



**CONFIRM.** NYC

The Conference on Information  
and Records Management

# ***Avoid the 'Bored' Room: Practical Strategies for Engaging Records and IG Training***

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***March 4, 2025***

# *Introduction*

- Importance of engaging training in Records & Information Governance
- Overview of two different training development experiences
  - Create new training
  - Streamlining pre-existing training
- Key areas of focus: audience segmentation, delivery methods, timing, interactivity, and scenario-based learning

# *Importance of Engaging Training*

- 🎯 Improves compliance and reduces risk
- 🎯 Enhances understanding and practical application
- 🎯 Drives adoption and organizational culture





## Creating new training

- Identifying distinct audiences and their needs (new hires, existing employees, different business areas)
- Designing custom content for different groups
- Key topics



Information Governance (IG) Training: Incoming Associates,  
Law Clerks, and Paralegals

Curriculum | ID: 0000086184

This curriculum is not in your plan.

★★★★☆ 4 (1)

REGISTER



Overview & Other Information

Paths

History

This training is for:

- Lateral Associates
- Fall Associates
- Law Clerks
- Paralegals

This IG myLearning curriculum will inform you of key functions of the Information Governance team here at Latham. It will equip you with key best practices to minimize risks for our clients, the firm, and you. The curriculum is delivered through several tip sheets and eLearning modules.

Available from: 04-MAR-2024

Show less

Paths

Training Roadmap

▼ Introduction

Required (Complete 1 of 1) ✓ 1/1

Paths

Training Roadmap

▼ Introduction

Required (Complete 1 of 1) ✓ 1/1

▼ Week One

Required (Complete 4 of 4) ✓ 4/4

▼ Week Two

Required (Complete 4 of 4) ✓ 4/4

▼ Week Three (Required)

Required (Complete 7 of 7) ○ 3/7

▼ Week Three (Optional)

Optional ✓ 1/1

▼ Week Four (Required)

Required (Complete 2 of 2) ○ 1/2

▼ Week Four (Optional)

Optional ✓ 1/1

REGISTER

Introduction

Required (Complete 1 of 1) 1/1



Introduction From Information Governance

Successful Web-Based

On 29-MAY-2024

PRINT CERTIFICATE

Week One

Required (Complete 4 of 4) 4/4



What Is Information Governance, and Why Does It Matter?

Successful Web-Based

On 08-MAR-2024

PRINT CERTIFICATE



Where to Store Information (Tipsheet)

Successful Web-Based

On 12-MAR-2024

PRINT CERTIFICATE



File Organization in Outlook and iManage (Tipsheet)

Successful Web-Based

On 11-DEC-2024

PRINT CERTIFICATE



When to Contact Information Governance (Tipsheet)

