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Donald G. Post

Overview

Mr. Post has more than 30 years' industry experience as a consultant and executive, with a focus during the past 15+ years on business process management, electronic document and records management, long-term preservation, workflow and imaging. He uses his skills to enable maximum effectiveness and productivity in organizations, linking document systems and technologies with business processes, office automation and enterprise systems.

Before joining IMERGE as a Principal in early 1999, he was Senior Manager of Xerox XPS Consulting Practice, and a Senior Consultant with A.T. Kearney Management Consultants.

Mr. Post clearly defines business requirements and identifies appropriate technologies and products that can yield maximum benefits. This results from a solid understanding of diverse EDRMS and other information technologies, including networking, client/server, workflow, document management, COLD, and forms processing. He has a broad understanding of and experience with business processes and industries, including insurance, utility, government, financial services, chemical, pharmaceutical, food processing, wholesale distribution, and air/truck freight. He has particularly strong expertise in manufacturing and engineering applications, including PDM, ERP, sales automation and technical publishing.

Areas of specific expertise include requirements analysis, cost/benefit analysis for ROI determination, technology/vendor evaluation, project management, implementation, and quality assurance. He is experienced in the delivery of full life cycle consulting and implementation services.

Mr. Post teaches the AIIM ERM Certificate Workshop courses, and preparation courses for both TAWPI's ICP Certification and the CDIA+ exam.

Significant Projects

Mr. Post has played a leading role in a number of projects during his career with IMERGE, Xerox and other firms. The following is a partial listing with a brief description of some key projects. Additional details are available.



This not-for-profit came to IMERGE needing an enterprise document management strategy (EDMS) and, subsequently, vendor selection. They understood their processes to be inefficient and paper-intensive. IMERGE worked with the organization to, in Phase I, understand the current, "As Is"

situation, and then determine the “To Be” scenario. Phase II followed in which IMERGE wrote the RFP, evaluated responses, and after the client chose the top responses, interviewed—with AANA—potential solution providers.

HARRIS ASSOCIATES L.P.

This firm manages money for individuals and institutions in separate accounts and mutual funds. Harris had paper- and people-intensive processes with numerous handoffs and heavy reliance on third-party requirements. The firm’s goals were to substantially reduce paper in the process; increase the speed and convenience of handling redundant paper folders; decrease administrative expense; automate document review processes; secure confidential information; improve disaster recovery; make documents more accessible; enable efficient file sharing; decrease the chance of lost files; consolidate information storage; increase customer satisfaction and the speed of servicing clients; build processes which better support exception processing; increase capacity and scalability of processes and systems. IMERGE distributed questionnaires and conducted interviews to understand current processes, and developed the “To Be” scenario (Phase A) to which the RFP was subsequently written in Phase B.

Colorado State University

IMERGE conducted a brief initial assessment of needs and practices in a number of department interviews. CSU’s greatest concern was what to do with burgeoning box storage filled with paper records. Secondly, there was a question of how CSU compares to other universities. IMERGE concluded that management of electronic documents and records is increasingly under scrutiny as to the accuracy, reliability and trustworthiness that needs to be managed on the basis of a common ERDMS program. IMERGE recommended policies and technology tools to be put in place in the next three years to significantly transition from paper to electronic documentation. A number of options for centralizing and improving paper records storage and archiving were outlined in a final assessment report based on extensive interviews in other universities and experience with similar organizations.

BARR Engineering

IMERGE engaged in a needs assessment, solution recommendations and strategic action to implement a document and records management system. IMERGE worked with the Steering Team to create an overall model that includes the components needed for development and implementation of such a system. Overall recommendations included providing the appropriate enterprise-wide governance, staffing and support structure, development of an overall RDMS with fewer, strategically-chosen integrated systems, and to capitalize on investments in existing software to the maximum extent possible.

Sargent & Lundy LLC

IMERGE engaged in a requirements definition and vendor procurement project with Sargent & Lundy, a 1600-person world-leading engineering design firm for power generation plants and distribution. Optimization of the current platform should be possibly 30-50% improvement with an expected internal return of 30-50% with a reduction of risk and significant improvement in customer satisfaction.



