KICKSTART YOUR CAREER IN 2017

SAN DIEGO ARMA

JANUARY 19, 2017
CERTIFIED INFORMATION PROFESSIONAL (CIP)

- AIIM Certification
- Demonstrates ability to bridge IT and business
- Leader in social and mobile content
- Demonstrate Knowledge in Six Domains:
  - Creating and Capturing Information | Organizing and Categorizing Information | Governing Information | Automating Information-Intensive Processes | Managing the Information Lifecycle | Implementation Planning
- Cost: Exam Fee - $349 USD ($285 members) – renewable every 3 years
- AIIM: [http://www.aiim.org/certification](http://www.aiim.org/certification)
Why CIP?

Over the past decade, there has been a “perfect storm” of change driven by consumerization, cloud, mobile, and the Internet of Things. It has changed how we think about enterprise information and IT — and changed how we think about the kinds of skills needed to adapt to these changes. The value-add for information technology in organizations is rapidly shifting from the technology per se to the stewardship, optimization, and application of the information assets themselves.

What is CIP?

To meet this need, AIIM worked with industry experts and focus groups to define the body of knowledge necessary for information professionals to be successful in the digital economy, built a certification and test based upon this body of knowledge that is available at locations around the world, and created a set of training courses and materials to help information professionals prepare for the examination. Click the button below to access the CIP Study Guide (free to professional members, $50 for nonmembers).
CIP - CONTINUED

How Do I Get Ready?
The path to CIP should be fairly simple for Information practitioners who already have expertise and work experience. AIIM has a number of resources that can help practitioners at all levels prepare to become a Certified Information Professional:

- CIP Data Sheet
- CIP Exam Outline
- CIP Study Guide (free to professional members; nonmember fee is $60 USD)
- AIIM Training Courses
- In-Person CIP Prep Class-NL or CIP Prep - Silver Spring, MD
- Practice Exam

See "www.aiim.org/-media/AIIM-Real-Files/CIP%202010%20Exam%20Outline.pdf?la=en" in a new tab
CERTIFIED RECORDS MANAGER (CRM)

- ICRM Certification
- Recognition
- Establishes Credentials
- Widely Accepted in Professions
- Creates Authenticate Knowledge and Skill requirements
- Requires education and or real work experience
- Successful Testing and Maintenance of Knowledge, Skills and Ability
- Portable
- Cost: Application Fee ($100); Parts 1-5 ($100 each); Part 6 ($150)
- ICRM: https://www.icrm.org/
CRM CONTINUED - APPLICATION CERTIFICATION

- Apply online with ICRM at www.icrm.org
- Qualifications
  - Education and Work Experience Requirements
- Candidacy
- Testing Environment
- Proctored Test Centers widely available in San Diego County
CRM CONTINUED – STUDY AIDS

- Test Preparation
- Timeframe for Testing
- Choose your plan
- Implement your plan
CRM CONTINUED – WHAT TO EXPECT

• Time Effort
• Testing Environments
• Maintenance
• Overall Costs – Long Term
CRM CONTINUED – BENEFITS

- Potential Employment Opportunity
- Demonstrating Knowledge, Skill and Ability
- Salary Differentials
- Networking
- Philanthropy
INFORMATION GOVERNANCE PROFESSIONAL (IGP)

- ARMA International Certification
- Demonstrate knowledge in:
  - Strategic Perspectives
  - Leverage Information for Maximum Value
  - Mitigate Risks & Reduce Costs
- Cost: $599 application fee (see AIEF for reimbursement availability)
- ARMA: http://www arma org/igp-resources/future-igps

- Diane Carlisle to present remaining slides via Skype -
CERTIFIED RECORDS ANALYST (CRA)

• ICRM Certification

• Knowledgeable and Experienced in:
  • Lifecycle management of records and information
  • Electronic records and information
  • Regulatory compliance, and more

• Provides immediate certification for CRM candidates who successfully passed Parts 2-4

• Great first step or for new professionals who do not immediately meet the requirements of the CRM candidacy

• Cost: $100 Application Fee; 3-part Exam $100 each
PROJECT MANAGEMENT PROFESSION (PMP)

• Demonstrates ability to speak the global language of project management
• Useful in various domains, locations, and methodologies
• Increases earning potential
• Cost: $405.00 (PMI member); $555.00 (non-PMI member)
• PMI: https://www.pmi.org/
PMP CONTINUED – CERTIFICATION QUALIFICATIONS

- Approved application listing experience managing projects
- Successful completion of rigor exam
- Maintenance of post-certification requirements
- Application and current fee structure on pmi.org
- Requirements – 35 hours of PM training
- With a college degree
  - 4500 hours or 3 years leading and directing projects
  - At least 36 unique months within last 8 years
- With a high school diploma
  - 7500 hours or 5 years leading and directing projects
  - At least 60 unique months within last 8 years
PMP CONTINUED – CERTIFICATION MAINTENANCE

• Complete and submit minimum of sixty (60) Professional Development Units (PDUs) every three years through pmi.org
• Cycle is based on date of certification
• Options to earn PDUs
  • Category A: PMI® Registered Education Providers (R.E.P.)
  • Category B: Continuing education
  • Category C: Self-directed learning
  • Category D: Creating PM knowledge
  • Category E: Service to professional/community organization
  • Category F: Professional PM experience
• Category hour requirements recently changed to reflect new Talent Triangle
PMP CONTINUED – ADDITIONAL PMI CERTIFICATIONS

- CAPM – Associate PM (Entry level)
- PMI-SP – Scheduling
- PMI-RM – Risk Management
- PMI-ACP – Agile Professional
- PMI-PBA – Professional Business Analyst
- PgMP – Program Management
MASTERS OF ARCHIVES AND RECORDS ADMINISTRATION (MARA)

PRESENTED BY NANCY HEATH, MARA STUDENT

- 100% online
- 42 units to earn your degree
- 14 courses (11 required and 3 electives)
- Workload 2-3 hours of study time per week for every unit you take
- E-portfolio culminating experience
- Cost $19,908 ($475 per credit hour)
- www.ischool.sjsu.edu
  - Programs Tab:
    - Master of Archives and Records Administration
MARA CONTINUED – STUDENTS LOVE MOST!

