

Rethinking Records Management in the Age of AI

FROM MANAGING DOCUMENTS TO MAKING
INFORMATION WORK



SPEAKERS

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RETHINKING RECORDS IN THE AGE OF AI

From Managing Documents to Making
Information Work



DANEEN STORC

Senior Product Marketing Manager



KYLE GILLETTE

Principle Sales Engineer

MOVE FASTER

STAY COMPLIANT

MAKE CONFIDENT DECISIONS

MAKE AI WORK



THE RULES OF BUSINESS HAVE CHANGED

Today's

OUTPERFORMERS

operate by a new set of rules



DECISION VELOCITY



ADAPTABLE PROCESSES



TRUSTED DATA



AI-POWERED TEAMS

2X

revenue growth for AI leaders v. industry laggards

2-5X

better outcomes for fast-moving orgs v. slower peers

FOR MOST COMPANIES, DOCUMENTS ARE THE LIFEBLOOD OF THE BUSINESS

- WORK GETS DONE
- COMPLIANCE IS UPHELD
- IP IS CAPTURED

60%

of processes are
document-driven
McKinsey 2025



This volume has
become untenable
for the business

COMPLEXITY IS OUTPACING CONTROL

Explosive growth and complexity are

OUTPACING

human scale, manual processes & traditional document management



DISPARATE SYSTEMS ARE THE REALITY



QUESTION #1

How many systems does a typical process in your organization touch — from start to finish?

THE HIDDEN PROBLEM: OPERATIONAL FRICTION

OPERATIONAL FRICTION

**THROTTLING
PERFORMANCE
AND AI POTENTIAL**



PRODUCTIVITY SINKHOLE

Wasted effort, process costs are not sustainable

CORPORATE-WIDE DRAG

Wasted effort, process costs are not sustainable

TRAPPED VALUE

Data is inaccessible, unfindable documents, undiscovered insights

QUESTION #2

Where do you feel the most friction today?

Audits | Approvals |

Finding information | Version control

THE ROOT CAUSE ISN'T DOCUMENTS—IT'S MISSING CONTEXT



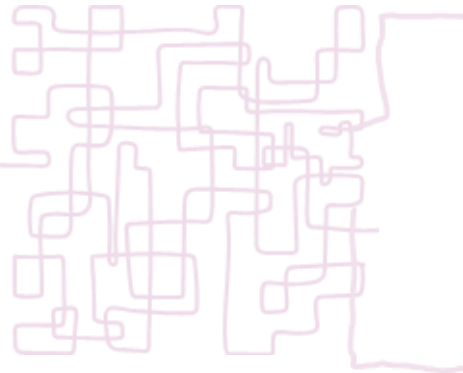
Knowledge about documents resides in **people's heads**

Documents **can't explain themselves** or the **interrelationships** around them

THE HIDDEN PROBLEM: OPERATIONAL FRICTION

OPERATIONAL FRICTION

**THROTTLING
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COMPLIANCE EXPOSURE

Missing or error-prone documents, no version control, audit nightmares

DATA FALLS SHORT

Documents and data are untrusted, and missing context, interrelationships, meaning

ESTT SLA 03-2024 DRAFT 2

⊗ OLD VERSION

VV

ESTT Service Level Agreement, March 2024

ement, March 2016

⊗ ARCHIVED

Office 365 SLA

⊗ WRONG SERVICE

AbobeSign EU SLA

What is the SLA penalty for delayed re

**Without CONTEXT,
you will never be an
AI-powered business**

AI can't recognize intent or be trusted
without surrounding human knowledge

ESTT SLA 03-2024 DRAFT

⊗ OLD VERSION

ement, March 2020

⊗ EXPIRED

Oracle DB Tools SLA

Service Level Agreement

⊗ WRONG

M-Files

DocuSign - SLA

⊗ WRONG

SLA Guidelines for Third-party Engagements

Financial compensation

⊗ SHOULD NEVER BE

QUESTION #3

Would you trust AI in a compliance or audit scenario today? Why or why not?

