

Information Governance

THIS COURSE IS DESIGNED TO ENHANCE AND PROMOTE THE PROFESSION OF INFORMATION MANAGEMENT BY PROVIDING THE REQUIRED KNOWLEDGE TO PREPARE DELEGATES TO WRITE THE CERTIFIED INFORMATION PROFESSIONAL (CIP) EXAM.

DURATION : 5 DAYS
COURSE ID : IG001

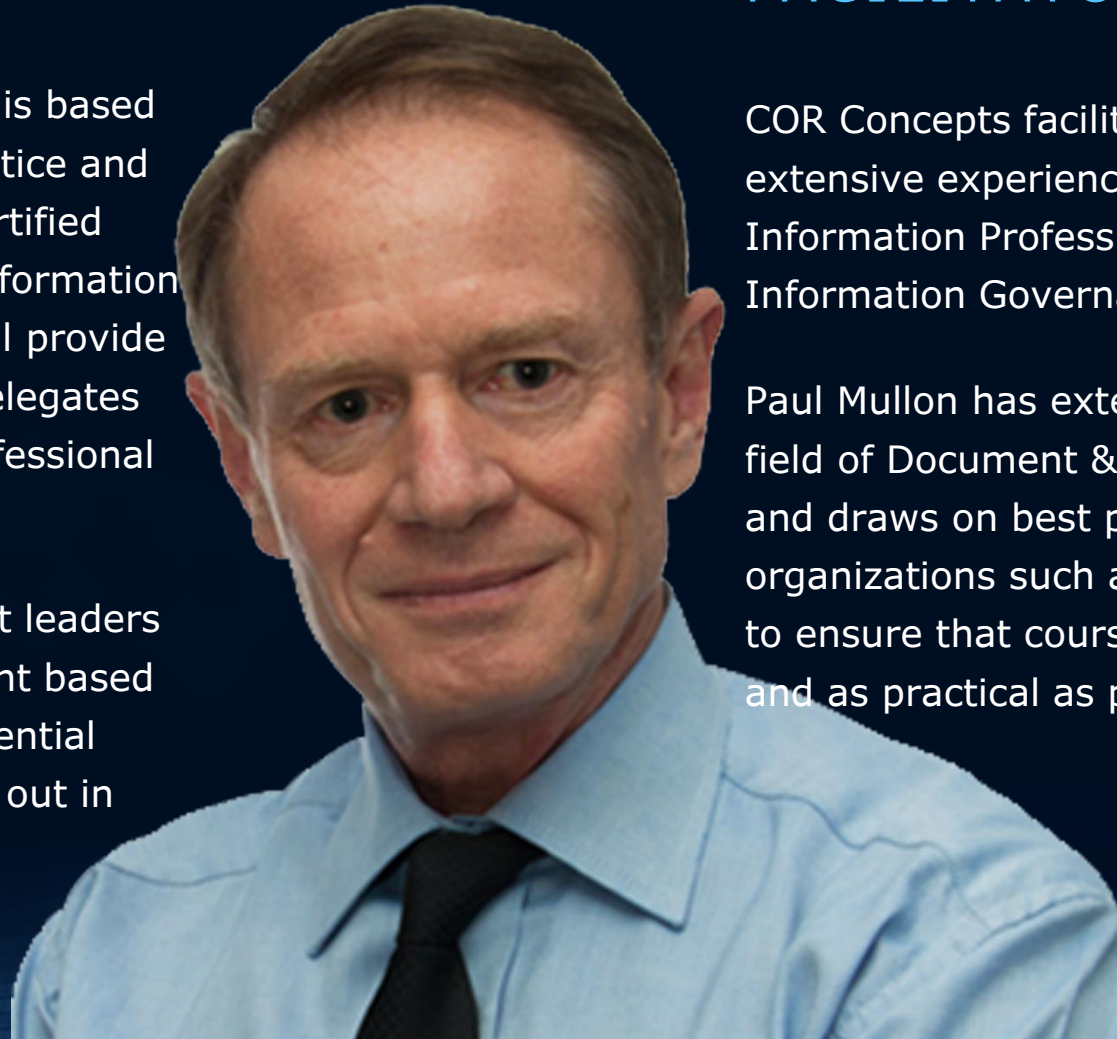


INTRODUCTION

BACKGROUND

The Information Governance training is based on International Standards, Best Practice and our experience in the field of both Certified Information Professional (CIP) and Information Governance Professional (IGP). It will provide the required knowledge to prepare delegates to write the Certified Information Professional (CIP) exam.

