

IN THE LOOP

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Special points of interest:

- New Board Members for the 2016-17 year
- Our Summer Event was a Huge Success
- September 13 Monthly Meeting you need to attend
- CRM Study Group all-day educational event September 17

ARMA CHICAGO AND YOU—THE YEAR AHEAD

ARMA Chicago - why do we exist? That's easy - ARMA Chicago exists for one reason - to benefit YOU! That means you collectively, the local chapter members, and you, reading this article. The mission of our chapter is first and foremost to provide education activities and knowledge that will help you in your current job, and help you grow your career. That's why we offer members and guests interesting, relevant content at each chapter meeting, and a full day of education every year at the Spring Seminar.

Second, we provide networking opportunities - I prefer to ditch the business jargon and just call them fun events - that allow you to connect with other Chicago professionals. Meet someone who will become a lifelong professional contact, or a person to recommend you for that next job, a mentor, a mentee, or a friend - or get a tip on a great product or service that will make your job easier. Or just enjoy good conversation. These are live events with real peo-

ple. Sometimes there is no substitute for F2F.

But recognizing that much of our work and world is virtual, we want to connect with our members in other ways. You don't have to miss a meeting and hearing an interesting speaker if you can't leave your office - we will continue to offer the ability to dial in to meetings virtually.

Why ARMA Chicago and not something else? There are many ways to get information these days, information is everywhere. There are tons of seminars and classes put on by professionals, who need to make a living at it and charge significant fees. On the other end of the spectrum, there is lots of free online content. But ARMA Chicago provides a unique space for your professional development - local professionals, face to face meetings where you can ask your questions directly to experts and discuss common issues with your peers. We provide education at a reasonable price, somewhere between free and expen-



sive. We provide direct access to a great vendor community that supports the chapter and highlights products and services to support your organization.

ARMA Chicago is a not for profit, volunteer led organization, and we depend on all of you! We welcome feedback - let us know what topics interest you. Go to the website and send a message. Give a board member a call. Get involved in a committee. Come to meetings.

On behalf of myself and the 2016 board members and committee chairs, we are looking forward to a great year serving YOU!

Laurie Gingrich, CRM President

ARMA CHICAGO CELEBRATES PROGRAM YEAR



Last month on a beautiful Tuesday evening, over 20 chapter members gathered at the Park Grill in Millennium Park to honor award recipients, induct new officers, and enjoy some valuable networking time. This year, the chapter presented nine awards as our way of saying "thank you" for particular contributions to the success of the ARMA Chicago chapter and to the field of Information Governance and Records Management.

Champion Award Recipients

This award celebrates the strong partnership between Records Management and key players within organizations who support RIM efforts and assist internally to bring a records management program to fruition. While these individuals are not Records Managers or affiliated with ARMA, their support contributes significantly to the overall success of Information Governance and RIM initiatives. These are our Champion Award recipients for the 2015-2016 program year:

Evan Mielke- Federal Reserve Bank of Chicago

Evan was nominated by chapter member Zachary Yontz for proactively working with RIM and department leadership to build an internal reference tool to allow the department to track what records they create, where they are stored, and the risk of each record type. His hard work and dedication to RIM projects and requirements allows his department to get out in front of several long-term, system-wide initiatives and position themselves to successfully pass audit reviews.

Christopher Culver – McDermott Will & Emery

Christopher was nominated by chapter member Barbara Dalton for consistently supporting IG and RIM efforts by providing additional resources during staff shortages. He has included IG in the new building planning process, and has partnered with office leadership on providing executive support of the IG cleanup efforts. He has also worked with Barbara on gathering information on the economics of off-site storage.

Lydia Kelley - McDermott Will & Emery

Lydia was nominated by chapter member Barbara Dalton for providing personal insight and support for each floor's cleanup effort. She shares progress updates in the bi-monthly All Attorney meetings, and is always available to talk to attorneys who aren't quite on board with the cleanup effort. Over the course of many all-secretary meetings, Lydia has become a bit of an IG evangelist herself, and waxes enthusiastically about the benefits of good Records Management.

