



## AIIM Training Programs

Enhance your business and professional skills with training from AIIM – the industry authority.

**Four distinct certificate programs will help you plan and implement:**

- **Enterprise Content Management (ECM)**  
Learn how to take control of your information assets.
- **Electronic Records Management (ERM)**  
Learn how to take control of your electronic records.
- **Business Process Management (BPM)**  
Learn how to improve your business processes.
- **Information Organization and Access (IOA)**  
Learn how to optimize findability and enterprise search.

Training programs are designed from best practices among AIIM's 70,000 global members.

**Position yourself to be tomorrow's leader. Call AIIM today to find out more.**



# AIIM Certificate Programs



## Enterprise Content Management (ECM)

Learn how to take control of your information assets.

- Enterprise strategies and technologies to capture, manage, store, preserve and deliver organizational content
- Technologies and solutions for DM, ERM, BPM, WCM, and Collaboration
- Information governance structure and responsibilities
- Corporate instruments like classification scheme, metadata model, and security model
- Integration techniques and migration
- Implementation planning and execution



## Electronic Records Management (ERM)

Learn how to take control of your electronic records.

- Methodologies and technologies for managing electronic records
- Development of metadata model, classification schemes and access control
- Retention schedule and disposition
- Digital preservation techniques
- Legislation, standards and regulations
- Implementation planning and execution



## Business Process Management (BPM)

Learn how to improve your business processes.

- Streamlining and re-engineering
- Requirements gathering and analysis
- Application integration
- Process design and modeling
- Monitoring and process analysis
- Managing change



## Information Organization & Access (IOA)

Learn how to optimize findability and enterprise search.

- Enterprise search
- Content classification
- Categorization and clustering
- Fact and entity extraction
- Taxonomy creation and management
- Information presentation

## AIIM Education Advisory Group

The training programs have been developed based on learning objectives and best practices defined by the following members.

- Accenture
- BearingPoint
- Canon
- CMS Watch
- Cornwell Management Consultants
- Credit Suisse
- Docubase Systems
- EMC
- Empagio
- Fujitsu
- Gartner
- GlaxoSmithKline
- IBM
- JPMorgan Chase
- Kent State University
- Kofax
- Lockheed Martin
- Marion County Health Department
- Microsoft
- Oracle
- Ricoh
- Royal Mail
- The National Archives of United Kingdom
- The Process Factory
- TIAA-CREF
- US Courts
- US Department of Treasury
- ZyLAB





The **ECM Certificate Program** contains three training programs taken in any order, or a 4 day Master class covering all ECM topics.

The **ECM Strategy** workshop provides you with the knowledge to gain ownership and support by senior executives and users.

The **ECM Practitioner** program covers information lifecycle and related concepts such as document management, collaboration, workflow, electronic records management, and web content management.

The **ECM Specialist** program covers the implementation and related processes such as analyzing business requirements, developing a business case, and planning the implementation including change management.

The **ECM Master** program provides you with a detailed understanding of ECM, with the main elements from all of the above training programs, in addition to case study exercises.

Some of the programs are available exclusively as highly interactive onsite training classes while others may be taken online.

Course materials produced in partnership with:  
Cornwell Management Consultants  
and  
The Oxford Group

# Enterprise Content Management (ECM)

## Why ECM?

### ECM Strategy workshop

1 day executive awareness workshop

#### Learn:

- The concept of ECM and its business drivers
- The need for ECM best practices
- The link between ECM and your current situation
- To identify information assets
- To enable content collaboration and reuse across your organization
- To identify necessary resources and organizational responsibilities for implementing ECM
- To explore the implications of an ECM strategic decision
- To gain commitment for change

Onsite Class Only

## What is ECM?

### ECM Practitioner

14 online modules or  
2 day training class



#### Learn:

- To understand information lifecycle
- Sources of information and appropriate capture mechanisms
- Relevant storage models, audit trail and storage technologies
- Concepts for managing information and content
- Digital preservation techniques
- Different ways of delivering information and content to employees, partners and customers
- Re-purposing and interoperability
- Metadata and indexing
- Classification concepts and various approaches for business needs
- Search and retrieval
- Different levels of access control and security
- To define interfaces, legacy systems, and migration
- Legislation, standards, and regulation

Become an **ECM Practitioner (ECM<sup>P</sup>)** after passing the online exam.