The CIP exam was created by thought leaders in the field of information management based in real-life situations to help CIP credential holders and their organizations stand out in today's information-driven world.



FACILITATOR

COR Concepts facilitator, Paul Mullon has extensive experience as both Certified Information Professional (CIP) and Information Governance Professional (IGP).

Paul Mullon has extensive experience in the field of Document & Records Management and draws on best practice as developed by organizations such as ISO, AIIM and ARMA to ensure that course content is up to date and as practical as possible.



WHO SHOULD ATTEND

CIP is an advanced certification. The CIP exam was designed to demonstrate the expertise and experience one might acquire over a long career in the Intelligent Information Management Industry.

We recommend that candidates have a minimum of five years of experience and to have experience in more than one exam domain.

It's definitely not a good fit for beginners with little to no preparation.

OBJECTIVES

The training focuses on the five CIP critical areas that comprise Intelligent Information Management.

Delegates will be able to:

- Understand the methods and processes used for creating, capturing and sharing information.
- Understand the process of extracting intelligence from information.
- Design and implement digitalizing information-intensive processes.
- Understanding the requirements of automating governance and compliance.
- Implement an information management strategy and solution.



THE VALUE OF CIP TO EMPLOYERS

The value of certification is often described from the perspective of the individual and how the certification will benefit the individual. But what about the organization – what is the value to a particular organization of hiring Certified Information Professionals (CIPs) or developing them internally?

CIPs reflect a more integrated, more holistic view of information management. Changes in one process, technology, or practice invariably affect others in the organization.

CIPs are able to see the forest and the trees and understand and plan for these outcomes. Because of this, CIPs will identify and understand changes that could cause compliance issues, thereby reducing liability.

Organizations that manage their information more effectively enjoy reduced costs, faster time to market, increased revenues and cash flow, and increased business agility. CIPs are uniquely positioned to help organizations achieve these benefits because they understand the interactions between different information-intensive processes and activities.



PART 1: Creating & Capturing Information

OUTLINE

Creating and capturing information focuses on all the different types of information and the characteristics to consider in determining how to store, manage, and use it effectively in support of business processes. This Part covers:

- **Capturing Information:** This Part begins with a look at how information comes into the organization and the most effective way to capture it - preferably in an automated fashion.
- **File Formats:** Learn about the common file formats and the importance of using open and standards-based formats wherever possible.
- **Digitalization:** Understanding the process for digitizing paper documents in terms of selecting the proper strategy and the steps in an imaging process.
- **Information Storage:** Once the information is present, it needs to be put somewhere.
- **Collaboration:** Work is a collaborative process, so we spend quite a bit of time on how to do it effectively (hint: it's not through email), how to manage the collaborative process, and things to consider when collaborating across organizational and geographic boundaries.
- **Knowledge Management:** We take a look at knowledge management as a discipline, paying particular attention to how to identify the right person for a specific role or issue.
- **Content Migration:** How do you get information from one system to another effectively? Two things to consider here: what do you migrate, some or all, and how do you ensure the migration was successful and accurate?

By the end of Part 1, you should have a solid grounding on how information is created or received by the organization and where and how it is captured so it can be used and managed throughout the information lifecycle.



PART 2: Extracting Intelligence from Information

OUTLINE

Extracting intelligence from information is all about gaining a better understanding of the information your organization has by using a variety of tools, techniques, and automation. Let's take a look at what's covered in this Part:

- **Metadata:** More than “data about data”, metadata provides the context required to understand information: how it's used, how it's managed, and how it is made available to users throughout the information lifecycle. This is one of the three pillars of findability.
- **Taxonomies:** If metadata makes up the bricks of findability, taxonomies are the blueprint. Taxonomies form the second pillar of findability by allowing users to browse information in different repositories and storage locations.
- **Analytics/Machine Learning/Artificial Intelligence (AI):** These tools and techniques form the third pillar of findability by extracting the contents of unstructured documents and making them available to other tools and processes. They also offer significant support for automating common information management tasks like classification and file share cleanup.
- **Data Recognition, Extraction, and Standardization:** These capabilities improve our ability to make sense of images as well as documents and can significantly improve the findability of business information.
- **Search:** Having all this information available doesn't help the organization if users are unable to find what they need.

By the end of Part 2, you should have a solid grounding on how to extract the value from different types of information and how to leverage these capabilities in support of business goals and objectives.



