



eSignRecords2018

Tuesday, November 13, 2018

6:00PM | **Networking Reception** (Sponsored by Adobe)

Wednesday, November 14, 2018

7:30 AM | **Registration and Networking Breakfast**

8:30 AM | **Opening Remarks**
Brian Webster | Wells Fargo

8:45 AM | **Chairman Remarks**
Harry Gardner | Docutech

9:15 AM | **Keynote: How to Make Digital Transformation a Reality** (Sponsored by Wells Fargo)
Jim Lundy | Aragon Research

10:00 AM | **Networking Break in the Exhibit Hall**

10:15 AM | **Legal Year in Review**
Margo Tank | DLA Piper
David Whitaker | DLA Piper

10:45 AM | **Beyond Signatures: Embracing High Velocity Contract Acceptance**
Thanks to companies like Amazon and Uber, consumers have come to expect everything on demand...a sentiment that has also made its way to the B2B world. In order to keep up, businesses must continually re-examine how to minimize friction and maintain speed...including with respect to how contract acceptance is handled. In this presentation, we'll discuss the legal basis for various methods of seamless and high velocity contract acceptance, and share case study examples of business that have successfully deployed this strategy.
Brian Powers | PactSafe

11:15 AM | **Not So Fast: Challenges for Blockchain in Highly Regulated Environments**
The panelists will share their respective experience in driving adoption of eMortgages in the US and Australia. The discussions will include regulatory landscape, the loan origination opportunity, eWarehouse (warehouse lending), challenges and keys to success. It will also look to the path forward and future opportunities post digitization.
Stephen Bisbee | eOriginal, Inc.
Margo Tank | DLA Piper
Andrew Gastwirth | DLA Piper

11:45 AM | **Roundtable Lunch**

1:00 PM | **2018 Mid-Term Election Review and What it Means to Technology**
As the first midterms under President Donald Trump, the elections will be held Tuesday, November 6th. All 435 seats in the United States Congress are up for grabs, and Democrats are defending more than two dozen Senate seats, including 10 in states President Donald Trump won in 2016. Republicans have just eight Senate seats up for re-

election. This election is keenly focused on the House and Senate balance of power. If Democrats end up flipping flip one or both chambers of Congress, they could impact the Trump and the Republicans' legislative agenda, but if Republicans hold control, it could mean sweeping policy changes. Meanwhile, there are dozens of governors' mansions and statehouses around the country up for grabs.

Politics and what the 2018 elections mean to business and technology innovation are overwhelming, and we continue to see a shift of activity from the federal government to states. This speaker would weave the threads of politics and industry by providing a midterm review and looking into the crystal ball of what it means for government activity into 2019 and the second half of President Trump's first term.

Kelsey Wiseman | The Cypress Group

1:30 PM | **Quick Demos - Three 8-minute Live Product Demonstrations**

2:00 PM | **Intro to ESRA Standards**

Because eSigned documents are increasingly relied upon by third parties, ESRA has been working on a standard that will allow third parties to rely on the e-signed documents from other parties. Bill Brice explains ESRA's standards approach, what this standard will mean for the market and how you can participate in the process.

Bill Brice | AlphaTrust

2:30 PM | **Networking Break in the Exhibit Hall**

2:45 PM | **Notarization in the Digital Age: The Evolution of Remote Online Notarization**

Notarization is experiencing a renaissance and is quickly evolving in the age of digital. Big industries such as mortgage, finance and construction are discovering the benefits of this newly modernized practice of notarization. But the introduction of remote online notarization hasn't been adopted by all and has left many confused as to where remote online fits in with their business model.

In this panel involving remote vendors and business leaders (mortgage and other), ESRA attendees will get an insight into the evolution of remote online notarization, discuss major legislative updates and trends, walk through the various use cases including challenges to implementation and adoption, all to help attendees understand this quickly evolving technology.

Jennifer Parker | Notarize

3:45 PM | **Mobile Driver Licenses: Are You Ready?**

The mDL is a secure, connected, legal, mobile version of a physical driver license rendered on a smartphone. The mDL incorporates various visible and invisible security features and is dynamically linked to the DMV's official driver license System of Record. The mDL leverages the ubiquity of mobile devices, and when combined with its "connected" nature, creates a new generation of driver license that can be updated and authenticated securely in real-time. The mDL is designed to be used in place of the traditional physical driver license in a variety of use cases including identity proofing and age verification. The presentation will examine and demonstrate certain features of the mDL, discuss interoperability, and update Iowa's status as it moves forward with becoming the first state in the U.S. to make the mDL available to all of its residents (coming early 2019).

