



# RPOST

# OPTIMIZE!™ 2021

## OPTIMIZE!™ 2021: E-SIGN & E-SECURITY JUNE 17, 2021

Main Stage Galaxy-Wide Opens 7am PT / 10am ET / 3pm UK / 4pm CET / Midnight Mars  
Pre-Conference European Country Sessions Start at 3pm CET (11pm Mars)  
<https://rpost.com/optimize2021/>

### Main Stage Galaxy-Wide Opens

7am PT / 10am ET / 3pm UK / 4pm CET / Midnight Mars

10am ET: Welcome to OPTIMIZE!™ 2021 (3pm UK/4pm CET)

1. Welcome to **OPTIMIZE!™ 2021: What is SMART-as-a-Service?** (15 minutes)

*What is **OPTIMIZE!™ 2021** all about? It's about SMART-as-a-Service; understanding the "art of the possible" with modern e-sign, e-security, and e-auth tech. It's also about optimizing experience, automation, and affordability around today's essential tech.*

**Welcome by:** Zafar Khan, RPost CEO

**Discussion with:**

- Volker Sommerfeld, Product Director, Frama Communications. International e-sign e-security specialist.
- Darryl Oliver, Cloud Portfolio Manager, Ingram Micro. World's largest technology distributor.
- Dewey Rodgers, Worldwide Marketing Manager, Xerox. Global document management.

10:15am ET: **SMART Industry Perspectives (3:15pm UK/4:15pm CET)**

2. **SMARTech Industry Perspectives: The Art of the Possible.** (25 minutes)

*How are users thinking about their e-sign and e-security challenges or opportunities? How are they using smarter features or smarter technologies to overcome these challenges? What are the most important elements of e-signature and e-security solutions, considering user experience, automation, and affordability?*

**Moderator:** Zafar Khan, RPost CEO

**Panelists:**

- **Manufacturer: Jungheinrich.** Global forklift manufacturer and intralogistics services provider, on year two of a global e-sign deployment across Europe and expanding to 40 countries for forklift rental contracts and other uses.
  - **Nicole Stiller**, Global E-Sign Leader, Jungheinrich
- **Insurance Agents/Brokers: Abbate Insurance, Renaissance Insurance Group.** Optimizing e-security with SMARTer ways of thinking about email encryption.
  - **Bill Alexander**, Manager, Agency Tech, Abbate Insurance / Renaissance Group

- **Government: Loudoun County, Virginia.** Part of the Washington DC metro area. Official government notifications were first converted from paper mail to standard email, but due to high claims of non-receipt and challenges in verifying fact of content delivered (or not), official notices were then converted to Registered Email™ messages.
  - **Melissa Murphy**, IT Systems, County of Loudoun, Virginia
- **Property Management / Self Storage: The Amsdell Companies / Compass Self Storage.** National property management firm using technology in SMARTer ways, automating legal tenant notices with legal e-delivery e-authentication and remote plus in-store tenant e-sign.
  - **Edward Hainrihar Jr.**, Vice President of Operations, The Amsdell Companies / Compass Self Storage
- **Power/Utilities: Belize Electric.** National power company of the country of Belize with growing concerns about ransomware and e-security currently re-thinking SMARTer ways to secure and interact with customers.
  - **Austin Castro**, Manager, Information Technology and Cybersecurity, Belize Electricity
- **Insurance Carriers: N&D Group insurance, Norfolk & Dedham Mutual Fire Insurance, Fitchburg Mutual Insurance and Dorchester Mutual Insurance.** Regional insurance carrier group discusses simple ways to automate e-policy delivery with proof of delivery of disclosures and waivers, and security.
  - **Technical Lead**, The N&D Group Insurance

## 10:40am ET: SMART Applications Perspectives (3:40pm UK/4:40pm CET)

### 3. SMARTech Applications Perspectives: E-Sign E-Security Bliss. (25 minutes)

*The most progressive companies and business process management applications are re-thinking their e-sign and e-security approaches. Today, it no longer is good enough to be able to “check-the-box” to say you have some sort of e-sign or email encryption available. Today users need to use these technologies more than ever. Smarter companies and business applications providers are employing SMARTer technologies and are considering optimizing their user experiences, automation, inter-connected data flows, and affordability (for when these e-sign and e-security services need to be used every day by everyone).*