Margie O'Connor – McDermott Will & Emery

Margie was nominated by chapter member Barbara Dalton for her work in rallying the troops for the arduous IG cleanup efforts. Margie conducts monthly Lead Secretary meetings, and has included Barbara in these meetings to lend guidance, support, and information to the lead secretaries. By working with Barbara to develop an atmosphere of trust and confidence with the IG team, Margie has been instrumental in the evolution of IG as a valued business partner to all the secretaries.

Special Commendations

Special Commendation Awards are presented to members for specific contributions, dedication, enthusiasm, and tireless effort in promoting the ARMA Chicago Chapter. These are our Special Commendation Award recipients for the 2015-2016 program year:

Jean Ciura, Committee Chair on Education

Jean was nominated for arranging an excellent schedule of speakers for the chapter's monthly educational sessions this year. She was also instrumental in resurrecting the chapter's quarterly newsletter, the inaugural issue of which came out in April. Jean is a prime advocate for CRM study groups, and has organized a formal CRM workshop to be held this September.

Kimberly Giertz, Bill Herrera, and Todd Kleine

Kimberly, Bill, and Todd were nominated as a group for their work on the chapter's dynamic new website! This was a two-year project, involving research, needs analysis, construction and implementation.

Chapter Leader of the Year

The Chapter Leader of the Year is presented to the most outstanding Chapter leader who has made a great contribution to Chapter operations and actively supports ARMA International's goals and objectives. The recipient is also recognized at the ARMA International Awards Banquet and receives an award from ARMA International.

This year's award was presented to **Laurie Gingrich** for her efforts in organizing a

successful and profitable Spring Seminar. She was also commended for her assistance in the successful launch of the chapter's new website.

Our outgoing President, Kimberly Giertz, shared a few words about this past years' experience:

"What a pleasure it was to serve this past year as president. I learned so much and met so many great people. I look forward to continuing to contribute to the Chapter while learning and networking with my peers."

One of our members shared this tribute about Kimberly's leadership:

"Leading an organization of volunteers is challenging and demanding as well. Working at a full time position in a role of CIO holds its own demanding responsibilities. One of Kim's goals was to improve or as needed replace the existing chapter website and its functionality. Her hope was to have it rolled out by early April which was accomplished as well as to utilize it to promote the annual chapter spring seminar. Her mission was accomplished and deserves a thank you for the presidency as well as setting and achieving the goal for the website."

Kathy Daloia, Chapter Administrator, was also acknowledged for all her efforts in keeping an organization like ARMA Chicago running smoothly!

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Officer Induction

With the close of the program year, the ARMA Chicago Chapter looks ahead with great anticipation to the start of the 2016-2017 program year. Beginning July 1, the new executive board will work diligently to plan monthly meetings, development opportunities, collaborate with vendors and recognize chapter members for work within the field of RM and IG. Elections for the chapter officers took place in June, with the following members elected to these positions for the 2016-2017 program year:

President – Laurie Gingrich
Vice President – Nate Pauley
Secretary – Joseph Suster
Treasurer – Scott Torkelson

In addition to these four executive board positions, Kimberly Giertz will serve as the Chair of the Board. Todd Kleine and Mary Ann Reandeau will serve as chapter advisors. After assuming office in July, the executive board will work to solicit volunteers for, and ultimately appoint, committee chairs to work on the Board of Directors.

In addition to the officers, the following members are serving as committee chairs and advisors:

- Chair of the Board and Website Administrator – Kimberly Giertz

- Membership – Pamela Coan
- Programs – Jean Ciura and Barbara Dalton
- Newsletter Editors – Jean Ciura and Mary Ann Reandeau
- Community Service—Janet Smith
- Vendor Liaison—Larry Bates
- Marketing – Bill Herrera
- Hospitality—Michelle Paluch
- CRM Liaison and Advisor – Mary Ann Reandeau
- Advisor – Todd Kleine

If you are interested in helping out with any of these areas, please send a note to armaadmin@armachicago.org.