To facilitate process re-engineering and improvement in critical-impact departments IMERGE concurrently conducted three projects: business process optimization; training; and knowledge transfer. IMERGE worked with more than a dozen departments to thoroughly understand all major processes and departmental interactions, and identify opportunities for improvement. IMERGE trained 125 managers in the basics of process reengineering; assisted two teams, Imaging and Pre-Admit, as they met to work on their processes; and identified FTEs that could be saved with process reengineering. MH has three Gary locations, 600+ beds and 2300+ employees, and is a not-for-profit, community-based healthcare system.



For Wisconsin Housing and Economic Development Authority (WHEDA), IMERGE developed a document imaging and management system strategy and plan having three phases, each with several deliverables. Phase 1: A feasibility study to identify document imaging and management opportunities and general requirements. Phase 2: A more detailed planning effort. Phase 3: Selection of a document imaging and management system using an RFP.



IMERGE conducted a comprehensive study and report with recommendations on available options for an enterprise solution for electronic document management. The study included 24 departments. The key deliverable: an opportunity assessment/analysis; an overview of market trends and available technology; and recommendations for next steps for acquisition and implementation.

A medium-sized property and casualty insurance company

IMERGE completed a comprehensive assessment of current processes related to underwriting and claims including both paper and electronic documents. A 13-page spreadsheet was developed which detailed work processes across the company, including opportunities for improvement and requirements for enabling technology. Overall procurement requirements were defined, as well as priorities for implementation over a three-year period. This enabled a strong business case for investment of several million dollars which resulted in executive approval to move into an RFP/procurement phase.



The City of Toronto retained IMERGE for three projects since 2006. The first was to develop an electronic records strategic plan. Mr. Post was part of a team that reviewed compliance issues, detailed the alignment of the plan with other related initiatives (e.g., document management pilot projects), and reviewed the impact of the electronic records strategic plan on legacy systems. The major deliverables: the electronic records management strategic plan, and the related workshops to finalize this.

The second project was In March, 2008 the City of Toronto retained IMERGE to assemble highly qualified and respected individuals in the field of electronic records management with specialization in business classification models to deliver a functional classification to cross all 40 City divisions. The City's "eCity Vision" requires moving to the desired state of ERM readiness to deliver their services efficiently and productively and enable electronic access to its citizens and local government 24/7. This requires the City to classify each record from the time it is captured and effectively manage that record from inception to disposition. IMERGE's development of business classification was based on best practices for development of a functional classification as per international standards and DIRKS methodology, and adapted to fit into the practical scheme of today's government practices.

The third project began in early 2010 and is in process.



This popular mail-order catalog and website gets thousands of orders daily. The company wanted to streamline their processes so that checks (their primary receivable) were processed as quickly and correctly as possible. After meeting with departmental representatives and fully understanding the entire order process, Mr. Post conducted a requirements definition, and translated that to an RFP that was submitted to the vendors having the needed capabilities.



Mr. Post reviewed department operation processes and opportunities to improve the way work is done through the use of integrated ERDMS solutions. IMERGE developed an RFI-RFP and a report detailing for management the expected beneficial changes. The focus was on Microsoft SharePoint Portal or similar solution in 2006.



Mr. Post completed a Strategic assessment of INTRIA Items/CIBC Bank Needs Analysis and Requirements Definition for imaging, ERM/COLD, document management and workflow in the enterprise. During this 2000 to 2001 project, IMERGE (Don Post) and Prinova (Bill Broddy) provided these consulting services and facilitated internal consensus on requirements. An RFP was issued based on these requirements, and IMERGE-Prinova facilitated the vendor bidding process and evaluation of proposals. The CIBC client team decided on a combination of FileNet and IBM.

Everest Re Group, Ltd.

Mr. Post completed needs analysis and requirements definition for EverestRE a 400-person reinsurance organization. IMERGE developed requirements that dictated the selection of a mid-tier integrated electronic document management vendor and integrator to support universal access to information within the company, and with brokers and reinsurers.



