

**Richard Medina, Principal Consultant**

Richard Medina is a Principal Consultant at Doculabs, Inc. He works with Fortune 1000 clients to identify the technology solutions that will best meet their business requirements. In more than 12 years with Doculabs, Medina has developed in-depth knowledge of the content management, records management, and infrastructure market spaces, as well as knowledge of the offerings of vendors in those market spaces. He has performed numerous assessments of software products and is in frequent communication with executives representing both the corporate and vendor communities to discuss strategic developments in the technology landscape.

Medina brings deep product knowledge to his client engagements, with particular expertise in enterprise content management and records management products. He brings a strong command of the strengths and challenges of the offerings of the software providers, as well as an understanding of the dynamics of and the direction of these software markets. In his analysis of a client's specific technology requirements, Medina's recommendations take into consideration an organization's existing technology investments and how the client can leverage those investments in its future technology environments.

Medina has consulted for organizations in a wide range of industries, including the government, financial services, insurance, communications, and utility industries.

Medina is a frequent speaker at industry conferences, including AIIM, Momentum, and Call Center Demo. He is also a much-sought host and presenter for many online seminars. Medina is regularly published and quoted in leading industry publications, including InformationWeek, Transform, Call Center Magazine, and AIIM E-DOC Magazine.

B.A., Philosophy, Loyola University of Chicago

Consulting Experience

871 Accident Fund

Insurance. Insurance Provider. Consultant for an engagement of X months with this provider of workers' compensation, third-party administration, and group dividend programs to businesses. Following an engagement in which Doculabs developed an overall strategy for document management, the client sought to issue a request for proposal (RFP) to candidate ECM vendors, as the initial step in the procurement process for an ECM solution. Doculabs compiled the functional and technical requirements from the previous engagement as the basis for the client's RFP. Doculabs evaluated the RFP responses and facilitated a series of vendor presentations, and also provided recommendations for the vendor negotiations, helping to ensure that the client selected the solution and vendor that best met its requirements.

863 LA County (E-mail Management)

Government. Municipal Government Organization. Consultant for an engagement of 6 months with this large, geographically-dispersed county government organization. The client sought an enterprise-wide solution for managing its e-mail, from inception through disposition. Doculabs' consulting team identified the client's requirements for a comprehensive e-mail lifecycle management system and recommended a list of vendors, providing objective guidance to the client. Doculabs also developed a solicitation document and a county-wide deployment strategy, thereby enabling the client to streamline the procurement and deployment of its e-mail management system.

861 Progressive

Insurance. Property and Casualty Insurance Provider. Consultant for a consulting engagement of 5 months for this provider of property-casualty insurance and related services. The client's legal department sought to define a strategy for information lifecycle management (ILM) for the company and its affiliates, to address requirements for compliance, records management, and search for litigation and discovery. Doculabs assisted the client in assessing its requirements for enterprise content management (ECM) and related technology components and developed a strategy that allowed the client to leverage common processes and technological infrastructure components for delivering solutions and capabilities.

855 Allstate

Insurance. Provider of Personal Insurance Lines. Consultant for an engagement of X months with this provider of auto, property, life, and commercial insurance. The client sought to evaluate procedural changes associated with the deployment and rollout of a new document composition tool. The Doculabs consulting team worked with the client to map out its current and future processes and provided targeted recommendations to make the deployment more effective and more timely. Doculabs also recommended industry best practices that would allow the client to improve the efficiency and effectiveness of its document composition process.

854 Guggenheim

Financial Services. Global Diversified Financial Services Firm. Consultant for an engagement of 1 month for a firm providing capital markets, portfolio and risk management, and investment advisory and family office services. The client sought to implement a document management system for fixed content, to improve document access, storage, controls, and retrieval for its legal and accounting departments. Doculabs determined the client's requirements for content management, and developed a short list of candidate solutions that met the client's requirements, providing objective analysis of the client's needs. Doculabs also developed an RFP and participated in formal presentations with three vendor finalists, assisting the client by shortening the vendor selection process.