SEPTEMBER KICKOFF MEETING— CLASSIFICATION SCHEMES, TAXONOMY AND REMIEDIATING SHARED DRIVES

One of the most vexing problems facing organizations today lies in the digital landfill known as “shared drives” (a.k.a. network drives or file shares). Shared drives, by and large, were not planned; rather, they grew organically by individuals for their own purposes and without an enterprise view. As a result, there is content with varying retention rules mixed together within folder structures making it impossible to simply delete a folder and all of its content. Added to that challenge is content fraught with duplication or near-duplication confusion, version uncertainty, ambiguous or worthless file names, and content that simply should not be on a corporate asset. It is a rare department (much less an entire organization) that has created standard taxonomies and metadata schemes for its information.

The effort to organizing content with **actual value** re-

quires elimination of the valueless ROT (redundant, outdated and trivial) content and classifying the remaining content in a meaningful way.

IMERGE consultant Jim Just will discuss IMERGE’s experience with shared drive cleanup (remediation) and the technologies available to help with the process. The discussion will include the development of enterprise classification schemes, linked to retention schedule, and their importance for the evaluation of content and subsequent migration to taxonomical structures with meaning and lifecycle control. Jim will discuss manual and automated methods of assessing content.

Mr. Just has twenty years’ experience in business process redesign, ECM technologies, business process management and workflow. Mr. Just focuses on helping organizations attain business process optimization using

process analysis and redesign techniques, often utilizing best-of-breed technologies. Mr. Just’s diverse experience in business and computing environments gives him a unique perspective on business problems with insight into creative ways of solving them. Mr. Just specializes in assisting clients through the process of Current and Future State process analysis and design, strategic planning, practical roadmaps for implementing effective content control, and, when needed, requirements definition, technology assessment, vendor selection, and implementation oversight.

Join us on Tuesday, September 13th at the East Bank Club located at 500 N. Kingsbury in Chicago. Our program will start at 10:30 with lunch to follow. Cost is \$35 for members and \$45 for non-members/guests.

September Kickoff meeting

East Bank Club

September 13, 2016—

Tuesday

“The effort to organizing content with actual value requires elimination of the valueless ROT (redundant, outdated and trivial) content and classifying the remaining content in a meaningful way.” - Jim Just



SPRING SEMINAR SUCCESS

The ARMA Chicago Spring Seminar, a key programming event of the chapter year, provides a full day of quality programming and education to chapter members and friends.

This year we welcomed over 60 attendees to the University Center in the South Loop, for a program that featured 8 speakers and panelists engaged with the topic of Information Governance. Vendor support is always key to the success of this event, and we were happy to host 15 vendors who highlighted their products and services. Thanks to our vendors we had a great lunch, snacks, and raffles - one lucky member went home with a TV.

SPEAKERS The day began on a high note with Robert Smallwood's presentation "Information Governance is not a Fad - Why the Keep Everything Forever Approach Will Not Work". Bob Smallwood is nationally known IG expert and this was an opportunity to hear him in Chicago. He laid the groundwork with a talk on IG activities, tasks, and best practices. We then had a variety of sessions on different aspects of IG - the titles speak for themselves:

- Ethics and Information Governance: A Legal Frame-

work and Beyond: Melissa A. Smart, Litigation Manager and Senior Counsel, Attorney Registration and Disciplinary Commission

- IG for Social, Mobile and Cloud - Robert Smallwood, Managing Director, Institute for Information Governance
- Dealing with the Old Stuff: IG for Archiving and Decommissioning - Tina Torres, Advisory Director, Price-waterhouseCoopers
- Measuring and Selling Your Program: IG Metrics and ROI Development - Mark Diamond, CEO, Contoural

The day closed with a Panel Discussion led by Kim Giertz, CIO of Marshall, Gerstein, & Borun where practitioners talked about "The Reality of Governance" - a welcome chance to hear from people "in the trenches" actually doing IG.

