

AIIM Email Management (EMM) Specialist Certificate program

- Learn best practices for implementing solutions for managing your corporate email

Introduction

Implementing effective email management requires effective project management. As with any well-run project, it requires contribution from different areas of the organization, a commitment to good project management principles, and execution on those principles. It also requires a strong business case to identify the unique requirements of the organization, which will be met by a carefully crafted email policy and the appropriate technology in support of the program.

Email is not always the best tool for collaboration. Other tools, including instant messaging, blogs, wikis, RSS feeds, and other collaborative tools can be used to reduce the amount of email to be managed, while improving collaborative processes and results.

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 Dept
BearingPoint	Microsoft
Canon	Oracle
CCRM Associates	Ricoh
CMS Watch	Royal Mail
Crown Partners	SAP
EMC	Serco
Gartner	Standard Chartered Bank
Gimmel Group	The National Archives of UK
GlaxoSmithKline	Tower Software
Fujitsu	US Department of Treasury
IBM	US Courts
JPMorgan Chase	ZyLAB
Westminster College	

The Email Management Specialist program (Advanced topics in email management)

(2 day training course or 10 online modules)

The Email Specialist class covers global best practices for implementing solutions for email management as well as advanced email topics. You will at this course learn:

- How to develop a business case for email management
- Defining the problem and planning the project
- Building the right project team
- Developing the email policy



- Identifying and gathering requirements for email management
- Implementing the solution
- Long-term preservation of messages, attachments, metadata
- Email and discovery
- Instant messaging
- Blogs, wikis, and RSS feeds as alternatives to email
- Web-based commercial email

AIIM recommends that you take the Email Management Practitioner course before starting the Email Management Specialist course to get a good understanding of email management concepts and technologies.

Course Designation

You will be awarded the AIIM Email Management (EMM) Specialist (EMM^S) 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 Specialist. 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.

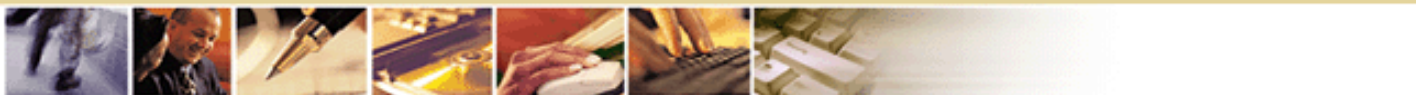
Audiences

- 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 Specialist

EMMS-1 – Making the case for email management

- Introduction to the business case
- Benefits identification
- Making the business case for email management
- Key stakeholders for an email management initiative

EMMS-2 – The email management project

- Before the project begins
- Project management
- Setting up the project team
- The project kickoff

EMMS-3 – Developing the email policy

- The policy development framework
- Research and analysis
- Drafting the policy
- Implementing the policy

EMMS-4 – Email management requirements

- Requirements definition and management
- Techniques for gathering requirements
- Gathering and validating requirements
- Requirements for email management solutions

EMM-5 – Implementing email management

- Selecting the optimum solution
- Model office and pilot program
- Rollout
- Post-implementation and benefits realization

EMMS-6 –Email preservation

- Introduction to preservation
- Message preservation
- Preservation of attachments and metadata
- Media selection and considerations

EMMS-7 – Email and discovery

- Introduction to discovery
- Review of applicable case law
- The electronic discovery reference model
- Email discovery issues and strategies

EMMS-8 Instant messaging

- How instant messaging works
- IM and email
- IM Usage and RM considerations



- Approaches for managing IM

EMMS-9 – Alternatives to email

- Blogs
- RSS
- Wikis
- Other collaborative tools

EMMP-10 – Web-based email

- Introduction to web-based email
- Security issues and strategies
- Retention and disposition issues and strategies
- Discovery issues and strategies

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 Specialist: Price per student is USD 600 for members / USD 750 for non-members

Prices for attending a public class (schedule TBA):

- EMM Specialist: Price per student is USD 1050 for members / USD 1150 for non-members

Price for an in-house / private class:

- Price per day is USD 3500 for one trainer with maximum 20 attendees. Your organization will also cover accommodation and travel from Washington DC

Please contact training@aiim.org if you have any questions.