Onsite or Online Classes

## How to Implement ECM

### ECM Specialist

12 online modules or  
2 day training class



#### Learn:

- To manage an ECM program consisting of several projects
- To identify new roles, responsibilities, and the organizational structure necessary to provide governance and management
- The "Concept of Operations" as a shared vision of an ECM future
- To develop an information survey
- To develop a business case for ECM
- To identify business requirements for an ECM system
- To develop and implement a business classification scheme
- How implementing ECM impacts an organization's IT infrastructure
- Pilot implementation/model office
- The roll-out stage of an ECM program
- How to sustain ECM after implementation

Become an **ECM Specialist (ECM<sup>S</sup>)** after passing the online exam.

Onsite or Online Classes

## Putting it all Together

### ECM Master

4 day training class



The ECM Master program comprises main elements from the strategy workshop and practitioner and specialist programs in addition to a case study exercise.

Become an **ECM Master (ECM<sup>M</sup>)** after passing the online exam and case study exercise.

### ECM Master Preparation

2 day training class

Available to students that currently hold both the ECM Practitioner and ECM Specialist designations.

Learn, share, and discuss global best practices for ECM through case studies and exercises based on elements learned from the Strategy, Practitioner, and Specialist programs.

Onsite Class Only

The **ERM Certificate Program** contains three training programs taken in any order, or a 4 day Master class covering all ERM topics.

The **ERM Strategy** workshop provides you with the knowledge to gain ownership and support by senior executives and users.

The **ERM Practitioner** program covers the lifecycle of a record and related concepts such as classification schemes, metadata, security, retention, and disposal.

The **ERM Specialist** program covers the implementation and related processes such as information audit, business requirements, concepts of operations, and roll-out.

The **ERM Master** program provides you with a detailed understanding of ERM including the main elements from all of the training programs, in addition to case study exercises.

Some of the programs are available exclusively as highly interactive onsite training classes while others may be taken online.

Course materials produced in partnership with:  
Cornwell Management Consultants  
and  
The Oxford Group

# Electronics Records Management (ERM)

## Why ERM?

### ERM Strategy workshop

1 day executive awareness workshop

#### Learn:

- ERM business drivers
- The need for ERM best practices
- The link between ERM and your current situation
- To demonstrate the impact of ERM on users
- To understand the concepts of ERM's affect on information challenges
- To identify necessary resources and organizational responsibilities for implementing ERM
- To explore the implications of an ERM strategic decision
- To gain commitment for change

Onsite Class Only

## What is ERM?

### ERM Practitioner

17 online modules or  
2 day training class



#### Learn:

- Records Management terminology
- The lifecycle of records
- Sources of records and appropriate capture mechanisms
- Concepts of classification and dimensional approaches for business needs
- Current metadata standards and guidelines
- Search and retrieval
- Different levels of access control and permissions
- Retention and disposal
- Digital preservation techniques
- Migration
- ERM administration and audit
- Legislation, standards, and regulation
- Discovery, disclosure, and related issues

Become an ERM Practitioner (**ERM<sup>P</sup>**) after passing the online exam.

Onsite or Online Classes

## How to Implement ERM

### ERM Specialist

12 online modules or  
2 day training class



#### Learn:

- To manage an ERM program consisting of several projects
- To identify new roles, responsibilities, and the organizational structure necessary to support an ERM facility
- The "Concept of Operations" as a shared vision of an ERM future
- To develop an information survey
- To develop a business case for ERM
- To identify business requirements of an ERM system
- To develop and implement a business classification scheme
- How implementing ERM impacts an organization's IT infrastructure
- Pilot implementation/model office
- The roll-out stage of an ERM program
- How to sustain ERM after implementation

Become an ERM Specialist (**ERM<sup>S</sup>**) after passing the online exam.

Onsite or Online Classes

## Putting it all Together

### ERM Master

4 day training class



The ERM Master program comprises main elements from the strategy workshop and practitioner and specialist programs in addition to a case study exercise.

Become an ERM Master (**ERM<sup>M</sup>**) after passing the online exam and case study exercise.

### ERM Master Preparation

2 day training class

Available to students that currently hold both the ERM Practitioner and ERM Specialist designations.

Learn, share, and discuss global best practices for ERM through case studies and exercises based on elements learned from the Strategy, Practitioner, and Specialist programs.

Onsite Class Only



## The **Business Process Management (BPM) Certificate Program**

contains three training programs taken in any order, or a 4-day Master class covering all BPM topics.

The **BPM Strategy** workshop provides you with the knowledge to get ownership and support by senior executives and users.

The **BPM Practitioner** program covers BPM technologies and methodologies, role of ECM in BPM, business analysis, process improvement, flowcharting, process modeling, approaches, technologies, and collaboration.

