

ENTERPRISE CONTENT MANAGEMENT MASTERCLASS



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TRAINING CENTER



Introduction

Enterprise Content Management Masterclass addresses the discipline of controlling organizational information throughout its lifecycle. Documents, records, emails, images, and digital assets accumulate faster than any organisation can manage them manually, and poor control creates real costs: lost information, duplicated work, compliance exposure, and slow decisions. This Enterprise Content Management Masterclass Training Course builds the capability to govern content deliberately. Participants examine content strategy, taxonomy and metadata design, records management, document lifecycle control, workflow automation, and platform selection. Furthermore, the course covers governance standards including ISO 15489 for records management, the DoD 5015.2 records requirements, and MoReq2010 specifications. It also addresses migration, retention, and disposal practice. As a result, participants leave able to run an ECM programme that staff actually use.

Enterprise Content Management Masterclass Course Objectives

- Develop an enterprise content management strategy aligned with business objectives.
- Build taxonomies, metadata schemas, and content classification structures.
- Apply records management standards including ISO 15489 and MoReq2010.
- Design document lifecycles covering creation, review, approval, and disposal.
- Apply retention schedules and legal hold procedures correctly.
- Design workflow automation for document approvals and routing.
- Evaluate ECM platforms against functional and technical requirements.
- Manage content migration, legacy systems, and metadata mapping.
- Apply information governance, security, and access control practices.
- Measure ECM performance with adoption, retrieval, and compliance indicators.



Course Methodology

The course applies interactive, practice-based methods:

- Facilitated workshops on live content management problems.
- Case studies of successful and failed ECM implementations.
- Hands-on taxonomy, metadata, and retention schedule exercises.
- Simulation of platform evaluation and vendor selection.
- Group work on migration plans and governance frameworks.
- Action planning that converts each framework into an ECM commitment.

Who Should Take This Course

- Records managers and information governance officers.
- IT and enterprise application managers.
- Knowledge and document management specialists.
- Compliance, legal, and audit professionals.
- Business analysts involved in content projects.
- Project managers implementing ECM systems.

Enterprise Content Management Masterclass Course Outlines

Day 1: Foundations of Enterprise Content Management

- Defining ECM, content, records, and information assets.
- Understanding the content lifecycle from creation to disposal.
- Reviewing ECM components: capture, storage, retrieval, and delivery.

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- Assessing the cost of poor content management.
- Examining compliance and legal drivers for ECM.
- Reviewing ECM maturity models and capability assessment.
- Assessing your organisation's ECM baseline and gaps.

Day 2: Taxonomy, Metadata, and Content Architecture

- Designing taxonomies and controlled vocabularies.
- Building metadata schemas with mandatory and optional fields.
- Applying content classification and auto-classification rules.
- Structuring folder hierarchies versus metadata-driven organisation.
- Developing naming conventions and version control standards.
- Building an information architecture blueprint.
- Drafting a taxonomy and metadata plan.

Day 3: Records Management and Lifecycle Control

- Applying ISO 15489 records management principles.
- Using MoReq2010 and DoD 5015.2 requirements for compliance.
- Building retention schedules and disposition rules.
- Handling legal hold, litigation, and e-discovery readiness.
- Managing physical and electronic records consistently.
- Applying version control and audit trails.
- Designing a records management framework.

Day 4: Workflow, Capture, and Platform Selection

- Designing document workflows with routing and approvals.



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- Applying capture technologies: scanning, OCR, and intelligent capture.
- Automating forms, signatures, and case files.
- Evaluating ECM platforms against defined requirements.
- Comparing functional, integration, and cost criteria.
- Planning integration with ERP, CRM, and collaboration tools.
- Building a platform evaluation scorecard.

Day 5: Migration, Governance, and Adoption

- Planning content migration and metadata mapping.
- Managing legacy content, duplication, and clean-up.
- Applying access control, security, and information protection.
- Measuring ECM performance with retrieval and adoption indicators.
- Driving user adoption through training and change management.
- Sustaining governance through ownership and review cycles.
- Finalizing a personal ECM implementation action plan.

Conclusion

By successfully completing Enterprise Content Management Masterclass, participants will have acquired practical knowledge of content strategy, taxonomy and metadata design, records management, workflow automation, platform evaluation, and migration governance. They will have gained skills in ECM strategy and taxonomy design, records and retention management, workflow and capture design, and content governance and migration, plus a personal action plan. Gentex Training Center designed this program to help organisations govern information with discipline.





FAQs

Q1 What is the "Enterprise Content Management Masterclass" course about?

It covers how organisations manage content and records through their full lifecycle. Participants study content strategy, taxonomy and metadata design, records management standards, retention schedules, workflow automation, platform selection, migration, and governance.

Q2 What are the key benefits of the "Enterprise Content Management Masterclass" course?

Participants gain faster information retrieval, reduced duplication, and stronger compliance readiness. Organisations also lower storage and administrative costs, speed up approvals through workflow automation, and reduce legal and audit exposure from uncontrolled content.

Q3 What skills will I gain from the "Enterprise Content Management Masterclass" course?

You will develop four core skills: ECM strategy and taxonomy design, records and retention management, workflow and capture design, and content governance and migration management.



Q4 What tools, methods, or standards are covered in the "Enterprise Content Management Masterclass" course?

The course covers ISO 15489 records management, MoReq2010 and DoD 5015.2 requirements, taxonomy and controlled vocabulary design, metadata schemas and auto-classification, retention schedules and legal hold procedures, OCR and intelligent capture, workflow and routing design, platform evaluation scorecards, and content migration and metadata mapping practice.

Q5 How is the "Enterprise Content Management Masterclass" course applied in real-world practice?

Participants apply the methods to live organisational tasks, such as building a taxonomy, drafting a retention schedule, designing an approval workflow, evaluating an ECM platform, and planning a content migration. Each module ends with an action commitment, so learning transfers directly into ECM delivery.