- **Flexibility:** Begin fall or spring, take one or more courses per semester, 7 years to complete
- **Customized Curriculum:** Select 3 electives from such courses as digital curation, metadata, business analytics, web design, and cyber security.
- **Outstanding Faculty:** All with work experience and hold one or more certifications such as the CA, CRM, IGP.
- **Practical Opportunities:** On premise or online virtual internship s available or complete an organizational consulting project for credit.
MARA CONTINUED – BEYOND THE CLASSROOM

- Student Organizations (ex. SAA Student Chapter—Note ARMA task force discussing this option)

- MARA Facebook Group: https://www.facebook.com/groups/101885699906412/

- MARA Blog: http://ischool.sjsu.edu/mara-blog

- Virtual Center for Archives & Records Administration (VCARA) in Second Life—see VCARA blog: http://ischool.sjsu.edu/vcara-blog

- MARA Guest Lectures – Charlene Cunniffe on “Using Lean Methods to Improve RIM, Wed. Feb. 8, 5:30-6:30 pm pacific—you’re all invited! Details at: http://ischool.sjsu.edu/about/webcasts/upcoming
RIM PROFESSIONALS ACROSS THE COUNTRY WERE ASKED…

- How has the certification helped you in your career?
- What advice would you give to someone considering this credential?
- Do you have any other credentials that you have found to be helpful in your career?

- AND HERE IS WHAT THEY SAID -
Certifications have allowed me to advance my career at an astonishing rate. Organizations are recognizing the value of hiring a certified RIM professional and there isn't enough of us right now to meet the demand.

Don't procrastinate, figure out what you need to do to get ready to pass the exams and get it done. I think this is a great time to be CRM, CIP or an IGP but if you are RIM professional without any credentials I think you are going to find it harder and harder to stay competitive.

The CRM is the most critical to earn since it is the most recognized. The CRA can be great interim credential to earn as you are working toward the CRM. The IGP, PMP and CIP are great second credentials to look at to help you stay competitive particularly if you are wanting to stand out among other CRMs. I hope this helps you in your efforts, let me know if you have any questions or if I can be of further assistance.

CRM, IGP
Records & Information Management Officer / Public Agency
Both jobs that I have started since 1996 has required a CRM certification. I believe it helped my resume to be seen AND it helped me get the 2 positions.

Definitely get the certifications if you plan to advance in the Records & Information Governance field.

IGP is beginning to show up on job sites as a requirement and I would consider getting it along with the CRM.

CRM, IGP
Sr. Manager, Records Management / Private Company
Certifications have been a huge part of my RIM career development. When I stumbled upon my passion for RIM, I knew I needed to pursue credentials to 1) increase my knowledge of the field and 2) show employers I was committed to RIM and was taking an active role in my career development. The first credential I received was the CRM designation. It was early in my career and stretched me to gain a solid foundation of the field I knew I was passionate about. Obtaining my CRM designation has by far been the most valuable, non-college, learning opportunity I've taken. Most employers require or prefer a CRM so this has automatically put me at the top of resume piles.

Earning the Information Governance Professional (IGP - ARMA) and Certified Information Professional (CIP - AIIM) designations have also been valuable. I think the IGP has been more valuable because companies seem to be more in tune with the value IG can bring to their organizations. Even when employers aren't directly familiar with the acronyms, it usually prompts the question, "what is the IGP or CIP?". This gives you the opportunity to discuss what you learned while preparing for the designation as well as how that knowledge will help you solve that employer's RIM/IG issues. I don't regret earning any of the designations I have (CRM, IGP, CIP, ERMm) and wouldn't be in my current position without them.

CRM, IGP, CIP, ERMm
Director, Records & Information Management / Utilities
CRM certification didn't help me in my job at all. I obtained my cert for me alone. If I was younger and changing jobs, it probably would be very beneficial.

My advice on considering CRM, CA, IGP, or any other cert is to make sure it's what YOU want. Unless there is a company requirement, ensure you are spending the time and money for a certification that you want.

CRM
Records Management Specialist / Municipal Agency
I hold IGP and PMP. While I went for IGP as a way to get me quickly up to speed with information management industry since I just moved into this field, I do not think it is very important when one is interviewing for a job. I think it might be seen as a small plus by employers, but I think experience is more important in their eyes. At least this is what I have heard from talking to my peers and recruiting firms. This certification is great to get a broad understanding of IG and I would recommend any traditional records managers to pursue it as a way to get on board with transformation to IG. As ARMA is struggling to growing membership and existing member base is getting old, I do not see the numbers for IGP certifications growing as fast as one would like to see. It is unfortunate because I think it is a good certification, but I think it is following a slow adoption and growth rate for IG as an industry.

I would highly recommend a PMP certification to any person in any business or IT profession. I found it very useful to set foundational understanding of project management. One would not use every concept in the PMP body of knowledge, but PMP certification would certainly add a very important skillset or enhance an existing one. PMP certification is rare among information management professionals, and therefore, I strongly believe that having PMP would make one stand out from the crown. It help having a PMP when a person is looking for a job as a PM. So having PMP for RM of IG professionals is definitely a huge plus. I have seen many job descriptions for RM and IG jobs that require strong project management skills and often traditional RM people do not have PM experience. So having a PMP certification would fill that gap in the skillset and help get that next dream job. PMP test is not easy, and one needs to study a lot to be able to pass it. However, there are millions of resources out there from a bunch of different providers, such as study guides, bootcamps, online training, sample questions, onsite classes, etc.

Looking to the future, I think RM and IG professionals should consider any of the privacy certifications offered by AIPP, such as CIPP (various flavors for US, EU, etc.), CIPM, etc. Privacy concerns are becoming very important now and data privacy falls under the umbrella of IG, so I would highly recommend considering privacy certification as a way to make yourself more marketable in the near future.

IGP, PMP
VP, Records Management
My CRM and IGP certifications have helped to establish credibility beyond my Bachelors and Masters degrees. They tell my employer that I am serious about my career and that I am willing to keep abreast of what is trending in the industry.