852 Securian

Financial Services. Global Institutional Asset Management Firm. Consultant for an engagement of 3 months with this global leader in multi-manager investing. Doculabs assisted the firm's Investment Management and Research Group in validating its proposed architecture for a knowledge-worker environment, centering on a web-based portal and also providing content management functionality. Doculabs assessed the business requirements for the envisioned portal and recommended a conceptual design, providing objective guidance to the client's internal team and shortening the time to market for the envisioned future state.

851 Northwestern Mutual

Financial Services. Provider of Insurance and Financial Services. Consultant for an engagement of X months for a large Midwest provider of insurance and financial services. The client sought to develop a strategy for content management within its legal department and law library, aligning the strategy with the organization's enterprise strategy and technology standards where possible, but also addressing the unique requirements of the legal department and law library. Doculabs reviewed the current strategy and identified the gaps in the law library's ECM approach. Doculabs then recommended several technology options to address these gaps and requirements, allowing the legal department to weigh the pros, cons, and tradeoffs, and to leverage existing technology moving forward, while also ensuring its requirements would be met.

849 LA County Assessor

Government. Office of the Assessor, Municipal Government Organization. Consultant for an engagement of 8 months for this large county assessor's office. The Doculabs consulting team provided tactical analysis toward the development of system requirements and an RFP to assist the client in selecting and procuring an enterprise content management (ECM) solution to replace its existing real property assessment system. The selected system will allow automation of the end-to-end business processes of the Office of the Assessor and interface with the systems and processes of other County departments. Doculabs' services provided objective guidance and enabled the client to shorten the system selection and procurement processes.

849 LAC DHS

Government. Municipal Government Organization. Consultant for an engagement of 8 months. The Department of Health Services of a large county sought to define its requirements for an electronic document management system (EDMS) that will meet the near- and long-term needs of its finance and administrative operations. Doculabs provided objective guidance, assisting the client in determining which EDMS components would best meet the client's needs and best fit its technology environment, while also complying with county IT standards. Doculabs' services enabled the client to shorten the procurement process, while also ensuring the selected components would meet its business needs.

845 CIGNA

Insurance and Financial Services. Insurance and Financial Services Firm. Consultant for two engagements with this large investor-owned employee benefits organization. The client was pursuing several business initiatives that would change its use of documents and content in its service channels, as well as other initiatives to improve compliance and reduce the costs of document communications. Doculabs worked with the client to assess its current state for ECM (including a high-level review of print suppression and records management/archival needs). Doculabs then defined a future-state architecture for ECM for the client and developed a deployment strategy for moving ahead with ECM.

841 Northwestern Mutual

Financial Services. Provider of insurance and financial services. Consultant for an engagement of X months for a large Midwest provider of insurance and financial services. The client sought to deploy a software solution for document capture and optical character recognition (OCR) in its life insurance underwriting division. Doculabs provided an outside checkpoint to ensure that the client obtained maximal the value from the deployment, helping the client identify and mitigate any risks associated with implementation, business continuity and change management and helping the client leverage industry best practices for document capture and OCR.

840 International Monetary Fund

Government. International Organization. Consultant for an engagement of 6 months with an international organization that promotes international monetary cooperation and economic growth. The client sought to create a technology environment that would allow staff to work more effectively and efficiently, facilitating information-sharing in a highly collaborative work environment. Doculabs assisted the client in developing an enterprise strategy for enterprise content management (ECM) – a strategy that would enable a consolidated approach toward the management of content. Specifically, Doculabs assisted the client in requirements analysis and provided procurement support toward the selection of an ECM suite. Doculabs then worked with the client to develop a strategy for moving forward with implementation of the ECM suite. This approach is expected to ease systems integration and maintenance, providing cost savings and also allowing staff throughout the organization to manage and share content, improving the efficiencies of collaborative processes across the enterprise.

829 Accident Fund

Insurance. Insurance Provider. Consultant for an engagement of 3 months with this provider of workers' compensation, third-party administration, and group dividend programs to businesses. The client sought assistance in evaluating its current state for document management, and in defining requirements and a comprehensive strategy for document management, encompassing areas of enterprise content management (ECM) including document capture, indexing, storage and retrieval, and retention. The strategy helped the client improve operational efficiency, provide better support for remote access to content, and reduce risk.

