

## Online ECM Specialist Training Course Outline

*Learn how to plan, design and 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, and it ties 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 Certificate Program based on changes in 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 Specialist program will provide you with a practical approach for implementing ECM. You will also learn about MIKE2, which is an open methodology for enterprise information management.

### 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	Gartner
Albistur Consulting	Gimmel Group
Barclays Capital	GlaxoSmithKline
Bill and Vieve Gore School of Business, Westminster College	Harris Corporation
BP	Hartman Communicatie
CCRM Associates	Health First
Chevron Phillips Chemical Company	Hewlett-Packard
CIA	Hyland Software
Crown Partners	IBM
Doculabs	Inforesight Limited
Fujitsu	JPMorgan Chase
Gambro	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 Specialist Training Course provides you with a thorough understanding of global best practices for implementing ECM. You learn a practical step-by-step approach for developing an ECM strategy, understanding and documenting your requirements, and planning and executing the implementation.

The course has 10 modules, and each module is 45-90 minutes in length and combines audio and presentations delivered via your Web browser. You may start, pause or stop the module at any time to review materials at your own pace. You can also view a module multiple times to ensure mastery of content. Downloadable handout materials and additional links and resources accompany each module, and you have unlimited access to the modules for 6 months.

We recommend that all course attendees have a good understanding of ECM components and technologies before starting the ECM Specialist training program, or they first take the AIIM ECM Practitioner training program.

### Course Objectives:

Specialist Course: (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



### Course Designation

You will be awarded the AIIM ECM Specialist (ECM<sup>S</sup>) designation after passing the online exam. This is an AIIM standard for industry professionalism and knowledge. By earning this designation, you can call yourself an AIIM ECM 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 – you have 6 months to pass the exam, and the designation is valid for 5 years.

Benefits of becoming ECM Specialist (ECM<sup>S</sup>):

- Position yourself to be tomorrow's leader by enhancing your business and professional skills
- Learn global best practices for 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 Specialist Course?

The ECM Specialist Course provides a detailed coverage of Enterprise Content Management for people working in both 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 Specialist Course 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 Specialist Course?

The courses follow a proven learning model with engaging, impactful and live workshops with participative and challenging exercises. The elements of this methodology are:

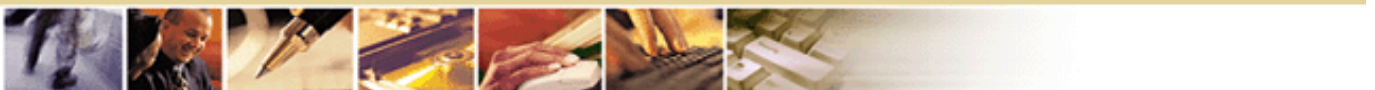
- **3 Domains:** development should engage participants at three levels – emotionally (feeling – the heart); logically (thinking – the head) and practically (doing – the hand)
- **Transferability:** students should always be able to see how the skills that they are developing can be used back at their 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 access to the online ECM Specialist courses and exam for 6 months. This is also accompanied by course notes, reference handouts, and an abbreviated glossary.

### Course Agenda

ECM Specialist Module 1 - Business Assessment



### Learning objectives

At the end of this session, you should understand:

- An introduction to the MIKE2 methodology, and initial work done in Phase 1
- The value of assessing and raising awareness of the organization regarding ECM capabilities
- How to begin the creation of the program charter
- An overview of suggested analysis and requirements gathering techniques

### Module Agenda

- Intro to MIKE2 Methodology and Phase 1
- Strategic Mobilization
- Program Charter
- Enterprise Information Management Awareness
- Intro to SAFE Architecture
- Analysis Techniques
- Organizational QuickScan for Information Development
- Bundled Information Gathering Techniques

## ECM Specialist Module 2 – Business Strategy & Blueprint

### Learning objectives

At the end of this session, you should understand:

- The purpose and value of a business blueprint
- How to construct a business blueprint
- The impact of a business blueprint across the organization

### Module Agenda

- Strategic Business Requirements
- Business Blueprint Completion
- Programme Review

## ECM Specialist Module 3 – Technology Assessment

### Learning objectives

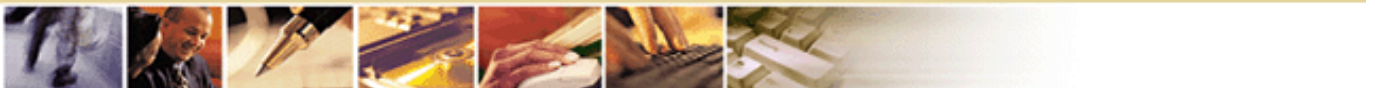
At the end of this session, you should understand:

- How to develop and define the technology requirements for your ECM solution
- How to leverage existing standards to simplify the production of your technology requirements
- How to meld the technology requirements with the business requirements to complete a finalized Business Blueprint and Technology Blueprint

### Module Agenda

- Phase 2: technology assessment
- Requirements
- Technical architecture
- RFP Process
- Technology Blueprint Completion

## ECM Specialist Module 4 - Governance



### Learning objectives

At the end of this session, you should understand:

- The role of governance within the MIKE2 methodology
- The importance of information governance to the integrity and awareness of your ECM system
- How to construct a governance council
- How to construct an information governance document
- How to maintain content management instruments
- How best to manage, communicate and train users on the governance

### Module Agenda

- The MIKE2 governance model
- The Information Governance Framework (IGF)
- The value and role of information governance
- Basic structure of the information governance document
- Building the enterprise information governance document
- Localized governance
- Governance of content management instruments

### ECM Specialist Module 5 - Roadmap

#### Learning objectives

At the end of this session, you should understand:

- The purpose of Phase 3 as the foundation to the continuous implementation phases of MIKE2
- Details on how to refine and target business and technical requirements for a specific iteration
- Importance and role of project management as applied to ECM

#### Module Agenda

- Phase 3: roadmap and foundation activities
- Roadmap overview
- Project and deployment plan
- Detailed business requirements

### ECM Specialist Module 6 – Foundation Activities

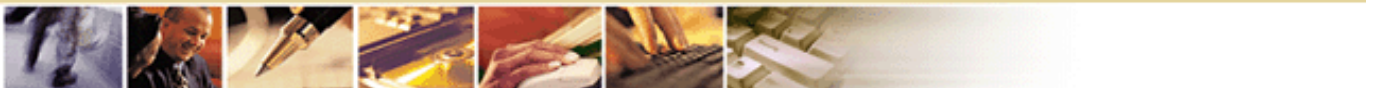
#### Learning objectives

At the end of this session, you should understand:

- Which foundation activities are most applicable to ECM solution development
- Definitions of, and tasks necessary to accomplish laying the foundation for your ECM-oriented information architecture
  - Software Development Readiness
  - Enterprise Information Architecture
  - Taxonomy Design
  - Metadata Development
  - Solution Architecture Definition/Revision
  - Prototype the Solution Architecture

#### Module Agenda

- Phase 3: Foundation Activities



- Software Development Readiness
- Enterprise Information Architecture
- Taxonomy Design
- Metadata Development
- Solution Architecture Definition/Revision
- Prototype the Solution Architecture

#### ECM Specialist Module 7 – Design

##### Learning objectives

At the end of this session, you should be able to:

- How to scope the key ECM-related design activities of MIKE2

##### Module Agenda

- Phase 4: design
- User Support & Operational Procedures Design
- Security Design
- Infrastructure Management Process Design
- User Collaboration Conceptual Design
- User Interface Design

#### ECM Specialist Module 8 - Develop, Test & Train

##### Learning objectives

At the end of this session, you should understand:

- The activities of Phase 5 that further refined the Foundation Activities and Design Activities
- Requirements needed to develop support and operational guides, as well as the technology backplane and core ECM environment
- Recommended testing, from both a technical viewpoint, and a user suitability and usability standpoint

##### Module Agenda

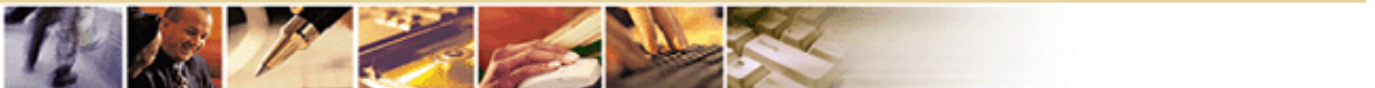
- Phase 5: Develop, Test, Train
- User Support & Operational Procedure Guides
- Technology Backplane Development
- Testing & Training in Action

#### ECM Specialist Module 9 - Deploy, Operate & Close-Out

##### Learning objectives

At the end of this session, you should understand:

- The final activities of Phase 5 of MIKE2, which take implementation through Deploy, Operate and Closeout
- Tasks required to ready the technical deployment of the solution
- Final testing via UAT and PVT to verify system readiness, user acceptance and sign-off of deployable system
- Areas to watch during Launch, and ensuring a successful launch
- Techniques to use in ensuring ongoing use of the ECM environment



#### Module Agenda

- Phase 5: Deploy, Operate, Closeout
- Production Deployment
- Evaluation and Launch
- Improve and Closeout

#### ECM Specialist Module 10 – Change Management

##### Learning objectives

At the end of this session, you should understand:

- How to assemble and tap the user community to understand what will drive adoption
- How to assess the level of need for change management strategies
- How to grow user involvement and identify “super users”
- Best approaches to managing change
- Incentives strategies that encourage user adoption

##### Module Agenda

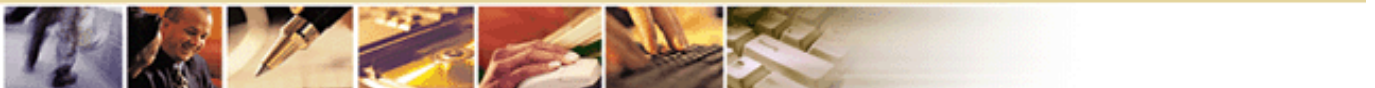
- Identifying and involving users
- Change readiness
- Best practices for implementing change
- Managing user expectations and needs
- Incentive strategies

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

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