

4-day ECM Master Training Class outline

- Learn global best practices to plan, design and implement Enterprise Content Management

Introduction

The Enterprise Content Management (ECM) Certificate Program is designed from global best practices among our 50,000 members. The program covers the strategies, tools and technologies used 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 Electronic Document Management, Electronic Records Management, Workflow, Business Process Management, Web Content Management, Collaboration and Digital Asset Management.

AIIM represents the Information Management community as the global association for both users and suppliers of Enterprise Content Management solutions – the strategies, services and technologies which enable organizations to capture, manage, store, preserve and deliver information to support business processes. We have existed for more than 60 years, and we are a not-for-profit organization.

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:

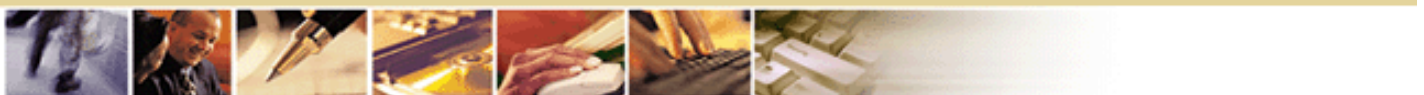
Accenture	Marion County Health Department
BearingPoint	Microsoft
Canon	Oracle
CCRM Associates	Ricoh
CMS Watch	Royal Mail
Crown Partners	Serco
EMC	Standard Chartered Bank
Fujitsu	The National Archives of UK
Gartner	TOWER Software
Gimmel Group	US Courts
GlaxoSmithKline	US Department of Treasury
Harris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

The course materials were developed by Cornwell Management Consultants and The Oxford Group based on requirements and best practices defined by the above companies.

Course Description

The ECM Master Training Class provides you with a good coverage of ECM with the main elements from AIIM's ECM Strategic, Practitioner and Specialist training programs in addition to case study exercises. This 4 day training program 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 Concepts** component covers the information lifecycle and related concepts such as Electronic Document Management, Collaboration, Business Process Management and Electronic Records Management.
- The **ECM Process** component covers the implementation of programs and projects, and related processes such as Information Governance, Concepts of Operations, Information Survey, Business Case, IT infrastructure details and After Implementation Management.
- The **ECM Case** component allows to you discuss, share and learn global best practices for ECM.

Course Objectives:

Strategy Component: (Why ECM?)

- *Understand the concept of ECM and its business drivers*
- *Be able to justify a “wake up call” about the need for best practice ECM*
- *Make an explicit link between ECM and current situation*
- *Structure for identifying information assets*
- *Enable content collaboration and reuse across an organization*
- *Identify necessary resources and responsibilities for ECM*
- *Explore the implications of a strategic ECM decision*
- *Gain commitment for change*

Concepts Component (What is ECM?)

- *Understand the information lifecycle, focusing on electronic content*
- *Consider the sources of information and appropriate capture mechanisms*
- *Decide upon relevant storage models including audit trail and storage technologies*
- *Consider the different concepts for managing information and content, such as BPM, Workflow, Collaboration, and Business Continuity*
- *Review digital preservation techniques*
- *Consider different ways of delivering information and content to employees, partners and customers*
- *Decide upon re-purposing and interoperability*
- *Review necessary metadata and indexing*
- *Explain the concepts of classification and different approached depending on local business needs*
- *Cover search and retrieval*
- *Discuss different levels of access control and security*
- *Define interfaces, legacy systems and migration*
- *Understand the impact of Legislation, Standards and Regulation*

Process Component (How do you implement ECM?)

- *Manage an ECM program consisting of several coordinated projects*
- *Identify the new roles, responsibilities and organizational structure necessary to provide governance and management*
- *Understand the “Concept of Operations” as a shared vision of an ECM future*
- *Plan and execute an Information Survey – what information do we have?*
- *Develop a Business Case for ECM*
- *Identify the business requirements of ECM systems*
- *Develop and implement a Business Classification Scheme*
- *Understand details of user groups and users*



- *Recognize the impact of implementing ECM on the organization's IT infrastructure*
- *Plan Pilot Implementation / Model Office*
- *Plan roll-out stage of ECM Projects*
- *Recognize the steps involved in sustaining ECM after implementation and realising the benefits*

Case Component (Putting it all together)

- *Allow participants to test and use their new knowledge for planning, designing and implementing ECM.*

Course Designation

You will be awarded the AIIM ECM Master (ECM^M) designation after passing the online exam and case study exercise. This is a new 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 exam and case study exercise are available via the Internet and you must pass these within 3 months of 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, available to address your comments, and willing to accept your feedback

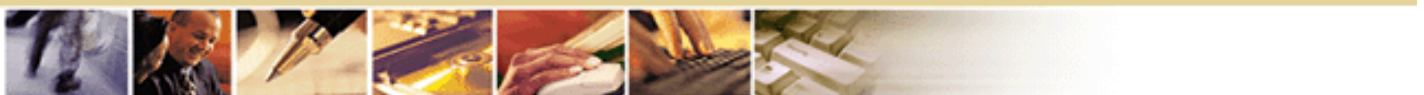
Who should attend AIIM's ECM Master Class?

