So You Want To Be a Certified Information Governance Professional?

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Learning Objectives

Upon completion of this session, participants will be able to:

1. List benefits of earning the certification
2. Assess their own capabilities in relation to the exam blueprint and requirements
3. Take action to apply for the credential
What Is Information Governance?

ARMA’s definition (2012)
Information governance is a **strategic framework** comprised of standards, processes, roles, and metrics that **holds organizations and individuals accountable** to create, organize, secure, maintain, use, and dispose of information in ways that **align with and contribute to the organization’s goals**.
Value of the Credential

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

For the organization
• Increase compliance
• Reduce risk
• Use a holistic approach to IG
• Have a competent labor pool to draw from
• Leverage information for greater effectiveness
• 1\textsuperscript{st} certification in information governance
• Broad-based set of skills and knowledge
• “Next step” for career professionals
• Computer-based testing; secure sites

More information available at:

www.arma.org/igp
Role of an IGP

- Strategic perspective
- Enterprise-wise perspective
- Leveraging information assets for maximum value
- Reduce costs
- Identify risks and non-compliance
- Harness management support
- Define solutions, controls, policies
- Collaborate across the enterprise
Skills of an IGP

**Analytical skills**
- Risk assessment / mitigation
- Business process analysis
- Critical thinking
- Trend analysis skills
- Research skills

**Management skills**
- Budgeting skills
- Personnel management skills
- Cultural sensitivity
- Decision making skills
- Interviewing skills
- Negotiation skills

**Planning/Forecasting skills**
- Benchmarking / metrics
- Environmental scanning
- Project management
- Strategic thinking
- Continuous improvement

**Communication skills**
- Ability to respond under pressure
- Business relationship building
- Networking
- Persuasion
- Presentation / speaking
- Technical writing
- Trust building
IGPs and CRMs: Key Partners

Complementary Certifications

• CRM
  – In-depth on RIM methods / tools
  – Longer history

• IGP
  – Natural career path for CRMs, and others
  – Works at strategic levels; wide array of competency areas
  – Works in collaboration with CRMs
How Does the IGP Fit?

- IGP at the center – integrates these various perspectives
- Expand your own knowledge base
- Work more effectively with these natural organizational allies
Why You Should Become an IGP

- Improve the speed of business for your organization
- Use information more effectively
- Become more successful, professionally
- Establish yourself as a business leader
Purpose of the IGP Program

Mission of the IGP Certification 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
IGP Governance Board

- Independent
- Established processes to:
  - Ensure validity
  - Provide fairness
  - Provide recertification requirements
  - Ensure public trust
- Coordinates various committees
- Responsible for credibility of the program
Code of Ethics

- Demonstrate integrity, honesty, and fairness
- Affirm the legal, ethical, and moral use of information
- Protect the privacy of individuals
- Report illegal or unethical practices
- Accept responsibility for maintaining the credential through recertification
- Uphold and abide by the policies of the IGP Certification Program
Recertification Requirements

Demonstrate continuing competence:

- 60 contact hours in a 3-year cycle
- 10 hours required in legal
- 10 hours required in IT
- Maximum of 18 hours awarded for a single activity
Recommended Candidate Background

• Option 1
  – Four-year degree (bachelors or equivalent);
  – Three years of management or leadership experience in RIM, law, compliance, audit, IT, privacy, or security

• Option 2
  – Secondary degree (high school, associates);
  – Six years management or leadership experience in fields above
## What’s Covered on the Exam?
The IGP Domain Areas

<table>
<thead>
<tr>
<th>Domain 1</th>
<th>Managing Information Risk and Compliance</th>
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</thead>
<tbody>
<tr>
<td>Domain 2</td>
<td>Developing Information Governance Strategic Plan</td>
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<tr>
<td>Domain 3</td>
<td>Developing Information the Governance Framework</td>
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<td>Domain 4</td>
<td>Establishing the Information Governance Program</td>
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<td>Domain 5</td>
<td>Establishing Information Governance Business Integration and Oversight</td>
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<td>Domain 6</td>
<td>Aligning Technology with the Information Governance Framework</td>
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# The DACUM Chart