A NEW MODEL MAKE INFORMATION WORK

STATUS QUO: OPERATIONAL FRICTION



Static, every doc an island

Context is trapped

Manual processes

Compliance complexity

AI not creating value

Connected ecosystem

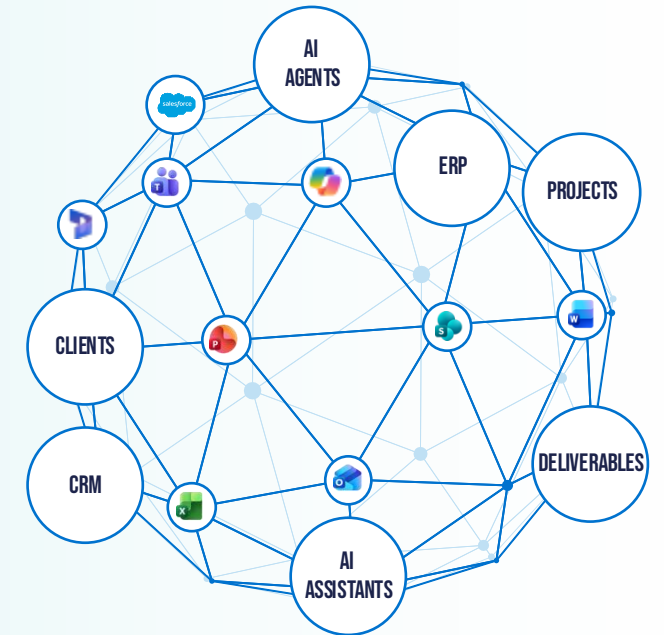
Context captured and operationalized

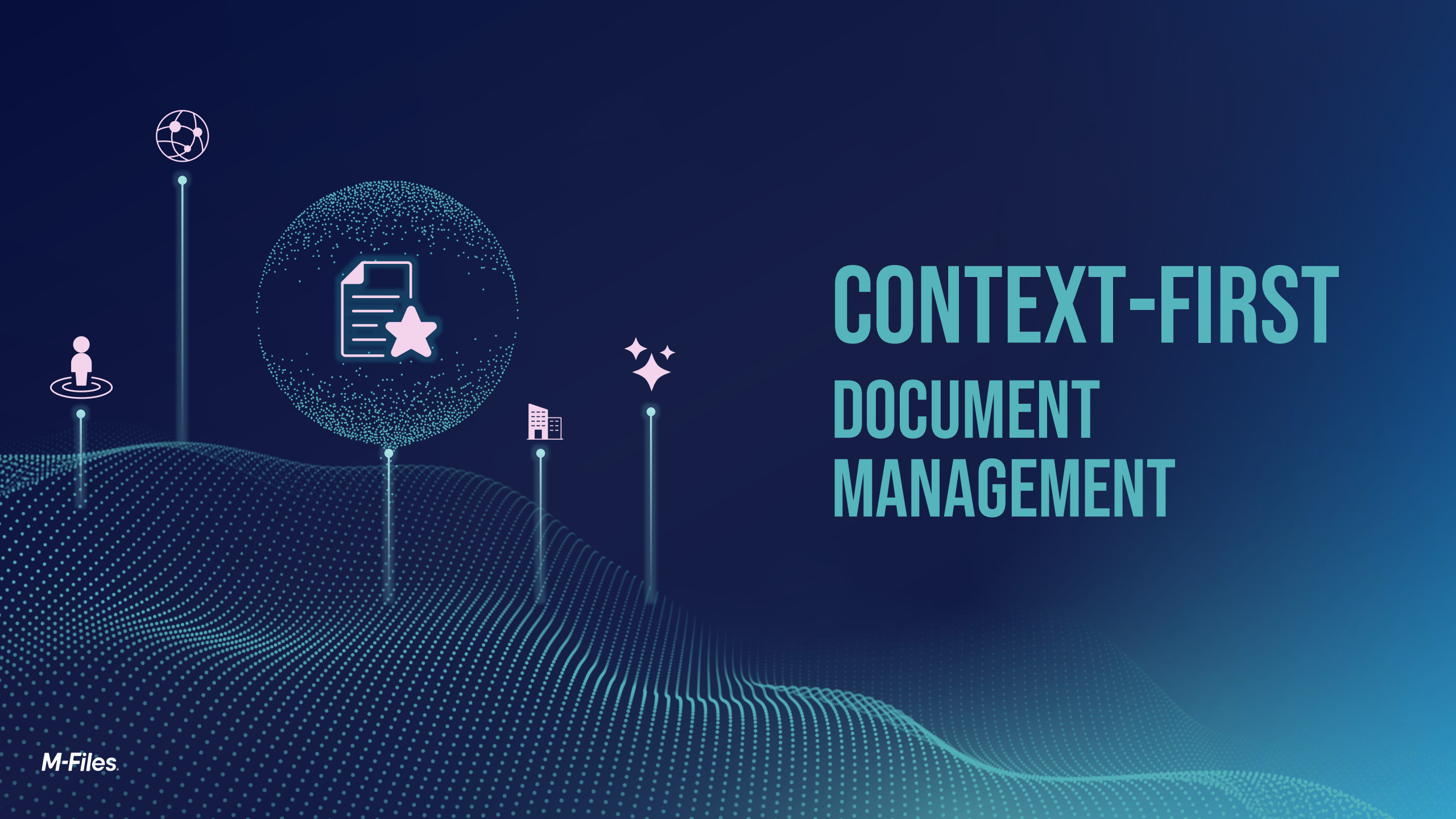
Automation

Business integrity and security

AI-powered productivity

CONTEXT-FIRST: PERFORMANCE ADVANTAGE





CONTEXT-FIRST DOCUMENT MANAGEMENT

QUESTION #4

If your information were fully trusted and connected, what would improve most?

Compliance | Decision-making |

Speed | AI adoption

THE OUTCOME: A PERFORMANCE ADVANTAGE

COMPLIANCE
PERFORMANCE

PROCESS
PERFORMANCE

AI
PERFORMANCE

Context-First
PERFORMANCE
ADVANTAGE

PEOPLE
PERFORMANCE

MARGIN
PERFORMANCE

DECISIONING
PERFORMANCE

CLOSING: THE MINDSET SHIFT



Documents are the DNA of modern business.



Documents without context are just static files.



Documents are a connected ecosystem.



Trust and governance are non-negotiable.



AI only creates value when it works with trusted documents.



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The Smarter Way to Work.



**THANK YOU
SEE US AT OUR BOOTH**