Successful Web-Based

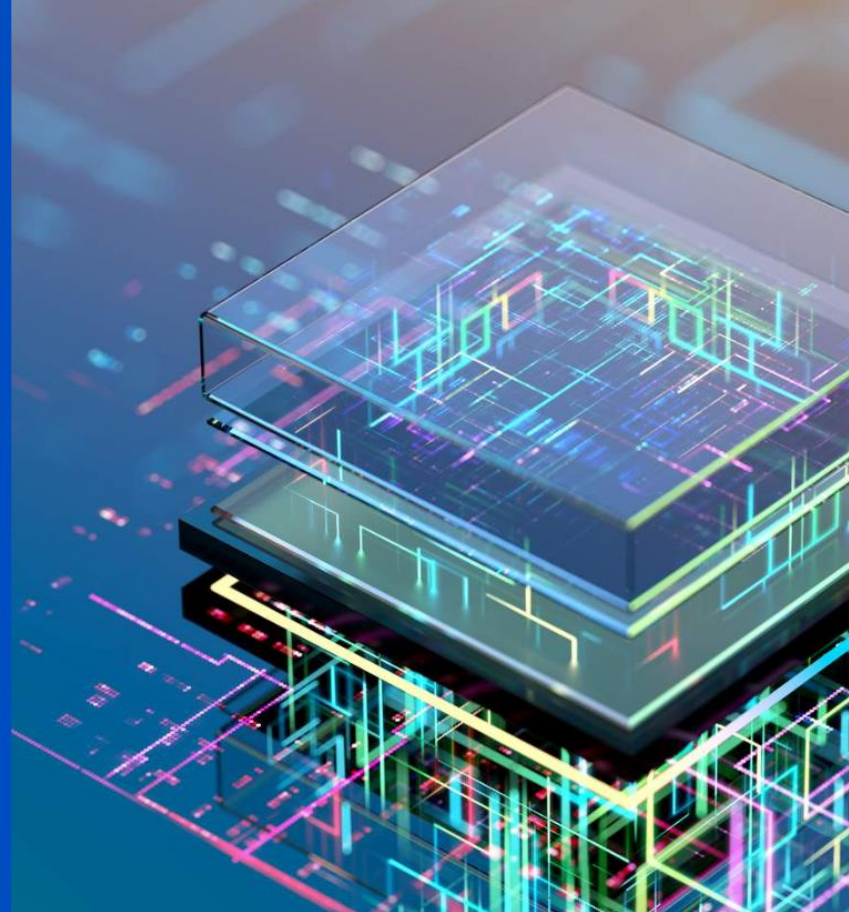
On 23-MAY-2024

PRINT CERTIFICATE

| Week Two                                                                            |                                                                                                                                             | Required (Complete 4 of 4) <input checked="" type="checkbox"/> 4/4 |                                  |
|-------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------|----------------------------------|
|    | <div>Introduction to the Client File Release Process (e-Learning Module)</div> <div>Successful Web-Based</div> <div>On 28-MAR-2024</div>    | PRINT CERTIFICATE                                                  | <input type="button" value="v"/> |
|    | <div>Introduction to the Client File Intake Process (e-Learning Module)</div> <div>Successful Web-Based</div> <div>On 11-DEC-2024</div>     | PRINT CERTIFICATE                                                  | <input type="button" value="v"/> |
|    | <div>Information Governance - File Destruction Training (e-Learning Module)</div> <div>Successful Web-Based</div> <div>On 11-DEC-2024</div> | PRINT CERTIFICATE                                                  | <input type="button" value="v"/> |
|  | <div>Information Governance - Legal Holds (e-Learning Module)</div> <div>Successful Web-Based</div> <div>On 28-MAR-2024</div>               | PRINT CERTIFICATE                                                  | <input type="button" value="v"/> |

# What Is Information Governance, and Why Does It Matter?

RESUME COURSE



# What Is Information Governance, and Why Does It Matter?

**100% COMPLETE**

## ▼ WHAT IS INFORMATION GOVERNANCE?

## Information Governance Teams and Responsibilities

Information Governance Services 

▼ QUIZ

 Knowledge Check 

☰ Thank you 

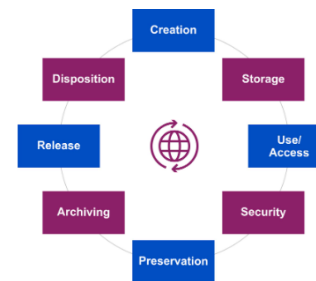
## Information Governance Teams and Responsibilities

EXIT COURSE

**Information Governance works to ensure the secure and efficient management of client and firm information.**

## The Information Lifecycle

Information Governance (IG) manages the entire lifecycle of information for the firm, from creation to disposition. The following section is a brief overview of the functions and services that the IG department provides throughout the information lifecycle.

