

AIIM Email Management (EMM) Master Certificate Program *- Learn technologies, concepts, and best practices for managing your corporate email*

Introduction

Email plays a significant role in documenting decisions and conducting the business of the organization. It is truly an enterprise-wide, mission-critical application that affects every user in the organization. It is critical that it be managed appropriately so that stakeholders retain access to the information contained therein. Knowledge workers will have different perspectives on what email management means depending on their role – individual users want to be able to find their own messages, while records management and legal must ensure that messages can be produced across the organization in support of legal or regulatory requirements. Technologies such as email archival, client-side plug-ins, and even ECMS and ERMS can help, but they will not be effective without appropriate policies, processes, and procedures to guide their deployment and usage.

The Email Management (EMM) Master Certificate training course comprises the main elements from the Email Management strategic workshop, Practitioner and Specialist certificate programs in addition to a case study exercise. The course provides detailed coverage of email management practices and technologies for professionals working in both the public and private sector.

Learn:

- Email capture and retention
- Technologies for email management
- Email storage, archiving and backup
- Email classification
- Developing, implementing, and managing the email policy
- Governance

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
BearingPoint
Canon
CCRM Associates
CMS Watch
Crown Partners
EMC
Fujitsu
Gartner
Gimmel Group
GlaxoSmithKline
Harris Corporation
JPMorgan Chase

Marion County Health Department
Microsoft
Oracle
Ricoh
Royal Mail
Serco
Standard Chartered Bank
The National Archives of UK
TOWER Software
US Courts
US Department of Treasury
Westminster College
ZyLAB



The course materials were developed by Access Sciences Corporation based on requirements and best practices defined by the above companies.

Course Description

The Email Management (EMM) Master Training Class provides you with a very good coverage of email management with the main elements from AIIM's EMM Strategic, Practitioner and Specialist training programs in addition to case study exercises. This 4 day training program covers why, what and how to take control of your corporate emails.

- The **Email Management Strategy** component provides you with the knowledge to get ownership and support by senior executives and users
- The **Email Management Concepts** component covers concepts and technologies for managing your corporate emails.
- The **Email Management Process** component covers best practices for implementing solutions to manage your corporate emails
- The **Email Management Case** component allows to you discuss, share and learn global best practices for managing your corporate emails

Course Objectives

Email Management Strategy (Why Email Management?)

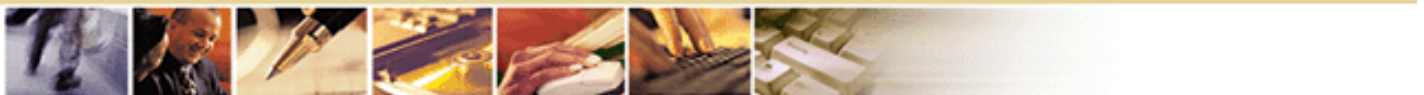
- *Business drivers for more effective email management*
- *Roles and responsibilities*
- *Policies and procedures*
- *Strategies for email management*

Email Management Concepts (What is Email Management?)

- *How email works*
- *What email management is*
- *Managing the inbox*
- *Email messaging applications and clients*
- *Remote and mobile email access*
- *Capturing and managing messages, attachments, and metadata*
- *Email classification including autoclassification*
- *Effective email governance*
- *Email security*
- *Email management tools and technologies*
- *Email archival approaches*
- *Email and ECM*

Email Management Process (How to implement Email Management?)

- *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*

Email Management Case (Putting it all together)

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

Course Designation

You will be awarded the AIIM EMM Master (EMM^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 EMM 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 EMM Master (EMM^M):

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

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 Strategy (Why Email Management?)

- Introduction
- Email management defined
- Email and ECM
- Email terminology
- Email management principles

Drivers

- Drivers for email management
- Regulatory compliance
- Legal drivers
- Business drivers

Roles and responsibilities

- Executive support
- Key stakeholders and roles

Policies and procedures

- The email policy
- Email procedures
- Implementing email policies and procedures

Strategies and best practices

- Strategies for managing email
- Technology in support
- Auditing compliance and effectiveness

Email Management Concepts (What is Email Management?)

EMMP-1 – Introduction to email

- Introduction to email management
- Terminology
- How email works generally
- Basic principles for email management

EMMP-2 – Inside the inbox

- Tour of the email client
- Email information objects
- Email folders
- Managing the inbox

EMMP-3 – Architecture

- Main messaging applications
- Mail messaging clients



- Plug-ins
- Remote and mobile email access

EMMP-4 – The Capture Process

- Identifying which messages to capture
- Capturing messages
- Capturing metadata and attachments
- Capture and records management

EMMP-5 – Classification

- Introduction to classification
- Classification approaches
- Classification structures
- Automatic classification technologies
- Issues and strategies for automatic classification

EMMP-6 – Governance

- The email governance framework
- Email policies and processes
- Email roles and tools
- Email standards and audits

EMMP-7 – Security

- Email-borne threats
- The email security model
- Digital signatures and encryption
- Content and attachment restrictions

EMMP-8 – Technologies

- Types of email management technologies
- Implementation models
- Selecting the appropriate solution(s)

EMMP-9 – Archival

- Archive, backups, and storage
- Organizational archival approaches
- Personal archive files
- Archival considerations

EMMP-10 – Email and ECM

- ECM defined
- Capture
- Manage
- Store
- Preserve
- Deliver

Email Management Process (How to implement Email Management?)

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
- EMMS-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
- EMMS-10 – Web-based email
 - Introduction to web-based email
 - Security issues and strategies
 - Retention and disposition issues and strategies



- Discovery issues and strategies

Case (Putting it all together)

- Students will receive a case study and have four assignments that correlate to the different key milestones in implementing an email management program.

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 Master: Not available

Prices for attending a public class (see www.aiim.org/training for current schedule):

- EMM Master: Price per student is USD \$2,705 for members / USD \$2,980 for non-members

Price for an in-house / private class:

- Price per day is USD \$3,500 for one trainer with maximum 20 attendees. Your organization will also cover accommodation and travel

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