Rob Mikell | IDEMIA

Mark Lowe | Iowa DOT

4:30 PM | **Wrap-up**

Brian Webster | Wells Fargo

5:00 PM | **Networking Reception (Sponsored by DocuSign)**

Thursday, November 15, 2018

8:00 AM **Registration and Networking Breakfast**

9:00 AM **The Next Era of Privacy in the new Era of GDPR and CA AB 375**

Cambridge Analytica's (mis)use of Facebook data appears to have been the last straw for an increasingly frustrated public. Data privacy regulation is now changing – rapidly. What do those who receive, store and use consumer data (in other words, everyone in the room) need to know about what's happening? This panel will address the following:

- 1. What every provider needs to know about where Privacy (cybersecurity and data privacy) is going post GDPR and AB 375*
- 2. How the national and state-level conversations interact (or fail to interact) and where we think regulation is heading at the federal level and state level. (i.e. where will most of the action be in the coming few years?)*
- 3. How are companies thinking through the intersection between the new paradigm of Privacy (highly regulatory focused with express limitations on use and extensive consumer control) over the prior paradigm which has governed in the past in the US (which is focused on disclosure and consent less than on regulation).*
- 4. How does this effect investment and growth for companies which receive large amounts of consumer data and for which use of that data is a legitimate and longstanding part of their business model?*

Ian O'Neill | Brownstein Hyatt Farber Schreck, LLP

Michael Chodos | Notarize

Gary Weingarden | Quicken Loans

Nicole Ehrbar | Quicken Loans

9:45 AM **Digital Workflow Case Study: How Instacart Sped Revenue Growth by Revolutionizing Contractor Onboarding**

Digital transformation does not occur within a vacuum and often external customers feel the impacts of change - be they negative or positive. Customers can act as the "catalysts" that help digital transformation to be more rapidly adopted and accepted within the organization. Co-creating solutions with suppliers, customers and partners delivers faster and better digital transformation outcomes for both parties.

Join HelloSign COO Whitney Bouck as she discusses how HelloSign put this philosophy to work with their customer Instacart — an on-demand grocery delivery service and one of the country's fastest growing companies — to completely transform their hiring and onboarding experience to hire shoppers 3x faster, dramatically impacting their top line revenue growth.

Whitney Bouck | HelloSign

10:15 AM **Quick Demos - Three 8-minute Live Product Demonstrations**

10:45 AM **Networking Break in the Exhibit Hall**

11:00 AM **Whose (Phone) Line is it Anyway?**

Open discussion/panel to review the importance of layered, multi-factor authentication to protect consumers and organizations from fraud. Our goal is to educate attendees on options to effectively authenticate consumers, regardless of channel, to reduce friction and improve customer experience. Topics covered will include data quality and the hijacking techniques fraudsters are using to take over phones/communications. We will also discuss ways to leverage cross industry data to identify these trends/threats and modify fraud tools to detect and combat the evolving threats.

Allison Lemaster | Innovis Data Solutions

Dustin Lehnig |

11:30 AM **Building a Digital Accessibility Program in Your Enterprise**

General overview on ADA Compliance and Digital Accessibility

Building a digital accessibility program in your enterprise

- ADA and Digital Accessibility Policy Development and Enforcement*
- Building accessibility into the entire SDLC*
- Consultation vs. Testing - the notion of consultation every step of the way vs. testing in the end stages*
- Subject matter expertise – hiring a vendor vs. in-house experts*

- *Hiring team members with disabilities*
- *Usability testing with people with disabilities*
- *Compliance validation*
- *Complaints management*
- *Accessibility specific customer service*

Jeremiah Rogers | Wells Fargo

12:00 PM **Roundtable Lunch**

1:00 PM **#AMA (Ask Me Anything) Session**

1:45 PM **Success Story: National Branch Based E-Sign Deployment**

E-Signature is not just for remote signing. Follow the multi-year success story of a top national bank deploying their first e-signature solution. What went well, what could be improved and what is next.

John Fraser | Core

2:15 PM **Artificial Intelligence, Robots and Bots Oh My!**

Margo Tank | DLA Piper

Rena Mears | DLA Piper

2:45 PM **Networking Break in the Exhibit Hall**

3:00 PM **Quick Demos - Three 8-minute Live Product Demonstrations**

3:30 PM **Customer Onboarding 2.0: Unlocking the Full Potential of Your Front Office**

Most onboarding experiences start and end poorly. If it's a bad or cumbersome experience, it can lead to immediate abandonment. Today's digital-savvy consumer expects a fully digital experience, however with stringent compliance requirements and the rise of malware and fraud attacks, delivering a secure yet frictionless onboarding experience across channels is a huge challenge. In this session, we'll demonstrate how banks, lenders and other financial services organizations can securely onboard customers in minutes rather than days or weeks – across their branch, online and mobile channels – with the combination of identity verification, e-signature and app security solutions. Customers will appreciate the ability to engage with their financial institution anytime and anywhere, without having to use paper or visit the branch to complete the onboarding process.

Michael Laurie | OneSpan

4:00 PM **The Digital Mortgage Revolution: Five Things You Need to Know Today**

Harry Gardner | Docutech

4:45 PM **Wrap-up and Thank You**

Brian Webster | Wells Fargo