Mr. Post conducted a detailed needs analysis for claims and service in this Blue Cross Blue Shield organization based in Washington, DC & Maryland. Completed functional requirements and managed RFP/vendor evaluation for a \$1.6 million claims forms processing system, justified by savings of over \$1 million annually. Completed comprehensive interviews of over 70 persons at CareFirst in Maryland and Washington DC operations, and wrote detailed description of current operations and future requirements. After consensus was reached on requirements, Mr. Post issued the RFP and requirements bid package, managed the project team and facilitated reviews of vendor proposals and presentations, including evaluation and selection of the best solution. Conducted a needs analysis and product assessment for Enterprise Report Management and "universal access to information" for CareFirst, as a second phase of the imaging/claims forms processing project.



Completed an assessment of power plant document management processes and technology requirements, and developed recommendations to best meet needs. Completed interviews with over 20 persons to complete a benchmark survey on the best use of EDMS technologies in supporting planning, construction and operation of gas-fired electric power generation plants. Resulted in specific configuration, and expansion of an existing FileNet system.



Mr. Post was engaged by the Quicken Loan division of Intuit to complete a high-level assessment of imaging document management and workflow needs to support the paper and online mortgage processing operations. He then assisted in completing the RFP and vendor evaluation.



Completed requirements analysis and RFP for an EDMS solution for the Illinois Housing Authority, to support legal, mortgage loan and organization records. Conducted Interviews, reviewed document files & processes, developed weighted functional requirements, and created the RFP. Resulted in issuance of RFP, bidders conference and evaluation of solutions. Procurement is in process.



Completed an imaging, COLD and workflow feasibility study for accounts receivable and micrographics departments in this \$300 million greeting card company. Gibson Greetings retained Mr. Post to address this need and to propose a workflow analysis and feasibility assessment of potential use of electronic imaging, optical storage and workflow technologies in departments to replace micro imaging systems. Benefits were quantified to yield a payback of fewer than two years on a recommended investment in workflow, COLD and imaging technology of an estimated \$650,000.

**Records
Management
Industry**

Conducting a study of enterprise-class records management software, and integration with Documentum, PC Docs and FileNet. The focus is to develop a benchmark assessment of functionality for several government and commercial clients which need both records and document management.



Recommended electronic records long-term storage strategies for a large jet engine manufacturer, including a focus on ultrasonic test records from critical powdered metal parts impacting flight safety.



**Vickers
Pratt & Whitney
Boeing
Armstrong
ABB**

Mr. Post participated in several projects while at Xerox including implementation of an imaging system and repository for engineering drawings and documents at an aerospace company, configuration and integration of an electronic document system for legal contracts in a large corporate law department, development of a Documentum-based system for proposals and RFP responses for a worldwide systems company, assessment of document management requirements for the engineering department of aircraft component company, needs analysis for technical publications at a large aircraft manufacturer, and development of an approach for managing enterprise report output from SAP/Peoplesoft for three companies.



**Emery Air Freight
Dayton Freight
Cinergy**

Mr. Post recommended and managed procurement of scanning equipment and software for a variety of companies including a large electric utility, local government, wholesale distribution, truck line, air freight company and others.



Mr. Post led marketing/engineering/MIS team efforts to improve business processes and systems for electronically collecting and publishing product information. He spearheaded Knowledge Management and Sales Automation Support projects to improve publishing processes and electronic multimedia systems for an information catalog. This was done in a way to support evolving electronic publishing and "catalog on a disk" selection and CD distribution methods. As a result of these improvements, enormous amounts of product and application information were communicated in an accurate, timely, cost-efficient way. This enabled thousands of users to

effectively find information that they needed. In addition, product selection and configuration programs were created using functional requirements developed by Mr. Post. This made it increasingly possible to electronically obtain and print-on-demand all of the same material that was distributed as hard-copy. In addition, search and retrieval capability enabled easier location and selection of product information.



**Kraft Foods
Mallinkrodt
Centel
GATX**

As a Senior Consultant with A.T. Kearney Management Consultants, Mr. Post was responsible for engagement management in a broad range of assignments. Recommended improvements in strategic and annual planning processes used by a multi-billion dollar food company, while reducing administrative costs to save more than \$20 million annually. Completed marketing and distribution strategy studies for clients in both consumer electronics and telecommunications. Recommended reorganization and operations improvement at a Fortune 500 chemical plant, as part of a major business process improvement engagement. Designed a computer systems network strategy for a large telephone utility company.