**Moderator:** Zafar Khan, RPost CEO

#### **Panelists:**

- **Purchase Quote-to-Order Showcase:** Simple ways to replication automation, what you can learn from **Frama’s SAP-integrated e-sign process**--truly a SMARTer way.
  - **Volker Sommerfeld**, Frama Digital Solutions Director (Europe)
- **Human Resources:** Simple ways to enable your HR systems for e-signatures, considering what tech to use for what type of forms or processes and what you can learn from the **VISMA (global HR/ERP platform)** approach.
  - **Mariëlle Kuijpers**, Product Marketing Manager, **VISMA HR/ERP platform** (Netherlands, Nordics)
  - **Astrid Bon-Stikkelorum**, Senior Associate HR/Functional Manager, **GGZ Rivierduinen**
  - **Leo de Rooij**, Director, RPost Netherlands
- **Contract Management:** A SMARTer way to think about contract lifecycle management is to consider a contract cloud that thinks smartly about the needs to prove e-delivery of contract notices (changes in price, terms, etc.), privacy related to contract terms shared in email-laden negotiations, plus feature-rich and more affordable e-signatures, sequential e-signing and more. Think Contract Cloud.
  - **Harry Angel**, Symfact CLM platform Director, Symfact

- **Security Gateway:** Automating inbound messaging security seems obvious, but also automating outbound messaging e-security -- what should be encrypted, how and when using AI -- is SMART. It's even SMARTer if the type of encryption is matched with the level of bliss you would like your encrypted email recipient to feel. With email encryption, thinking about sender needs plus the recipient user experience is SMART.
  - o **Kevin Beatty**, Vice President, MDAemon Technologies, email server and security software developer.
- **Microsoft and Google Workspace:** Most businesses run their messaging on Microsoft Office as a service (Microsoft 365) or Google Workspace (formerly G-Suite, Gmail for business). When it comes to business users that send messages of consequence, in particular those in highly regulated industries such as financial services/insurance, legal, healthcare, add-ons to these platforms can provide the "edge" in terms of complying with regulations and mitigating operational cyber and reputational risk -- all the while driving business performance. While there are some native elements of e-security inside these ubiquitous general email platforms, there are tools that can truly make Google and Microsoft better for consequential business. Hear about which e-sign and e-security extensions both simplify experiences and securely empower users.
  - o **Don Previti**, Fin Tech Expert, ACE IT, a financial services-centric managed service provider.
- **Property Management / Self Storage:** Technology to manage tenants -- especially individual tenants -- needs to think SMARTly about legal consequences. How to legally deal with tenants who are skirting payments and who are non-responsive, how to more elegantly onboard new tenants with e-signatures that will stand up to legal scrutiny if something goes wrong later. Legal e-communications and e-signatures are SMART.
  - o **Rohan Shenoy**, VP Operations, Self-Storage Manager tenant management platform

## 11:05am ET: What's New & Cool (4:05pm UK/5:05pm CET)

### 4. SMARTech: Global IT Expert Perspectives. (25 minutes)

Hear from IT experts on the front line, international managed service providers discussing tech trends related to simplifying e-security and automating e-signatures (i.e., when Microsoft Office works fine and what makes it better). Hear experts in the field explain their top choices and their least favorite options.

