

Virtual ECM Master Preparation Workshop

- Learn why, what and how to implement Enterprise Content Management

- For people that already have both the ECM Practitioner and Specialist designations

Introduction

The AIIM Enterprise Content Management (ECM) Certificate Program is designed from global best practices among our 65,000 associate and professional members. The training program covers the strategies, tools and technologies to capture, store, manage, preserve and deliver information in support of business processes. It provides you with a framework which enables the management of information assets across an organization, and it ties in relevant components and technologies. This could be Imaging, Electronic Document Management, Electronic Records Management, Workflow, Web Content Management, Document Centric Collaboration, or Enterprise Search technologies.

AIIM is an industry association that provides education, research, and best practices to help organizations find, control, and optimize their information. For over 60 years, AIIM has been the leading non-profit organization focused on helping users to understand the challenges associated with managing documents, content, records, and business processes. Today, AIIM is international in scope, independent, implementation-focused, and, as the representative of the entire Enterprise Content Management industry - including users, suppliers, and the channel - acts as the industry's intermediary

Newly Revised and Updated

AIIM has just revised and updated the ECM Master Program based on changes in the industry with new content types, solutions, and best practices, but also incorporated comments made by the thousands of students that have taken the courses, online or in our classrooms. Students who have previously completed the ECM program should consider taking this newer version to enhance their skills and strengthen their learning from the prior course. In addition to updating their certificates and designations, attending the revised program will bring benefit from the expanded focus on available solutions (e.g. SharePoint 2007); new content types (e.g. wikis and blogs); taxonomies and folksonomies; new preferred approaches (platforms/solutions); new best practices and standards (e.g. PDF/A and MoREQ2); and best practices for implementing ECM using the open methodology MIKE2.

Course Development

The course objectives and content is defined and reviewed by AIIM Education Advisory Groups in the US and Europe, representing AIIM's more than 65,000 associate and professional members. These Education Advisory Groups have the following members:

Accenture	Fujitsu
Albistur Consulting	Gambro
Barclays Capital	Gartner
Bill and Vieve Gore School of Business, Westminster College	Gimmel Group
BP	GlaxoSmithKline
CCRM Associates	Harris Corporation
Chevron Phillips Chemical Company	Hartman Communicatie
CIA	Health First
Crown Partners	Hewlett-Packard
Doculabs	Hyland Software
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Infocore Limited
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Objective Corporation
Oracle
Ordina
Ricoh
Royal Mail Group

Shell
SpringCM
Sunoco
The National Archives of United Kingdom
The South Financial Group
US Courts
US Department of Treasury
ZyLAB

The course materials were developed in partnership with Information Architected Inc based on requirements and best practices defined by the above companies.

Course Description

The virtual ECM Master Preparation Workshop is a highly interactive online workshop that enables you to learn, share and discuss global best practices for Enterprise Content Management. It provides you with a summary of the main elements from AIIM's ECM Strategy, Practitioner and Specialist training courses in addition to additional information, exercises and case studies. This live online workshop covers why, what and how to implement ECM.

- The **ECM Strategy** component provides you with the knowledge to get ownership and support by senior executives and users
- The **ECM Practitioner** component covers tools and technologies for ECM
- The **ECM Specialist** component covers the implementation and related processes such as creating an ECM strategy, documenting your requirements, and developing a roadmap as well as design, deployment and change management.
- The **ECM Case** component allows you to discuss, share and learn global best practices for ECM.

Course Objectives:

Strategy Component: (Why ECM?)

- Introduction to ECM
- ECM technology components and functionality
- Business benefits of ECM
- Linking ECM to business strategy and KPIs
- Value of taxonomies, metadata and security model
- Market trends and options
- Departmental vs enterprise; platforms vs solutions
- Overview of preferred approaches and best practices for implementing ECM

Practitioner Component: (What is ECM?)

- Business benefits of ECM
- ECM technologies such as document management, imaging, records management, workflow, web content management and collaboration
- Preferred approaches, platforms vs solutions, enterprise vs departmental
- Information architecture, interoperability, and integration



- Sources of information and appropriate capture and migration mechanisms
- Metadata and indexing
- Types of taxonomies and their value
- Ontologies and folksonomies
- Different levels of access control and security
- Process improvements and automation
- Search and retrieval technologies
- Different ways of delivering information and content to employees, partners and customers
- Existing and emerging trends such as Web 2.0, SaaS, and Open Source.

Specialist Component: (How to implement ECM?)