**Professional
Experience**

IMERGE Consulting Chicago, IL 3/99 +

Partner & General Manager

Mr. Post joined IMERGE in early 1999. In the Spring of 2001, Mr. Post was selected by the Board of Directors to serve as General Manager and become a Partner. Since joining, he has participated in a number of projects in health insurance, government and general business where he has used his knowledge of the EDMS market and business process redesign in improving client operations. See above for description of engagements.

XEROX Professional Services Chicago, IL 2/97 to 3/99

Senior Manager

Independent consulting & integration practice focused on electronic document technology and knowledge management digital on-demand printing and workflow. Responsible for business development and engagement management, as an integrator of Documentum, FileNet and other solutions.

Digital Document Solutions, Inc. Dayton, OH 12/94 to 2/97

President and Founder

Mr. Post provided innovative consulting and integrated product solutions for imaging, workflow and electronic document management. DDSI has been a business partner for FileNet, Microsoft, IBM, and Adobe as a value-added reseller and consultant in imaging, workflow and electronic document management.

A.T. Kearney Management Consultants Chicago, IL 1978-81

Senior Consultant

Mr. Post was responsible for engagement management in a broad range of assignments. Completed business strategy studies for clients in consumer electronics and telecommunications. Recommended major operations and business process improvements for Fortune 500 food processing and chemical clients. Designed a computer systems network strategy for a large telephone utility company.

Emerson Electric (Copeland Corporation) 1986 - 95

Marketing Manager; Senior Product Manager

Pacific Scientific 1984 - 86

Vice President of Sales and Marketing

**Awards and
Certifications**

Mr. Post was recognized as one of the first 28 Certified Document Imaging Architects (CDIA) in the US, received AIIM's MIT Laureate (Master of Information Technology), and served in leadership roles in AIIM in Ohio and Illinois. He has been certified by TAWPI as an Imaging Capture Professional. Approved by AIIM to teach its ERM Certificate workshops, he also earned AIIM's ERMp and ERMs certificates.

Publications

White papers and published presentations on document management; frequent contributor of articles to industry publications.

Seminars

Mr. Post produced and was the keynote speaker at the 2010 Midwest SharePoint Conference. This conference had hundreds of attendees, and featured three tracks and 14 presentations by SharePoint experts from across the US. In 2009 Mr. Post gave the keynote at the Salt Lake City AIIM/ARMA SharePoint Conference.

Mr. Post spoke at the AIIM 2000 Conference and has been a regular speaker and session chair for the Kalthoff Conference. In addition, he co-taught one-day workshops on document management and GIS for the URISA, AIIM Chapters and several clients. These seminars covered technology and applications to bring attendees current with imaging, document management, workflow, internet, forms processing and other technologies.

He organized and presented workshop for AIIM Chicago, including a half-day session on "Requirements Definition and RFP Development". He was AIIM's Chair for the Knowledge Management Expo/Empower98 Conference in 1998, and was a presenter at the Documentum Fall 1999 User/Partner Conference on "ISO9001 Quality Systems".

At the DMW99 (Document & Workflow Management Conference) sponsored by Kansas DOT, AASHTO, NASIRE and IMERGE, Mr. Post spoke on "Integration of Document Management with Geographical Information Systems."

As a speaker and session chair at Kalthoff Conferences he presented these topics: "Improving the Effectiveness of Workflow", "WEB Access to Legacy Data", "Document Conversion", and "Search Technologies for Documents, Data and Drawings". He has also been a speaker for an XPLO conference session on "Merging the Data Center and Print Shop".

Over the years he has been a featured speaker or panelist at several chapter meetings of AIIM and ARMA chapters across the US.

Professional Associations

Throughout his career, Mr. Post has been active in a number of professional organizations. Currently Mr. Post is a Board member of AIIM Chicago. He is a member of IEEE (the world's leading professional association for the advancement of technology), working on Mass Storage Systems & Technology Initiative (MSSTC2010). He is active in AIIM standards committees for digital archiving, and in the SNIA.org (Storage Networking Industry Association) working group for long-term storage standards.

Education

Mr. Post has a BS in Electrical Engineering from Purdue, and a Master of Business Administration degree.