825 American Express

Financial Services. Financial Services. Global Travel, Financial, and Network Services Provider.

Consultant for an engagement of X months. Doculabs assisted the client in reviewing its technology for outbound customer correspondence, validating its technology environment and providing recommendations for document composition technology approaches. Doculabs helped the client understand the components it would require for a scalable, high-performance solution – one that provides the flexibility for traditional print composition as well as e-mail composition and distribution.

817 SEI Investments

Financial Services. Asset Management and Financial Advisory Firm. Consultant for an engagement of 4 months with this global provider of asset management and investment technology solutions. The client had undertaken an initiative to integrate its major systems under a common platform, to provide a unified, web-based application suite to support advisors, investors, and administrators. The document management component of this application suite was found to be unsatisfactory. The client sought to validate its document management requirements and to validate its decision between two finalist vendors. Doculabs validated the client's requirements, conducted a gap analysis of those requirements, developed a deployment strategy, and performed an analysis and comparison of the two vendor candidates, providing the client objective guidance toward the replacement of the document management component.

811 Community Health Network of CT

Healthcare Service Provider. Not-for-Profit Managed Care Organization. Consultant for an engagement of 3 months for this managed care organization that provides statewide healthcare services for state programs in a state in the Northeast. The client was considering the use of enterprise content management (ECM) technology, particularly for managing inbound documents as well as internal documents, as part of its goals of improving operational efficiency and reducing costs. The Doculabs team analyzed the organization's current state and made best practices recommendations for the use of ECM technology to improve document-intensive processes. They also developed a conceptual design for the future-state solution, compared a number of potential software solutions, and developed a business case for the recommended future state.

801, 787 Bay Area Air Quality Management District

Government. State Government Agency. Consultant for an engagement of X months for a regional state agency responsible for air quality. The agency's technology environment included legacy systems that were difficult to maintain and customize. It sought to standardize its technology for enterprise content management (ECM) and business process management (BPM), thereby improving document control and distribution and streamlining key processes. Doculabs assessed the current state, defined the requirements for the agency's future state, and defined a high-level conceptual design for the envisioned ECM and BPM environment. Finally, Doculabs also recommended a short list of vendors for the agency's proof-of-concept evaluation process, and facilitated the evaluation of two vendors' proof-of-concept implementations.

778 Church Pension Group

Non-profit Financial Services. Financial Services Organization. Consultant for an engagement of X months for a non-profit organization providing retirement benefit plans, insurance, and investment services to clergy of a Protestant church. The client sought to update the software used for producing documents associated with its insurance products, in order to more efficiently meet industry requirements for selling its insurance products in all 50 states. Doculabs assisted the client in evaluating and selecting a set of document authoring and composition tools capable of managing the differing state license requirements for policies, statements, and other documentation associated with its insurance products. Doculabs also helped the client develop an understanding of best practices and a strategy for rolling out these tools, and how to integrate them with the newly implemented ECM solution.

776 Ubisoft

Entertainment Product Provider. Global Publisher and Distributor of Interactive Entertainment Products. Consultant for an engagement of 4 months with this leading international developer, publisher, and distributor of video games and other interactive entertainment products. The company's U.S. marketing organization sought to deploy a system that would enable employees to easily access, share, and retrieve digital assets such as sound, video, graphics, and image files, as well as unstructured data. Doculabs assisted the client in selecting a digital asset management solution capable of supporting the requirements of its U.S. sales and marketing operations which could also integrate with its other content and operational projects and could scale to address other application areas in the future.

774 Frank Russell Company

Financial Services. Global Institutional Asset Management Firm. Consultant for an engagement of 6 months with this global leader in multi-manager investing. Doculabs assisted the firm's Investment Management and Research Group in validating its vision and proposed architecture for a knowledge-worker environment. The environment would center upon a web-based portal as the front end, and would also provide extensive content management functionality. Doculabs assisted in assessing the business requirements that the firm sought to address with its portal and provided recommendations for the conceptual design for the envisioned future-state enterprise portal and content management environment.