The **BPM Specialist** program covers the implementation of BPM, and related tasks such as the business case for BPM, stakeholders and the project team, gathering and analyzing requirements, process design best practices, validating requirements, project stages, pitfalls and best practices, and methodologies.

The **BPM Master** program provides you with a detailed understanding of BPM including the main elements from all of the training programs, in addition to a case study exercise.

Some of the programs are available exclusively as highly interactive onsite training classes while others may be taken online.

Course materials produced in partnership with: CMS Watch

# Business Process Management (BPM)

## Why BPM?

### BPM Strategy workshop

1 day executive awareness workshop

#### Learn:

- BPM business drivers
- The need for BPM best practices
- The link between BPM and your current situation
- To demonstrate the impact of BPM on users
- To understand the concepts of BPM's affect on information challenges
- To identify necessary resources and organizational responsibilities for implementing BPM
- To explore the implications of a BPM strategic decision
- To gain commitment for change

Onsite Class Only

## What is BPM?

### BPM Practitioner

11 online modules or 2 day training class



#### Learn:

- Technologies and methodologies of BPM
- Role of ECM in BPM
- Business analysis
- Process improvements
- Flowcharting
- Process modeling
- Business process improvement
- Business process reengineering
- Service oriented architecture (SOA)
- Six Sigma and continuous improvement
- BPM technologies
- Standards and protocols
- Collaboration

Become an **BPM Practitioner (BPM<sup>P</sup>)** after passing the online exam.

Onsite or Online Classes

## How to Implement BPM

### BPM Specialist

10 online modules or 2 day training class



#### Learn:

- Planning your project
- How to develop a business case for BPM
- Identify and establish stakeholders and project teams
- Gather requirements
- Analyze requirements
- Best practices for process design
- Understand clusters, parallel and sequential processing, natural order, check and reviews, decision making, simplification, and upstream and downstream
- Project advice, pitfalls and, best practices
- Management methodologies including TQM, BPR, Six Sigma, and Lean

Become an **BPM Specialist (BPM<sup>S</sup>)** after passing the online exam.

Onsite or Online Classes

## Putting it all Together

### BPM Master

4 day training class



The **BPM Master** program comprises main elements from the strategy workshop and practitioner and specialist programs in addition to a case study exercise.

Become an **BPM Master (BPM<sup>M</sup>)** after passing the online exam and case study exercise.

### BPM Master Preparation

2 day training class

Available to students that currently hold both the **BPM Practitioner** and **BPM Specialist** designations.

Learn, share, and discuss global best practices for BPM through case studies and exercises based on elements learned from the **Strategy**, **Practitioner**, and **Specialist** programs.

Onsite Class Only



# Information Organization & Access (IOA)

The **Information Organization & Access (IOA) Certificate Program** contains three training programs taken in any order, or a 4-day Master class covering all IOA topics.

The **IOA Strategy** workshop provides you with the knowledge to get ownership and support by senior executives and users.

The **IOA Practitioner** program covers technologies and methodologies of IOA; finding, inventorying and analyzing content; taxonomy; metadata; ontologies, topic maps, and semantic networks; content modeling; introduction to access; content intelligence and text mining; advanced topics in findability; advanced search techniques; search interfaces; document structures; and content finding.

The **IOA Specialist** program covers project planning; defining the problem and planning the project; building the right team; user analysis and scenarios; content inventory, aggregation, and analysis; architecting a standards-based content/data model; tagging and content organization models; optimizing IOA tools; improving findability; governance; and maintenance and management.

The **IOA Master** program provides you with a detailed understanding of IOA including the main elements from all of the training programs, in addition to a case study exercise.

Some of the programs are available exclusively as highly interactive onsite training classes while others may be taken online.

Course materials produced in partnership with: CMS Watch

## Why IOA?

### IOA Strategy workshop

1 day executive awareness workshop

#### Learn:

- IOA business drivers
- The need for IOA best practices
- The link between IOA and your current situation
- To demonstrate the impact of IOA on users
- To understand the concepts of IOA's affect on information challenges
- To identify necessary resources and organizational responsibilities for implementing IOA
- To explore the implications of an IOA strategic decision
- To gain commitment for change

Onsite Class Only

## What is IOA?

### IOA Practitioner

10 online modules or  
2 day training class



#### Learn:

- Technologies and methodologies of IOA
- Finding, inventorying, and analyzing content
- How to develop and maintain a taxonomy
- Developing and maintaining metadata
- Ontologies, topic maps, and semantic networks
- Content modeling
- Access techniques
- Content intelligence and text mining
- Advanced topics in findability
- Advanced search techniques
- Search interfaces
- Finding without search — content finding us

Become an IOA Practitioner (**IOA<sup>P</sup>**) after passing the online exam.