<table>
<thead>
<tr>
<th>Duties, Tasks, and Steps</th>
<th>Knowledge</th>
<th>Skills, Abilities, and Attributes</th>
<th>Tools, Equipment, and Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A</strong></td>
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<tr>
<td><strong>Managing Information Risk and Compliance</strong></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>1 Monitor legal and regulatory landscape</td>
<td>- Industry regulations</td>
<td>- Analytical skills</td>
<td>- Internet</td>
</tr>
<tr>
<td>a Engage with legal department and other stakeholders</td>
<td>- Jurisdictional regulations</td>
<td>- Project management skills</td>
<td>- Legal defensibility</td>
</tr>
<tr>
<td>b Identify and interpret existing applicable laws of all jurisdictions and regulations</td>
<td>- Legal defensibility</td>
<td>- Research skills</td>
<td>- Research services</td>
</tr>
<tr>
<td>c Identify resources for current development</td>
<td>- Legal frameworks</td>
<td>- Stakeholder specific communication skills</td>
<td>- Subscription services</td>
</tr>
<tr>
<td>d Document relevant laws and regulations</td>
<td>- Legal research</td>
<td></td>
<td></td>
</tr>
<tr>
<td>e Establish regular review process</td>
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<tr>
<td><strong>2</strong> Identify internal and external compliance requirements</td>
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<td></td>
</tr>
<tr>
<td>a Investigate industry practices</td>
<td>- Benchmarking methods</td>
<td>- Analytical skills</td>
<td>- Benchmarking tools</td>
</tr>
<tr>
<td>b Review business practices</td>
<td>- Business practices</td>
<td>- Communication skills</td>
<td>- Professional associations and industry groups</td>
</tr>
<tr>
<td>c Collaborate with internal stakeholders</td>
<td>- Cultural practices</td>
<td>- Cultural sensitivity</td>
<td></td>
</tr>
<tr>
<td>d Conduct benchmarking</td>
<td>- Industry practices</td>
<td>- Networking skills</td>
<td>- Research services</td>
</tr>
<tr>
<td></td>
<td>- Regional differences</td>
<td>- Project management skills</td>
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<tr>
<td></td>
<td></td>
<td>- Research skills</td>
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<td></td>
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<td>- Surveying skills</td>
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About the Exam

• Time allotted is three hours.
  – 5-minute non-disclosure agreement
  – 10-minute testing tutorial
  – 2 hours 45 minutes for the exam
• 140 multiple choice questions
  – 125 questions are scored.
  – Only correct answers are counted towards your score.
  – 15 questions are being pre-tested for statistical purposes only.
• Scaled score of 650 or more is required to pass
  ✓ Pass: Congrats! You are a new IGP
  ❌ Fail: Retake during the next cycle, with a retake fee of $250
A key risk consideration when leveraging “big data” for business intelligence is

A. staffing
B. recovery time
C. e-discovery
D. data storage.
How Do I Get Started?

- Application form at [www.arma.org/igp](http://www.arma.org/igp)
- Submit form, signed consent statements, and fees
- When approved, you will schedule directly with Pearson VUE
  - 4500+ test centers across North America and several other countries
- AIEF offers reimbursement program for successful candidates
How Can I Prepare?

• Do a self-assessment against the DACUM chart
  – How proficient do I feel in these areas?
• Review suggested reading list in weak areas
  – Read suggested publications
  – Take suggested online courses
• IGP Study Guide and Exam Workbook
IGP Resources

- ARMA’s IGP suggested reading list
  http://www.arma.org/r2/igp-certification/suggested-reading

- ARMA’s IGP examination study kits
  http://www.arma.org/r1/bookstore/igp-resources

- ARMA’s IGP sample questions:
  http://www.arma.org/r2/igp-certification/sample
How Can I Learn More?

IGP Website (www.arma.org/igp)
• IGP Candidate Handbook
• IGP Application Form
• Code of Ethics
• DACUM chart
  – Detailed descriptions of duties, knowledge, and skills
• Suggested Reading List
• Exam Blueprint
• Sample Questions
• “Becoming an IGP” roadshow in some cities
  (www.arma.org/r1/conferences/roadshow/arma-live!-2014-roadshows)
Sample Q&A

One measure of an effective IG program is

A. reduction in storage footprint
B. social media posts that attest the program
C. improvement in employee morale
D. testimonial email and other communications
What is the MOST important reason for establishing a digital preservation strategy?

A. Clearly defines the long-term preservation strategy of records and information assets
B. Defines obsolete file formats and technologies
C. Ensures readability of historical marketing material for future generations
D. Mitigates the risk of technology obsolescence in the use of long-term information assets
Sample Q&A

Resources necessary to align business area requirements with the IG framework include:

- A. Information technology and application inventories
- B. Key IT and industry standards
- C. Records retention schedules and life plans
- D. Strategic plans and goals
Sample Q&A

Communications to senior leaders regarding the IG framework should ALWAYS include:

A. Detailed execution plans
B. Litigation risk analysis
C. Multi-year cost analysis
D. Program accountability
Case Study Q&A

Read the case study - ACME Pharmaceuticals

1. List 2-3 questions important to understanding ACME’s key risk areas
2. List key stakeholders you need to collaborate with
3. Identify 3 risks and vulnerabilities that need to be addressed
Questions?

- Email: CertificationStaff@armaintl.org
- Website: www arma org/igp