I would advise anyone considering a career in the industry to earn a certification because it will give you a strong foundation beyond your day-to-day work experience. Beside my CRM and IGP, I am looking forward to earning my CIP and CIPM this year. Security and Privacy are concerns that should be of interest to anyone pursuing a career in the Information Governance space.

CRM, IGP
Records Manager, Law Firm
How has the certification helped me in my career? The CRM certification was the first one I attained. It gave me a solid foundation and great deal of confidence when talking with others in my organization, that I knew what I was talking about. I think it instilled confidence in my co-workers as well, that they had a professional, someone who knew what really needed to be done according to industry standards. The CIP helped me look at things from a more technical perspective, and to take that perspective into account when devising a records program. We work so closely with IT that I often find myself acting as the translator between IT and the business unit. The IGP has drawn me into the world of governance. It's exciting to see how all the pieces fit together and having someone with the skills to incorporate RIM, IT, Legal, Compliance, INFOSEC, and other aspects is a great value to the organization.

Advice to those considering credentials. Credentials require ongoing education. This keeps you up to date on the latest thoughts and initiatives in the industry. If RIM or IG is your career, a credential is well worth the effort it takes to attain it. Don't be afraid to try, even if you fail a test, take it again! You will always learn something. I always recommend getting a credential to those who want to be the best they can in our industry.

Other credentials. I had the CEDS (Certified eDiscovery Specialist) until recently. It was by FAR the hardest for me, because it was outside my wheelhouse (skill set). I passed, but it was difficult for me to keep up with the education requirements, so I let it lapse. Still, I am better off for having studied and taken the test because I was exposed to the whole eDiscovery process.

CRM, IGP, IG
Private Company
On January 21st, I will celebrate 43 years in the legal industry in the specific field of litigation. By virtue of that work, I have worked just as closely with records and information that was the subject of litigation and regulatory inquiry. I share that as the certifications I hold are interrelated. Market forecast is part of what I do these days, and one of the pieces of information I use to forecast is the hiring trends. I see more organizations hiring for professionals to manage records, establish RIM programs, work on eDiscovery requiring CEDS and IGP especially. There’s no doubt that these raise your professional currency.

My individual thoughts below:

CEDS: The Certified eDiscovery Specialist. This is a proctored examination administered through the Association of Certified eDiscovery Specialists, a BARBRI organization. Its intent is to measure eDiscovery technology, process, and experience competency. 1. Yes, the certification has helped me in my career as it is a rigorous test confirming knowledge of the eDiscovery process from preservation and hold, collection and processing, review and budget. Those who have sat for this test have described it as akin to sitting for the Bar examination. When an employer, colleague or client sees that I have achieved, CEDS, they know that I have more than a basic understanding of the process. People with CEDS are usually the first ones hired when multiple candidates are being considered for the same position. 2. Reach out to someone who has this credential and seek mentorship. I found a mentor who already held the credential before I took the test, and I now have several mentees.

IGP: The Information Governance Professional. This is a proctored examination administered through ARMA to measure competency in information governance over an organization. 1. Absolutely it has helped me in my career. This certification has been more recognized in fact than the CEDS. There is overlap in the CEDS and the IGP in that eDiscovery is technically a part of the overall governance principle. When someone sees that I have the IGP, they understand that I have a strategic understanding of governance as a discipline and a broad understanding of the business units involved in good governance. Those with an IGP will be considered for jobs involving the various parts of governance before others without this certification. 2. Again, I recommend reaching out and finding a mentor. Once you obtain your IGP, volunteer to mentor and bring along others to help them become certified.

CIP: Certified Information Professional. This is a proctored examination administered through AIIM. Its intent is to measure the competence of information professionals and is a more technical examination. 1. I would have to say the same thing about this test as the other two. Those who see that I have the CIP know I have the information management knowledge as well as the technical aspects associated with information management. 2. Again, find a mentor who has gone through the CIP to help you make the most of your studies and preparation.

CEDS, IGP, CIP, IG
VP, Marketing
Boost Your Career with the IGP Credential

Diane K. Carlisle, IGP, CRM
IG Program Advisor
ARMA International

San Diego Chapter
January 19, 2017

What is an IGP?

• The IGP certification recognizes individuals who have the strategic perspective, knowledge and skills to:
  – lead an organization's information governance initiatives
  – leverage information for maximum value
  – reduce costs
  – mitigate risks associated with using and governing information assets.
Why Should You Care?

Value to the individual
• Showcase your expertise
• Achieve recognition within your organization and industry
• Pursue career growth opportunities

Value for the organization
• Leverage information for greater effectiveness
• Have a competent labor pool to draw from
• Increase compliance
• Reduce risk

Mission of the Program

Provide an information governance (IG) credential within an ethical and professional framework to support individuals to deliver organizational value and reduce risk.

• Certify a body of knowledge required for IG
• Assess individual proficiency against it
• Impact industry organizations
• Create trust and ethics in the IG industry
About The IGP Role

Information Governance Defined

A strategic, cross-disciplinary framework composed of standards, processes, roles, and metrics that hold organizations and individuals accountable for the proper handling of records and information. The framework helps organizations achieve business objectives, facilitates compliance with external requirements, and minimizes risk posed by sub-standard information-handling practices.

Role of an IGP

- Strategic role
- Enterprise-wise perspective
- Leverage information for maximum value
- Identify risks and non-compliance
- Harness management support
- Define solutions, controls, policies
- Collaborate across the enterprise
- Reduce costs
About the Exam

Information Governance Professional (IGP)

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>ARMA International; IGP Governance Board</th>
</tr>
</thead>
<tbody>
<tr>
<td>Focus</td>
<td>... strategic perspective and requisite knowledge to (1) leverage information for maximum value, (2) reduce costs and (3) mitigate risks associated with poorly managed information assets.</td>
</tr>
<tr>
<td>Eligibility (Recommended)</td>
<td>4-year degree + 3 years management level experience in one of the following: RIM, IT, Legal, Privacy, Security</td>
</tr>
</tbody>
</table>
| Fees                     | Application + 1st take of the exam: $599  
Recertification: $250 / 3-year cycle |
| Exam structure           | 140 multiple choice questions; 3 hours to complete  
Computer-based testing – Pearson VUE |
| Maintenance              | 60 continuing education units / 3-year certification cycle  
- 10 hours Legal; 10 hours IT |
| Related certifications   | None |
| Website                  | www.arma.org/igp |
Information Governance Domains

1. Managing Information Risk and Compliance
2. Developing IG Strategic Plan
3. Developing IG Framework
4. Establishing the IG Program
5. Establishing Business Integration/Oversight
6. Aligning Technology with the IG Framework
Where do I find......?

