

## 4 day ECM Master Training Class Outline

- Learn the Why, What, and How to implement Enterprise Content Management

### Introduction

The AIIM Enterprise Content Management (ECM) Certificate Program is designed from global best practices among our 65,000 associate and professional members. The training program covers the strategies, tools and technologies 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, tying in relevant components and technologies. This could be Imaging, Electronic Document Management, Electronic Records Management, Workflow, Web Content Management, Document Centric Collaboration, or Enterprise Search Technologies.

AIIM is an industry 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 ECM 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 previously completed the ECM program should consider taking this newer version to enhance their skills and strengthen their learning from the previous course. In addition to updating their certificates and designations, attending the revised program will bring benefit from the expanded focus on available solutions (e.g. SharePoint 2007); new content types (e.g. wikis and blogs); taxonomies and folksonomies; new preferred approaches (platforms/solutions); new best practices and standards (e.g. PDF/A and MoREQ2); and best practices for implementing ECM using the open methodology MIKE2.

### 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:

Accenture	Gambro
Albistur Consulting	Gartner
Barclays Capital	Gimmel Group
Bill and Vieve Gore School of Business, Westminster College	GlaxoSmithKline
BP	Harris Corporation
CCRM Associates	Hartman Communicatie
Chevron Phillips Chemical Company	Health First
CIA	Hewlett-Packard
Crown Partners	Hyland Software
Doculabs	IBM
Fujitsu	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 Information Architected Inc based on requirements and best practices defined by the above companies.

### Course Description

The ECM Master Training Class provides you with an extensive coverage of ECM with the main elements from AIIM's ECM Strategy, 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 Practitioner** component covers tools and technologies for ECM
- The **ECM Specialist** component covers the implementation and related processes such as creating an ECM strategy, documenting your requirements, and developing a roadmap as well as design, deployment and change management.
- The **ECM Case** component allows you to discuss, share and learn global best practices for ECM.

### Course Objectives:

Strategy Component: (Why ECM?)

- Introduction to ECM
- ECM technology components and functionality
- Business benefits of ECM
- Linking ECM to business strategy and KPIs
- Value of taxonomies, metadata and security model
- Market trends and options
- Departmental vs enterprise; platforms vs solutions
- Overview of preferred approaches and best practices for implementing ECM

Practitioner Component: (What is ECM?)

- Business benefits of ECM
- ECM technologies such as document management, imaging, records management, workflow, web content management and collaboration
- Preferred approaches, platforms vs solutions, enterprise vs departmental
- Information architecture, interoperability, and integration
- Sources of information and appropriate capture and migration mechanisms
- Metadata and indexing
- Types of taxonomies and their value



- Ontologies and folksonomies
- Different levels of access control and security
- Process improvements and automation
- Search and retrieval technologies
- Different ways of delivering information and content to employees, partners and customers
- Existing and emerging trends such as Web 2.0, SaaS, and Open Source.

**Specialist Component: (How to implement ECM?)**

- How to link the ECM initiative to business strategy and KPIs
- How to develop an ECM program charter and business case
- How to plan the implementation of ECM according to the open methodology MIKE2
- How to identify and prioritize the business requirements for ECM
- How to develop and define the technology requirements for ECM
- How to meld the technology requirements with the business requirements to finalize the ECM blueprint
- How to build an ECM roadmap and prioritize projects based on the blueprint
- How to design a taxonomy, metadata, and security model
- How to identify new roles, responsibilities, and the organizational structure necessary to provide governance and management
- How to develop, test and train
- How to deploy, operate and close-out an ECM implementation
- Global best practices for change management

**Case Study Component:**

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

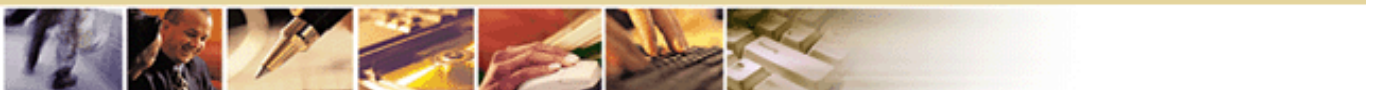
**Course Designation**

You will be awarded the AIIM ECM Master (ECM<sup>M</sup>) designation after passing the online exam and case study exercise. This is an 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 – you have 6 months to pass the test, and 3 months to submit your case study, after attending the training course. The designation is valid for 5 years.

