



DRAFTING EFFECTIVE IM and PRIVACY POLICIES

LIVE ONLINE WORKSHOP

Tuesday, May 24 through
Thursday, May 26, 2022

10:30PM–12.30PM EDT

12:00pm - 2:00pm NDT

7:30am - 9:30am PDT



LEWIS EISEN
LEWISEISEN.COM

THE WORKSHOP //

“In only a few hours, I learned more practical and useful information in Lewis’s workshop than I did in a two-day policy writing course I had taken elsewhere.”

*M. R., Information Management Specialist
Global Affairs Canada*

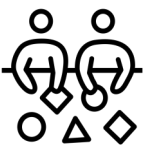
Do your organization’s Information Management policies still use the same structure and tone that they did 20 years ago?



A lot has changed in 20 years. Workplace culture and employee expectations are very different today. The tone of your rules documents needs to keep pace.

Older phrases like “You must do this” and “is not tolerated” are antiquated in today’s workplace. They are remnants of an earlier time and do not invite engagement or

You will have the opportunity to explore a variety of



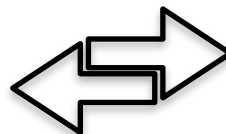
The Interplay between Policy and Corporate Culture

What policy wording reveals about your organization



The Connection between Policies and Values

How tying policies to corporate values can increase compliance



Ways to Overcome the Parent-Child Dynamic

Making rules sound helpful rather than confrontational



Where to Look for Unintentional Negative Messaging

Removing disrespectful words

THE CONTENT //

“I’m a lawyer of 37 years experience, so I know a thing or two about legal drafting, but Lewis has such a simple, consistent doctrine... that I have been re-educated.”

Norman Bowley J.D. LLM., Coach and Author
purposeful.ca



This workshop is for records / IM / IT professionals who write policies, directives, and standards for their organizations.

- ➔ privacy
- ➔ information classification
- ➔ acceptable use guidelines
- ➔ storage
- ➔ information security
- ➔ metadata standards
- ➔ disposition procedures
- ➔ retention schedules
- ➔ related documentation

You will be shown techniques for improving your

Policy Strategy

- ➔ *adjusting for what’s changed in the past two decades*
- ➔ *moving away from the binder-based model*

Policy Framework

- ➔ *positioning policies within a larger framework*
- ➔ *global components: master policies and lexicons*

Policy Wording

- ➔ *purging the musts — writing strict rules without a Parent–Child dynamic*
- ➔ *avoiding micro-management*

You will leave with

- ➔ a copy of the international best-selling book *How to Write Rules That People Want to Follow: A guide to drafting respectful policies and directives*
- ➔ a roadmap of foundational activities
- ➔ a Policy Suite Health Diagnostic Checklist
- ➔ a values–policies—guidance infographic
- ➔ dozens of suggestions for improvement to your current documentation

EARLY BIRD

STANDARD

Register by
April 29, 2022

Register by
May 23, 2022

ARMA Member

\$350*

\$400*

Non-member

\$400*

\$450*

*All amounts are in US dollars

*10% discount for 2 or more registrants from the same organization

I’d like to register





ABOUT THE INSTRUCTOR //

“Highly recommend Lewis’s workshop — He’s a guru!”

*S.S., Information Management Specialist
Keyera Energy Corporation*

Lewis S Eisen JD CIP CVP is the author of the Amazon international best-seller *How to Write Rules That People Want to Follow: A guide to drafting respectful policies and directives*, and recently won the 2020 ARMA International Britt Literary Award.

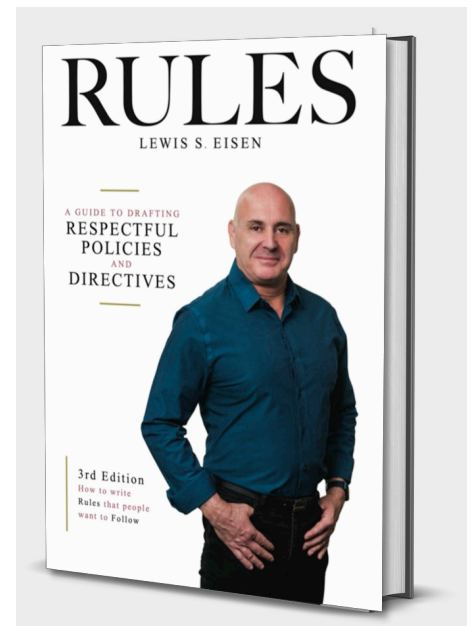
Lewis combines his experience practising law with 20 years of business consulting in the private sector and 17 years working in the federal government. Today he shows organizations how to draft policies, directives, and guidelines to be clear, concise, and respectful.

“The first policy we wrote using the concepts we learned in Lewis’s workshop sped through the approval process in one-quarter the length of time it normally takes.”

**Diane Spencer, Manager
Social Sciences and Humanities Research Council of Canada**

“We are impressed with Lewis’s approach and style.”

**Scott Schmuhl, Director of Information Security
Merrick Bank, Utah**



FOR MORE INFORMATION
lewiseisen.com

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[LINKEDIN.COM/IN/LEWISEISEN](https://www.linkedin.com/in/lewiseisen)



I’d like to register >