Onsite or Online Classes

## How to Implement IOA

### IOA Specialist

10 online modules or  
2 day training class



#### Learn:

- Planning your project
- How to develop a business case for IOA
- Defining the problem and planning the project
- Building the right team
- User analysis and scenarios
- Content inventory, aggregation, and analysis
- How to build a taxonomy
- How to create a metadata model
- Architecting standard-based content/data model
- Tagging and content organization models
- Optimizing information access tools
- Improving findability
- Governance
- Maintenance and management

Become an IOA Specialist (**IOA<sup>S</sup>**) after passing the online exam.

Onsite or Online Classes

## Putting it all Together

### IOA Master

4 day training class



The IOA Master program comprises main elements from the strategy workshop and practitioner and specialist programs in addition to a case study exercise.

Become an IOA Master (**IOA<sup>M</sup>**) after passing the online exam and case study exercise.

### IOA Master Preparation

2 day training class

Available to students that currently hold both the IOA Practitioner and IOA Specialist designations.

Learn, share, and discuss global best practices for IOA through case studies and exercises based on elements learned from the Strategy, Practitioner, and Specialist programs.

Onsite Class Only



## Who should attend

- IT/Technical Staff
- Information Architects
- Records Managers
- Consultants
- Business Managers
- Regulatory Staff
- Implementation Teams
- Service Providers

## Pricing

Pricing for the AIIM Certificate Program includes attendance (online or in-person) for one individual; a workbook, checklists and resource guide; and access to supporting web courses. AIIM Professional Members receive a special discount on all courses and program rates.

## Group Discounts

Groups of 10+ professionals from one organization may qualify for a group discount. Volume discounts and site licenses are available for companies, user groups, professional associations, or social clubs.

## Corporate Training

AIIM delivers private onsite training classes around the world upon request. For information about pricing, please email [training@aiim.org](mailto:training@aiim.org) or call us at +1 301.755.2686 or +44 1905.727600.



## Online

### AIIM Professional Members:

1 course	\$65	£35*	€50*
Complete Practitioner Certificate package	\$600	£345*	€500*
Complete Specialist Certificate package	\$600	£345*	€500*

### Non - AIIM Members:

1 course	\$75	£40*	€60*
Complete Practitioner Certificate package	\$750	£430*	€630*
Complete Specialist Certificate package	\$750	£430*	€630*

## Classroom

### AIIM Professional Members:

1 day Strategy workshop	\$535	£295	€435
2 day Practitioner or Specialist classes	\$1050	£580	€850
4 day Master class	\$2705	£1495	€2195
2 day Master preparation workshop*	\$1050	£580	€850

### Non - AIIM Members:

1 day Strategy workshop	\$590	£325	€480
2 day Practitioner or Specialist classes	\$1160	£640	€935
4 day Master class	\$2980	£1640	€2415
2 day Master preparation workshop*	\$1160	£640	€935

\* Available for students that currently hold both Practitioner and Specialist designations within a program.

For information about **AIIM Certificate Programs** contact us at  
+1 301.755.2614 or +44 1905.727600





For over 60 years, AIIM – The Enterprise Content Management Association, has been the leading international organization focused on helping users to understand the challenges associated with managing documents, records, content, and business processes. AIIM is international in scope, independent, implementation-focused, and, as the representative of the entire Enterprise Content Management (ECM) industry – including users, suppliers, and the channel – acts as the industry intermediary. As a neutral and unbiased source of information, AIIM serves the needs of its members by providing educational opportunities, professional development, reference and knowledge resources, networking events, and industry advocacy.



Headquarters:

1100 Wayne Avenue  
Suite 1100  
Silver Spring, MD 20910 US  
T. +1 301.587.8202 / 800.477.2446  
E. [training@aiim.org](mailto:training@aiim.org)  
[www.aiim.org](http://www.aiim.org)

European Office:

8 Canalside  
Lowesmoor Wharf  
Worcester  
WR1 2RR UK  
T. +44 1905.727600  
E. [training@aiim.org](mailto:training@aiim.org)  
[www.aiim.org.uk](http://www.aiim.org.uk)

**For information about  
AIIM Certificate Programs  
contact us at  
+1 301.755.2614 or +44 1905.727600**