**Moderator:** Zafar Khan, RPost CEO

**Panelists:**

- **ACE IT (MSP-USA):** US financial services specialist with a Microsoft/Ingram Micro ecosystem focus.
  - o **Don Previti**, Fin Tech Expert, ACE IT (MSP-USA)
- **PROMPT (MSP - México):** LATAM financial services and Microsoft/Ingram Micro ecosystem focus.
  - o **Moises Mondragon Cedillo**, CEO, PROMPT (MSP - México)
- **iT-Orae (MSP-France):** France mid-market business optimization focus.
  - o **Chris Mariusse**, Managing Director, iT-Orae (MSP-France)
- **Vincimus (MSP-Germany):** German and Dutch mid-market financial services focus.
  - o **James Lancaster-Peat**, Director, Vincimus (MSP-Germany)
- **Danastar (MSP-Nordics):** Nordics/Danish managed service provider with health care e-security focus.
  - o **Jonas Lyngdahl Seidenfaden**, E-Security Manager, Danastar (MSP-Nordics)
- **Post of Poland (MSP-Poland/E. Europe):** Managed service provider and e-postal operator with enterprise and government focus in Poland and Eastern Europe.
  - o **Robert Zukowski**, CEO, Post of Poland (MSP-Poland/E. Europe)

- **RPost US (MSP-USA)**

- **Sean Walsh**, Director of business development, managing small-mid-sized financial, health care, legal e-sign e-security specialists managing a portfolio of US-based managed service providers.

**11:30am ET: What's New & Cool (4:30pm UK/5:30pm CET)**

**5. What is SMART, New & Cool (& Selected by Industry as a "Top Choice")? (10 minutes)**

*You've heard what many may think sounds like code: "humanizing e-security" and "optimizing e-sign" in new "Smarter" ways. We'll showcase what we actually mean--the SMART, new and cool.*

- **Alex Khan**, Vice President Product, RPost
- **Phil Kennedy**, UK E-Sign E-Security Expert, RPost
- **Jonathon Israel**, Director, LegalFuel: The Practice Resource Center of The Florida Bar

**6. SMART Innovation Lab: New for You, New to the World & Award-Winning Tech. (15 minutes)**

*And now, we'll unveil to the world the truly unique--solving problems with technology SMARTly.*

- **Alex Khan**, Vice President Product, RPost
- **Jonathon Israel**, Director, LegalFuel: The Practice Resource Center of The Florida Bar

**9am PT / 12 ET / 5pm UK / 6pm CET Breakout Sessions**

**Breakout Sessions – Track 1**

**12pm ET: Breakout Sessions Track 1(5pm UK/6pm CET)**

**7. Humanizing Technology (30 minutes – simultaneous virtual breakout rooms)**

*Protecting from common human e-security errors, sensitizing humans to e-security issues, automating more to simplify life for us humans.*

● **Room 1: Hannah & E-Sign Bliss: Did You Know You Could Do This?**

*Moderator: **Hannah Wells**, RPost E-Sign E-Security Customer Success Specialist*

*Discussion with:*

- **Jim Dahoney**, SVP, Chief Information Officer, Director of Strategic Acquisitions, Marshall & Sterling Insurance
- **Jim Vaughn**, Director of Agency Operations, Hargett & Associates Insurance
- **Brendan Robb**, RMail and RSign specialist at RPost

● **Room 2: Ted & E-Security Compliance-Ease: It's Easy to Do This!**

*Moderator: **Ted Shultz**, RPost Director Gateway Security*

*Discussion with:*

- **Scott Tengen**, Co-Owner, Agency Technologies, a managed service provider
- **Paige Smith**, Agency Manager, Loman-Ray Insurance Group

- **Room 3: Olga & Admin/End-User Insights: I Can Show You How!**

Moderator: **Olga Flores**, RPost E-Sign, E-Security Customer Success Leader

Discussion with:

- **Tami Call**, Operations Support Analyst, for C.T Lowndes & Company
- **Chad Stachowicz**, Sr. Director, Finance Operations, Intelepeer.com
- **Alana Boehm**, RMail and RSign specialist at RPost

- **Room 4: The 10 Most Common E-Sign Questions (in German)**

Moderator: **Lea Charlotte Ibal**, E-Sign E-Security Expert, Frama Communications (Germany)

Discussion with: **Jana Kaufmann**, E-Sign Specialist, Frama Communications (Germany) and **Michael Erzhöfer**, E-Sign Specialist, Frama Germany.