The ECM Master Class provides complete coverage of records management in the electronic environment for people working in both in 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 records and information management strategy.

The ECM Master Class is designed for Business Managers, IT Managers, Compliance Officers, Archivists, Librarians, Risk Managers, Records Managers, and Information Managers, 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



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

Our courses follow the Oxford 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:** delegates 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
- **Transparency:** we encourage an environment of openness, trust and transparency – no tricks, no 'reporting back' unless agreed.

Course Material

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

- The **ECM Strategic** component will be accompanied by a succinct overview of what ECM covers; the strategic drivers for its introduction that should be considered; the benefits that can be realized; and the impact its introduction can be expected to have on an organization at all levels.
- The **ECM Concepts** component will be accompanied by a handout that summarizes the key concepts, including references to authoritative publications and web resources:
 - Bibliographic and web resource pointers
 - The Document Lifecycle, often best shown diagrammatically
 - Capture - a summary of capture processes
 - Metadata and Indexing - a summary of the purpose and usage of metadata, including examples and screen shots of metadata input methods
 - Classification Schemes - a summary of the different approaches available, with diagrammatic examples of classification hierarchies
 - Searching and Retrieving - a (generic) summary of search engines, their characteristics and usage
 - Controls and Security, covering recommended approaches to developing Access Control Lists and Permissions matrices
 - Delivery - a summary of delivery mechanisms, media and possible outputs, including transformation and security options
 - Legacy applications and Paper holdings - guidelines on integration and/or interfacing options to external systems, and the options for dealing with existing paper holdings
 - Retention, Preservation & Disposal - a summary of disposition scheduling in real-world business environments, and the need for digital preservation measures
 - Components - a glossary of brief explanations or definitions of ECM terminology
 - Technologies - a glossary and brief explanations of the technologies relevant to ECM implementations.



- The **ECM Process** component is comprised of (multiple) one-page summaries and checklists summarizing the relevant topics, thereby covering the processes associated with:
 - Governance
 - Project & Program Management
 - Concept of Operations
 - Information Audits
 - Business requirements
 - Procurement Strategies
 - Business Classification Schemes
 - Retention and Disposal schedules
 - IT infrastructure details
 - Details of User groups and users
 - Pilot or Model Office environments
 - Roll-out planning and practical aspects
 - Using ECM - ongoing considerations and action
- 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

Day 1, Strategy

- Introduction
- Business drivers for ECM
- Managing information assets
- ECM Terminology
- ECM Strategies
- The genesis of ECM
- Analyzing current situation
- Present an overarching structure
- Information governance
- What's involved?
- Who's responsible?
- Next steps

Day 2, Concepts

- ECM Information Lifecycle
- Capture
- Store
- Manage
- Preserve
- Deliver
- Re-purposing
- Metadata and indexing
- Classifications schemes
- Searching and retrieving
- Controls and security



- Interfaces, legacy systems and migration
- Legislation, Standards and Regulation
- Next step

Day 3, Process

- ECM Project & Program Management
- Information Governance
- Concept of Operations
- Information Survey
- Business Case
- Business Requirements
- Business Classification Schemes
- Details of user Groups & users
- IT Infrastructure details
- Pilot or Model Office
- Roll-out
- After Implementation

Day 4, Case

- Introduction of Case Studies
- Group 1 – Strategy
- Group 2 – Concepts
- Group 3 – Process
- Develop possible solutions
- Presentations by Groups
- Evaluation & Discussions
- Post-Workshop Case Study

Summary

Training:

- ECM Master Class, 4-days, 9:00 AM – 5:00 PM with a maximum of 15 attendees
- Includes access to supporting web modules
- Includes a case study exercise that must be answered within 3 months
- Includes 3 opportunities to take and pass the AIIM ECM Master web exam
- Includes English language delivery and all training materials

Contact training@aiim.org to check dates for in-house training classes.

Contact twhite@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.