VENDORS Vendor Support is key to helping us fulfill our mission of all day education at the Seminar.

- Special recognition this year to our GOLD Sponsor, CHICAGO RECORDS MANAGEMENT. CRM is well known to the chapter, a Chicago area company that specializes in providing secure, dedicated, and professional Paper Storage, Media Storage, Document Imaging /Scanning,

electronic back up, and Electronic Document management. THANKS CRM for your generosity and your support of our chapter!

Also special thanks to our SILVER Sponsors, File Trail, GRM Information Management Services, Intapp, IST Management Services, Om-Tool, and R4 Services.

This year the group of 15 vendors showed the diversity of our field - products and services ranged from "old school" Records Management services like hardcopy storage and staff sourcing, to software companies providing IG services for electronic records work.

THANKS to all those chapter members whose hard work helped get the seminar off the ground: The planning team - Barbara Dalton, Jean Ciura, Pamela Coan-- The communications team - Nate Pauley, Bill Herrera, Kim Giertz -- And to Kathy Daloia, our Chapter Admin, who put in a heroic effort in the final weeks! The Spring Seminar is a highlight of our year and an important part of the financial support of our chapter, so great appreciation for everyone involved, both planners and attendees.

Without advertising, you know what you do, but nobody else does!

Chicago ARMA welcomes our vendors to advertise their business, introduce new services, announce new staff or partnerships in our quarterly newsletter. Ad space is available in various sizes and all are welcome to participate.

For more information, contact Larry Bates (lbatesconsulting@comcast.net) or Kathy Daloia (armaadmin@armachicago.org)



MEET THE BOARD

The 2016-2017 ARMA Board Members show the diversity of industry, background and experience of the chapter itself. ARMA executive leadership consists of four Executive Board Member positions: President, VP, Treasurer, and Secretary, plus the council of Advisors, the three past Board presidents. Committee Leadership roles are also key to the functioning of the Chapter – Committees that get things done for you are Membership, Education, Hospitality, Vendor Liaison, Newsletter, Web Marketing and Communications, and Library.

In the four Executive Board positions, we have professionals from the worlds of Government, Education, and the private sector – Financial Services and Healthcare. Feel free to reach out to anyone with questions or suggestions for the chapter, we appreciate hearing from you.

President: Laurie Gingrich, MA, CRM.

Laurie has over 20 years experience as a professional records manager and IT project manager mostly in the Finance and Legal fields. She is the National Director of Records Management for the big 4 Accounting firm PwC, responsible for Records and Information Management policy, compliance, operations, and technology.

Laurie obtained her B.A. in French and German from Goshen College and her MA in Library Science from the University of Chicago. She has been a CRM since 1995. She is currently working on Spanish, as the PwC US and PwC Mexico firms recently merged and she is getting to know her Mexico colleagues.

Email: laurie.gingrich@pwc.com

Vice President: Nathaneal R. Pauley

Nate is the Assistant Director of Records Management at DePaul University, helping to manage storage and retention of digital documents system-wide. He has a Bachelor's degree in Psychology from the University of Central Missouri, and a Master's in Counseling and Student Development from Eastern Illinois University. A "lifer" in the education field, he has worked in various roles at Eastern Illinois University, Southern Illinois University-Edwardsville, and the Illinois Institute of Art in Schaumburg.

Email: npauley1@depaul.edu

Treasurer: Scott Torkelson, MBA

Scott has 16 years of experience in the RIM field. He obtained his MBA from the Keller Graduate School of Management. He is currently the Records Manager at Blue Cross Blue Shield Association in the Legal and Governance department. Some of his responsibilities include managing the company wide records program, supporting Strategic Counseling and Brand teams, managing the domain names portfolio, and the department's SharePoint Administrator. He recently won the President's Team Award for his contributions implementing an email management program.