Online Application Process

- My ARMA account
- Signed Code of Ethics
- Signed consent statement
- Test fee: $599 (must pay by credit card)
- ADA accommodation available if needed

Access application at: www.arma.org/igp
Scheduling Your Exam

- Receive your Authorization to Test (ATT) e-mail
  - Unique candidate ID number
  - Valid for 12 months
- Schedule directly with Pearson VUE
  - Online: pearsonvue.com/igp
  - Phone: testing region numbers are on website
  - 5100 test centers; 175 countries
- Test windows
  - Two per year (Spring / Fall)
  - 8 weeks in length

IGP Landing Page
Where Should I Start?

Information Governance Professional Certification: Study Guide and Exam Workbook

- ARMA Members: $60
- Non-members: $90
- Includes
  - Descriptions of exam coverage
  - Self-assessment worksheet
  - Tools to plan your study

Thank You!!

Contact Info:
Diane K. Carlisle, IGP, CRM
Diane.Carlisle@armaintl.org
913-312-1742

LinkedIn:
linkedin.com/in/diane-carlisle-95a8b11
This course is ideal for...

- Demonstrating your ability to bridge IT and business
- Keeping your information management skills current and competitive
- Leading your organization into the world of social and mobile content
- Enhancing your value to employers and clients
- Becoming part of the next wave of information management professionals

Secure Your Success

Become a Certified Information Professional

Benefits and Objectives

Over the past decade, there has been a “perfect storm” of change driven by consumerization, cloud, mobile, and the Internet of Things. It has changed how we think about enterprise information and IT - and changed how we think about the kinds of skills needed to adapt to these changes. The value-add for information technology in organizations is rapidly shifting from the technology per se to the stewardship, optimization, and application of the information assets themselves.

Organizations that manage their information more effectively enjoy reduced costs, faster time to market, increased revenues and cash flow, and increased business agility. But it takes more than deep knowledge of a particular process or technology.

Information Professionals are charged with these questions:- Who owns the BIG PICTURE for how information is managed in our organization?- Who owns our information management STRATEGY?- Who can help us treat information as the critical BUSINESS ASSET it has become?

The Certified Information Professional (CIP) designation affirms mastery of the core body of knowledge needed for success in the digital economy. The CIP has come to represent a badge of competency and knowledge at the top of the knowledge worker pyramid for those entrusted with the task of building an information STRATEGY in a time of digital disruption. It is broader than records management or information governance, and broader than any single technology or solution provider.

Make the CIP part of your path to career development and continuous learning.
CIP Preparatory Workshop

We also offer a CIP preparatory workshop for candidates who need a more structured review. This 4-day workshop covers all of the domains and topics on the CIP exam through examples and discussions. Attendees will take a sample exam at the end of the workshop; select workshops will offer live onsite proctoring of the actual CIP exam. Also available as a private workshop onsite - contact training@aiim.org for details.

Feedback:

“If you work with your organization’s information or collaboration resources and technologies, you’ll surely find AIIM a treasure trove of resources.”
- Andrew McAfee, Professor and author, Enterprise 2.0 and Race Against the Machine

“Anyone in IT or in an information related discipline today should be thinking about it.”
- Ken Bisconti Vice President, Enterprise Content Management Products and Strategy, - IBM Software Group

Developed in accordance with ISO Standard 17024 to ensure conformity to accepted procedures for individual certification programmes, CIP candidates must demonstrate knowledge of the six domain areas spanning the full spectrum of content and information management.

Creating and Capturing Information
Organizing and Categorizing Information
Governing Information
Automating Information-intensive Processes
Managing the Information Lifecycle
Implementation Planning

Subject matter experts across the broad range of knowledge domains identified the skills and knowledge to be measured in this examination. These industry experts determined the weighting and scope of these six core domains.

Contact us today.
Details and enrollment are a click away.

aiim.org/certification certification@aiim.org

Our counselors are standing by:
North America: ☎ +1 301.587.8202
Europe: ☎ +44 1905.727.600

www.aiim.org/certification
The Value of the CIP – to the Company

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.

At the same time, the CIP was built on industry standards, guidelines, and accepted best practices. CIPs are not just winging it or reinventing the wheel – they bring and use techniques that have been developed, revised, and improved upon by many others in the industry.

These techniques are not specific to a particular industry, work process, or technology solution; rather, they are broadly applicable across industries and technologies. CIPs understand how to leverage these standards and practices – and how to tailor them to meet the particular needs of their organization.

In the case of new hires, research has shown that certified individuals hit the ground running. A 2015 study by CompTIA found that 90% of employers believe IT certifications enable employees to learn faster once starting a job. Reducing onboarding time can reduce specific project costs as well as the overall cost to hire and train staff.

CIPs bring to their organizations a foundational base of knowledge that covers all aspects of information management. This means they will already be familiar with information-related processes and issues that are common to different types of organizations. Similarly, internal staff that complete the CIP process will demonstrate that they understand information management issues beyond just their narrow work process.

The CIP program provides a shared understanding and vocabulary, based on industry guidelines and good practices. CIPs will be able to communicate more consistently and effectively across process areas and bridge the gaps between information management, legal, IT, and specific business units. This also means that CIPs will be able to identify and resolve issues faster because of that shared language and shared understanding.

CIPs demonstrate a commitment to their own professional development. This means that as new developments occur in their industries, in technologies, and in processes, CIPs will be well-positioned to address and leverage them on behalf of their organizations.
The CIP program itself was developed by AIIM, a global industry association dedicated to information management best practices. Since 1943 AIIM has been at the forefront of effective information management – developing standards, delivering educational events and content, and conducting research.