- How to link the ECM initiative to business strategy and KPIs
- How to develop an ECM program charter and business case
- How to plan the implementation of ECM according to the open methodology MIKE2
- How to identify and prioritize the business requirements for ECM
- How to develop and define the technology requirements for ECM
- How to meld the technology requirements with the business requirements to finalize the ECM blueprint
- How to build an ECM roadmap and prioritize projects based on the blueprint
- How to design a taxonomy, metadata, and security model
- How to identify new roles, responsibilities, and the organizational structure necessary to provide governance and management
- How to develop, test and train
- How to deploy, operate and close-out an ECM implementation
- Global best practices for change management

Case Study Component:

- Allows the delegates to get some practical experience using their new knowledge

Course Designation

You will be awarded the AIIM ECM Master (ECM^M) designation after passing the case study exercise (as a holder of ECM Practitioner and ECM Specialist designations, there is no need to retake an online exam). This is an AIIM standard for industry professionalism and knowledge. By earning this designation, you can call yourself an AIIM ECM Master. You can use the associated logo and title on your business card, email signature, web page, etc. The case study exercises are not available via the internet and you have 3 months to submit, after attending the training course.

Benefits of becoming ECM Master (ECM^M):

- Position yourself to be tomorrow's leader by enhancing your business and professional skills
- Learn global best practices for planning and implementing ECM
- Discover real world solutions and best practices for challenges you face



- Learn from experts in the field who are able to answer your questions, address your comments, and are willing to accept your feedback.

Who should attend AIIM's ECM Master Class?

The ECM Master Preparation Workshop is only available for people that already have both the ECM Practitioner and Specialist designation, the class provides the attendee with an opportunity to learn, share and discuss best practices for Enterprise Content Management with people working in both the public and private sector. Through attendance in this program, participants will be able to consolidate their current position and standing, as well as prepare for future career development in a more senior role in the management and development of an organization's information management strategy.

The ECM Master Preparation Workshop is designed for IT Managers, Compliance Officers, Archivists, Librarians, Risk Managers, Business Managers, Records Managers, and Information Managers, as well as for solution providers, sales consultants, project managers, and technical staff.

How will I learn at AIIM's ECM Master Class?

The courses follow a proven learning model with engaging, impactful and live workshops with participative and challenging exercises. The elements of this methodology are:

- **3 Domains:** development should engage participants at three levels – emotionally (feeling – the heart); logically (thinking – the head) and practically (doing – the hand)
- **Transferability:** students should always be able to see how the skills that they are developing can be used back at their workplace
- **Memory:** the design of the event and the activities within it should be memorable
- **Measures:** participants (and their organizations) should be able to measure the impact of the intervention
- **5 Senses:** the activities within a development program should appeal to all 5 senses wherever possible, to stimulate a range of different responses
- **Reflective Dialogue:** activities are not effective unless there is a period of reflection built into a program, so that participants can reflect on their actions and plan how they would do things in future

Course Material

You will receive an ECM Workbook and access to supporting ECM online courses.

- The **ECM Strategy** component will be accompanied by a short summary of ECM.
- The **ECM Practitioner** component will be accompanied by the course notes, reference handouts which will support the course material and an abbreviated glossary.
- The **ECM Specialist** component will be accompanied by the course notes and handouts supporting the course material, including useful external resources.
- The **ECM Case** component provides you with a series of case study exercises that gives participants a feel for what is involved, the information that needs to be gathered and processed, the outcomes expected and the amount of effort likely to be involved in a real world situation.

Course Agenda (access via the internet and phone)

Day 1: Monday 1pm-2:30pm EST

- Introduction (10 min)
 - Objectives
 - Instructor



- Attendees
- Agenda
- Part 1: ECM Strategy (20 min.)
 - Definitions: ECM, Collaboration, DM, ERM, WCM, DAM, BPM, and IAT
 - ECM vs Information Management vs Knowledge Management
 - Business drivers & trends
 - How to sell to executives?
- Case study exercise: ECM Strategy (40 min.)
 - Assignment 1: Developing a strategy for ECM
 - Vision
 - Business benefits
 - Business objectives
- Recommendations and discussions (20 min)
 - Questions & Answers

Day 2: Tuesday 1pm-2:30pm EST

- Part 2: ECM as a Practice (80 min.)
 - Introduction
 - Technologies
 - Information Architecture
 - Capture
 - Metadata
 - Taxonomies
 - Security
 - Process Improvement & Automation
 - Findability
 - Delivery
 - Market Trends
- Introduction of case study assignment 2 (10min)

Day 3: Wednesday 1pm-2:30pm EST

- Case study exercise: ECM as a Practice (40 min.)
 - Assignment 2: Solution design
 - ECM Tools and Instruments
 - Regulation and Standards
 - Organizational implications
- Recommendations and discussions (40 min)
 - Questions & Answers

Day 4: Thursday 1pm-2:30pm EST

- Part 2: ECM as a Project (80 min.)
 - Business Assessment
 - Business Strategy & Blueprint
 - Technology Assessment & Blueprint
 - Governance
 - Roadmap & Project Plan
 - Foundation Activities



- Design
- Develop, Test, Train
- Deploy, Operate, Closeout
- Change Management
- Introduction of case study assignment 3 (10min)

Day 5: Friday 1pm-2:30pm EST

- Case study exercise: ECM as a Project (40 min.)
 - Assignment 3: Project initiation and foundation activities
 - Blueprint
 - Design
 - Implementation & benefits
- Recommendations and discussions (30 min)
 - Questions & Answers
- Information about Home Case Study (10 min)
- Summary & Conclusions (10 min)

Please note that this AIIM ECM Certificate Program is designed to give all participants an appreciation of global best practices of ECM. You should not expect to gain in-depth expertise in all aspect of ECM from this Program. If you need in-depth expertise you should refer to specialist courses, references or expert assistance.