- Part 1: The 10 most common e-sign questions. All you ever wanted to know about e-signatures to help your digitization efforts (20 minutes)
- Part 2: SMART digitalization. For those who are looking to understand the art of the possible with e-signatures and e-security automation. (20 minutes)

- **Room 5: “In-the-Moment” User Sensitization to E-security Issues (in Danish)**

Moderator: **Johan Seidenfaden**, E-Security Specialist and Journalist (Denmark)

Discussion with: **Allan Frank** (Government data protection specialist): IT-sikkerhedsspecialist & cand.jur ICT-Security specialist & Master of Laws LLM, hos Datatilsynet DK.

- Part 1: SMARTER ways to deploy e-security. “In-the-moment” user sensitization to e-security issues, automated; thinking about the human factor (20 minutes)
- Part 2: SMARTER ways to deploy e-security in the health sector. Securing personal data with automated email encryption with great user experiences from Outlook, Gmail, or automated sending systems. (20 minutes)

## Breakout Sessions – Track 2

### 12:30pm ET: Breakout Sessions Track 2 (5:30pm UK/6:30pm CET)

#### 8. **Industry Expert Insights** (45 minutes – simultaneous virtual breakout rooms)

Learn what industry technology experts call their “Top Choice” e-sign and e-security innovations, and see why these are the new “essentials” of tech for today’s SMART businesses.

- **Room 1: Insurance Tech Expert Insights with Steve Anderson**

Moderator: **Jake Finnell**, RPost Vice President Business

Discussion with:

- **Steve Anderson**, Insurance Tech Expert (a/k/a Insurance Tech Guru)
- **Rebecca Shigley**, COO, Independent Insurance Agents Association of North Carolina

- **Room 2: Law Practice Technology Experts (Florida Bar CLE Credits)**

Moderator: **Zafar Khan**, RPost CEO

Discussion with:

- **Jonathan Israel**, Director, LegalFuel: The Practice Resource Center of The Florida Bar
- **Peggy Gruenke**, Founder & Co-Owner, CPN Legal
- **Liz Trincone**, Client Advisor, ZolaSuite Law Practice Platform

- **Room 3: Contract Cloud**

Moderator: **Alex Khan**, RPost Vice President Products

Discussion with:

- **Harry Angel**, Symfact CLM platform Director, Symfact

- **Room 4: Self Storage / Property Management with the Legal Gurus**

Moderator: **Mike Rooney**, RPost Director Enterprise

Discussion with:

- **Carlos Kaslow**, Partner, Self-Storage Legal Network, LLC
- **Scott I. Zucker**, Partner, Weissmann Zucker Euster Morochnik Garber, P.C.

- **Room 5: Real Estate Title Insurance – What Wire Fraud?**

Moderator: **Nick Villacarlos**, RPost E-Security FinTech/Real Estate Specialist

Discussion with:

- **Kimberly Stinson**, Florida Coastal Closing & Escrow
- **ResWare Title Insurance Management Platform**

## 1:15pm ET: Breakout Sessions Track 3 (6:15pm UK/7:15pm CET)

9. **What Your Peers Use That's Cool & SMART** (30 minutes – simultaneous virtual breakout rooms)

*Learn what your peers are using, how they're using it, and why it's simply SMARTech. Enjoy their generous insights on how they have simplified e-security and optimized e-sign in business operations similar to yours.*

- **Room 1: Insights from Your Insurance & Finance Peers**

Moderator: **Zafar Khan**, RPost CEO

Discussion with:

- **Michael F Noone**, Vice President, Agency Operations Kaplansky Insurance
- **Erin Beals**, Operations Manager, Andres O'Neil & Lowe Agency
- **David Chudyk**, Principal Agent, Chudyk Financial Services

- **Room 2: Top 10 E-Sign Wish it Could Questions (and How it Can)**

Presenter: **Alex Khan**, RPost Vice President Products

- **Room 3: Document Management Integrations**

Moderator: **Hannah Wells**, RPost E-Sign E-Security Customer Success Specialist

Discussion with:

- Review of RMail & cleanDocs
- Review of RSign & iManage

- **Room 4: E-Sign & E-Security Innovation in Salesforce.com**

Moderator: **Mike Rooney**, RPost Director Enterprise

Discussion with:

- **Daiana Vaisman**, RPost Professional Services

- **Room 5: E-Dist: Making E-Sign, E-Security Better for MSPs in Legal and Health Care**  
Moderator: **Jake Finnell, RPost Vice President Business**

