

Virtual ERM Master Preparation Workshop

- *Learn why, what and how to implement Electronic Records Management*

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

Introduction

The Electronic Records Management (ERM) Certificate Program is designed from global best practices among our 65,000 associate and professional members. It explores records management in relation to the business needs of all types of organizations both in the public and private sector, embracing all records but with a particular emphasis on electronic records.

AIIM is an 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 ERM 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 completed the ERM program previously should consider taking this newer version to enhance their skills and strengthen what they learned in the prior course. In addition to updating their certificates and designations, attending the revised program will bring benefit from the expanded focus on new content types (wikis, blogs, etc.), tighter focus on email (capture and retention), changes in the vendor landscape, new best practices and standards, and implementing ERM based on ISO/TR 15489-2.

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:

@doc
Accenture
Albistur Consulting
Barclays Capital
Bill and Vieve Gore School of Business,
Westminster College
BP
CCRM Associates
Chevron Phillips Chemical Company
CIA
Crown Partners
Doculabs
Fujitsu
Gambro
Gartner

Gimmel Group
GlaxoSmithKline
Harris Corporation
Hartman Communicatie
Health First
Hewlett-Packard
Hyland Software
IBM
Inforesight Limited
JPMorgan Chase
Kodak
Marion County Health Dept.
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 Access Sciences Corporation based on requirements and best practices defined by the above companies.

Course Description

The virtual ERM Master Preparation Workshop is a highly interactive online workshop that enables you to learn, share and discuss global best practices for Electronic Records Management. It provides you with a summary of the main elements from AIIM's ERM 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 ERM.

- The **ERM Strategy** component provides you with the knowledge to get ownership and support by senior executives and users
- The **ERM Practitioner** component covers the lifecycle of records and related concepts such as Classification Schemes, Metadata, Security, Retention and Disposal.
- The **ERM Specialist** component covers the implementation and related processes such as global best practices for ERM implementation and related processes such as Business and Systems analysis, Developing a Business Case, Business and System Requirements, Project Management, and Roll out.
- The **ERM Case** component allows you to discuss, share and learn global best practices for ERM.

Course Objectives:

Strategy Component: (Why ERM?)

- *Understand what electronic records management is*
- *Learn electronic records management principles*
- *Appreciate the importance of records*
- *Understand ERM business drivers*
- *Identify necessary roles and responsibilities for successful ERM*
- *Understand information governance*
- *Learn what activities and functionality are required for ERM*
- *Understand the concepts of ERM and how they address current information challenges*
- *Learn how to implement an ERM environment (policies, processes and people)*
- *Understand how to implement an ERM solution*
- *Gain commitment for change*

Practitioner Component: (What is ERM?)

- *Understand records management terminology and principles*
- *Understand the lifecycle of records, with focus on electronic records*
- *Consider the sources of records and appropriate capture mechanisms*
- *Learn about current metadata standards, guidelines and practices*



- *Understand the concepts of classification and different approaches depending on local business needs*
- *Understand search, retrieval and presentation*
- *Explore different levels of access control and permissions*
- *Determine retention and disposition*
- *Learn about records management technologies*
- *Understand the need for ERM governance, staff and audits*
- *Learn about electronic records storage*
- *Understand digital preservation techniques*

Specialist Component: (How to implement ERM?)

- *Identify the stakeholders of an ERM program*
- *How to carryout business and technology assessments*
- *Develop a Business Case for ERM*
- *Planning the implementation of ERM according to ISO15489-2*
- *Identify the business and system requirements of the ERM system*
- *Understand information governance*
- *Identify records management policies and procedures*
- *Learn how to design records management processes*
- *Learn how to design records technology solutions*
- *Understand model offices and pilot implementation*
- *Define and explain the project work products for ERM implementation*
- *Understand what is meant by benefits realization*
- *Learn about discovery and disclosure activities*
- *Learn how to address trans-jurisdictional records management issues*
- *Understand records management issues with email, mobile communication devices and E2.0 technologies*

Case Study Component:

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

Course Designation

You will be awarded the AIIM ERM Master (ERM^M) designation after passing the case study exercise (as a holder of ERM Practitioner and ERM 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 ERM 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 an ERM Master (ERM^M):

- *Position yourself to be tomorrow's leader by enhancing your business and professional skills*
- *Learn global best practices for planning and implementing ERM*
- *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 ERM Master Class?

The ERM Master Class provides a detailed coverage of records management in the electronic environment for people working in both in the public and private sector. Through attendance in this program, students 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 records and information management strategy.

The ERM Master Class is designed for Records and Information Management professionals, IT Managers, Business Managers, Compliance Officers, Archivists, Librarians, Risk Managers, as well as for solution integrators and providers, sales consultants, project managers, and technical staff.

