

## **AIIM Email Management (EMM) Practitioner Certificate program** *- Learn concepts and technologies for managing your corporate email*

### **Introduction**

Email is arguably the single largest source of information creation for most organizations. Yet for the majority of them, email is managed poorly – if at all. In order to ensure that email is managed for regulatory compliance, operational efficiency, and strategic advantage, businesses and public-sector groups alike must take better control of their email policies, processes, and technologies.

The AIIM Education Advisory Groups helped AIIM develop this new training program focusing on how to effectively manage email through all phases of the information lifecycle. The course objectives and content were defined and reviewed by the subject matter experts in our Education Advisory Groups, and the course materials were based on this developed by Access Sciences Corporation.

### **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 50,000 members. These Education Advisory Groups have the following members:

Accenture	Marion County Health Department
BearingPoint	Microsoft
Canon	Oracle
CCRM Associates	Ricoh
CMS Watch	Royal Mail
Crown Partners	Serco
EMC	Standard Chartered Bank
Fujitsu	The National Archives of UK
Gartner	TOWER Software
Gimmel Group	US Courts
GlaxoSmithKline	US Department of Treasury
Harris Corporation	Westminster College
JPMorgan Chase	ZyLAB

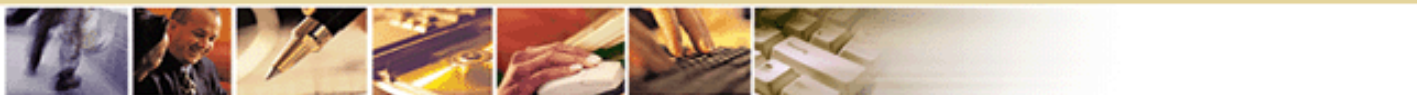
### **Course Description**

#### **The Email Management Practitioner program (What is email management?)**

(2 day training course or 10 online modules)

The Email Practitioner Training Course covers the concepts and technologies of Email Management:

- How email works
- What email management is
- Managing the inbox
- Email messaging applications and clients
- Remote and mobile email access
- Capturing and managing messages, attachments, and metadata
- Email classification including autoclassification
- Effective email governance



- Email security
- Email management tools and technologies
- Email archival approaches
- Email and ECM

### Course Designation

You will be awarded the AIIM Email Management (EMM) Practitioner (EMM<sup>P</sup>) designation after passing the online exam. This is a new AIIM standard for industry professionalism and knowledge. By earning this designation, you can call yourself an AIIM EMM Practitioner. You can use the associated logo and title on your business card, email signature, web page, etc. The exam is available via the Internet and you must pass this within 3 months of attending the training course.

### Who should attend?

The Email Management training programs are designed for Business Managers, IT Managers, Compliance Officers, Archivists, Librarians, Risk Managers, Records Managers, etc, as well as for solution providers, sales consultants, project managers, and technical staff.

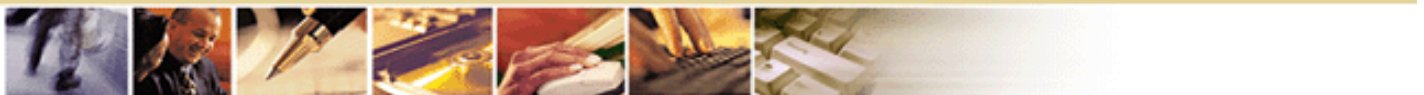
### Audiences

- Regulatory (audit, CPA, financial, governmental)
- IT Management
- Technical staff
- Record Management personnel
- Business Unit (line staff & management)
- Implementation team-IT and business
- Suppliers/Solution Providers/Vendors
- Executives
- Change agents
- Users

### Course Material

You will receive an Email Management (EMM) Workbook and access to supporting EMM online courses and exam. This will include references to authoritative publications and web resources:

- List of applicable standards and guidelines
- List of published books and templates
- List of email solutions providers
- List of blogs, wikis, feeds relating to email management
- List of court cases where email was a significant issue
- Sample email management policy
- Sample decision tree for determining whether an email is a record
- Sample checklist for responding to request for discovery of email
- Sample verbiage for email privacy/usage statement for messages
- Glossary of email management terms and acronyms



## Course Agenda

### Email Management Practitioner

#### EMMP-1 – Introduction to email

- Introduction to email management
- Terminology
- How email works generally
- Basic principles for email management

#### EMMP-2 – Inside the inbox

- Tour of the email client
- Email information objects
- Email folders
- Managing the inbox

#### EMMP-3 – Architecture

- Main messaging applications
- Mail messaging clients
- Plug-ins
- Remote and mobile email access

#### EMMP-4 – The Capture Process

- Identifying which messages to capture
- Capturing messages
- Capturing metadata and attachments
- Capture and records management

#### EMMP-5 – Classification

- Introduction to classification
- Classification approaches
- Classification structures
- Automatic classification technologies
- Issues and strategies for automatic classification

#### EMMP-6 – Governance

- The email governance framework
- Email policies and processes
- Email roles and tools
- Email standards and audits

#### EMMP-7 – Security

- Email-borne threats
- The email security model
- Digital signatures and encryption
- Content and attachment restrictions

#### EMMS-8 – Technologies

- Types of email management technologies
- Implementation models
- Selecting the appropriate solution(s)

#### EMMP-9 – Archival

- Archive, backups, and storage
- Organizational archival approaches



- Personal archive files
- Archival considerations

EMMP-10 – Email and ECM

- ECM defined
- Capture
- Manage
- Store
- Preserve
- Deliver

**Who is the Course Instructor?**

The classroom course will be lead by Carl E. Weise, ECM/ERM/EMM Instructor, AIIM International. Carl has over twenty years of senior level records management and project management experience in the financial, IT, manufacturing, electric power and legal environments. He is also a regulatory compliance and risk management expert. He has been a Certified Records Manager (CRM) for eleven years, and he has earlier given presentations at ARMA conferences, ARMA and AIIM chapter meetings. Carl has also developed and taught community college level records management courses, and he has given a number of seminars on records management. He has been Vice-President, Examination Administration, Institute of Certified Records Managers (ICRM), ARMA Conference Program Committee Member, ARMA Conference Program Manager, and Chapter President of Pittsburgh ARMA Chapter.

**Summary**

Prices for taking the online courses:

- EMM Practitioner: Price per student is USD \$600 for members / USD \$750 for non-members

Prices for attending a public class (see [www.aiim.org/training](http://www.aiim.org/training) for current schedule):

- EMM Practitioner: Price per student is USD \$1,050 for members / USD \$1,160 for non-members

Price for an in-house / private class:

- Price per day is USD \$3,500 for one trainer with maximum 20 attendees. Your organization will also cover accommodation and travel

Please contact [training@aiim.org](mailto:training@aiim.org) if you have any questions.