Discussion with:

- **Mike Whalen, Executive Vice President, eDist Business, LLC.** *The world's largest provider of specialized AI productivity, e-sign and e-security to the health care and legal sectors, working with specialized MSPs.*

## Main Stage Closing Remarks

**10:45am PT / 1:45pm ET / 6:45pm UK / 7:45pm CET**

**10:45am PT / 1:45pm ET / 6:45pm UK / 7:45pm CET: Time to Upgrade**

10. **Time to Upgrade: The NEW AI-Infused RMail for Outlook Office 365** (15 minutes)

*RPost's most popular all-in-one interface, RMail makes Microsoft better for business. Better encryption, unique Registered Email™ track and prove, one-click e-signatures, file share, and much more.*

**Speaker:** Alex Khan, RPost VP Global Services

**11am PT / 2pm ET / 7pm UK / 8pm CET: Operational Elegance**

11. **In Pursuit of Operational Elegance** (15 minutes)

*What we hear, why customers of all sizes and types, in all geographies switch to RMail and RSign. Stories from the field.*

**Speaker:** Zafar Khan, RPost CEO

**11:15am PT / 2:15pm ET / 7:15pm UK / 8:15pm CET: Meet the Experts, Humanized & Live**

12. **Meet Your Favorite Experts, Humanized & Live: Preview of (BYOB) Receptions** (5 minutes)

**11:30am PT / 2:30pm ET / 7:30pm UK / 8:30pm CET**

**Virtual (BYOB) Reception Live** (30 minutes)

13. **Virtual (BYOB) Reception**

*For those ending their day, join our country hosts for a BYOB toast and **giveaways**.*

- **Room 1: Cajun Room with Insurance Tech Experts**
  - *Hosted by RPost's Nick and Jared*
- **Room 2: Silicon Beach, E-Security Experts**
  - *Hosted by Ted, Jon and Robert*
- **Room 3: Mars, E-Sign Experts**
  - *Hosted by Olga, Hannah, and Mike*

**12pm PT / 3pm ET – Conference Ends**

## Pre-Conference European Country Sessions

### 3pm CET European Country Session Special Welcome (June 17)

#### 1a. Welcome to *OPTIMIZE! 2021* (5 minutes)

**Main Stage Welcome** (in English with comments in German and Danish)

What does **SMART-as-a-Service** mean? In short, it is all about pairing smarter ways to use the technologies that you have (or finding smarter technologies that are evolving) with the needs to humanize e-security and digitize business processes more intelligently.

**Speaker:** Zafar Khan, RPost CEO

#### 2a. European Country Breakout Sessions (45 minutes)

##### Track 1: Room 4 Opens – **SMART** E-Signatures (Session in German)

- **Moderator:** *Lea Charlotte Ibalde, E-Sign E-Security Expert, Frama Communications (Germany)*
- **Discussion:**
  - *Jana Kaufmann, E-Sign Specialist, Frama Communications (Germany)*
  - *Michael Erzhöfer, E-Sign Specialist, Frama Germany*
- **Part 1: The 10 most common e-sign questions.** All you ever wanted to know about e-signatures to help your digitization efforts (25 minutes)
- **Part 2: SMART digitalization.** For those who are looking to understand the art of the possible with e-signatures and e-security automation. (20 minutes)

##### Track 1: Room 5 Opens - **SMART** E-Security (Session in Danish)

- **Moderator:** *Johan Seidenfaden, E-Security Specialist and Journalist (Denmark)*
- **Discussion:**
  - *Allan Frank (Government data protection specialist): IT-sikkerhedsspecialist & cand.jur ICT-Security specialist & Master of Laws LLM, hos Datatilsynet DK.*
- **Part 1: SMARTER ways to deploy e-security.** “In-the-moment” user sensitization to e-security issues, automated; thinking about securing the human factor (20 minutes)
- **Part 2: SMARTER ways to deploy e-security in the health sector.** Securing personal data with automated email encryption with great user experiences from Outlook, Gmail, or automated sending systems. (20 minutes)