Email: scott.torkelson@bcbsa.com

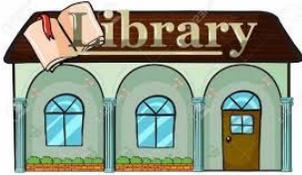
Secretary: Joseph Suster, CRM

Joe is currently a senior records analyst and course instructor with the National Archives and Records Administration (NARA) - Chicago Office. He has worked for NARA since 1978, having 21 years of management experience in federal records centers and an additional 17 years specifically working in records and information management. He has a BA in History from Loyola University. He has been a member of ARMA since 1999 and became a Certified Records Manager in 2000.

Email: joseph.suster@nara.gov

Future newsletter issues will feature our Committee Leaders and Board Advisors.

LIBRARY UPDATE



As part of the effort to prepare CRM Candidates studying for the Certified Records Manager (CRM) exams, the ARMA Chapter Library has acquired all the resources that are part of the ARMA CRM Study Packs. A total of 24 titles have been added to the Library collection.

More information about specific titles can be obtained by contacting the Chapter Librarian, Kate Elgayeva, PhD (kelgayeva@thechicagoschool.edu)

Individual study pack titles can be found here:

CRM Study Pack - Part 1: Management Principles and the Records and Information Management Program

CRM Study Pack - Part 2: Records Creation and Use

CRM Study Pack - Part 3: Records Systems, Storage and Retrieval

CRM Study Pack - Part 4: Records Appraisal, Retention, Protection, and Disposition

CRM Study Pack - Part 5: Technology Equipment and Supplies

As an additional resource, ARMA International recommends that CRM candidates (or potential candidates) consider enrolling in **ARMA International's online Essentials of RIM Certificate Program**, as completing this program will help establish a great foundation for passing examination parts 1-5. For the complete list of resources in the ICRM's Bibliography, visit the [ICRM website](#).

INSIDE THE BOARDROOM



Many chapter members may not be aware that the Board confers during the summer and before every scheduled monthly meeting during the chapter's operational year. The purpose of these meetings is to ensure that the chapter operates efficiently, within budget, and serves the best interests of its membership and related constituencies. Board meetings are highly structured. Each meeting includes a president's report, a treasurer's report (where the chapter's budget and expenses are reviewed), individual board members' reports on the goals and status of their committees, a review of any unfinished previous business, and a preview of new proposed business.

The most recent Board meeting in April included discussions about the 2016 Spring Seminar, the chapter's June awards event, current library holdings, a proposed July

networking event downtown, and a planned CRM exam preparation session scheduled for mid-September. At previous Board meetings this year, important issues such as revisions to the chapter's website and records schedule, digitization of the chapter's records, initiatives to increase membership, and potential vendor sponsorship of various chapter events were discussed and decided upon.

During the 2016-2017 operational year, the Board expects to address such ongoing matters as increasing chapter membership and attendance at chapter events, recruiting educational speakers for monthly meetings, planning the 2017 Spring Seminar, and implementing new initiatives to better serve chapter members and the community. Please note that Board meetings are open to all ARMA members. As the Board

works for you, your ideas, input, and other contributions, such as volunteering to be a member of one the Board's many committees, are always welcome.

Joseph Suster, CRM
2016-2017 Board Secretary

SUMMER EVENT—A WINNER

ARMA CHICAGO was pleased to co-sponsor another free summer event this year. Working with SAA, KM, AIIP, SLA, and KM Chicago, the goal was to provide an open event for information professionals across Chicago. On July 13, a group of about 40 professionals and vendors were able to spend a few hours together socially at Grant Thornton after work. It gave everyone the opportunity to meet new people from different organizations. In addition, those who attended were able to connect with someone from a different profession. It provided an

opportunity to forge new relationships and exchange ideas. Needless to say, for those who came, it was great to meet new folks in a casual environment.

Vendor presence added to this year's event which provided a pleasant way to network, see new services and enjoy an after-work gathering.

If you have an idea for an event or would like to organize or promote an event, contact one of our Board members to share your ideas and help us bring more information professionals together.



AIEF SCHOLARSHIPS AVAILABLE

The ARMA International Educational Foundation (AIEF) is excited to announce the availability of a variety of funding opportunities for current and aspiring records and information management professionals.