Organizations that hire or train CIPs can be confident that CIPs demonstrate the breadth and depth of knowledge required to effectively develop, manage, and support information-intensive processes throughout their organizations.
INFORMATION PROFESSIONALS:
WHERE WE CAME FROM AND WHERE WE'RE GOING

by John Mancini, Chief Evangelist, AIIM
So let’s think a little bit about what 1996 looked like:

- Only 20 million American adults had access to the internet.
- Something called “a blog” was still three years away.
- 99% of phone users did not find text messaging to be of any use whatsoever -- assuming they even knew what it was.
- The first iPhone was still 11 years away. That’s right, 11 years in the future.
- Microsoft Office 97 was published in December on CD-ROM but also - get this - on a set of 45 (forty-five!) 3.5 inch floppy disks.
- In 1996 there was no YouTube. No Huffington Post. No Google. No Twitter. No Facebook. And no Wikipedia.

- In 1996, AIIM was also in what I would call the pre-web phase of its existence. One month before I joined AIIM, the association’s magazine, INFORM, had this quote:

  “Despite the area of Internet enthusiasm and the hyped up selling palaver of some web services providers, we remain uncertain as to the long run substitute benefits the internet will bring to businesses and to individual users.”

I’m especially glad that this AIIM prediction was before my time.

As Yogi would say.
“It’s tough to make predictions especially about the future.”
So that technology setting is the backdrop for the past 20 years. Of course, against this, AIIM goes back even further. Many people do not realize that AIIM was founded in 1943 as the National Microfilm Association. Many people are mystified about how an organizational journey could somehow begin in 1943 with microfilm, and wind up in 2016 with content and information management.

So what is the connective tissue in this strange story?

I think it boils down to 3 words.
Of course, what People + Process + Technology adds up to IF DONE RIGHT -- is intelligent information management, which is what AIIM is all about. The reason I say “If Done Right” is that over the course of managing this triad, organizations tend to get parts of this equation right, but seldom do they get all three working in sync. Which is why there is so much frustration out there. I happen to think that an “Information Professional” is the person that weaves this story together, but I’m getting ahead of myself.

Let me go through a very short prehistory of how we came to think there was even such a thing as an “Information Professional” in the context of this triad of PEOPLE and PROCESS and TECHNOLOGY.

From 1996 to 2006, the PROCESS questions we asked in our organizations centered around this fundamental question: “How can we automate content-intensive, complicated, and mission-critical processes?”

On the TECHNOLOGY side, most implementations in this period were complex and custom and expensive. There was no standard body of knowledge. Technology expertise was lodged in the consulting community. Looking over to the PEOPLE side of the equation, solutions were difficult to use and required LOTS of training. But nobody really cared because the people who used the solutions were specialists and were only a tiny percentage of the overall number of knowledge workers in our organizations.
“Professionalism” in this world was narrowly defined. If you think about the overall universe of knowledge workers, you can divide them into Gurus, Techies, Line of Business executives, and Everybody Else (in other words, those pesky end users). “Professionalism” in this world was defined principally by AIIM with its MIT and LIT designations (“Master” and “Laureate” of information technology) and by ARMA/ICRM with the Certified Records Management (CRM) certification. And the focus was on the tippy top of the pyramid.

In this tight little world, something was missing. Even 20 years later, there are still less than 1,000 CRMs in the world. The CRM certification was (and still is) extremely valuable, but it only tapped into the surface of the information management education needed by technology and business people. There was clearly a need for industry-standard technology education, focused on standardizing the hodge-podge of consultant-delivered training that was the norm in 2006.

In 2006, the nature of content, records, and information management training changed with the launch of AIIM’s ECM Practitioner, Specialist, and Master training programs. AIIM followed up its standardized ECM training with training in Electronic Records Management, Business Process Management, SharePoint, and a host of other content technologies. By 2010, the concept of “professionalism” was stretched to also include the “techie” and line of business communities via the AIIM designations.

In 2010, AIIM came to the conclusion that there was an opportunity to standardize an even broader body of knowledge under the concept of a “Certified Information Professional,” or CIP.

AIIM’s original conception of what it meant to be an “Information Professional” was not unlike the definition of professionalism that came to be accepted in the 1980s and 1990s in project management. In the early stages of the professionalization of project management, if you had proposed that there was a common body of project management knowledge that could stretch across a wide variety of domains and industries, people would have thought you were crazy. How could the project management knowledge to run a software project possibly be similar to that required to build a bridge or that required to construct a building? In the course of the 1980s and 1990s, the Project Management Institute succeeded in establishing the PMP as the standard body of knowledge associated with project management across a broad variety of disciplines.

In its original conception, AIIM thought the CIP would become an “everyman’s” certification, relevant to gurus and techies and business people alike. The reality after 1,000 CIPs and six years is that it has come to signify something different.

The CIP has come to represent a badge of competency and knowledge at the top of the knowledge worker pyramid for those entrusted with the task of building an information STRATEGY in a time of digital disruption. It is broader than Records Management and Information Governance.

Information Professionals are charged with these questions:

Who owns the BIG PICTURE for how information is managed in our organization?

Who owns our information management STRATEGY?

Who can help us treat information as the critical business asset it has become?

The accelerating pace of Digital Disruption makes this role more important -- and different -- than ever. But before going there, how exactly is the emerging era of Digital Transformation different from where we are now?
I have spoken for the past few years about three key disruptors:

- **Disruptor #1. CONSUMERIZATION** is transforming what users expect from applications and how we deliver them. We are now in the era of user-centric IT.

- **Disruptor #2. CLOUD AND MOBILE** are creating an expectation of anywhere, anytime access and transforming how we engage with customers and employees.

- **Disruptor #3. THE INTERNET OF THINGS** is generating massive amounts of new data and information creating enormous new challenges and opportunities.

Meanwhile, back in the real world a lot of **AMAZING technology changes are going on**.

I think one way of thinking about the radical disruption that is upon us is to think about how “Life in the Mainstream” is different from “Life at the Edge” across four variables:

- **MINDSETS** -- “How do we look at things?”
- **MESSAGES** -- “What stories do we tell?”
- **MONEY** -- “Where is the money going?”
- **MACHINES** -- “What are our technology building blocks?”

To make things even more challenging, the impact of these disruptors is accelerating, with profound implications for how organizations manage their information assets.

