



Everything You Need to Know About Becoming a CRM

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CRM CERTIFICATION

How is this presentation organized?



- Lucy's perspective
- Henry's perspective
- Sofia's perspective

LUCY'S PERSPECTIVE

What will this section review?

- Lucy's perspective
 - About CRM certification
 - Parts 1-5



ABOUT CRM CERTIFICATION

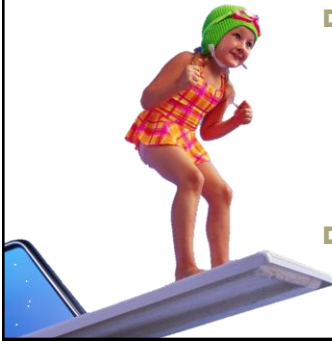
What is a CRM designation?

- The CRM (certified records manager) is a professional certification issued by the ICRM.
 - Demonstrate education/professional experience
 - Pass rigorous exams
 - Abide by Professional Code of Conduct
 - Commit to maintaining active credential



ABOUT CRM CERTIFICATION

Who is the official certifying body?



- Institute of Certified Records Managers (ICRM)
 - International certifying organization of and for professional records managers
 - Sets standard by which persons involved in RIM are to be measured, accredited and recognized according to criteria of experience and capability established by their peers
 - Official certifying body for ARMA and NIRMA

ABOUT CRM CERTIFICATION

Why should you become certified?

- Many jobs require CRM designation
- Earn 10% more than market average
- According to a 2007 ICRM salary survey:
 - 51% of CRMs made at least \$90,000
 - United States CRMs averaged just under \$95,000
 - 77% participated in a 401K or 403b
 - 74% received medical benefits



ABOUT CRM CERTIFICATION

What educational/professional experience is needed?

- Educational/Professional Experience
 - 4 years, BA degree/1 year experience
 - 3 years, BA degree/2 years experience
 - 2 years, BA degree/3 years experience
 - 1 year, BA degree/4 years experience
 - High school graduate/5 years experience



LUCY'S PERSPECTIVE

Why did I choose to become a CRM?

- Personal and professional satisfaction
- Job growth and professional opportunities
- Increase personal knowledge base



LUCY'S PERSPECTIVE

What steps did I take to become certified?

- Step 1 – Determining Ability to Qualify
 - ▣ Education plus experience
 - ▣ Relevant professional experience
- Step 2 – Applying
 - ▣ \$100 application fee
 - ▣ Form
 - ▣ Letter
 - ▣ Outlined experiences
 - ▣ Supporting documents



LUCY'S PERSPECTIVE

How long did it take?

- CRM Workshop ARMA International 2009
 - ▣ Made pact with friend from workshop to get CRM
- Filled out application in early 2010
- Accepted as candidate in March 2010
- Ordered 22 ARMA books
- March – May 2010 spent every moment reading
- Finished Bibliography, began review of notes



LUCY'S PERSPECTIVE

How long did it take?

- Reviewed notes from previous RIM classes
- Mentor helped tremendously
- Took Parts 1-3 on Tuesday and passed
- Took Parts 3 and 4 on Thursday and passed

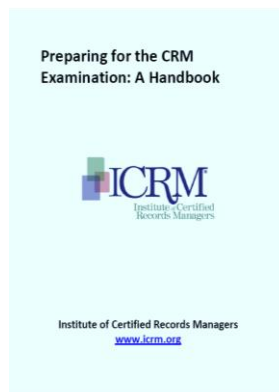
- You can take your time...
- You have 5 years to complete all exams



CRM EXAM: PARTS 1 -5

Where do I find more detailed information?

- Preparing for the CRM Examination: A Handbook



CRM EXAM: PARTS 1 -5

What topics are covered in each part?

- Part 1: Management Principles & RIM Program
- Part 2: Records and Information: Creation and Use
- Part 3: Records Systems, Storage and Retrieval
- Part 4: Records Appraisal, Retention, Protection and Disposition
- Part 5: Technology



CRM EXAM: PARTS 1 -5

What is the exam schedule?

- **Winter 2012:** Parts 1-V, Feb 6-10, 2012/ Part VI, February 16, 2102
- **Registration Open:** Nov 28, 2011- Feb 2, 2012
- **Spring 2012:** Parts I-V, May 7-11, 2012/ Part VI, May 17, 2012
- **Registration Open:** February 24, 2012-May 3, 2012
- **Summer 2012:** Parts I-V, Aug 6-10, 2012/ Part VI, August 16, 2012
- **Registration Open:** May 25, 2012- Aug 2, 2012



CRM EXAM: PARTS 1 -5

What do I need to know?

