Capitol," February 17, 2007
Washington Post, December 18, 2006, "New Orleans Writers Struggle to Pen Rebirth Story"
FoxNews.com, December 2, 2006, "Big Easy Recreates Capote's Masked Ball"

Seminars

Legal IQ Conference, Enterprise Rights Management, Wash., D.C., June, 2006
Xplor Conference, Cover Your Assets: Negotiating IT Contracts, Dallas, October, 2004
RESULTS Conference, Document, Content & KM: Tying IT All Together, New Orleans March, 2001
ITEC Expo, Knowledge Management: Foundation for E-Business, St. Louis, May, 2000
McKesson/HBOC Client Conference on Electronic DM, Implementing EDM, Atlanta, May 1999
Association for Computers in Taxation, EDM Project Considerations, Captiva Island, FL, February 1999
Southern Regional AIIM Conference, KM: Building the Anticipatory Enterprise, October 1998
Annual AIIM International Conference, Critical Issues in Patient Records, Los Angeles, May 1998
Imaging and Workflow in Gov't Conference, sponsored by NASIRE and KM World, Orlando, March 1998
DIIME/KM Expo, AIIM Technology Forum - OD vs. CD & the Path to DVD, Chicago, October 1997
Imaging Expo, Panel discussion of industry trends, New York City, October 1996
AIIM Managing the Digital Document, San Francisco – electronic records, January 1996
Southern Regional AIIM Conference, New Orleans – DM, workflow, May 1996
National Medical Cost Containment Assn., – Economic Impact, Trends and Issues in EPR, February 1996
Chicago Metropolitan Healthcare Council, Chicago – trends and issues in EPR, November 1995
RLB Systems Seminar, Hamilton, Bermuda –Trends & Standards In Document Imaging, 1993

Professional Associations

Louisiana Writers Foundation, Chairman, 2006-2007
Association for Information & Image Management (AIIM)
International, Board of Directors, 1996-99
Treasurer, Member of Executive Committee, International Board of Directors, 1998-99
Member, Founder and President, Great Southern Chapter (1994-96)

Education

International M.B.A Candidate, Loyola University, (with high honors) December, 2001
B.A., University of Northern Iowa – Business and Psychology, double major (with honors) 1982
National Student Exchange Scholar, University of Massachusetts at Boston, 1979-80

Continuing Education

ARMA International Conference, September, 2005

Streaming Media Conference, InfoToday, New York, May, 2004
Streaming Media Conference, InfoToday, San Jose, October, 2003
ARMA International Conference, Boston, October, 2003
Enterprise Intelligence, Knowledge Management Consortium, Orlando, December 1999
International Business Study Program, Loyola University, Brussels, Belgium, June-July 1998
AIIM Executive Summit, London, November 1997
Information Management '97, Sponsored by *Information Age*, London, November 1997
International Information Management Congress, Executive Summit, Barcelona, September 1997
International Business Seminar, Arizona State University, London, Paris, January 1997

Community Service

Habitat for Humanity, volunteer, New Orleans, 2006
Christopher Inn, New Orleans, volunteer care for the elderly, 2003-05
Folsom Athletic Association, volunteer and coach, 1999-2000
Big Brothers of Greater New Orleans & United Way volunteer, 1983-87, Board member, 1986-87