- Graduate education scholarships - \$1,000
 - Access Leadership scholarships - \$6,000 & \$2,000
 - RIM certificate/certification reimbursement awards - \$500
- These awards include scholarship and reimbursement awards to cover costs associated with:

- Earning a bachelor's degree
- Earning a graduate-level degree
- Earning a CRM (Certification of Records Management), IGP (Information Governance Professional Certification), or other RIM related certifications

Note: Deadline for all awards: July 31, 2016 at midnight (CST).

For more information and eligibility requirements, please visit: www.armaedfoundation.org.

AIEF is a funding resource for

research and scholarships in the field of records and information management. The primary funding source is derived from concerned individuals and organizations in the profession. AIEF is a 501(c) 3 non-profit entity.

The availability of funding is determined on an annual basis. AIEF reserves the right not to offer awards unless funding is available. Potential donors are invited to contact the foundation administration for additional information:

admin@armaedfoundation.org.

CAREER CORNER

Records Management Specialist

The Records Management Specialist will assist the Records Information Manager with planning and program development, analyzing records and records management problems, and designing strategies to meet ongoing records management needs. Click here for more info

Director of Information Governance

The Director of Information Governance and Records Management is responsible for leading Information Governance (IG) efforts, including, but not limited to, the Records and Information Management ("RIM") program. This position is responsible for all aspects of records management for Abbott globally. Click here for more info



SUCCEEDING AT INFORMATION GOVERNANCE: THE SOFT STUFF IS THE HARD STUFF

Skills and Tasks Like Executive Sponsorship, Team Building, and Communications Can Make the Difference

By: Robert Smallwood

When organizations seek out answers for the keys to success in information governance (IG) projects, they often get the typical answer from consultants and vendors: it depends.

Sure, it depends on the focus of the initial effort in an IG program. The business driver for some organizations may be cost cutting measures that focus on reducing redundant, outdated and trivial (ROT) files to cut the cost of storage, or at least abate it. One organization we are working with spends \$40 million per year on disk storage and associated storage support and maintenance costs, and it is increasing at 30% per year. It has become a significant cost category that now has the attention of company executives. Hard dollar savings can be made by reducing storage costs of central servers and reducing dependence on poorly managed shared drives, while additional savings can be gained through improved content organization (through improved taxonomy design and leveraging metadata) and search capabilities on unstructured files such as scanned documents, Word, Excel, and PowerPoint. That's 'hard' stuff that yields hard dollar cost savings, but it is relatively straightforward.

Other organizations are focused on reducing runaway litigation discovery costs, and concentrate their efforts on e-discovery, by not only cutting ROT and organizing e-documents which cuts costs and improves search capabilities, but also by leveraging

newer technologies such as predictive coding to automate and drastically reduce document review and costs.

Still other organizations focus their IG efforts on securing confidential information by identifying personally identifiable information (PII) and/or personal health information (PHI) and applying security software and techniques. Using file analysis, classification and remediation (FACR) software finding all incidences of PII and PHI is easy, due to the unique characteristics of the data. Then various encryption tactics are applied.

And yet other organizations focus on data governance as a strong component of their IG program. Improved data governance can yield cost savings by data scrubbing, data cleansing, deduplicating, and implementing master data management (MDM). Also, new business insights can be gained by using data analytics, business intelligence (BI), trend analysis, and other tools. These new insights can lead to increased revenue from upselling and cross-selling existing customers, and finding new ones or creating new products or services.

The point is, there are multiple entry points for IG programs, and the focus of the effort depends on where the organization has decided to invest resources. The focus of an IG program is often borne out of the greatest pain points of risk and cost that boil up to the executive suite and demand attention. It is taken for granted that Sony Pictures is now investing resources in identifying and securing PII, intellectual property (IP), and other confidential information.

But what do all IG programs have in common as their most critical factor to succeed? What absolutely must be done before the program has a chance to succeed?