- Parts 1-5 each consist of 100 multiple choice
- 80 minutes per part
- \$100 per exam, Parts 1-5
- 70% to pass
- Electronic, local Pearson Vue testing center
- Retake as often as you like in a 5 year period
- 1-5 are offered 5 consecutive days
- Must do parts 1-5 before qualifying for part 6



HENRY'S PERSPECTIVE

What will this section review?

- Henry's perspective
 - Part 6
 - Test taking strategies



HENRY'S PERSPECTIVE

Why did I choose to become a CRM?

- **Job Security.** Records are simply more important to the NJ Judiciary than Law Libraries are.
- **Career Options.** I wanted options other than looking for employment as a Librarian.
 - ▣ Part-time work/post-retirement options
 - ▣ Desire to professionalize the function
 - ▣ Realization that CRM was within reach



HENRY'S PERSPECTIVE

What steps did I take to become certified?

- Determined if I could sit for the test
 - ▣ Requirements somewhat stringent, but I had basics
- Reviewed assessment tools from ICRM
- Discussed process with current CRMs
- Obtained texts and related materials
- Studied approximately 200 hours



HENRY'S PERSPECTIVE

What resources did I use?

Preparing for the CRM
Examination: A Handbook

ICRM
Institute of Certified Records Managers

Institute of Certified Records Managers
©2012/2011

- *Preparing for the ICRM Exam: A Handbook*
- Robek, Mary, and Gerald Brown and David O. Stephens. 2002. *Information and Records Management*
- Saffady, William. 2010. *Records and Information Management*
- Saffady, William. 2002. *Managing Electronic Records*
- Liberty Bell Chapter sample test
- Materials provided by mentor

HENRY'S PERSPECTIVE

Who did I turn to for help?



- Other CRMs
- Mentor
- My RIM colleagues

HENRY'S PERSPECTIVE

Why is part 6 easier than parts 1-5?

- In parts 1-5, you know it or you don't -- Pass/Fail.
- In Part 6 if you use the mechanics of test taking, you can be weak in a few areas but impressive in others.
 - Pay attention to test taking techniques as described in the ICRM Manual.



CRM EXAM: PART 6

What is the goal of Part 6?

- “Part VI presents an opportunity for you to apply the knowledge that you have gained through study and work experience to *life-like* problem scenarios, otherwise known as case studies or practical exercises.”



ICRM. 2012. Preparing for the CRM Examination:
A Handbook, 12th edition. Available at www.icrm.org.

CRM EXAM: PART 6

What is the overall structure of Part 6?

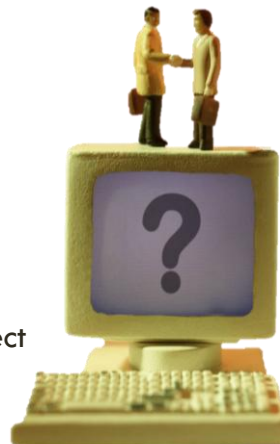
- Part 6 is only given on Thursday
- You choose times convenient for you
- If you fail Part 6 by less than 8 points (63-69%), you can appeal within 15 days
- \$150 for Part 6



CRM EXAM: PART 6

What is the overall structure of Part 6?

- Consists of two parts
 - ▣ 60 point question
 - Comprehensive answer
 - 150 minutes
 - ▣ 40 point question
 - In-depth analysis of a specific subject
 - 90 minutes



TEST TAKING STRATEGIES

How is the 60 point question structured?

- I. Introduction – 10 points
 - A. Statement of the Problem – 5 points
 - Summary of Overall Findings – 5 points
- II. Analysis – 50 points
 - Staffing & Training Issues
 - Equipment, Technology, & Space Issues
 - Methods and Procedures Issues



CRM EXAM: PART 6

How can I prepare to answer the case studies?

- Do practice problems
 - *Preparing for the ICRM Exam: A Handbook*
 - Chapter Websites
- Take an ARMA sponsored class
 - Sponsored by ARMA Chapters
 - Offered at annual ARMA conference
- Get a mentor



TEST TAKING STRATEGIES

How do I structure my answers?

