



Information management (IM) professionals frequently bear the responsibility for educating staff members about their IM-related responsibilities. This article focuses on how to set the training sequence into motion and provides a list of resources for learning more about training and finding IM content relevant to their training efforts.

The ‘Building Blocks’ of Training

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Training is a necessary component of a well-run organization. The practice of information management (IM) embraces a discrete body of knowledge, and the IM professional is the frontline representative for the dissemination of that knowledge to individuals in an organization.

At a fundamental level, this article discusses the “building blocks” of training and offers a structural guide for the planning, preparation, development, delivery, and evaluation of training activities. Although IM content-related resources are suggested, this article does not delve into the specifics of *what* should be included in training. Rather, it focuses on *how* to set the training sequence into motion when an IM professional bears the responsibility for educating others.

Preparing to Conduct Training

When undertaking training activities within an organization, executive management’s buy-in and approval are essential. When meeting with executive management to make the case for training, it is important to state the benefits for the organization, as well as the costs. Certainly, trainers are expected to outline the training topics and prepare a budget with a projection of expenses, as well as an estimate of the time that will be needed. IM professionals will also want to highlight the organizational benefits of their training initiatives, such as:

- Heightening awareness of policies, processes, and procedures to foster greater effectiveness
- Fortifying *esprit de corps* through educational team-building initiatives and nurturing a culture of collaboration and cooperation
- Disseminating essential legal and regulatory information throughout the organization’s ranks to encourage improved compliance
- Enhancing individuals’ personal and professional growth by expanding business knowledge and skillsets

Further, to reinforce the essential nature of training within the IM universe, consider referencing such industry-related publications as ARMA International’s *Records*

and *Information Management Core Competencies, 2nd Edition*, which has wide-ranging applicability across industry sectors and types of organizations. It states the need for training and educating users about the IM program.

Training is prominently featured in ARMA International’s Generally Accepted Recordkeeping Principles® and in the association’s standards/best practices titles. Other educational documents, such as ARMA International’s *Information Governance Body of Knowledge (IG-BOK): The Foundation*, encourage continuous learning and development. In addition, international standards related to IM and issued by the International Organization for Standardization (ISO), recognize the necessity of employee training for an organization’s ongoing growth.

Establishing a Knowledge Base

Once management buy-in has been established and approval for training has been secured, the next step is to establish a knowledge base from which to assemble the training content. To make the training experience more pertinent and timely, assess the trainees’ prior knowledge to identify gaps.

Such a pre-test can be conferred through interviews or surveys, for example; depending upon the number of individuals to be trained, it may be feasible to interview or survey a subset of prospective trainees (rather than the entire group), constituting an informal, representative sample. For ease of administration and scoring, construct a survey in a simplified format so that responses are true/false or yes/no.

Selecting Schedule and Methodology

Planning and creating a training schedule involve consideration of several factors. For instance, if training is in-person, the time of day and the day of week can impact the trainees’ receptivity to learning.

Accordingly, Friday afternoon is probably not the optimal time for classroom-based training, because holding individuals’ attention at the conclusion of a long week could be a challenge! Monday is likely to be one of the least conducive days to engage in productive training

Read More About It

To learn more and to gain access to additional training content, visit these resources online:

AIIM (www.aiim.org) focuses on the intersection of people, processes, and information. It was founded in 1943 as the National Micrographics Association, and it provides educational content for information management professionals.

ARMA International (www.arma.org) offers educational materials and learning experiences for information management and information governance practitioners, including an annual conference, *Information Management* magazine, and web-based continuing education activities.

International Association of Privacy Professionals (IAPP) (www.privacyassociation.org) is a global community with a focus on the provision of educational resources.

National Archives and Records Administration (NARA) (www.nara.gov) is managed under the auspices of the U.S. federal government, providing records and archives-related guidance materials for practicing professionals.

National Association of Government Archives and Records Administrators (NAGARA) (www.nagara.org) provides professional development activities and materials for archives and records practitioners in all sectors of government.

PRISM (Professional Records and Information Services Management) International (www.prismintl.org) is an information management trade association and a resource for product/company-related insights.

Society of American Archivists (www2.archivists.org) provides an array of continuing education materials and activities, including an annual conference and a semi-annual journal, *The American Archivist*.

Society for Human Resource Management (www.shrm.org) offers general management advice and educational resources for business professionals, regardless of industry or sector.

Training Magazine (<https://trainingmag.com>) is a bi-monthly periodical devoted to topics pertaining to staff training and development, regardless of industry or sector.

because for most workers it is the week's starting point. Energy levels can be low and the workload can be high; subsequent to the weekend break, a plague of overflowing inboxes can be endemic throughout an organization.

For most individuals (and in keeping with the human body's natural circadian rhythms), the best time for classroom training is mid-to-late morning on a Tuesday, Wednesday, or Thursday.