It isn't running FACR software to identify PII/PHI, duplicates, and out-of-

date documents, and to begin broad classification of files, and insert basic metadata tags. No, that all sounds complicated but they are very straightforward processes. Simple software execution.

And it isn't implementing an enterprise content management (ECM) system aimed at reducing or eliminating shared drives and implementing a holistic approach to content management. That is what the software was designed to do. It manages content. Sure, many ECM efforts have failed but not because of the software itself lacked capability, but rather, poor implementation planning, training and communications efforts have been the primary cause.

What all IG programs must do well to succeed, the *absolute most critical elements*, are what is often referred to as "soft stuff." Soft stuff includes such activities and tasks as leadership, executive sponsorship execution, team selection and building, group dynamics, change management, communications, and training. All are critical program management functions. These are the crucial elements that any IG program must include—and do well—to succeed.

Now consider the fact that IG programs must be ongoing, so you have to plan on how you are going to keep team members motivated and performing over a span of years. How will you maintain their focus for three, four, five years or more? And instill commitment to the IG program in any team replacements or additions? These are challenging tasks. They are not easy to do, which is why many IG programs will fail, leaving careers in their wake.

I had a conversation recently with a high profile IG consultant who said, "I have designed perfect IG programs for organizations and nothing happened." Nothing happened because there was likely no strong executive sponsor; or the proper blend of professionals for the IG

SUCCEEDING AT IG (CONTINUED FROM PREVIOUS PAGE)

team (from risk, privacy, IT, legal, records management, etc.) were not assembled; or the business objectives of the new IG program were not clearly established and communicated, and therefore the appropriate level of budgetary and temporal resources were not committed.

As a starting point, let's examine some of the considerations for determining the best executive sponsor to drive an IG program. When a client of ours recently proclaimed, "Oh, an executive sponsor for this new IG program isn't a problem. We have four of them! They are all on board."

It sounds like good news. But there is work to do. Much work.

Consider that those four executive sponsors are likely from different departmental areas, and they will then appropriately have different agendas. That means conflicting goals and business objectives for the IG program. It can mean resentment from executive sponsors who have had their priorities shelved in an initial IG effort. It can mean a blurring of focus for the IG program. That can mean waning support for the IG program over the long term. And that can mean failure.

What is needed is to get all the varying agendas and business

objectives out on the table and to assess and prioritize them according to the organization's overall business objectives. That means nominating the most senior of the those four potential executive sponsors to be the executive sponsor for the IG program, or, better yet, finding that person on the organization chart who is senior to all four potential executive sponsors.

So if there is a scenario where the General Counsel, CIO, SVP of Operations, and Chief Security Officer all are on board to help drive the program, perhaps the best choice is an executive who they all report up through. Say, the EVP of Risk Management. After all, risk is a key impact area for IG programs: Reduce the risk that PII/PHI is breached, reduce the risk that confidential documents or IP is breached, reduce the risk that litigation costs soar out of control and threaten the viability of the organization.

If you attend one of the IG Bootcamps that is put on by the [IG Initiative](#), an exercise you may be introduced to is one where members of a roundtable role-play as if they are representing different functions in an IG program's initial stages. You will clearly see at the end of the exercise how widely the agendas and business objectives of each function vary and can be at odds with others. It is essential to harmonize and prioritize the objectives of the IG program, and in the

process, as Bennett Borden puts it, "to find your natural allies."

For IG programs to succeed they must get off on the right foot. That requires strong leadership and executive sponsorship, a functional and consistently motivated team, and an excellent communications and training program plan.

Easier said than done. Hopefully IG practitioners will learn from the failures in ECM and records management programs and ensure that they address the "soft stuff" from the beginning.

Because it really is the hard stuff of IG.

Robert Smallwood is Managing Director of the Institute for Information Governance, which can be found at www.IGTraining.com at IMERGE Consulting and author of the leading text on IG, Information Governance: Concepts, Strategies, and Best Practices (Wiley, 2014).

