



## Information Management Reference Model Project Overview and Highlights

### IMRM Project: what it is, what it isn't, and its basic purpose

- **Relationship to EDRM framework:** The IMRM is an entirely new reference model; a separate counterpart to EDRM
  - What it is NOT: The IMRM Project does NOT aim to solely build out the Information Management node of the EDRM framework.
  - The IMRM will stand alone but will not be isolated: it will have conceptual correlations to IM-related activities/processes, such as RM, compliance, ECM, e-discovery, etc.
- **Fills a need:** There is a genuine need for a general-purpose, broadly applicable reference framework for the industry at large (end users, vendors, influencers, and other market players). No such model currently exists. While there are many IM-related frameworks, they typically deal with RM/structured information, or are organization-specific, not “generic” or broadly applicable across multiple industries, functions, etc.
- **A communications tool:** The IMRM will help bridge gap between IT, Legal, Compliance, RM, and other stakeholder groups within organizations. The IMRM does NOT aim to produce a model that is prescriptive in nature; rather, it seeks to provide a reference that will promote cross-functional dialogue and collaboration.

### Official IMRM Project description / mission statement

The goal of the IMRM Project is to provide a common, practical, flexible framework to help organizations develop and implement effective and actionable information management programs.

The IMRM Project aims to offer guidance to Legal, IT, Records Management, line-of-business leaders and other business stakeholders within organizations. The Project seeks to facilitate dialogue among these stakeholders by providing a common language and reference for discussion and decision-making based on the needs of the organization.

### IMRM group profile

- Membership to date: 53 individuals with representation from 27 organizations
- Nearly 20 percent of the group is comprised of individuals who are currently serving, or have previously served, as professional records and/or information managers (actually carrying out RIM functions within their organizations).



## Accomplishments to date

- IMRM Project established at EDRM kickoff meeting in May 2009
- Agreed-upon objective, scope of project (broad; not limited to e-discovery)
- Organization into 6 sub-groups to research and gather input from a wide variety of resources (organizations, experts, and industry professionals)
  - SG1 = Technology industry analysts
  - SG2 = Industry trade associations: ARMA, AIIM, ISACA
  - SG3 = ECM vendors and other IM vendors
  - SG4 = Standards and certification organizations: ISO, ITIL, DoD, etc.
  - SG5 = Healthcare (AHIMA, HIMSS)
  - SG6 = Corporations
- Varying levels of progress have been made with each of the sub-groups; but for the most part, each sub-group gathered resource material, conducted preliminary research, and engaged in dialogue with target sub-group audiences
- Developed multiple preliminary IMRM framework(s) for internal review, comment, refinement, further development
- Developed and decided on primary IMRM framework (Level 1) diagram (currently in development but available to make public as an initial draft)

## Remaining deliverables, target dates for Project year 1 (May 2009-May 2010)

- **February 1, 2010 (LegalTech NY):** Exhibit version 1 of draft IMRM framework for public comment.
- **February-May 2010: Public comment period**
  - Obtain comments via multiple sources. In addition to general public comment, we will seek feedback via: (a) outreach activities of each of the 6 sub-groups, and (b) additional proactive outreach methods, which may include a structured, formal feedback mechanism.
  - Develop and produce draft working definitions document based on research and activity across all 6 sub-groups to accompany framework and describe components.
  - Intake comments; develop and refine framework and supporting materials. Repeat as necessary (within reason).
- **May 2010 (EDRM annual meeting):** Official launch of IMRM framework