During training, ensure there are breaks so that individuals can stand and stretch. In addition, provide access to coffee, tea, water, and soft drinks. Beverages and breaks can help support mental alertness and increase individuals' receptivity to the training experience.

There are unique dynamics with traditional, in-person training that do not apply to online instruction, whether scheduled or on-demand. Trainees in a small-group, in-person session can relate to the trainer and other trainees in a personalized way. Training large groups can be an efficient way to deliver standardized content in a single event while maintaining a face-to-face setting with some level of immediacy. Usually, if physical interaction, games, or role-playing activities are incorporated into the learning experience, in-person training is the preferred modality.

Given the time constraints, the costs, the logistics of reserving meeting space, and the travel time (if applicable), on-site classroom learning may not be the optimal delivery format. It is fortunate that today's technologies offer many computer-based or online platforms for remote learning, both on-demand and live.

It is essential that the trainees' and the organization's needs receive full consideration when deciding upon a training schedule and methodology. Striking a balance can be daunting, but with forethought, planning, and comprehensive communications with personnel (including executive management), it is usually possible to reach a feasible arrangement.

When training is needed to learn compliance with new regulatory, legislative, or legal mandates, the schedule may take on heightened immediacy. For the trainer, this is an opportunity to add value and to attain increased visibility within the organization.

Selecting Training Materials

In addition to creating original content, trainers can cull a wealth of existing IM training material. (A list of resources is provided in the sidebar above.) Typically, trainers will need to get permission from the author and/

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or publisher before they can legally use copyrighted content. Further, they should use reference citations within the material, as appropriate.

Trainers will need to decide whether to use paper or electronic materials. Electronic materials are usually cheaper, but if business needs dictate the use of paper, then paper is preferable. Certainly, electronic materials can be presented to trainees with the understanding that they are allowed to print their own copies, if appropriate. Regardless of the content's format, multi-national organizations may need to provide training materials in languages other than English to accommodate a global audience.

Delivering Training Activities

In today's digital age, the delivery of training can involve the use of audio files (e.g., podcasts), video files (e.g., taped presentations of live content delivery that has been uploaded to social media platforms), live streaming of content online, computer-based training documents (such as PDFs or Word documents), and online learning modules, both live and archived.

Smartphones, tablets, laptops, and desktops can be used as training delivery devices. Multiple training options are usually well-received by tech-savvy trainees. The "always on, always available" nature of many of these self-directed training activities can heighten acceptability and accessibility for users. Many organizations find that digital training venues offer convenience and cost savings, as well.

Nevertheless, in-person training continues to be a popular choice. It can be particularly useful in settings where team building is sought, in environments where a more traditional training culture prevails, or in training scenarios where hands-on skills are taught.

When there are trainees with physical, visual, hearing, or mobility impairments, make sure to accommodate those needs. Trainers may need to plan with the HR team and include a question in their e-mail messaging that inquires about special needs. To ensure confidentiality, make sure the invitation responses cannot be viewed by the entire group.

Examples of specific considerations include, but are not limited to:

- Reserving training venues that are wheelchair accessible
- Providing large-print versions of hard-copy materials
- Offering computer-based or online training platforms that incorporate options for adaptive audio-visual modifications

Trainers must always give full consideration to trainees with disabilities so their unique requirements can be met. They must work with their organization's legal counsel and HR team to become familiar with the regulatory mandates pertinent to training activities conducted and sanctioned by the organization, such as the

Americans with Disabilities Act and the Occupational Safety and Health Administration's edicts.

Regardless of the format or delivery medium, professionalism must always prevail. Trainers should offer well-written, user-friendly materials and deliver the content in a comprehensive manner. They are responsible for providing a safe, respectful, accurate, and enriching experience for *all* attendees. Training technologies have changed over the years and will continue to evolve, but succinct communication remains a valuable commodity that will never go out of style.

Assessing the Training

The purpose of soliciting critical feedback from attendees is to help make future training sessions more effective. Feedback is typically obtained from surveys, interviews, or post-tests – which can help identify whether learning gaps remain. Formats can be computer-based, online, telephonic, in-person, or paper-based.

Honest, constructive feedback will foster an atmosphere of continuous quality improvement. Evaluations should inquire about such things as the training environment (e.g., temperature level, comfort, convenience of location), the materials (e.g., readability, organization, relevance), and the perceived competence of the trainer, to name a few.

To encourage trainees to submit feedback, management should deem the evaluation to be a necessary component and that the training activity will not be considered complete until input has been provided.

If possible, trainers should self-critique their training experience for their own professional development, too. The self-evaluation can be in the form of a training journal or a more formalized exercise, the results of which might be shared with a supervisor.

Many beneficial outcomes can be realized from well-planned, IM training initiatives. As a hallmark of a thoughtfully managed organization, training continues to be a "tried-and-true" way to effect positive change. **E**



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