768 Oneida Nation

Government. Tribal Government Organization. Consultant for an engagement of X months for the governmental body of a Native American sovereign nation. With the objective of improving operational efficiencies across its departments, the nation sought to define a strategy for enterprise content management (ECM), to address document-intensive areas such as land management, health center, and its business committee. Doculabs assessed the nation's current state, then defined the requirements to be addressed in the future state, including future areas to be addressed by ECM, and developed a conceptual design for the

future-state ECM environment. Doculabs then provided a list of products that met the nation's requirements, and assisted in preparation and review of the request for proposal (RFP), enabling the client to significantly reduce the time required to select an ECM software provider that would meet its requirements.

746 NiSource

Energy. Energy Holding Company. Consultant for an engagement of 5 months for this Fortune 500 holding company whose operating companies provide energy to approximately 4 million customers. The company's Information Services department sought to educate executive management on ECM technology, focusing on ECM's benefits and applications and best practices within the utility industry. It also sought to identify potential applications for the technology within its business units and to develop a plan that the organization can use to move toward a phased implementation of ECM. Doculabs conducted a series of ECM workshops, developed a series of ECM application scenarios, and presented a high-level roadmap for ECM that would allow the company to leverage its existing technology investments and make incremental investments to add further functionality.

724-741 Roche

Pharmaceutical. Global Pharmaceuticals Manufacturer. Consultant for two engagements of X months with a research site for a global pharmaceuticals manufacturer. The client had begun a project to develop its strategy for electronic records management (ERM). It sought a sound technology strategy to facilitate the policy-based management of electronic records, including office documents, computational data sets, collaborative discussion threads, and e-mail. In the initial engagement, Doculabs' consulting team assessed the client's current state and need for ERM, and determined the requirements for the desired future state for Roche, and provided general guidance and direction for moving forward with ERM. In a second engagement, Doculabs developed a conceptual design and a phased deployment plan for implementing an ERM solution.

734 Qwest Communications

Communications Services. Communications Services Provider. Consultant for an engagement of 9 months with this leading provider of high-speed Internet, data, video and voice services. The client sought to deploy content management technology to address records and information management issues. Doculabs' consulting team provided strategic analysis and recommendations, assisting the organization in identifying the technologies required to meet its enterprise requirements and ensuring that the selected solution would fit into the client's existing IT infrastructure and future plans for enterprise content management. The resultant solution will allow the company to ensure compliance with internal records retention policies as well as industry regulations and mandates, while also reducing storage costs and time and costs of discovery activities, and improving business productivity.

703 Auto Club Insurance Association (AAA MI)

Insurance. Regional Auto Club Association. Consultant for an engagement of 2 months for this regional provider of auto insurance products. The client was generating increasing numbers of policies, with the expectation of future increases as the result of a planned merger with two other regional associations. The client sought to automate policy production and because of challenges in scaling its existing technology environment, it wanted to investigate the use of alternative solutions or outsourced providers for policy generation. Doculabs assisted the client by assessing its current state and defining the organization's overall business needs, and formulating a Request for Proposal for outsourced policy authoring and assembly. Doculabs then reviewed the resultant proposals and developed a deployment strategy for implementing the solution.

627 Shell Information Technology, Inc.



200 West Monroe Street (T) 312.433.7793 info@doculabs.com
Suite 2050, Chicago, IL 60606 (F) 312.433.7795 www.doculabs.com

Petrochemical. Global Oil and Gas Refining, Marketing, and Distribution Organization. Consultant for an engagement of 5 months with the U.S. companies of a global oil and gas organization. the client sought to develop an enterprise records management (ERM) framework to enable employees within its U.S. companies to effectively manage, consistently classify, appropriately retain, and easily retrieve their records. Doculabs' consulting team assessed the client in defining its ERM requirements and I comparing products and solution providers that best meet those requirements. Doculabs also developed a deployment strategy and provided RFP development assistance and RFP response evaluation.