



Learning Objectives

Upon completion of this session, participants will be able to:

1. Outline the characteristics of the case study section of the CRM Exam
2. Summarize the requirements for passing part 6 of the CRM Exam
3. Explain how to maximize the chances of successfully completing Part 6 of the CRM Exam

Agenda

1. Exam basics
2. Break
3. Writing the practice case
4. Grading

Pre-Test Preparation

1. Know where the test is being given
2. Know how to get there and how long it will take
3. Arrive at least 15 minutes early
4. Read your testing instructions carefully so there will be no surprises once the test starts
5. Know what you can bring to the test
6. Watch, stopwatch or digital timer
7. (Time is also shown on the computer screen)
8. Water, coffee, soft drinks, or snacks (check with testing site to see what is allowed)
9. A sweater or jacket

Before You Start

1. Pick a seat and check:
 - A. The Lighting
 - B. The Chair
 - C. The ventilation (no vent blowing on you)
 - D. The Computer is on and working
2. Know where the bathrooms and water fountains are
3. Be sure and ask for a white board to take notes

Preparation

1. Practice writing
2. Take a writing course if you can
3. Be prepared with the working knowledge gained through experience and taking the passing Parts 1-5
4. Use the Preparing for the CRM Examination: A Handbook (www.icrm.org)

Preparation Help

Mentorship Program

Part 6 Mentor Coordinator

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Part 6 Requirements

All tests are administered through Pearson Vue Testing Centers (www.ICRM.org or PearsonVue.org)

1. No spell check, bullets, underlining or bolding
2. You can not return to the 60-Point case study once you've selected your 40-Point case study
3. Each case study will bring up a section (i.e. Introduction) in a single screen
4. No plain paper allowed only whiteboards where available

Case Study Requirements

1. You will write answers to two case studies
2. The first case study is worth 60 points
3. You must complete this 60 point case study before you can see the 40 point case studies
4. You will be presented with two 40 point case studies in which you will choose one
5. Once you've completed your 40 point case study, your finished
6. You cannot go back to the 60 point case study once you've finished the 40 point case study

Time Management

1. Time management is critical to successfully completing Part 6
2. You have four hours to complete and submit both case studies
3. Be sure to leave adequate time for your 40 point case study
4. Check your time frequently to adjust your pace

Time Management

Acknowledge Non-Disclosure Agreement	5 minutes
60 Point Case Study	
Reading	20
Jotting Notes (whiteboard)	15
Planning and Organizing	20
Writing	75
Reviewing and Editing	<u>15</u>
	150 minutes

Time Management

40 Point Case Study	
Reading	15
Jotting Notes	5
Planning and Organizing	10
Writing	50
Review and Editing	<u>10</u>
	90 minutes

Writing Your Report

1. Narrative Report should be concise and complete
2. Outlines and lists are not an acceptable format (unless specified in the directions)
3. Action Instructions (make sure an read carefully)
4. Be Aware of Point Values for each section and spend your time where it counts the most.

Writing Your Report

1. Remember there often is more than one correct answer but there is always a BEST answer
2. The best answer will focus on RECORDS
3. Management from a global viewpoint and applicable to all types of Organizations
4. Don't be preoccupied with how you may be doing things in your current job, the exams are based on best practices
5. For the clarity for the graders, put in headings to separate the areas of your answer

Instructions

1. Preface
 - A. Preliminary directions
2. Problem
 - A. Focus of the Report
 - B. Specific to the Case Study
3. Action
 - A. Apply to each Case Study
 - B. Specific for each Case Study
 - C. Point Values differ for each Case Study

Instructions

1. Introduction
 - A. Problem Statement
 - B. Summary of Overall Findings
2. Introductions for case studies are only worth 8 and 10 points so be concise but don't spend a lot of time on these

Problem Solving Techniques

1. Develop a plan of action
2. Have basic steps memorized

Approach to Problem Solving

1. Identify the problem
2. Seek management support
3. Determine level of support required
3. Gather information

Approach to Problem Solving

1. Analyze information
2. Select and compare alternatives (Pros & Cons)
3. Select the best solution and support it

Approach to Problem Solving

1. Staff, train and organize
2. Schedule and obtain resources and materials
3. Complete the project
4. Evaluate, report and audit

Conclusion

1. Conclusion, Summary or Recommendation
(as directed in Action area of Case Study)
2. Managerial and professional tone
3. Distinguish between facts, conclusions and your recommendations (supported)
4. Include both the records management theory and application

Editing

1. Review Case Study
 - A. Choppy or wordy sentences
 - B. Incorrect punctuation
 - C. Lengthy paragraphs
 - D. Inconsistent verb tense
 - E. Lack of transition
 - F. Poor typing skills
 - G. Inconsistent formatting
 - H. Jargon and acronyms
 - I. There is no spell-check

Grading

1. Professionalism
2. Logic
3. Completeness
4. Condition, neatness and format
5. Reader's reception of reply
6. Each Case Study will be assigned to a different Grader

Graders' Comments

1. The **Candidate** did not Read or perform the "Action" requested in the case study
2. Rewrote or restated too much of the printed case study rather than demonstrating concepts and conveying viable solutions
3. Did not provide enough detail or argument and/or solutions were too basic or generic

Graders' Comments

1. Writing is disorganized or wordy
2. Case study was incomplete
3. Writing style was inappropriate and/or did not follow the requirements (language too formal or academic)
4. Did not write to the relevant audience as directed

Graders' Comments

1. Did not answer or address the specific questions from the case study
2. Misunderstood the problem
3. Did not demonstrate knowledge of the capabilities of the technologies discussed in the problem

Graders' Comments

1. Alternative solutions were not developed as to pros and cons
2. Did not demonstrate enough knowledge and detail to provide a convincing argument
3. Did not use suggested format with introduction and conclusions
4. Did not provide a thorough discussion of relevant costs

Re-grades & Appeals

1. A Candidate who fails Part 6 by less than ten points (60-69 percent) receives an automatic re-grade
2. If a Candidate's final score is 63 to 69 percent, they may make a written request to appeal the failing grade
3. Request for an appeal must be postmarked within 15 days of receiving notice from the ICRM

Re-grades & Appeals

1. The review shall be performed by the Examination Appeals Committee and processed within 30 days
2. Decisions of the Examination Appeals Committee are final
3. The Appeals Committee does not provide an evaluation or feedback on the appeal

Questions?

www.icrm.org
(877) 244-3128

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