

**Wednesday June 2, 2010**

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**Education Sessions**

**8:30 AM – 9:45 AM**

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**W11 What Does Your Desk Say About You? Getting Organized for Success!**

*Business Functions*

Meeting Room: Salon C

Kim Anstey, ECMP, IOAp Senior Information Management Analyst, Department of Fisheries & Aquaculture, Government of Newfoundland and Labrador

Having exceptional organizational skills is a requirement for a successful career in records and information management (RIM). By attending this session, you'll receive tips, tricks and techniques on topics such as goal setting, time management, paper management, workspace organizing and work/life balance. This session is comprised of proven practices and principles that are easily implemented into your everyday life. By the end of the session, you'll have a better sense of what it looks and feels like to be organized, and be motivated to take action to improve your organizational skills.

**W12 Improving ROI Through Pre-Implementation Shared Drive Clean-up (case study)**

*IT*

Meeting Room: Salon B

Chris Perram President, Perram Consulting Inc.

Mike White Manager, Information Management and Records Services, Public Health Agency of Canada

Implementing records and information management (RIM) is an expensive undertaking but the return on investment (ROI) is greatly enhanced by conducting a pre-implementation clean-up of the shared drive. This case study will highlight one organization's experience in implementing a functional classification structure and file plan as a RDIMS pre-implementation step. It will examine the pitfalls and challenges experienced, and work through different options for resolving them. This session will also examine the results and impact on ROI of this important implementation step.

**W13 Backroom to Boardroom: Marketing A RIM Program (workshop)**

*Communications & Marketing*

Meeting Room: Salon E

Stephen Neilly, CRM Chief Executive Officer, Information Innovation Inc.

This session will explore the "how to's" of getting your organization's attention with regard to the value of a Records and Information Management (RIM) program. Not only will this session cover effective presentations, it will cover day-to-day tools and practices that are essential in the positive promotion of your RIM program. The session will also include a reflective look at the personal presentation the RIM team makes in representing the program. Session activities will include team exercises, group discussions, and question and answer activities.

**W14 How Green is Your RIM Program? Sustainable Contributions to Organizations***RIM Practices*

Meeting Room: Salon D

Alexandra (Sandie) Bradley, CRM President, Harwood Information Associates Ltd.

Public organizations must look for "green" options as legislation and regulations are requiring them to demonstrate sustainability and cost savings in their operations. Isn't this "back to the future"? A key benefit of records and information management (RIM) programs has always been cost savings, and now with an emphasis on sustainable operations, organizations will benefit from the contributions of RIM programs. This session will examine the green contributions a RIM Program can make to organizational sustainability programs.

**W15 How Automated Records Archives Reduce Litigation Costs and Risks***Risk Management*

Meeting Room: Salon A

Bill Tolson Director of Product Marketing/Evalgelism, Iron Mountain Digital

Many organizations view records and information management (RIM) as a way to "flush" legally destructive electronically stored information out of the system. This "destroy the smoking gun" strategy effectively raises an organization's risk of spoliation and of choosing the wrong legal strategy when facing civil litigation. An effective RIM program can ensure the placement of legal holds on all responsive content in a timely manner as well as provide all the data required to make the proper "Early Case Assessment". Attend this session and learn how automated records archives can reduce litigation costs and risks.

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**Education Sessions****10:15 AM – 11:30 AM**

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**W21 Developing and Delivering RIM Training***Business Functions*

Meeting Room: Salon C

Jason Pearce President and Senior Consultant, Provatect Inc.

Effective training content and delivery are critical to the success of any records and information management (RIM) program. The basic program goals of compliance, risk management and business efficiency all depend heavily on knowledge of RIM fundamentals and hands-on competency with corporate records management tools. But knowledge and skills transfer can be challenging given the impact of competing priorities on individual work schedules and attention spans. How do we reconcile organizational training objectives with individual training needs? This session provides practical guidance for responding to this challenge, through RIM-centred application of tested principles in instructional design and performance-based learning.

**W22 What Success Looks Like – The Anatomy of a Successful ECM Program***IT*

Meeting Room: Salon A

Greg Clark Principal, C3 Associates Inc.

Organizations often struggle with how to position Information Management (IM) and Enterprise Content Management (ECM), often with an over-emphasis on technology. In this session you will learn how the value proposition of IM can be aligned with your organization's key objectives by

coordinating the efforts of Information Technology, senior management and business stakeholders. You will also learn why ECM initiatives may either struggle or fail, and how to position your ECM program for success.

### **W23 Backroom to Boardroom: Marketing A RIM Program (workshop)**

(continued from previous session, see session W13)

### **W24 How to Conduct a RIM Situational Analysis**

*RIM Practices*

Meeting Room: Salon B

**Scott Procter** President, Still Waters Consulting

Records and information management (RIM) programs are being re-examined by all types of organizations. A RIM situational analysis is a straightforward organizational self-assessment that should be performed on a yearly basis as a means of establishing goals and priorities, and when seeking resources. Attend this session to review a complete situational analysis methodology. Specifically, this session will address: establishing RIM goals for your organization, gathering support for RIM interviews and other research, conducting RIM interviews, documenting observations and recommendations, and organizing recommendations into an action plan.

### **W25 Enterprise Information Management: Implementation Strategies**

*Risk Management*

Meeting Room: Salon D

**Graham Riley** Account Services Manager, Iron Mountain

Many influences impact records and information management (RIM) professionals as they support their organization's ability to expand and grow as a business, comply with applicable legislation and manage the exponential growth of information and data. In response to this change in the business environment, the ability to manage information at the enterprise level is now more critical than ever and many organizations are looking to implement an Enterprise Information Management (EIM) program that addresses both business needs and regulatory compliance for all records, regardless of format or location. This session will provide a best practices framework for implementing an EIM program.

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**Education Session**

**8:30 AM – 11:30 AM**

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### **W10 Preparing for the CRM Exam, Part 6 (workshop)**

*RIM Practices*

Meeting Room: Executive Boardroom

**Christine Ardern, CRM, FAI** Principal Consultant, The Information Management Specialists

**William Le Fevre, CA, CRM** Reference Archivist, Wayne State University

This session will assist you to prepare for and write Part 6 of the Certified Records Manager (CRM) examination by providing an overview of Part 6, discussing test-taking strategies, and explaining the grading procedures. Because CRM candidates can be overwhelmed when writing case studies, this session will provide an opportunity for each participant to practice writing a 40-point case study. The session will close with the identification of elements the graders use to evaluate case studies written for Part 6. Notes: 1) **Attendance is limited to 20.** 2) Participants should bring a laptop if at all possible; **laptops will NOT be provided.** Participants may write the case study in long-hand if they are unable to bring a laptop.