- ▣ Narrative
- ▣ Follow instructions
- ▣ Write for the management level
- ▣ Use headings
- ▣ Every problem needs a solution
- ▣ Use bullet points very sparingly
- ▣ Include a summary paragraph



TEST TAKING STRATEGIES

What else do I need to know?

- Answer all categories or you will lose points
- Must answer 60 point, before 40 point question
 - ▣ No navigation back and forth between case studies
- Write from the perspective of a RIM consultant
 - ▣ Provide answers that would interest management rather than your supervisor



TEST TAKING STRATEGIES

How do I allocate my time for the 60 point question?

Sample Time Allocation

- ▣ Acknowledge Non-Disclosure Agreement 5 minutes
- ▣ 60 Point Case
 - Reading 20
 - Jotting Notes (whiteboard) 10
 - Planning & Organizing 20
 - Writing 80
 - Reviewing/Editing 15
- Subtotal 150 minutes



SOFIA'S PERSPECTIVE

What will this section review?

- Sofia's perspective
 - ▣ Grading/ Mentoring
 - ▣ CRM maintenance



SOFIA'S PERSPECTIVE

Why did I choose to become a CRM?



- Demonstrate *minimum* level of RIM knowledge
- Desire to contribute to RIM profession
- Test my knowledge of RIM

SOFIA'S PERSPECTIVE

What resources did I use?

100% print materials



SOFIA'S PERSPECTIVE

Who did I turn to for help?

- Myself. Devised methodology for exams
 - ▣ Targeted topics, but reviewed broadly
 - ▣ Studied for comprehension for parts 1-5
 - ▣ Studied test taking strategies for part 6
 - Standardized some parts of answer for part 6
 - Prepared some information in advance



CRM PART 6 GRADING

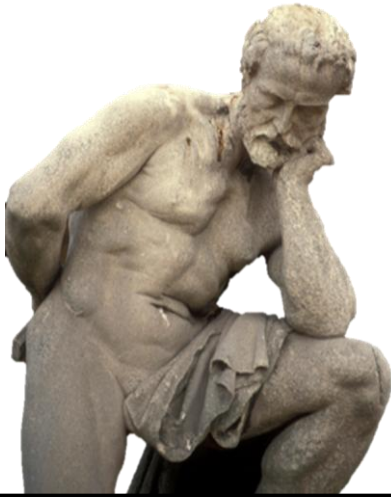
How does a grader judge your answer?

- Professionalism
 - ▣ demonstrated knowledge of RIM concepts
- Logic
- Completeness
- Condition/Neatness/Format
 - ▣ arrangement of information
- Reader's Reception to Your Answer
 - ▣ persuasion, managerial tone, reasonableness
- Other indicators
 - ▣ cost consciousness, efficiency, and resourcefulness.



CRM MENTORSHIP

What is a mentor?



- An experienced CRM who is paired with a CRM candidate to assist them with Part 6.

CRM MENTORSHIP

How do I find a mentor?



- CRM from local ARMA Chapter
- ICRM Mentorship Coordinator
 - Howard Loos, CRM, CDIA
Forensic Services
KPMG LLP, Houston
Office: (832) 335-8411
e-mail: howard.loos@gmail.com

CRM MAINTENANCE

How do I maintain my certification?

- 100 hours of educational activities within 5 year period
- CRM credits requested through CRM's database
- Most major RIM conferences have an advance determination about the number of credit hours allotted
- Must apply within 6 months of activity
- Begins January 1st or July 1st
- During last year of cycle, 50 hours which exceed the 100 can be carried over
- Annual membership fee = \$200



CRM MAINTENANCE

What are some approved educational activities?

- ARMA chapter meetings
- College or university courses
- Seminars or conferences
- Vendor courses
- Activity with educational content
- Company-sponsored educational course
- Teaching or presentations
- In-house records management training
- Management presentations



Getting Started

What can NNJ ARMA do for you?

- ICRM sanctioned workshops
- Local mentor
- Resource library
- Membership can offer practical advice
- Local study groups



GETTING STARTED

How do I contact the ICRM?



www.icrm.org

(877) 244-3128

QUESTIONS?

- ❑ lucy@libraryupdate.com
- ❑ hgozdz@rci.rutgers.edu
- ❑ sofia@recordsupdate.com