- **Klaus Schwab, World Economic Forum**: “The speed of current breakthroughs has no historical precedent.”

- **Steven Kottler**: “For the first time in history, the world’s leading experts on accelerating technology are consistently finding themselves too conservative in their predictions.”

- **Dion Hinchcliffe**: “The old days of doing it all ourselves using traditional IT projects are receding and even counterproductive much of the time.”
In each case, I will talk about three representative data points that describe what life looks like in the mainstream, and compare this to what life looks like at the edge. This is not to imply that life in the mainstream is universally bad or undesirable, or that life at the edge is universally good and desired. Rather, the point is to highlight how things are changing and to urge organizations to think through the dimensions of this change and how it manifests itself in your particular organization.

So let’s start with MINDSETS and how we look at things.

### Mindsets - How Do We Look At Things?

**LIFE IN THE MAINSTREAM**
- **I’ll Set up a Meeting with IT.**
- **How do I control information?**
- **Updating Legacy**
- **Rolling out Apps**

**LIFE AT THE EDGE**
- **How can I do it myself?**
- **How do I set information free?**

In the mainstream, if we have a technology need, we think in these terms: 1) Set up a meeting with IT; 2) Control the information we have; and 3) Look at how we might update our legacy systems.

Compare this to life at the edge. At the edge, we think in very different terms: 1) How I can do it myself without IT intervention? 2) How do I set information free and put it to work? and 3) How can I quickly roll out an app -- without being dragged into endless discussions about updating a legacy system?

Similarly, the MESSAGES we use to communicate in the mainstream -- the stories we share -- tell a lot about our fundamental assumptions with regards to technology.

### Messages - What Stories Do We Tell?

**LIFE IN THE MAINSTREAM**
- **SharePoint**
- **Teller Deposits = $65 Each**
- **IT Heroes = Efficiency**

**LIFE AT THE EDGE**
- **Slack**
- **Mobile Deposits = $.03 Each**
- **IT Heroes = Innovation**

In the mainstream -- when we get together around expense-account lunches and around the water cooler -- when it comes to collaboration, we often talk about SharePoint. We also talk about how we might take traditional processes like bank teller facilitated deposits -- these typically cost $0.65 each -- and how we might automate these processes. Linked to both of the above, our IT Heroes are those that bring greater efficiency into the organization.

Compare these messages and stories to the ones that we tell at the edge. The Cool Kids on the Block are all talking about Slack, an enterprise collaboration platform that in the span of less than 18 months has grown to a market valuation of over three billion dollars. Now Slack may very likely not be the solution for many large Enterprises, but the way of thinking about the problem of collaboration that surrounds Slack -- its nimbleness and openness -- needs to be part of the way that we rethink collaboration.

Taking the example of bank deposits, at the edge, the focus is on mobile deposits, which typically cost less than $0.03 each. Mainstream organizations try desperately to automate a core set of processes and services that have $.65 as their foundation. Edge organizations seek competitive redefinition by ignoring mainstream processes and reinventing the banking industry around processes with $.03 as their foundation. These types of market disequilibriums are occurring in countless processes and industries throughout the economy. This translates into a new set of IT Heroes -- those who can quickly bring innovation and value into our organizations.

Let’s turn now to MONEY. Where is the money going and what does this mean?

### Money - Where Is The Money Going?

**LIFE IN THE MAINSTREAM**
- **GM Valuation = $55 Billion**
- **Teller Deposits = $65 Each**
- **IT Heroes = Efficiency**

**LIFE AT THE EDGE**
- **Uber Valuation = $68 Billion**
- **Mobile Deposits = $.03 Each**
- **IT Heroes = Innovation**

In the mainstream world, the market valuation for General Motors is $55 billion. At the edge, Uber is now valued at $68 billion. In the physical world -- in
the bricks-and-mortar world -- we seek to add digital capabilities to our existing physical business models in order to compete with companies that are natively digital. That is challenging enough. But the challenge is about to accelerate as digital companies like Amazon seek to open up physical storefronts and as digital companies like Uber seek to extend their value proposition into logistics and package delivery.

It is worth thinking about how fundamental Facebook, Amazon, Apple, and Google have become to our collective economic future and what their models of success say about the future. These four companies alone have a market value of $1.3 trillion. This is the same as the GDP of Korea. These four horsemen of the digital world provide perspectives on what life at the edge looks like that we need to incorporate into our mainstream thinking.

Lastly, let us turn to the question of **MACHINES**. What are our technology building blocks?

---

### Machines - What Are Our Technology Building Blocks?

<table>
<thead>
<tr>
<th>Life in the Mainstream</th>
<th>Life at the Edge</th>
</tr>
</thead>
<tbody>
<tr>
<td>On-Premise</td>
<td>Cloud</td>
</tr>
<tr>
<td>PC is the Lego</td>
<td>Mobile is Lego</td>
</tr>
<tr>
<td>Build and Develop</td>
<td>Configure and Connect</td>
</tr>
</tbody>
</table>

In the mainstream, the focus is still on on-premise applications built on and for the PC. The core skills that are valued in the mainstream are focused on building and developing systems. At the edge, the focus shifts to the cloud, mobile technologies become the Lego building blocks of systems, and the skill sets that are valued within our IT staffs shift from building and developing to configuring and connecting.
On the PROCESS side, a revolutionary thing has happened. Process owners can now implement their OWN solutions. This creates incredible pressure to take monolithic business processes and turn them into applications. On top of this, the world is rapidly shifting to one in which most interactions will be on mobile devices. This means all processes must be reformulated from a mobile perspective.

This has interesting implications when we think about the world of TECHNOLOGY. As mentioned earlier, configuring, connecting, and mobile skills are now critical and in short supply. We need to rethink the entire notion of security. Security that was once defined purely in terms of what was inside and outside the firewall now needs to be reconstructed around individual information assets. And organizations are experiencing a massive legacy drain on their ability to innovate.