Feedback

Below is feedback from previous and existing course attendees;

- “AIIM’s training programs are essential to anyone in Information Management. Without up to date training, systems and programs are set up -- but may be at risk, in the long run, if developed by the under trained. The Information Management Industry as a whole is developing at the speed of light, so even someone like myself (a 23 year veteran) needs to refresh their training and stay on top of technology and advancement in trends to understand how to apply it. AIIM’s training programs provide this education.” TK Train, CRM, ECMp, MBA, Document Control Manager, Gambro
- “Enterprise records management or content management projects are comprised of cross functional teams with various backgrounds and specialties. It is important to the success of such projects that interdisciplinary teams develop a common lexicon and understanding of key concepts as fast as possible to enable collaboration. AIIMs educational curricula serve this need quickly and excellently”, Jayne Bellyk, RIM Program Manager, Chevron Phillips Chemical Company LP
- “Kodak clearly understands the value of the AIIM ECM courses. Our sales team uses this knowledge often as we support our document imaging resellers in their sales processes.” Todd LeVeque ECMp CDIA+, Director - US Channel Sales, Document Imaging - Graphic Communications Group, Eastman Kodak Company



- "The AIIM ECM training course provides an extremely comprehensive platform related to the enterprise content management industry and the technologies that support and drive it. The materials are thorough, up-to-date and well presented. I would recommend the course to both vendors and customers of ECM solutions." John Opdycke, Vice President of Marketing, Hyland Software
- "Fujitsu chose the AIIM ECM Certificate Training Program to empower our partners with the tools and strategies to help companies world-wide achieve successful ECM implementations." Pamela Doyle, Director, Fujitsu Imaging Products Group

Summary

Training:

- Highly interactive virtual ECM Master Preparation Workshop with a maximum of 15 attendees. Attendees access the workshop via the Internet and phone (toll free number), but may also use VOIP with headphones.
- The virtual workshop runs from 1pm to 2:30pm EST every day for one week (Monday – Friday). Please note that attendees have to attend all sessions that week to get access to supporting Practitioner, Specialist, and Master materials
- Includes a case study exercise that must be answered within 3 months
- Includes English language delivery and all training materials

Go to www.aiim.org/training to learn of public courses being held in your area and their dates, and please contact training@aiim.org if you have any questions.

Contact askjekkeland@aiim.org if you are interested in becoming an AIIM Training Partner. You can then sell and deliver AIIM Training Programs leading to AIIM designations.

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Company Website _____

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Course Fees

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1. Total Amount Payable _____

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3. Check enclosed

Payment may be made by cheque in USD or GBP for the appropriate amount. Payment may also be made by check in Euros. Checks should be made payable to AIIM and mailed with a copy of this form to AIIM International for training courses in North America, and to AIIM Europe for training courses in Europe. The address can be found below. A VAT invoice will be issued to you (or the invoice address) in all cases.

Send Cheques to:

In North America: AIIM, 1100 Wayne Ave., Suite 1100, Silver Spring, MD 20910

In Europe: AIIM Europe, 8 Canalside, Lowesmoor Wharf, Worcester, WR1 2RR, UK

Complete the booking form and fax a copy to:

North America: +1 240-391-2003

Europe: +44 (0)1905 727609

Attn: AIIM Education & Training Dept.

All program tuition fees are exc. VAT and include full program materials, as well as examination fees where appropriate.

Any classroom or onsite residential fees are also exc. VAT and charged at a fixed rate per night and vary depending on venue.

Terms & Conditions

1. Liability for payment of tuition and accommodation fees arise at the time of booking. Where a cancellation in writing is made 28 days or more prior to the start of the program a refund or credit note will be issued for 75% of the course fee. After this time, liability for the full amount remains.

2. In all cases of accepted and acknowledged company purchase order payments, payment must be made in full 14 days prior to the start of the program. Where payment is not received prior to the start of the program the booking will be cancelled notwithstanding the fact that the liability of full payment still exists.

3. Delegates may be substituted until 48 working hours prior to the start of the program without further fee provided notice is given in writing.

4. Delegates requesting a transfer to a later program date may do so without incurring penalty fees provided the request is received in writing at least 28 days prior to the start date of the program originally booked and payment is made in full at the time of the transfer request. After which time, transfer requests will not be accepted notwithstanding the fact that the liability of the full payment still exists.

5. We require minimum 8 to run a classroom training course, and the course may be cancelled by AIIM if the minimum number of attendees is not met. We maximum allow 20 attendees on the first come first serve basis. Your order is therefore only valid when confirmed.

All personal data supplied will be treated as confidential and contact information will only be used by AIIM International to communicate program arrangements with delegates and to inform them of related information management programs, publications and events.