

# 1 day ERM Strategy Workshop outline

- *Understand why to implement Electronic Record Management*

## Introduction

The Electronic Records Management (ERM) Certificate Program is designed from global best practices among our 65,000 members. It explores records management in relation to the business needs of all types of organizations, whether in the public or 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.

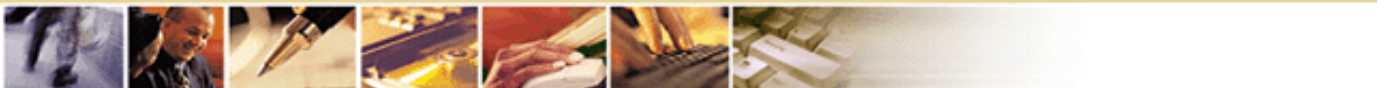
## Newly Revised and Updated

AIIM has revised and updated the course material for this ERM Strategy course. The original content was developed in 2006 and there have been substantial changes in the methods, standards and technologies for addressing electronic records management (ERM) since that time. AIIM has also taken the comments made by its thousands of students who have taken all courses and have consolidated and improved this course curriculum.

## Course Development

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

@doc	Hewlett-Packard
Accenture	Hyland Software
Albistur Consulting	IBM
Barclays Capital	Inforesight Limited
Bill and Vieve Gore School of Business, Westminster College	JPMorgan Chase
BP	Kodak
CCRM Associates	Marion County Health Dept.
Chevron Phillips Chemical Company	Objective Corporation
CIA	Oracle
Crown Partners	Ordina
Doculabs	Ricoh
Fujitsu	Royal Mail Group
Gambro	Shell
Gartner	SpringCM
Gimmel Group	Sunoco
GlaxoSmithKline	The National Archives of United Kingdom
Harris Corporation	The South Financial Group
Hartman Communicatie	US Courts
Health First	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.

### Workshop Description

The ERM Strategy Workshop provides a good understanding of strategic Electronic Records Management. It addresses the administrative, financial, legal, operational, or historical value of electronic records, emails, instant messages, voice mails, paper, websites, a collaborative team space, and also physical records. The workshop also addresses best practices for ERM and allows the participants to make the explicit link between ERM and their current situation. You will be able to lead a “wake up call” in your own organization.

### Workshop materials

You will receive an ERM Workbook that will be accompanied by a short reference handout on key standards and guidance documents relevant to ERM across North America, Europe and Australasia. Each document will be briefly described, together with its status and (where relevant) its relationship to other documents.

### Workshop 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*

There is no exam or designation linked to this workshop.

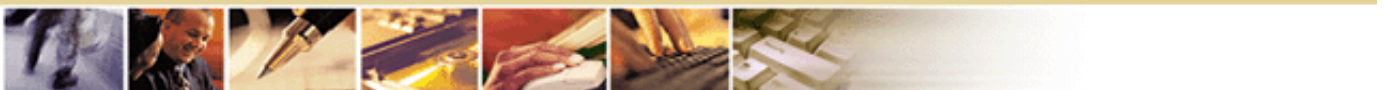
### Who should attend AIIM’s ERM Strategic Workshop?

- Anyone with a need to understand, explain or justify an ERM initiative, or who has a need to “sell” the concept internally or externally;
- Those responsible for information policy, strategy and governance;
- CIOs, senior executives, directors, managers, process owners, senior legal and IT staff.

### How will I learn at AIIM’s ERM Strategy workshop?

The course follows 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

### Workshop Agenda

- Introduction to ERM
- Business drivers for ERM
- Roles and responsibilities
- ERM in practice
- Implementing ERM

### Summary

#### Training:

- ERM Strategy Workshop, 1-day, 9:00 AM – 5:00 PM with a maximum of 15 attendees
- Length of workshop can be reduced due to time restraints on students
- Includes English language delivery and all training materials

Contact [training@aiim.eu](mailto:training@aiim.eu) to arrange dates for in-house training classes.

Contact [askjekkeland@aiim.org](mailto: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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