PART 3: Digitizing Core Business Processes

OUTLINE

Digitalizing core business processes is much more than scanning paper documents or workflows. It involves rethinking business processes and asking questions about how information comes into, flows through, and leaves business processes. It involves reimagining work at the speed of digital and leveraging new capabilities to satisfy business and customer expectations. Part 3 includes the following topics:

- **Introduction to Business Process Management:** We don't change processes simply because we're bored; instead, process change is usually driven by changes in the business, legal, or technical environment. Whatever the changes are to be introduced, though, it's important to ensure they continue to support business goals and objectives - and it's important to recognize that successful process change is much more dependent on human factors than technology.
- **Business Analysis:** It's important to understand the current state before making recommendations for change. Gaining and maintaining senior management support will require an understanding of the cost of making changes to a process - and the cost of not making the changes.
- **Flowcharts:** Flowcharts are simple yet effective tools to help document existing business processes, identify bottlenecks or other process issues, and redesign those processes to be more efficient.



PART 3: Digitizing Core Business Processes

OUTLINE (CONT.)

- **Troubleshooting and Improving Existing Business Processes:** Once we understand the issues with business processes, we can take to rework or redesign them for efficiency. This could include introducing or expanding the use of parallel processing or work specialization.
- **Selecting the Right Process Automation Solution:** Different business processes will benefit from different technical approaches depending on their complexity and other factors. Whichever approach is selected, it's important to measure the efficiency of business processes so that corrective actions can be taken as required.
- **Robotic Process Automation:** This is a newer entry into the BPM stack, but it is already proving its value to processes that involve a lot of manual data entry between systems. These solutions free up users to perform more valuable, innovative tasks that require creativity.
- **Case Management:** Case management blends content management and process management capabilities to help manage all content associated with a particular incident, application, or case throughout a business process.

By the end of this Part, you should have a solid understanding of process analysis and process improvement, and how to streamline and automate business processes in support of business goals and objectives.



PART 4: Automating Governance & Compliance

OUTLINE

This Part is important because it focuses on the compliance and risk side of information management. While the primary focus of intelligent information management is enabling and supporting business goals and objectives, it's still important to safeguard information to minimize risk and liability.

The challenge here is that all the policies and procedures you can imagine won't help if they aren't implemented and followed. Here, particularly in the case of records management, users aren't records managers and don't want to be - they want to focus on their main job responsibilities. In addition, they aren't trained to do these types of tasks. So, the better approach by far is to streamline and automate them so that they are relatively transparent to users.

This is the single biggest Part on the CIP exam - and looking at the contents, it's no wonder.

- **Information Governance (IG):** IG is the strategy that all the other information management disciplines and tactics support. But this strategy still needs to align to and support the overall business strategy. It starts with assessing the existing IG program (if one exists) in the overall context of the organization, developing an IG strategy, and then building or optimizing IG practices to promote effective information management practices.
- **Records Management:** For most organizations, only a small percentage of information needs to be formally managed as records. But those are their most important information assets because they document strategies, decisions, and financial and legal liabilities. Information professionals should know how to determine whether something is a record and how to manage them throughout the information lifecycle, including how to disposition them at the end of that lifecycle.



PART 4: Automating Governance & Compliance

OUTLINE (CONT.)

- **Information Security:** Information professionals play a key role in balancing security and business requirements and need to know how common information security practices can impact effective information management. This means understanding tools like roles-based access, redaction, and encryption, and when and how to use them effectively.
 - **Privacy and Data Protection:** It seems like every day brings news of another data breach. But data breaches are almost always preventable. At the same time, regulations around the globe are forcing organizations to understand what constitutes personal data and how to protect and manage it appropriately.
- Organizations that leverage the principles of Privacy by Design, that follow effective information lifecycle management practices, and that collect only what they need for only as long as they need it will be much less likely to suffer breaches and the attendant costs - in both money and trust.
- **Digital Preservation:** Information has to be managed throughout its lifecycle; for some types of information, this lifecycle can be measured in decades, centuries, or...longer. Organizations need to understand what they have, where the risks are, and take appropriate actions to ensure they can access information as long as the business requires.

By the end of this Part, you should have a solid understanding of how to develop and implement an information governance framework and program, how to manage information effectively and securely throughout the information lifecycle, and how to ensure long-term access to digital information.



