

Selling Yourself to Senior Management

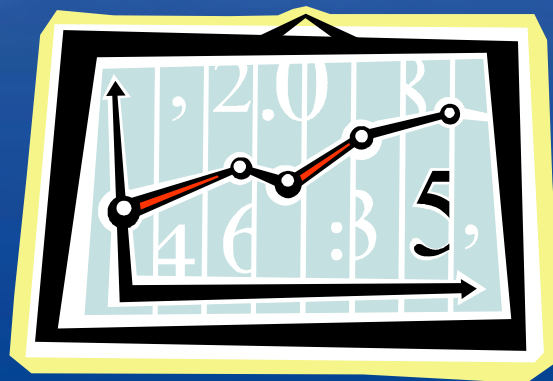
Upland-Inland-Empire Chapter
Meeting

September 17, 2008



Selling Yourself to Senior Management

- **Introductory Remarks**
 - 34 Year Career
 - 32 Year ARMA Involvement
 - Focus on Sales
 - R.I.M. Blog – <http://www.rimthought.com>



Selling Yourself to Senior Management

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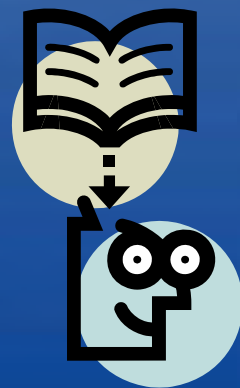
**“I wouldn’t say my computer skills are outdated.
I prefer to think of them as ‘classic’.”**

Selling Yourself to Senior Management - Agenda

- What Organizations Seek in RIM Professionals
- What RIM Professionals Deliver
- Greatest Challenges in Selling Yourself
- Where Do Organizations Need Additional “Education”
- What Do RIM Professionals Need?

Selling Yourself to Senior Management - Agenda

- ARMA International Competencies
 - Competencies
 - Self Assessment
 - Synchronizing ARMA's Educational Offerings



Selling Yourself to Senior Management

- What Do Organizations Seek from RIM Professionals?
 - “Proof of Compliance”
 - Reduction of Corporate Risk
 - Litigation, Audit, Regulatory Issues
 - Improved Management of Records for All Media
 - Reduced Retention Costs
 - Improved Information Access

Selling Yourself to Senior Management

- **What Do RIM Professionals Deliver?**
 - Policies, Procedures & Controls for Management of Records & Content for All Media Types
 - Compliant File Plans, Retention Schedules
 - Guidelines for Implementation of ECM, BPM, eRecords Solutions
 - Active Management of ECM, BPM and eRecords Solutions



Selling Yourself to Senior Management

- What Do RIM Professionals Deliver?
 - Reduced Risk – Litigation, Audit, Regulatory Compliance
 - Management of Inactive Media Storage
 - Reduced Costs for Storage



Selling Yourself to Senior Management

- What Are The Greatest Challenges In Selling Yourself ?
 - Organization's Understanding of Risk, Compliance Needs
 - Organization's Understanding of Challenges with Management of Electronic Records
 - RIM Professional's Skills
 - RIM Professional's Education & Training
 - RIM Professional's Ability to Articulate Value Proposition for RIM

Selling Yourself to Senior Management

- Where Do Organizations Need More Education ?
 - Operational Costs of Failure to Manage All Records
 - Risks of Non-Compliance
 - Litigation Costs & Penalties
 - Audit Costs & Penalties
 - Regulatory Penalties, Sanctions
 - Differences in Storing eRecords v. Managing eRecords

Selling Yourself to Senior Management

- **What Do RIM Professionals Need**
 - Higher Level of Legislative Involvement
 - More Comprehensive Standards
 - Better Recognition of RIM as a Profession
 - Improved Ability to Articulate RIM Value Proposition
 - More Thorough eRecords Training
 - Improved Advanced Degree Programs

Selling Yourself to Senior Management

- **What Do RIM Professionals Need?**
 - **A Defined Set of Competencies**
 - **Levels that Reflect Career Progress and Responsibilities**
 - **Specific Areas of Knowledge and Experience Within Those Levels**
 - **An Assessment Tool that Guides Our Continued Development**
 - **The Motivation / Will to Embrace Our Careers**

Selling Yourself to Senior Management

- So – What’s ARMA Doing About This?
 - Focus on a Strategic Plan Designed to:
 1. Establish information governance standards and best practices
 2. Advance the profession
 3. Bring value to ARMA members