Perhaps the most extreme change has been on the PEOPLE side of the equation. We have moved into a world in which usability is EVERYTHING. Even individual users can implement their own enterprise-like solutions, and if we try to get in their way they will do it anyway. There has been an enormous blurring of the lines between what is the home and what is the office. There is no way to put this genie back in the bottle, and organizations must understand that Millennials operate in a fundamentally different fashion than the email generation.
The implications of this relative to how we manage information are profound. The kinds of questions that are being asked in our organizations vary greatly depending on whether you view the world from a PROCESS perspective, a TECHNOLOGY perspective, or a PEOPLE perspective. And in an era in which enterprise-like capabilities are increasingly available without IT intervention, the short-term pressure for each of these people to actually communicate and cooperate with each other is decreasing.

Each of these players in the information management story has a different role to play in the organization, and in some ways they are all versions of information professionals. However their needs and requirements are vastly different.

End users need education on responsible computing practices and need to understand how their organization wishes to place boundaries on their use of information. Now that process automation solutions are available to a much wider range of companies than ever before through SaaS solutions, line of business executives must be educated to better understand what is possible. And technology specialists must keep up with a wide range of content and information management solutions, understand the relative strengths and weaknesses of each, and try to forecast the survivability of individual companies into the future.

But this still leaves the fundamental question of the role of the Information Professional in all of this.

- Someone needs to own the big picture.
- Someone needs to provide adult supervision to the process people, technology people, and end users that interact with content and information management systems.
- Someone needs to help the organization think through what it means to manage information as a critical business asset.
- Someone needs to act as the translator of the unique language of each of the people who interact with our information systems, whether they are from a PEOPLE perspective, a PROCESS perspective, or a TECHNOLOGY perspective.

We believe that that person is an Information Professional.
Why CIP?
Over the past decade, there has been a “perfect storm” of change driven by consumerization, cloud, mobile, and the Internet of Things. It has changed how we think about enterprise information and IT - and changed how we think about the kinds of skills needed to adapt to these changes. The value-add for information technology in organizations is rapidly shifting from the technology per se to the stewardship, optimization, and application of the information assets themselves.

What is CIP?
To meet this need, AIIM worked with industry experts and focus groups to define the body of knowledge necessary for information professionals to be successful in the digital economy, built a certification and test based upon this body of knowledge that is available at locations around the world, and created a set of training courses and materials to help information professionals prepare for the examination.

How Do I Get Ready?
The path to CIP should be fairly simple for information practitioners who already have expertise and work experience. AIIM has designed a CIP study guide to help you prepare for the exam. Any knowledge gaps can be filled by taking an AIIM training course. The study guide is free to Professional Members. Non-members can purchase the guide for $60 USD.

How Do I Sign Up?
With testing centers all over the world, Kryterion serves as our approved CIP examination proctor. The exam fee is $349 USD. Professional Members enjoy a discounted fee of just $285 USD. The CIP certification is renewable after three years. Find a testing center near you, and register to take the exam.

For more information visit: www.aiim.org/cip
Simply put, we offer training in a variety of topics relevant to the Information Professional. Training that’s available in the office, at home or on-the-go.

Many Ways to Learn
Who better than the global community of Information Professionals to develop essential skills training and certification for the social, mobile, cloud, and big data era? Our curricula and assessments are based on the best practices of our 196,000-member community for managing and leveraging your business information assets.

Rely on AIIM for Your Training Needs
Improve your skills and advance your career. We offer live, instructor-led as well as online, self-paced classes. You can thoroughly immerse yourself with a “deep-dive” course, or take a dip in a topic with our “quick study” offerings.

Perhaps you have years of experience and training and want to become an AIIM Certified Information Professional? The certification is dedicated to enhancing and promoting the profession of information management by providing the premier credential in the industry.

Pick Your Path

What is a Quick Study?
New to information management? AIIM’s Quick Studies provide you a quick overview of the topic; definition, goals, principles and/or business drivers. Get your feet wet with these introductory training courses.

What is a Deep Dive?
AIIM’s Deep Dive training courses concentrate on providing you a detailed understanding of various information management technologies; how to use them to improve business outcomes; how to develop, use and apply their tools and techniques; and how to plan for their integration into business processes.

What is the CIP?
AIIM’s Certified Information Professional (CIP) certification was first developed in 2011 and relaunched in 2016 to meet the needs of information professionals. With now over 1000 CIP’s, the certification is a recognized credential of those who understand not just the information management technologies but how to best optimize their value to achieve business goals.

For more information visit: www.aiim.org/training
AIIM is the global community of information professionals. We provide the education, research and certification that information professionals need to manage and share information assets in an era of mobile, social, cloud and big data.

AIIM
1100 Wayne Avenue, Suite 1100
Silver Spring, MD 20910
+1 301.587.8202
www.aiim.org

AIIM Europe
Office 1, Broomhall Business Centre,
Worcester, WR5 2NT, UK
+44 (0)1905 727600
www.aiim.eu
What is an IGP?
An Information Governance Professional (IGP) is a person who has earned the only certification that demonstrates he or she has the strategic perspective and the requisite knowledge to help an organization leverage information for maximum value while reducing the costs and mitigating the risks associated with using and governing this important asset.

Why should you become an IGP?
Earning this certification:
• Showcases your information governance expertise
• Brings professional recognition within your organization, network, and industry
• Extends your professional network to include an elite group of other IGPs
• Increases your potential for career growth

Mission of the IGP Certification Program:
Provide an information governance credential within an ethical and professional framework to support individuals to deliver organizational value and reduce risk.

“The skills and experience needed to be successful in the field of records and information management have been changing rapidly as we mature and grow into information governance.”
– Jason Stearns, IGP
IGP Governance Board Chair

Testing Windows
2016: Fall: September 24 through November 19.
Application deadline: November 12, 2016.

2017: Spring: March 20 through May 19.
Application deadline: May 12, 2017.

2017: Fall: September 11 through November 10.

An application fee of $599 (USD) is required. Application fees are eligible for reimbursement by the ARMA International Educational Foundation. See www.armaedfoundation.org for more details.

Information Governance Professional Certification
Study Guide and Exam Workbook
This guide helps you chart your own preparation to sit for the IGP certification exam. At its core, it describes the six domain areas covered in the exam.

In addition, it includes the following resources:
• IGP Program Policies and Procedures
• Self-assessment sheets to help you rank study areas
• Template for planning how you will study for the exam
• Sample exam questions
• “Day of the Test” tips for success

Regular Price: $90.00  Professional members: $60.00

Online Course: A Closer Look at the IGP Credential
This guide helps you chart your own preparation to sit for the IGP certification exam. At its core, it describes the six domain areas covered in the exam.