PART 5: Implementing an Information Management Solution

OUTLINE

The final Part of the CIP focuses on how to implement an information management program. Such a program includes more than just technology, though that is often a part of the overall solution. But it's also assessing the current state of the organization, making the business case for change, and designing a solution that will support and enable its goals and objectives. Part 5 includes the following topics:

- **Information Management Strategy:** Any information management initiative needs to support the overall goals of the organization. The strategy should outline the impact of the initiative on ways of working, how business processes may change, roles and responsibilities for the initiative, and the outcomes of the business and technical assessment.
- **The Business Case for Intelligent Information Management:** The business case identifies the expected benefits of the initiative and serves as a baseline for improvement.
- **Business Requirements for Information Management:** Requirements serve to identify and document how the solution will satisfy the organization's needs - what is included in the implementation and what might be left for subsequent iteration. We also compare on-premises vs. cloud from a business requirements perspective.

As the old maxim notes, you can't manage what you don't measure, so one of the key outcomes of the business case is to identify key performance indicators and critical success factors that support improved outcomes.



PART 5: Implementing an Information Management Solution

OUTLINE (CONT.)

- **System Design and Implementation:** Your organization is unique which makes every implementation different. However, there are some common steps that need to be included: design, development, deployment, the pilot, local preparation, and the actual go-live process.
- **Change Management:** Most technology projects fail due to human issues rather than technical ones. Change management begins when the project does. While different audiences receive different messages and on different timelines, change management has to be an ongoing process if the initiative is to succeed.

By the end of this Part, you should have a solid understanding of how to develop and implement an information management solution, from strategy to implementation and post-implementation activities.

EXAM PREPARATION

At the end of the course, the group will do a 100-question practice exam that mimics the exam weighting and timing of the real exam, as well as a Foundations of Intelligent Information Management course that serves as a prep course for the CIP exam.



REGISTRATION INFORMATION

Company Name:				VAT No.:	
Postal Address:					
Telephone No.:				Fax No.:	
E-mail Address:				Purchase Order No.:	
No.	Title	Delegate Name	Designation	E-mail	Cell. No.
1.					
☐	Yes, please update me with relevant information				
No.	Title	Delegate Name	Designation	E-mail	Cell. No.
2.					
☐	Yes, please update me with relevant information				
No.	Title	Delegate Name	Designation	E-mail	Cell. No.
3.					
☐	Yes, please update me with relevant information				
No.	Title	Delegate Name	Designation	E-mail	Cell. No.
4.					
☐	Yes, please update me with relevant information				

Terms & Conditions

COR CONCEPTS CANCELLATIONS & POSTPONEMENT POLICY

In the event that COR Concepts cancels an event, delegate payments will be refunded. In the event that COR Concepts postpones an event, delegate payments at the postponement date will be credited towards the rescheduled date. If the delegate is unable to attend the rescheduled event, the delegate will receive a 100% credit representing payments made towards a future event. This credit will be available for up to one (1) year from the date of issuance. No refunds will be available for postponements. COR Concepts is not responsible for any loss or damage as a result of a substitution, alteration or postponement of an event. COR Concepts shall assume no liability whatsoever in the event this training course is rescheduled or postponed due to fortuitous event, Act of God, unforeseen occurrence or any other event that renders performance of this training course impracticable or impossible. For purposes of this clause, a fortuitous event shall include, but not be limited to: war, fire, labour strike, extreme weather or other emergency.

DELEGATE CANCELLATIONS

All delegate cancellations must be received in writing and are subject to the following conditions:

- For any cancellations received 20 working days before the start of the training course, COR Concepts will issue 100% credit for the value paid to be used for up to one year from the date of issue for any further COR Concepts training course;
- For any cancellation received less than 20 working days before the date of the training course, the full fee will be payable and no refunds or credit notes will be given;
- If a registered delegate does not cancel and fails to attend the training course, this will be treated as a cancellation and no refund or credit note will be issued;
- Delegate substitutions are welcome. Please notify us 5 days before the event.



Payment Terms

**IN ORDER TO SECURE YOUR REGISTRATION,
PAYMENT IS DUE IN FULL UPON RECEIPT OF INVOICE**

Confirmation

Your registration will only be confirmed once payment is received and may be subject to cancellation.

Right of Admission

COR Concepts reserves the right to refuse admission to the training course where evidence of full payment cannot be shown.

Delegate Substitutions

Delegate substitutions are welcomed at any time and do not incur any additional charges. Please notify us in writing of any such changes.

Application for Registration & Acceptance of Terms & Conditions

I acknowledge that I have read and understood all of the Payment Methods, Policies and Terms and Conditions (including payment terms) and hereby apply for registration on behalf of myself (if a single delegate) or on behalf of the under mentioned organization which I am duly authorised to represent.

Name: _____

Organization : _____

Job Title : _____

E-mail : _____ Cell No.: _____

Signature : _____ Date : _____