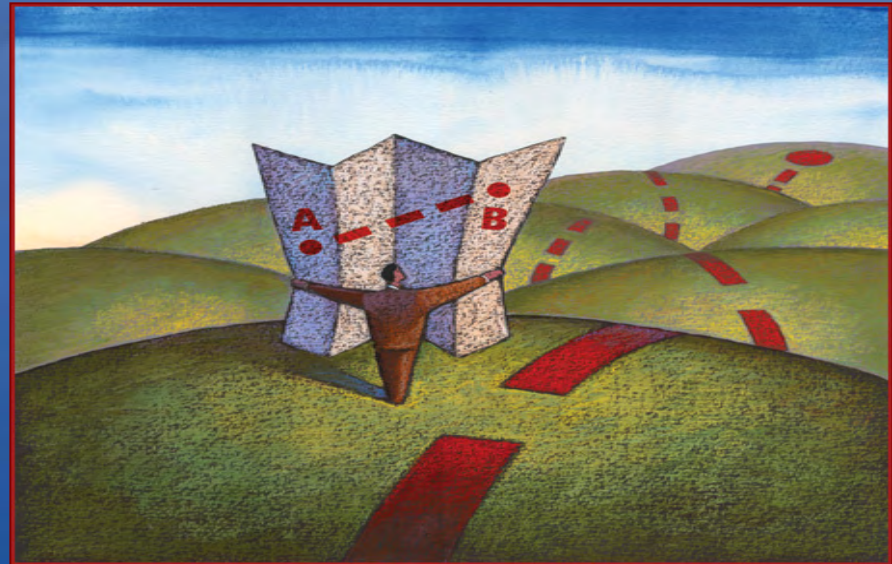
Selling Yourself to Senior Management

- **Key To Education and Training**
 - Ability to Identify Existing Strengths and Weaknesses
 - Ability to Point to Resources to Address Gaps
 - Ability of ARMA International to Map Sessions v. Competencies
 - Education Development
 - Undergraduate / Post Graduate Courses & Degrees

Selling Yourself to Senior Management

- Introduction of ARMA International Competencies

ARMA's RIM Core Competencies ***Where is YOUR Career Going?***



What: Initiative Scope

1. Core Competencies

- Model for Core Skills at Various Levels

2. Self-Assessment Tool

- Measure Current Level
- Direct Development Opportunities

3. Specialty Competencies

- Industry
- International

Why: Key Drivers

1. Validation & Credibility Tool for:

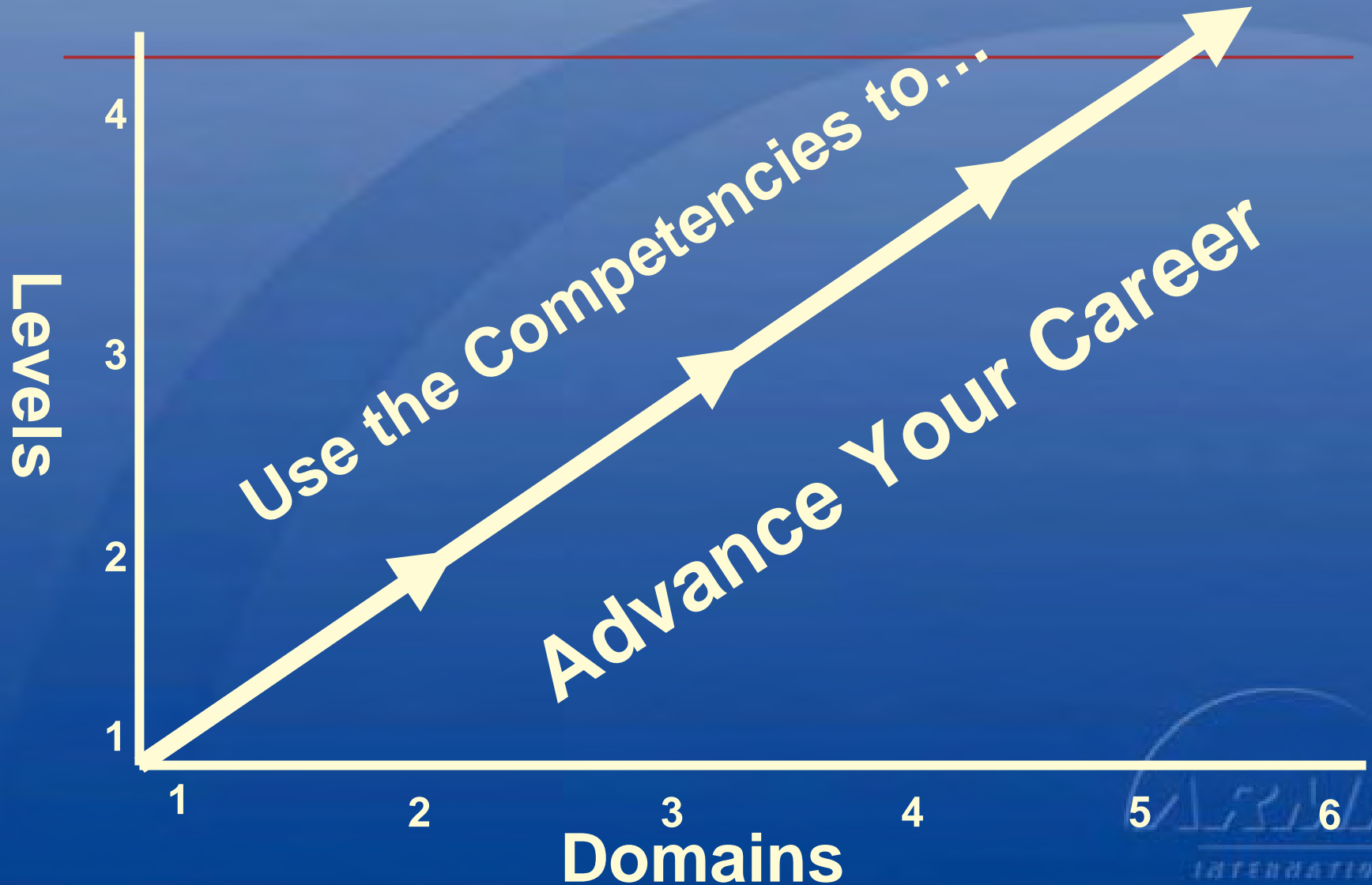
- Practicing RIM Professionals
- Business Environment
 - HR, Exec Level Mgmt, IT Peers & Partners, Risk Mgmt, Training, Policy Makers, Educational Institutions & Certifying Bodies, Product Developers & the Vendor Community and other information professionals