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

The workshop 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 the future

Course Material

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

- The **ERM Strategy** component will be accompanied by a short reference handout on key standards and guidance documents relevant to ERM from North America, Europe and Australasia. Each such document will be briefly described, together with its status and (where relevant) its relationship to other documents. If possible, the relationships will be shown graphically.
- The **ERM Practitioner** component will be accompanied by the course notes, reference handouts which will support the course material and an abbreviated glossary. It will also include a list of useful references (such as URLs for software certification scheme websites).
- The **ERM Specialist** component will be accompanied by the course notes and handouts supporting the course material, including useful external resources.
- The **ERM 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: ERM Strategy (20 min.)
 - Definitions
 - Business drivers & trends
 - How to sell to executives?
- Case study exercise: ERM Strategy (40 min.)
 - Assignment 1: Developing a strategy for ERM
 - Identify key stakeholders for the ERM programme
 - Identify the recommended scope for the ERM programme
 - Describe the purpose of conducting a formal programme assessment
- Recommendations and discussions (20 min)
 - Questions & Answers

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

- Part 2: ERM as a Practice (80 min.)
 - Creating and capturing records
 - Metadata
 - Classification
 - Search, retrieval, and presentation
 - Controls and security
 - Retention and disposition
 - Technologies such as SharePoint, ECM and ERM for managing electronic records
 - Electronic records storage
 - Digital Preservation
- Introduction of case study assignment 2 (10min)

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

- Case study exercise: ERM as a Practice (40 min.)
 - Assignment 2: Solution design
 - Identify the information to be gathered from an information inventory
 - Identify the information to be gathered from the technology assessment
 - Identify the technology-related requirements for an ERM system
- Recommendations and discussions (40 min)
 - Questions & Answers (10 min)

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

- Part 2: ERM as a Project (80 min.)
 - Preliminary Investigation
 - Business Analysis
 - Business Case
 - Requirements
 - Governance
 - Designing the Records System
 - Implementation



- Post-Implementation
- Discovery and Disclosure
- Enterprise ERM
- Emerging Issues in ERM
- Introduction of case study assignment 3 (10min)

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

- Case study exercise: ERM as a Project (40 min.)
 - Assignment 3: Implementing ERM
 - Identify the impact of the ERM programme on IT infrastructure
 - Prepare an outline project plan for updating the records retention schedule
 - Prepare a change management plan
- Recommendations and discussions (30 min)
 - Questions & Answers
- Information about Home Case Study (10 min)
- Summary & Conclusions (10 min)

Please note that this AIIM ERM Certificate Program is designed to give all participants an appreciation of global best practices of ERM. You should not expect to gain in-depth expertise in all aspect of ERM 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;

- "The class was truly the best training class I have ever taken!", Attendee from Chicago, IL
- "I have been working towards my Project Management Professional certification and I see the AIIM Master programs as being just as vital to our industry as the PMP are to project management now." Attendee from Jacksonville, FL □□
- "I see AIIM as a leading resource of knowledge in the industry of electronic records and ways to manage them. It will continue to be a source I turn to for future educational opportunities and growth." Attendee from Tumwater, WA
- "The AIIM certificate programs can help any individual in any circumstance within their organization." Attendee from Calgary, Canada
- "Excellent balance of instruction, debate and workshops. Suitable for organizations at all stages of development." Attendee from London, UK
- "I was impressed with the delivery, professionalism and the structure of the training." Attendee from George Town, Cayman Islands
- "AIIM's training programs provide up-to-date, real-world knowledge that can be put to practical use immediately." Attendee from Alexandria, VA
- "The programs contain an ideal blend of theory and practice." Attendee from Charlotte, NC
- "I would recommend this course to both vendors and customers of ECM solutions." Attendee from Cleveland, OH
- "The AIIM education programs provide great content and practical knowledge you can put to use immediately." Attendee from Chicago, IL



- "I would like to take the opportunity to thank all at AIIM for delivering an excellent course from which I have learnt an enormous amount of invaluable information." Attendee from Reading, UK

Summary

Training:

- Highly interactive virtual ERM 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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AIIM Professional Development Courses BOOKING FORM

Course Code _____ Course Name _____

Online or Classroom date and location _____

Prefix _____ First Name _____

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Job Title _____

Company Name _____

Mailing Address _____

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Company Website _____

Invoice Address (if different from above)

Course Fees

I am an AIIM Professional Member

1. Total Amount Payable _____

2. Credit Card Payment: Visa MasterCard American Express

Card No. _____

Name on Card _____

Expiration Date _____

Signature _____

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.