Regular Price: $285.00  Professional members: $199.00

IGP Study Packs:
Build Your Professional Library at a Discount!

• IGP General Interest
  Regular Price: $166.00  Professional members: $116.00

• Managing Information Risk and Compliance (IGP)
  Regular Price: $594.00  Professional members: $498.00

• Establish IGP Business Integration and Oversight
  Regular Price: $278.00  Professional members: $219.00

• Developing IGP Strategic Plan
  Regular Price: $195.00  Professional members: $178.00

• Developing IGP Framework
  Regular Price: $133.00  Professional members: $99.00

• IGP Mega Pack
  This mega pack contains all of the IGP titles from all 6 study packs.
  Regular Price: $1,585.00  Professional members: $1,290.00

Order online today! www arma org bookstore
IMMERSE YOURSELF IN THE WORLD OF INFORMATION.

Master’s Degree in Archives and Records Administration – 100% Online

With our convenient, flexible and exclusively online Master of Archives and Records Administration program, you can live anywhere while earning a graduate degree focused on leadership opportunities in the rapidly expanding fields of records management, corporate archives and information governance.

The MARA curriculum at the San José State University School of Information will give you a solid foundation in the theory and practice of archives, records and information management and will prepare you for the Certified Records Manager and Certified Archivist examinations. You’ll also gain real-world experience and expand your professional network by completing an organizational consulting project or an internship as part of your course work.

Along the way, you’ll connect with our engaging community of award-winning SJSU iSchool faculty members, future information professionals and alumni from around the globe.

PROGRAM SNAPSHOT

- **42 units** to earn your degree
- **14 total courses** (11 required + 3 electives)
- **E-portfolio** for culminating experience

"I was really impressed with the instructors in the MARA program. They are all consummate professionals and have lots of practical experience as well as classroom experience, which I see as a real benefit."

_Eileen Hansen, ’16 MARA_

"I think this program is so fantastic! All of the courses fit together so nicely to form the core of the program, and experiencing all of the camaraderie with classmates has been great."

_Emily Gendrolis, ’15 MARA_

ischool.sjsu.edu
Where will you go with your MARA degree?

As the volume of digital data increases exponentially, many organizations’ existing platforms are no longer efficient, and they are taking steps to simplify their content management infrastructures.

With a MARA degree from the SJSU iSchool, you will have the expertise and specialized skills required to steer the information governance strategies of corporate, government and nonprofit institutions. You’ll learn to develop and execute plans for preserving, managing and providing access to growing amounts and expanding varieties of digital content—including audio and video, social media and email, and proprietary information.

Be prepared to work in a rapidly expanding field that plays an important role in today’s digital world. Imagine an exciting career as a digital archivist, quality control analyst, or records management specialist—to name just a few of the career titles that could be on your business card!

iSchool Alumni at Work

Amy Abadilla ’12 MARA
Amy works as a records coordinator for Sound Transit’s Procurement & Contracts division, based in Seattle, Washington. She is using her expertise in records management to build a cohesive file share between all Sound Transit departments, in order to foster a cohesive records management program that follows state and federal guidelines.

Jason Bell ’16 MARA
Jason wrote a successful grant as part of his course work that helped the Napa College Library to increase its database of online materials. With his newly minted MARA degree in hand, Jason plans to continue work that increases accessibility to records in the Napa Valley College Library and the Yolo County Archives in California.
What our students love most about the 100% online MARA program at SJSU iSchool

Flexibility

Begin your online study program when it’s most convenient for you. Apply for admission in the fall or spring semester and complete the program at your own pace. Attend as a full-time or part-time student and choose the number of courses you want to take each semester, so you can fit course work around your work schedule and family life.

Customized Curriculum

Customize your educational experience to fit your interests and career objectives. You get to choose three different elective courses from our school’s nationally ranked Master of Library and Information Science program to study a topic in depth or expand your knowledge in a variety of areas.

Online Learning Environment

100% online learning means that you can complete course work whenever and wherever is most convenient for you. Through our engaging and interactive online environment, you’ll network with students and professionals from around the globe, providing a diversity of perspectives to enrich your learning journey.

Outstanding Faculty

SJSU iSchool faculty members are award-winning scholars and leaders from around the world. Many are also currently working in the field and hold Certified Archivist, Certified Records Manager, and Information Governance Professional credentials, bringing a practical perspective to their courses.

Virtual Internship Opportunities

You can choose to complete an on-site internship near your home or do a virtual internship online with a host organization that may be located nearby or across the continent. Either way, you’ll have the chance to engage in exciting learning opportunities that fit your career aspirations—no matter where you live.
Master’s Degree in Archives and Records Administration

Admission Requirements:

- A bachelor’s degree from any regionally accredited institution in any discipline with a GPA of at least 3.0 at the bachelor’s degree institution or in the last 60 semester or 90 quarter units
- A general understanding of computers and technology
- Access to a computer with Internet connection and appropriate software
- International applicants must have a TOEFL score of 600 (paper version), 250 (computer version), or 100 (Internet-based); or an IELTS score of 8

Note: We do not require a GMAT or GRE test, letters of recommendation, a statement of purpose, or a résumé.

Tuition:
Fees for the MARA program are $474 per unit, with a total cost of $19,908 for the degree (42 units). Fees are subject to review and change. Scholarships and paid student assistant positions may be available.

Accreditation:
San José State University is accredited by the Western Association of Schools and Colleges.

Contact:
For more information about the MARA program, please contact:
Patricia C. Franks, PhD, CA, CRM, IGP
MARA Program Coordinator
Patricia.Franks@sjsu.edu

Apply Now!
1. Fill out the online application form at ischool.sjsu.edu/mara-admissions
2. Pay the $55 application fee
3. Send your transcripts

SJSU School of Information
A school within the College of Applied Sciences and Arts
ischool.sjsu.edu

September 2016
- Greta Blash – Basics of Project Management: [https://youtu.be/5d16JwWwjKo](https://youtu.be/5d16JwWwjKo)