2. Recruiting to the Profession

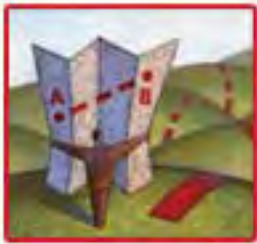
Why: Key Drivers

3. Vehicle to Define the RIM Profession in Current Business Context
4. Shape the Education, Products & Services of ARMA International & Chapters
5. RIM Role in the Community of Professionals

How: Benefits



ARMA's RIM Self-Assessment



Where's Your Career Headed?

ARMA International's RIM Self-Assessment

helps you get excited about your career!



ARMA's RIM Self-Assessment



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Where's Your Career Headed?

ARMA International's RIM Self-Assessment

helps you get excited about your career!

Welcome to the RIM Self Assessment!

The challenge for any professional is to recognize when new competencies need to be learned — and to make sure core competencies continue to meet the current needs of the marketplace. ARMA International developed the RIM Self Assessment to help RIM Professionals identify and target their professional and educational needs.

This professional development tool is designed to help you assess your RIM competencies and develop a professional development plan.

The RIM Self Assessment can be used to:

- Confirm your strengths
- Identify where growth is needed to make you a better RIM practitioner
- Identify learning opportunities to improve your knowledge and skills
- Structure a job performance evaluation
- Build a professional development plan
- Gain insights and strategies to make a career move

To receive your copy of the RIM Core Competencies, please visit the [ARMA Web Site](#).

Step 1: Assess Your Competencies
Assess your current proficiency for each competency within the level you select.

Select your current level of competency

Level 1: RIM practitioner is defined as holding an entry-level position in the RIM profession requiring no previous RIM experience. Participants at this level should be acquiring basic, foundational knowledge and skills for the RIM field and have a basic understanding of what records and information management encompasses. A person at this level may or may not have an undergraduate degree or work experience in another field.

Step 2: Review Your Gap Analysis
The Gap Analysis provides you with a report outlining your strengths and weaknesses related to the RIM competencies.

Step 3: Create Your Professional Development Plan
Once you have received your gap analysis report, review the resources associated with your areas for development. Create a Professional Development Plan by setting both short and long-term career and training goals based on your assessment results.

Step 4: Take Action
Finally, create an Action Plan to achieve your goals. This detailed plan will guide your professional development process.

Use the Menu on the left to guide you through this tool.

- Welcome
- Definitions
- Self Assessment
 - Level 1 ▶
 - Level 2 ▶
 - Level 3 ▶
 - Level 4 ▶
- Gap Analysis
 - Level 1
 - Level 2
 - Level 3
 - Level 4
- Contact Us



ARMA's RIM Self-Assessment

- **Step 1: Assess Your Competencies**

Assess your current proficiency for each competency within the level you select.

