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Methodologies for Effectively Managing Documents

PIK715-0227 UK-LDN-1

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Place	: London	**Venue**	: London Marriott Hotel (134 George St, London W1H 5DN) - TBC		
Start Date	: 22-02-2027	**End Date**	: 26-02-2027	**PPP**	: £4950

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If you can't train them, you can't blame them!

Short Description:

COURSE OVERVIEW This training program provides a thorough examination of the principles and practices involved in the systematic organisation, upkeep, and retrieval of organisational documents and records. Participants will engage in a detailed curriculum that covers various methodologies for effectively managing documents, which is crucial for maintaining a well-ordered information system. The program emphasises the importance of establishing a solid framework for document management, enabling participants to understand the intricacies of organising data in a manner that facilitates easy access and retrieval. Moreover, the training equips participants with essential skills and strategies to create and sustain efficient document management systems. Emphasis is placed on the significance of compliance with organisational policies, as well as security measures to protect sensitive information. By the conclusion of the program, participants will be adept at implementing best practices that ensure the efficient handling of organisational information, ultimately contributing to improved operational effectiveness and reduced risks associated with mismanagement of documents.

Course Overview:

COURSE OBJECTIVES

By the end of this program, participants will be able to:

- Develop records management programs to enhance the value of information.
- Reduce risks through effective records management practices.
- Implement document control methods to secure critical information.
- Retain important documents and information systematically.
- Apply relevant regulations and standards for compliance in information management.
- Identify risks associated with poor document handling.
- Create an information asset register to effectively manage critical organizational data.

Target Audience

- Records managers who oversee the organisation of documents.
- Document controllers responsible for maintaining document integrity.
- Administrative professionals looking to enhance their document management skills.
- Employees tasked with the creation of essential documents.
- Individuals in charge of storing important documents securely.
- Staff members focused on efficient retrieval of documents.
- Professionals interested in optimising document management processes.

Program Outline:

DAY 1: Fundamentals of Information Management

1. Methods for evaluating existing practices in organisational information management.

2. Essential terminology - Grasping concepts related to information management.
3. Document oversight vs. records administration- Comparisons and contrasts.
4. Recognising organisational hierarchy, personnel, and information pathways.
5. Establishing information objectives for organisational achievement.

DAY 2: Establishing a Document Control and Records Management Program

1. Clarifying the objectives and extent of a document control program.
2. Details of document control and records management processes.
3. Assessing and pinpointing essential documents and records.
4. Overseeing electronic and physical document formats.
5. Techniques for efficient record storage and retrieval.

DAY 3: Features of a Document Control and Records Management Program

1. Formulating file plans and tackling challenges.
2. Classifying records, determining retention, and disposing of documents.
3. Adhering to laws, regulations, and industry standards.
4. Developing a retention schedule for effective records management.
5. Ensuring confidentiality, transparency, integrity, and security in handling records.

DAY 4: Roles and Responsibilities in Information Management

1. Grasping the principles behind filing systems.
2. Defining accountability in information management roles.
3. Improving communication and teamwork in document management.
4. Creating educational resources for information management.
5. Gaining support and direction from senior management.

DAY 5: Strategic Planning and Execution

1. Formulating an information management strategy and asset inventory.
2. Drafting policies and procedures for document and records management.
3. Developing process plans for effective document control.
4. Applying change management and disaster recovery plans.
5. Establishing actionable strategies for enduring information management practices.