**Benefits of becoming ECM Master (ECM<sup>M</sup>):**

- 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, address your comments, and are willing to accept your feedback.

**Who should attend AIIM's ECM Master Class?**



The ECM Master Class provides a detailed coverage of Enterprise Content Management 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 information management strategy.

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

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

The courses 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 future

### Course Material

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

- The **ECM Strategy** component will be accompanied by a short reference handout on key standards and guidance documents relevant to ECM 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 **ECM Practitioner** component will be accompanied by the course notes, reference handouts which will support the course material and an abbreviated glossary.
- The **ECM Specialist** component will be accompanied by the course notes and handouts supporting the course material, including useful external resources.
- 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 and Practitioner

- Introduction
- Defining ECM
- ECM as a practice
- ECM as a project



- The justification for ECM
- Introduction to ECM
- Technologies and Functionality
- Information Architecture
- Capture
- Metadata

Day 2, Practitioner

- Taxonomy
- Exercise : Creating a Taxonomy
- Security and Control
- Process and Automation
- Findability
- Delivery and Presentation
- Trends and Directions
- Exercise: Redefining ECM

Day 3, Specialist and Case

- Introduction to MIKE2
- Business Assessment
- Exercise 1 : Strategy
- Business Strategy & Blueprint
- Technology Assessment
- Governance
- Roadmap
- Foundation Activities
- Exercise 2: Practitioner

Day 4, Specialist and Case

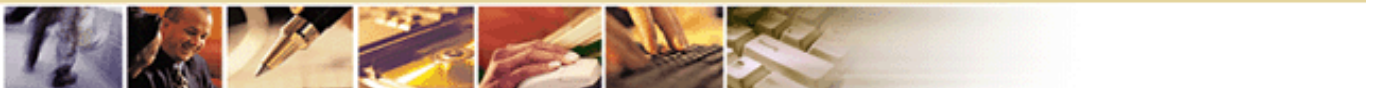
- Design
- Develop, Test & Train
- Deploy, Operate & Close-Out
- Change Management
- Exercise 3; Specialist
- Next Steps

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

- "AIIM's training programs are essential to anyone in Information Management. Without up to date training, systems and programs are set up -- but may be at risk, in the long run, if



developed by the under trained. The Information Management Industry as a whole is developing at the speed of light, so even someone like myself (a 23 year veteran) needs to refresh their training and stay on top of technology and advancement in trends to understand how to apply it. AIIM's training programs provide this education." TK Train, CRM, ECMp, MBA, Document Control Manager, Gambro

- "Enterprise records management or content management projects are comprised of cross functional teams with various backgrounds and specialties. It is important to the success of such projects that interdisciplinary teams develop a common lexicon and understanding of key concepts as fast as possible to enable collaboration. AIIMs educational curricula serve this need quickly and excellently", Jayne Bellyk, RIM Program Manager, Chevron Phillips Chemical Company LP
- "Kodak clearly understands the value of the AIIM ECM courses. Our sales team uses this knowledge often as we support our document imaging resellers in their sales processes." Todd LeVeque ECMp CDIA+, Director - US Channel Sales, Document Imaging - Graphic Communications Group, Eastman Kodak Company
- "The AIIM ECM training course provides an extremely comprehensive platform related to the enterprise content management industry and the technologies that support and drive it. The materials are thorough, up-to-date and well presented. I would recommend the course to both vendors and customers of ECM solutions." John Opdycke, Vice President of Marketing, Hyland Software
- "Fujitsu chose the AIIM ECM Certificate Training Program to empower our partners with the tools and strategies to help companies world-wide achieve successful ECM implementations." Pamela Doyle, Director, Fujitsu Imaging Products Group

## 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 submitted within 3 months
- Includes 3 opportunities to take and pass the AIIM ECM Master web exam
- Includes English language delivery and all training materials

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Contact [askjekkelland@aiim.org](mailto:askjekkelland@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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