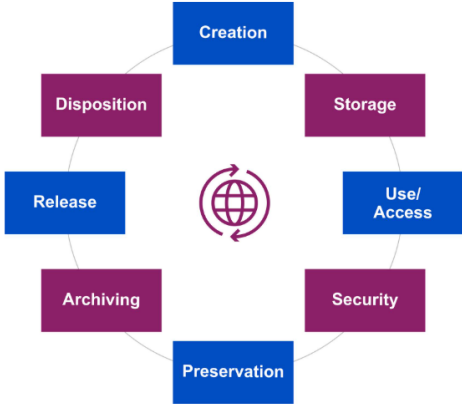




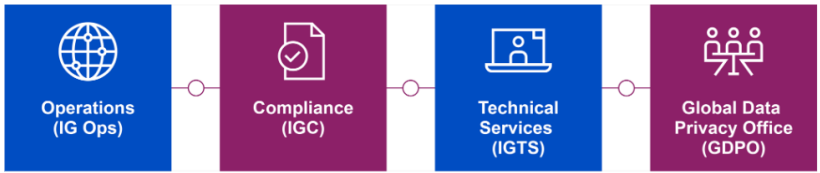
EXIT COURSE

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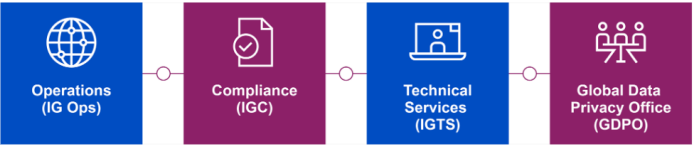
Information Governance (IG) is comprised of the following teams:





Information Governance (IG) is comprised of the following teams:

EXIT COURSE



(Click a box to learn more about each team)



**Why Does All of This Matter?**

As you can see, Latham has an entire team of people (who don't bill to the client!) to help with your IG needs.

Together we work to ensure the secure and efficient management of client and firm information and ensure we meet our ethical duty to the client to maintain a complete file. This helps protect the firm against claims of error or malpractice.

The IG myLearning curriculum will equip you with key best practices to minimize risks for our clients, the firm, and you.

1

### File Intake



File Intake occurs when files are transferred to Latham outside the normal course of ongoing representation, for example, the transfer of files with a new employee, or from former counsel.

Please always contact Information Governance for assistance with file intakes at: **#XX INFORMATION GOVERNANCE**, where **XX** represents your office code.

1

2

3

4

5

6

>

Lesson 3 - Knowledge Check

## Knowledge Check

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This quiz is designed to reinforce the key concepts and ensure you're well-equipped to handle the responsibilities that come with your role. Don't worry if you find some questions challenging; this is an opportunity to solidify your understanding and identify areas where you might need a bit more review. Let's get started!

[TAKE AGAIN >](#)

*Question*

**01/04**

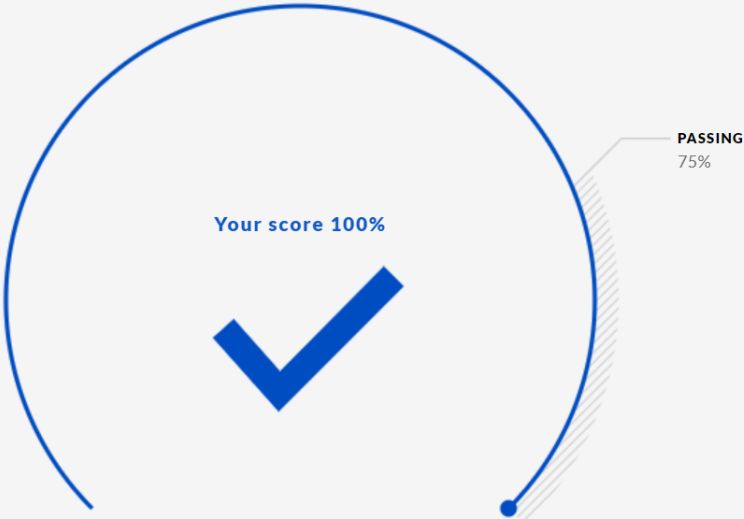
Which department at the firm is responsible for providing guidance on file management?

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- ☐ Records Management
- ☐ Information Governance (IG)
- ☐ Technology

SUBMIT

# Quiz Results



What Is Information Governance, and Why Does It Matter?

100% COMPLETE

▼ WHAT IS INFORMATION GOVERNANCE?

Information Governance Teams and Responsibilities

Information Governance Services Overview

▼ QUIZ

Knowledge Check

Thank you

Thank you

EXIT COURSE

Thank you for completing this introduction to Information Governance training!

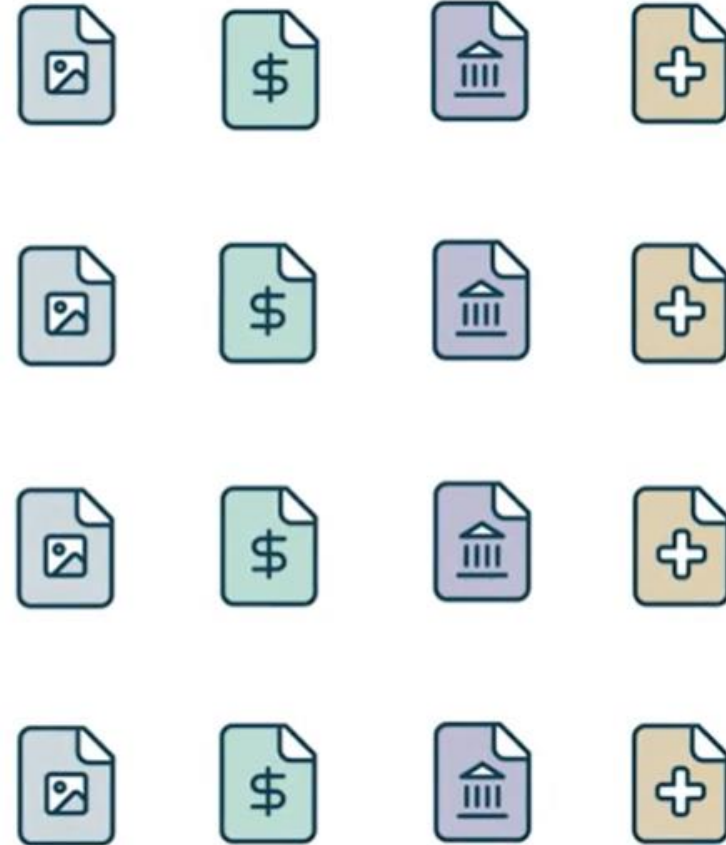
March 4, 2025



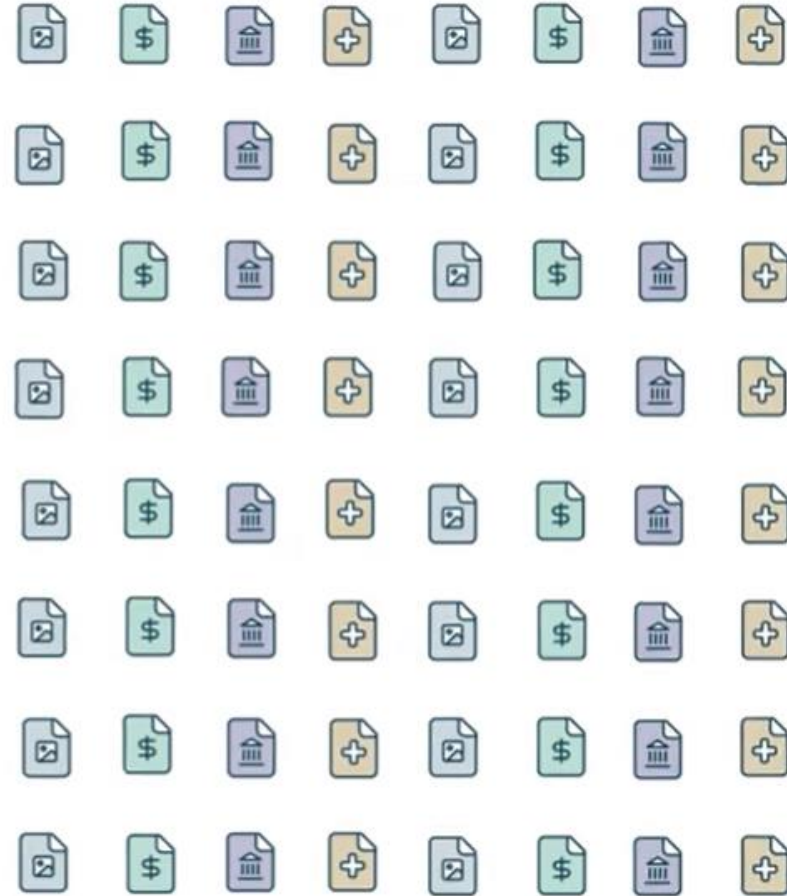
## Streamlining pre-existing training

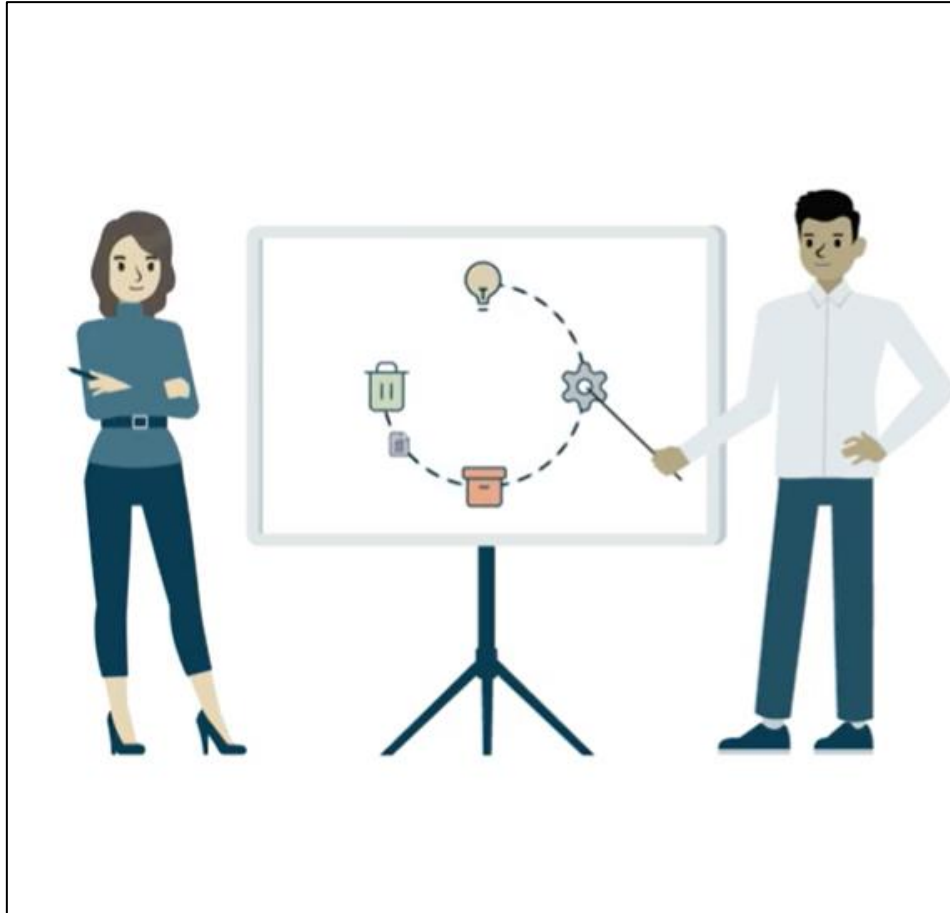
- The process of revamping the existing training module
- Moving from text-heavy content to interactive, scenario-based learning with accompanying intro video
- Stakeholder collaboration and iterative feedback integration
- Key topics that are covered

In our personal lives,  
we manage photos,  
financial information,  
tax documentation,  
and healthcare records.  
We organize them by  
date or category for  
quick access.



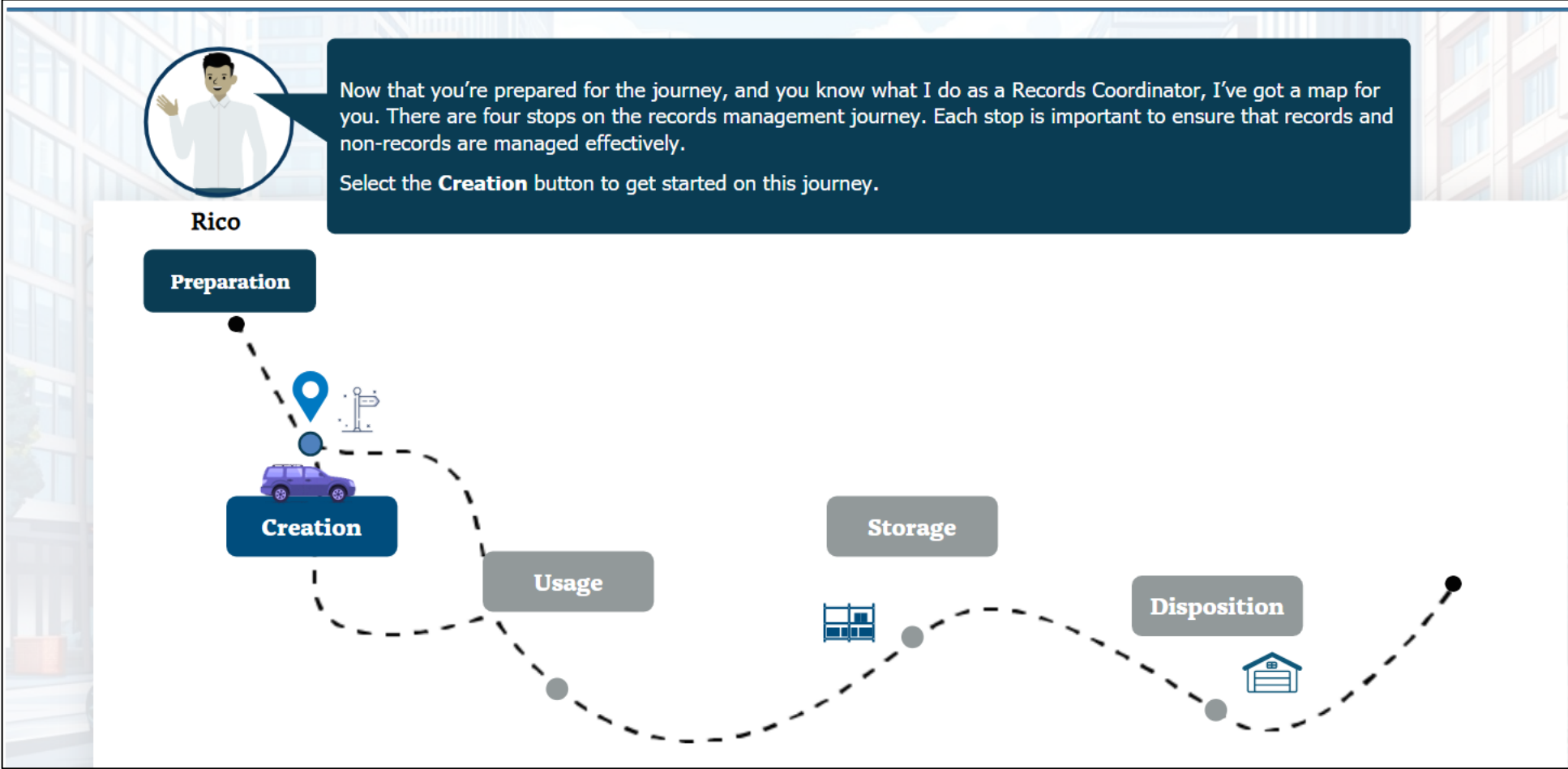
Corporate records management is like managing your personal documents but on a larger scale, with regulations and security measures.





I'm Rico, a Records Coordinator, and I'm going to be working with Marta and her team to help them understand more about records management.

Come along with me and enjoy the trip!



# Challenges

- Breaking down dense content into digestible parts
- Managing stakeholder feedback and balancing priorities
- Working with vendors for technical implementation



# *Methods of Delivery and Timing*



- On-line Resources
  - Available anytime
  - Accessible from anywhere
  - FAQs
- In-person Resources
  - Face-to-face interaction
  - Personalized assistance

# *Lessons Learned & Best Practices*



- **Engaging and Relevant Content**
  - Keep content engaging, concise, and relevant to the audience
- **Diverse Learning Methods**
  - Use a mix of learning methods to cater to different preferences
- **Stakeholder Involvement**
  - Involve stakeholders early and often for smoother implementation
- **Continuous Improvement**
  - Continuously iterate and improve training based on feedback and effectiveness assessments

