



Lead Document Control and Management (ILM Recognized Programme)

Overview

This course is designed to cover advanced strategies, tools, and technologies used to capture, categorize, manage, store, archive, and deliver vital business records in support of business processes. The training will empower participants to setup and maintain a state-of-the-art Document Control Centre (DCC), operate modern document storage, retrieval and archiving systems, establish an Electronic Document Management System (EDMS) with company specific procedure, effectively control and manage company documents and records.

The course concentrates on the tools, the methods and the approach to efficiently manage Document Controllers.

Learning Outcome

Participants will learn

- The fundamentals of lead document control & management system
- The procedures and operations involved in implanting or revamping electronic document control
- Global standards in electronic document control.
- To organize DC activities and tasks,
- To calculate and distribute workload using a structured plan
- To manage stakeholders and interfaces
- To manage a team of document controllers.

Course Content

Day 1:

Module 1 - Introduction to Document Control

- Overview of Document Control and Management
- Basics of Document Control
- Definitions
- Importance of Document Control in Business Operations
- Regulatory Compliance and Industry Standards

Module 2: The Lead Document Controller

- Roles and Functions
- Planning and Organizing Document Control Tasks
- Methodology for Planning and Organizing Task
- Planning and Task Allocation
- Task Tracking Progress Monitoring

Module 3: Managing the Document Control Team

- Team Leading
- Motivation
- Objectives
- Performance Management
- Workload Management

Module 4: Stakeholders Management

- Stakeholders Management
- Gatekeeping
- Communication

Module 5- Document Types and Categorization

- Identifying Document Types and Formats
- Document Categorization and Hierarchy
- Creating and Maintaining a Document Register
- Document Naming Conventions

Module 6 - Document Control Procedures

- Document Control Processes and Workflows
- Document Creation, Review, and Approval
- Change Management and Version Control
- Document Release and Distribution

Day 2

Module 6 Implementation of Document Control Rules

- Documenting the Document Control System
- Flowcharts
- Policies
- Internal Procedures & Guidelines
- Document Templates

Module 7: Post-implementation & System Performance Management

- Documentation Audit
- System Performance Metrics
- Stakeholders Management
- Team Performance (Training and Development)
- Team member roles
- How to build a productive team
- Characteristics of high performing work teams
- Stages of team development
- Ingredients for a successful team
- The synergy between the Document Control Team and Leadership
- Building Distribution Metrics

Module 8 - Document Access and Security

- Managing Document Access Permissions
- Controlling Confidential and Sensitive Documents
- Protecting Intellectual Property
- Information Security Best Practices

Module 9 - Document Revisions and Archiving

- Managing Document Revisions and Change History
- Controlling Obsolete Documents
- Document Archiving and Retrieval
- Document Retention Policies

Module 10- Electronic Document Management Systems (EDMS)

- Introduction to EDMS and its Features
- Implementing EDMS in Document Control

- Advantages of Using EDMS for Document Management
- EDMS Training and User Adoption

Day 3

Module 11 - Quality Assurance and Audit Readiness

- Preparing for Document Control Audits and Inspections
- Maintaining Audit Trails and Documentation
- Corrective and Preventive Actions (CAPAs)
- Continuous Improvement in Document Control

Module 12 - Document Control Metrics and Performance

- Measuring Document Control Effectiveness
- Key Performance Indicators (KPIs) for Document Control
- Metrics for Compliance and Efficiency
- Reporting and Analysis of Document Control Data

Module 13 - Risk Management in Document Control

- Identifying Document Control Risks
- Mitigation Strategies and Risk Assessment
- Business Continuity Planning
- Ensuring Document Control Resilience

Module 14 - Summary and Action Planning

- Recap of Key Concepts and Takeaways
- Action Planning for Implementing Document Control Best Practices
- Q&A Session and Participant Feedback

Target Audience

- Document Controller /Coordinators
- Data Manager
- Team Leaders or Managers of Document Controllers
- Existing/ aspiring leaders of Document Control teams,
- Managers of Document Controllers (New and Experienced)
- ICT Managers & Officers
- Administrative Officers & Managers

Course summary

This course is both for:

- **Experienced** Document Controllers: Most Document Controllers learnt the discipline 'on-the-job'. This course consolidates basics, formalizes knowledge and deepens competences. It allows experienced Document Controllers to compare their experience with common / best practices and to get recognized through the certification examination.
- **And for Document controllers who have taken the DCM training previously.** It's a great opportunity to network and share experience with other Document Control professionals.

At the end of this course, professionals can get certified by taking our internationally recognized **certification examination (Institute of Leadership and Management, UK)**.