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ARMA's RIM Self-Assessment

Self Assessment

Level 3, RIM Practices (Domain 2 of 6)

You do not have to complete the entire Self Assessment at one time. However, we do suggest that you complete an entire domain at one time as those competencies are related.

Directions:

Complete the proficiency ratings for each task statement on the following pages by reviewing the legend then selecting your star rating. To identify the knowledge and skills needed to successfully perform a task, click on the Show Details image.

Show Legend

[Previous](#)[Next](#)

1. Implement systems in compliance with RIM requirements based on an organizational needs analysis.

★★★★★ 5 - Complete Proficiency [Show Details](#)

2. Develop comprehensive procedures to document organizational RIM practices.

★★★★★ 5 - Complete Proficiency [Show Details](#)

3. Create and implement records retention policies and schedules.

★★★★☆ 4 - High Proficiency [Show Details](#)

4. Manage records retention and disposition in compliance with RIM program policy, legal and regulatory requirements, and business needs.

★★★★★ 5 - Complete Proficiency [Show Details](#)

ARMA's RIM Self-Assessment

Rating	Description
☒ ☆☆☆☆☆ 0 - Not Applicable	This task is not relevant to me.
☒ ☆☆☆☆☆ 1 - Little or No Proficiency	This is a new task or skill for me.
☒ ☆☆☆☆☆ 2 - Low Proficiency	I have some experience with this task but limited knowledge and skills.
☒ ☆☆☆☆☆ 3 - Moderate Proficiency	I can perform this task fairly well based on past experience and can demonstrate several of the knowledge
☒ ☆☆☆☆☆ 4 - High Proficiency	I can perform this task very well based on past experiences and can demonstrate most of the knowledge
☒ ☆☆☆☆☆ 5 - Complete Proficiency	I am fully competent to perform this task.

☒ ☆☆☆☆☆ 5 - Complete Proficiency

Hide Details

Knowledge of:

- RIM principles and best practices
- System analysis methodologies
- RIM implementation processes and procedures
- Cost/benefit analysis technologies
- Workflow processes required for implementation
- Business process analysis techniques
- Legal and regulatory requirements
- Organizational RIM practices and requirements
- Organizational legal and regulatory environment

Skills:

- Identify and analyze current trends and opportunities for improvement
- Evaluate cost impact of implementing systems
- Plan and organize for an implementation
- Assist with the development and implementation of RIM plans for improvement
- Develop evaluation tools
- Apply metrics to measure the success and impact of RIM processes
- Map workflow
- Train and facilitate
- Communicate appropriately for the task verbally and in writing
- Obtain support from stakeholders

ARMA's RIM Self-Assessment

Leadership

Avg: ★★★★★

100% Complete

Task Statement	Your Rating	Resource
1. Champion projects by communicating with, and marketing to, stakeholders consistent with organizational goals and objectives.	★★★★★	4 Resources
2. Foster effectiveness during changes in tasks, work environment, or conditions affecting the organization.	★★★★★	3 Resources
3. Manage and mediate conflict.	★★★★★	4 Resources
4. Empower others through leadership and training to maximize the potential of the RIM professional and create a positive work environment.	★★★★★	6 Resources
5. Foster and encourage team behaviors to achieve organizational goals.	★★★★★	7 Resources
6. Evaluate RIM staff career development plans through periodic reviews and provide mentoring to improve staff effectiveness and skills.	★★★★★	2 Resources

Educational Resources

Level of Coverage	Title	Author	Format
Extensively Details	Implementing Electronic Records Management Without Upsetting Users	ARMA	Conference
Moderately Details	Global Records Management - The P&G Story	ARMA	Conference

Informational Resources

Level of Coverage	Title	Author	Format
Moderately Details	(2007IMJ) Evolving the Records Management Culture: From Ad Hoc to Adherence	Patricia Daum, CRM	IMJ Article
Moderately Details	(2007IMJ) Does Your RIM Program Need a Strategic Alignment	Alan A. Andolsen, CMC, CRM	IMJ Article



Next Steps

- **Recommendations for YOU!**
 - Evaluate
 - Set goals
 - Start NOW!

Next Steps

- Road Map for ARMA
 - Self Assessment
 - Mapping
 - Prepare & acquire educational resources

Demonstration

- ARMA RIM Core Competencies
 - www.arma.org/competencies
- ARMA RIM Self-Assessment
 - www.arma.org/ARMAPortalWeb/SelfAssessment/Welcome.aspx
- Access
- Demo

QUESTIONS?