<https://www.igtraining.com/live-online-training.html>



WHY IT PAYS TO BE A CERTIFIED RECORDS MANAGER

The Institute of Certified Records Managers (ICRM), an international certifying body of and for professional records managers, began the process of issuing the CRM designation in 1975. Thirty-seven (37) years later, the organization and the credential remains a valuable part of the Records and Information Management (RIM) community; an expanding interdisciplinary, global and diverse constituency.

There are many certificate programs in the market that are targeted for “just-in-time” training needs; they are valuable and serve an important purpose. There are other certifications that fill an important niche for specific levels of records management or evolving technologies. However, no other professional records management certification does what the CRM does in elevating one’s skills and competencies to a level that is continually benchmarked against standards set by the RIM profession; standards that do not lose their relevancy in the midst of changing technologies.

The stellar continuing education requirements that come with being a CRM ensure that professionals remain current in their skills and competencies and can assist organizations in the deployment of successful RIM strategies. CRMs are well sought after in the market place, salaries continue to be elevated and demand for the credential is such that many of the ICRM’s strategic initiatives put in place in the last several years have been to ensure we can supply the demand of employers.

If you are reading this article, your organization is most likely using the ICRM’s licensed CRM Exam Prep Product to host a high-quality workshop that supports CRM candidates through the examination process. The ICRM designed this Product to be in tight alignment

with exam content developed by its Exam Development Committee (EDC). The Product materials emulate the needs of our candidates as the Institute understands them through feedback from those attending similar held by the ICRM in recent years.

This workshop is brought to you as part of a robust strategic plan where the ICRM has advanced several key initiatives that embrace the need for a licensed Examination Preparation Product, lower the barriers to entry for an expanding pool of CRM prospects, and increase the level of service to candidates. The multi-year plan provides for a thorough evaluation of certification standards, the Institute’s current business model, formalization of its examination preparation program, and an extensive marketing plan that will support growth, awareness and a strong, globally recognized value proposition for being a Certified Records Manager (CRM).

For more information on the CRM designation, please contact the ICRM at (877) 244-3128 or visit the website www.icrm.org

ARMA Chicago

PO Box 6034
Buffalo Grove, IL 60089

E-mail: armaadmin@armachicago.org

Check us out on our new
website:
www.armachicago.org



Upcoming Events:

September 13, Tuesday—ARMA Chicago Kickoff Meeting East Bank Club in Chicago

September 25—27—ARMA Conference in San Antonio, TX.

CRM EXAM PREP WORKSHOP



September 17, 2016

McDermott, Will and Emery
227 W. Monroe
Chicago, IL 60606

Host:

Barbara Dalton
312-984-7554
847-209-4434

Attendees are required to be registered and show photo I.D.

The CRM Examination Preparation Workshop prepares candidates for the six-part test by identifying the core subject matter to study for each part and reviewing relevant resources to ensure you develop a successful test-taking strategy.

\$75 ARMA MEMBERS,
\$85 NON-MEMBERS

Speakers:

Mary Ann Reandeau, CRM -
Willis Towers Watson

Joseph Suster, CRM - NARA

Jean M. Ciura, Ph.D., CRM -
JMCIMC, LTD

Contact Kathy Daloia by **SEP-
TEMBER 12, 2016**

Email:

armaadmin@armachicago.org

Schedule:

Registration / Continental
Breakfast: 8:00-8:30 a.m.

Welcome / Opening Remarks:
8:30-8:45 a.m.

Intro to the Exam / Applica-
tion Overview: 8:45-9:30 a.m.

Exam - Part 1: 9:30-10:30
a.m.

Break: 10:30-10:45 a.m.

Exam - Part 2: 10:45-11:45
a.m.

Lunch: 11:45 a.m. - 12:30
p.m.

Exam - Part 3: 12:30-1:30
p.m.

Exam - Part 4: 1:30-2:30 p.m.

Break: 2:30 - 2:45 p.m.

Exam - Part 5: 2:45-4:00 p.m.

Exam - Part 6 Overview / Q&A: