

AI Education for RIM Professionals: What's here, what's next

Exploring AI's impact and skills for RIM success

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ARMA Madison Wisconsin Chapter | March 26, 2026

Agenda Highlights

- ▶ AI Fundamentals
- ▶ The Impact of AI on RIM
- ▶ Standards and Governance for AI in RIM
- ▶ Upskilling and Competencies
- ▶ AI Learning Landscape

What is Artificial Intelligence?

- **Artificial Intelligence (AI)**
The simulation of human intelligence processes by machines, especially computer systems.
- **Machine Learning (ML)**
A subset of AI that enables systems to learn and improve from experience without being explicitly programmed.
- **Natural Language Processing (NLP)**
AI technology that allows computers to understand, interpret, and generate human language.
- **Generative AI**
AI systems that can create new content, such as text, images, or audio, based on patterns learned from data.
- **Agentic AI**
AI systems designed to act autonomously toward goals, making decisions and taking actions with minimal human intervention.

What AI Does NOT Do

AI does not:

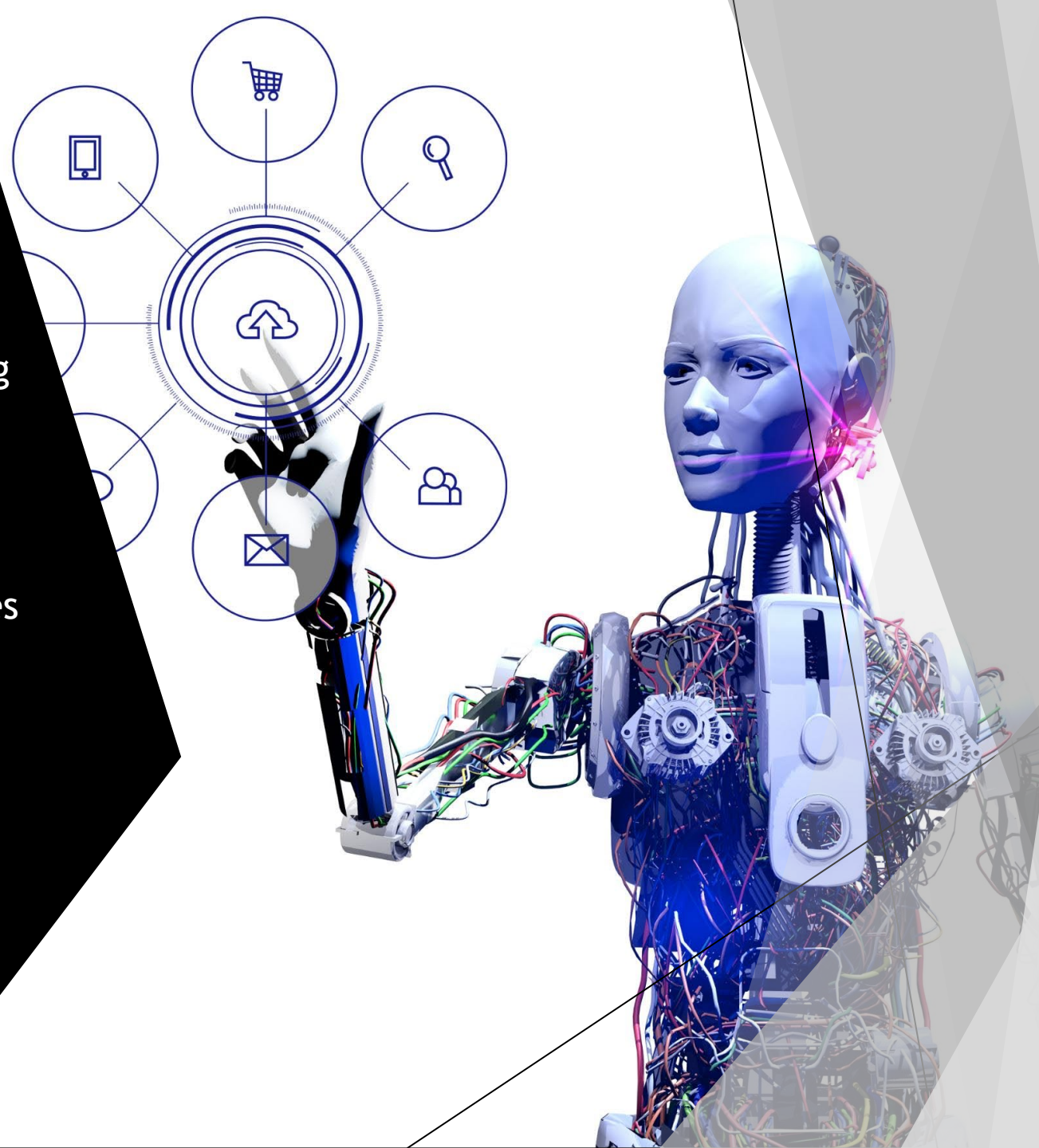
- Replace human judgment in complex or ethical decisions—even agentic AI requires oversight.
- Guarantee accuracy—results depend on data quality and context.
- Understand context or intent beyond its programming and training data.
- Ensure compliance or governance automatically—human review is essential.
- Eliminate the need for RIM professionals—AI, including agentic systems, supports but does not substitute expert knowledge.



The Impact of AI on RIM

How AI is Transforming RIM

- **Transformation by AI**
AI is revolutionizing how organizations handle records and information, improving efficiency and accuracy.
- **Adapting to New Technologies**
RIM professionals must embrace new AI-driven tools and incorporate new processes to stay effective.
- **Importance of Education**
Continuous learning ensures RIM professionals stay competitive and effectively leverage AI in the digital era.



Revolutionizing RIM: Key AI Capabilities

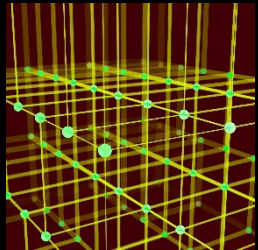
AI CAPABILITY	DESCRIPTION	BENEFITS
Automated Data Classification	Uses AI algorithms to categorize records based on content and metadata.	Reduces manual effort, improves accuracy, accelerates workflows.
Enhanced Search & Retrieval	Employs natural language processing for precise and fast record searches.	Optimizes access to information, supports timely decisions.
Improved Compliance Monitoring	Detects risks and anomalies to ensure regulatory adherence.	Strengthens governance, reduces compliance-related risks.
Dynamic Retention Scheduling	Analyzes document usage patterns and regulatory changes to recommend or automate updates to retention schedules.	Minimizes manual oversight by identifying records at risk, cutting compliance risks and storage costs.
Metadata Extraction & Enrichment	Extracts and enriches metadata from unstructured documents.	Automates tagging and classification for consistent, accurate metadata across the organization.

The Next Wave in RIM



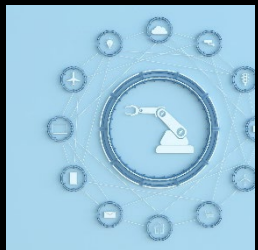
AI-Powered Analytics

AI-driven analytics improve insights and decision-making in records management systems.



Blockchain Integration

Blockchain technology secures records through decentralized and tamper-proof data verification.



Enhanced Automation

Automation streamlines workflows and reduces manual tasks in records management.

Key Challenges for RIM Professionals

➤ Data Quality & Sensitive Information

- Ensuring high-quality, well-classified data is essential for reliable AI outcomes.
- Careful management of sensitive information is needed to prevent exposure and misuse.

➤ Security & Privacy Risks

- Data breaches pose significant risks to privacy and organizational reputation.
- Robust security measures are critical to safeguard AI systems from unauthorized access.

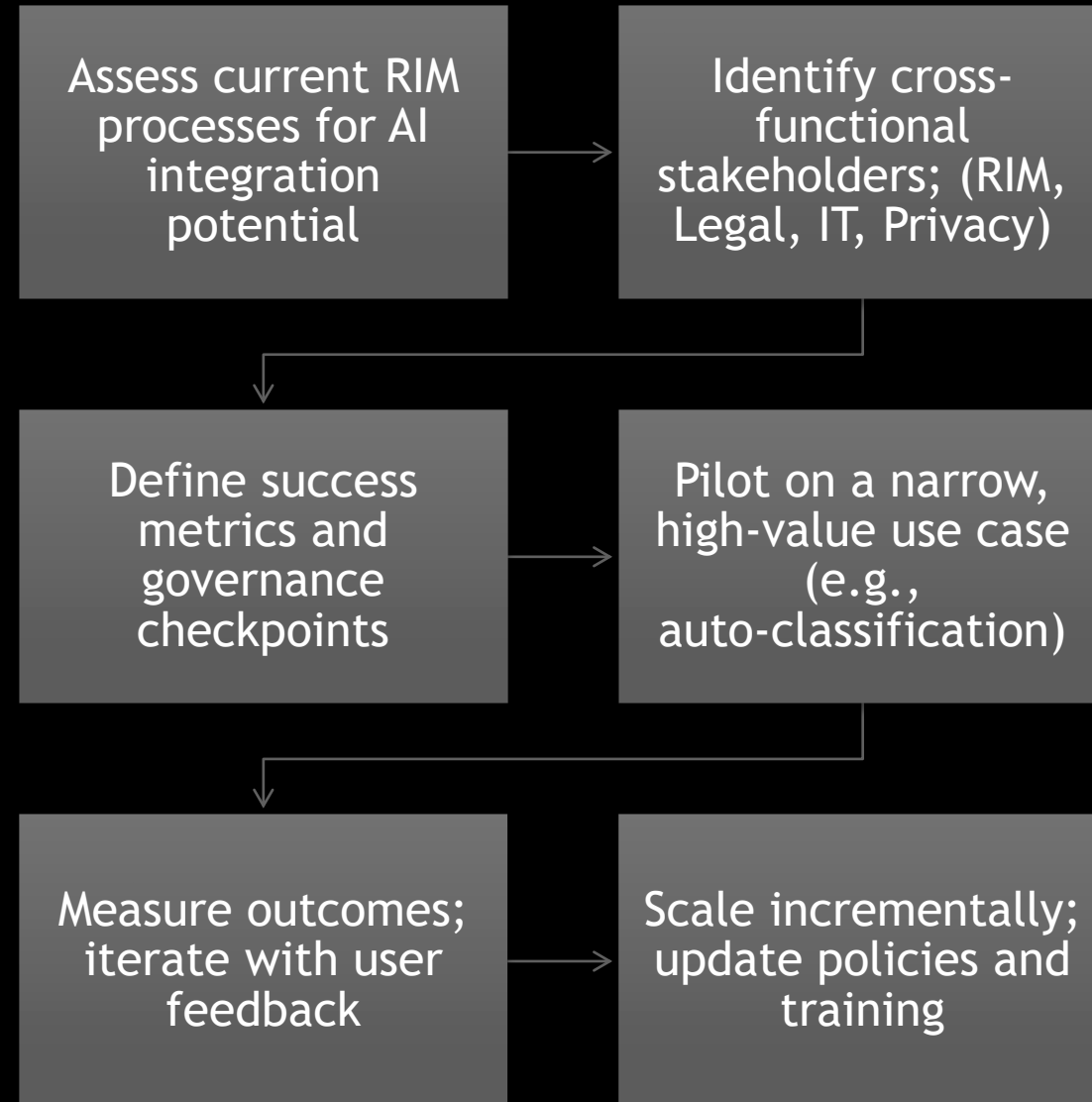
➤ Ethics & Adaption

- Addressing ethical concerns in AI use is essential for responsible records and information management.
- RIM professionals must continuously adapt to evolving AI technologies to remain effective.

Key Opportunities for RIM Professionals

- **Leadership in Governance**
RIM professionals can guide policy updates and champion responsible AI practices.
- **Strategic Innovation**
Lead the integration of new technologies to improve compliance, efficiency, and value.
- **Skill Development**
Upskill in AI, data stewardship, and security to become trusted advisors in the evolving landscape.

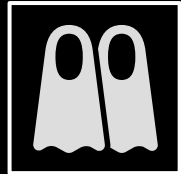
Roadmap for Adopting AI in RIM



Avoiding Common Pitfalls in AI Implementation



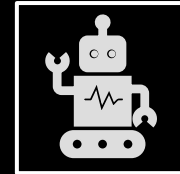
Undefined objectives → set measurable outcomes



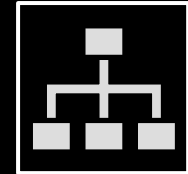
“Flip the switch” mindset → phase by phase rollout



Skill gaps → invest in role-based training and coaching

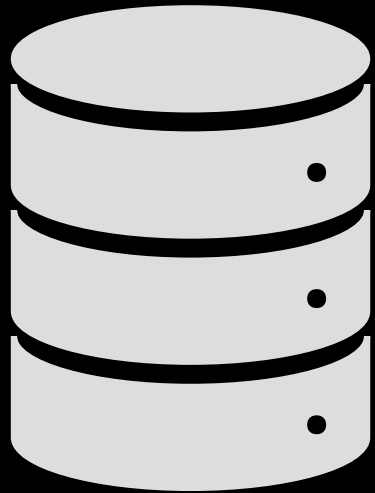


Over-automation → keep human oversight for high-risk items




Compliance drift → align to ISO, NIST, and internal policies

Ensuring Data Quality for AI Success



- **Metadata Standardization**
Ensure all records use consistent naming conventions and required fields to support accurate classification and retrieval.
- **Automated Duplicate & Anomaly Detection**
Leverage technology to quickly identify and flag duplicate records or unusual data patterns, reducing manual review.
- **Data Stewardship & Review Cadence**
Assign clear ownership for data quality and schedule regular reviews to maintain integrity across collections.
- **Validation at Capture/Ingest**
Implement checks at the point of entry to catch errors early and guarantee data completeness from the start.
- **Evolving Data Standards Management**
Continuously update data requirements and retire outdated fields to keep pace with organizational and technological change.



Standards and Governance for AI in RIM

Global Frameworks and Best Practices

- **International Standards Shaping AI and RIM**
Covers ISO, NIST, and other global frameworks influencing records and information management.
- **Cross-Border Compliance and Global Harmonization**
Focuses on the challenges and strategies for meeting international requirements and harmonizing practices across jurisdictions.
- **AI-Specific Guidelines: Transparency, Explainability, Auditability**
Addresses new standards and best practices for ethical and accountable AI use in RIM.
- **Collaboration with Associations and Standards Organizations**
Highlights the importance of engaging with ARMA, ISO, IAPP, and similar bodies to stay current and help shape industry best practices.

AI Standards & Frameworks

Name	Provider	Source
ISO/IEC 22989:2022 - Artificial Intelligence Concepts and Terminology	ISO	iso.org/standard/74296.html
ISO/IEC 23894:2023 - Artificial Intelligence Guidance on Risk Management	ISO	iso.org/standard/77304.html
ISO/IEC 42001:2023 - Artificial Intelligence Management System Standard (AIMS)	ISO	iso.org/standard/42001.html
ISO/IEC TR 24028:2020 - Trustworthiness in Artificial Intelligence	ISO	iso.org/standard/77608.html
NIST AI Risk Management Framework (AI RMF)	NIST	nist.gov/itl/ai-risk-management-framework
IEEE 7000 Series - Standards for Ethical AI	IEEE	standards.ieee.org
OECD AI Principles	OECD	https://oecd.ai/en/ai-principles
EU AI Act	EU	artificialintelligenceact.eu

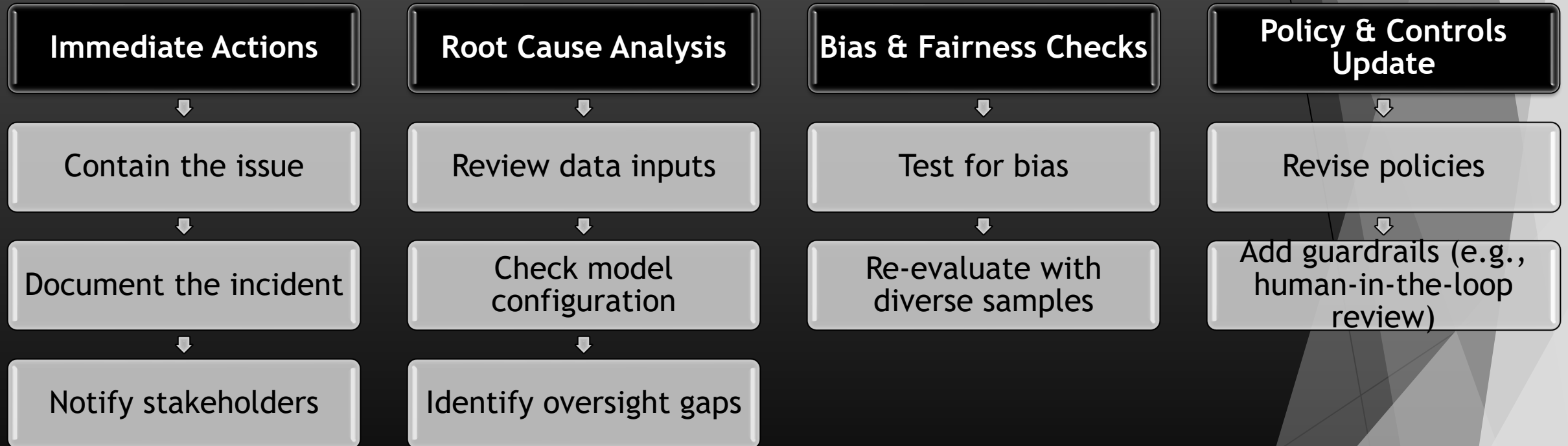


Practical Steps for RIM Professionals

- **Documenting AI Decisions**
Maintain audit trails and records of AI-driven processes
- **Continuous Benchmarking**
Regularly update certifications and participate in professional assessments
- **Monitoring Regulatory Changes**
Use automated tools and networks to track updates to standards
- **Engaging with Professional Communities**
Join working groups, attend webinars, and contribute to shaping best practices
- **Aligning Organizational Policies**
Ensure internal policies reflect evolving external standards

AI Governance in Action

Scenario: Sensitive records misclassified → potential exposure





Upskilling & Competencies

Why Upskilling Matters—Learning, Ethics, and Change Leadership

- **Stay Current with AI Advancements**
Pursue ongoing education to keep up new AI tools, technologies, and best practices.
- **Champion Ethical AI**
Address ethical issues, monitor for bias and ensure transparency and compliance.
- **Lead and Manage Change**
Actively guide organizational change and train others as AI adoption grows.

AI Readiness: How to Upskill

- **Assess Your Current Skills**

Identify your strengths and gaps in AI knowledge and RIM competencies.

- **Choose Relevant Learning Opportunities**

Select courses, certifications, and workshops that align with your professional goals.

- **Create a Learning Plan**

Set clear objectives, timelines, and milestones for your AI education journey.

- **Develop Technical Proficiency**

Build data literacy, understand how AI systems work, and apply ethical standards in information management.

- **Align Policies and Foster Culture**

Ensure organizational policies support AI processes, foster an open culture, and support staff training.

- **Champion Change Leadership**

Guide organizational change and advocate for responsible AI use.

Essential AI Competencies

- **AI Model Understanding**
Have knowledge of AI models to oversee AI-augmented workflows effectively and responsibly.
- **Data Analytics and Machine Learning**
Develop skills in data analytics and machine learning fundamentals to leverage AI effectively.
- **Algorithmic Governance**
Understand algorithmic governance to ensure ethical and compliant AI implementations.
- **AI-Driven Compliance Solutions**
Be familiar with AI-driven compliance tools and how they support regulatory and legal adherence.

AI-Enabled RIM Competency Matrix

COMPETENCY AREA	FOUNDATIONAL	PROFICIENT	LEADERSHIP
AI Concepts & Literacy	Understand basic AI terms and use cases	Interpret model outputs; spot anomalies	Explain AI decisions to stakeholders; guide audits
Data Stewardship	Know metadata basics and retention rules	Apply classification and validate sensitive data	Design governed automation workflows
Bias & Ethics	Recognize bias risks in automation	Apply fairness checks and privacy-by-design	Champion ethical AI policy across the org
Governance & Controls	Follow documented workflows	Implement dual-control and evidence logging	Define governance frameworks and escalation paths

AI Skills & Readiness: Personal Self-Assessment & Recommendations

Assessment Question

Recommendation

Do I understand basic AI concepts (ML, NLP, generative AI)?

Take a foundational AI course or webinar

Can I identify where AI could improve RIM processes in my role?

Map your workflows and flag repetitive/manual tasks

Am I comfortable interpreting AI-generated reports or outputs?

Review sample outputs with a mentor or peer

Do I know how to spot potential bias or errors in AI results?

Learn about AI bias; use checklists for output review

Have I completed at least one AI-related training, course, or certification?

Register for a relevant online course or workshop

AI Skills & Readiness: Organization Self-Assessment & Recommendations

Assessment Question

Recommendation

Does our organization have a documented AI strategy or roadmap for RIM?

Advocate for an AI strategy session with leadership

Are there clear policies for AI use, including ethical guidelines?

Review and update policies with compliance/legal teams

Are data governance roles and responsibilities defined for AI projects?

Assign data stewards for each major AI initiative

Do staff receive regular training on AI and data literacy?

Schedule quarterly training or lunch-and-learns

Do we review and update AI tools/processes at least annually?

Set a recurring calendar reminder for annual reviews

Is there a process for reporting and remediating AI-related issues?

Create a simple reporting workflow and escalation path

Reflection: AI Opportunities in Your Organization



One RIM process to target with AI (write it down).



One skill to upskill (data literacy, model oversight, governance).



One risk you'll monitor (privacy, bias, explainability).



Record these as your action items for the next quarter.



AI Learning Landscape

Learning Options: Certifications, Workshops, University Programs

- **Industry Certifications**
Provide foundational and advanced AI knowledge recognized across the RIM industry.
- **Hands-On Workshops**
Offer practical experience with AI tools and applications used in Records and Information Management.
- **Specialized Academic Programs**
Universities offer degrees focusing on information governance, compliance, and artificial intelligence integration.

AI Certification Opportunities

Name	Provider	Format	Source
AIGP (AI Governance Professional)	IAPP (Source: iaap.org)	Exam-based	iaap.org
AAIR™ (Advanced in AI Risk)	ISACA (Source: isaca.org)	Credential	isaca.org
NIST AI RMF Certification	CertifiedInfoSec	Training & Certification	certifiedinfosec.com
CAIM™ (Certified AI Manager)	Knowledge Management Institute	4-day virtual	kminstitute.org
CIGO/AI™	Certified Information Governance Officers Association	Live/on-demand + exam	cigoa.org
CAIP (Certified Artificial Intelligence Professional)	Professional Evaluation and Certification Board (PECB)	Online	pecb.com
Artificial Intelligence Management Professional (AIMP) Certification	Institute of Artificial Intelligence Management	Online	iaim.ai/courses/artificial-intelligence-management-professional-aimp-certification/

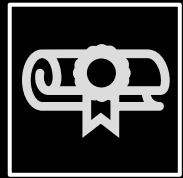
AI Training and Workshop Options

Name	Provider	Format	Source
AI Fundamentals	ISACA	On-demand	isaca.org
AI Fundamentals and Applications	Upskill Development	Online	upskilldevelopment.com
AIIM AI Certificate of Specialization	AIIM	On-demand	aiim.org
AIIM AI Courses (AI Readiness, Generative AI, AI 101)	AIIM	On-demand	aiim.org
Artificial Intelligence and How it Applies to Records Management	Collabware	Online	university.collabware.com/courses
Artificial Intelligence in Business Environment; Artificial Intelligence for Professionals	Blackbird	Online	blackbird-training.com

AI Training and Workshop Options continued

Name	Provider	Format	Source
Artificial Intelligence: Getting Started Quickly but Safely	Leadership Through Data	Online	Leadershipthroughdata.com
Human-Centered Artificial Intelligence Certificate	San Jose State University	Online/Hybrid	sjsu.edu
Practical AI for Business Users	Northern Virginia Community College (NOVA)	Online	nvcc.edu
Strategic AI Program	University of Colorado, Colorado Springs (UCCS)	Online/Hybrid	https://zs.uccs.edu/strategic-artificial-intelligence.html
The Role of RIM in AI Governance	CIGOA	Online	cigoa.org
Virtual Workshop: AI in Action: Modernizing Data & Information Governance	Digital Government Institute	Online	digitalgovernment.com

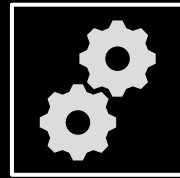
Continuing Your AI Education



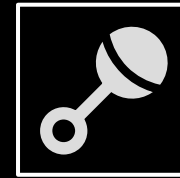
Identify one professional credential or course to pursue in the next quarter.



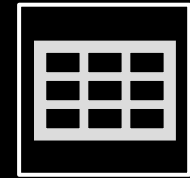
Join a working group or professional community to exchange best practices.



Schedule quarterly reviews of AI outputs and exceptions in your workflow.



Use resources from ARMA, AIIM, ISACA, NIST to stay current.



Build and track your personal learning plan (spreadsheet, OneNote, etc.).

Tip: Treat your AI education as an ongoing project—set milestones and review progress regularly.

Lead the Way in AI-Driven RIM



Champion

Champion ethical AI use.



Foster

Foster continuous learning.



Apply

Apply critical thinking.



Share

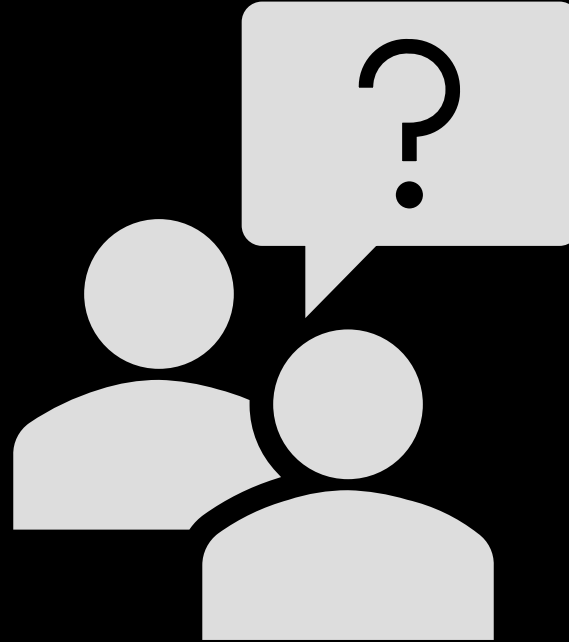
Share knowledge and best practices.



Lead

Lead with purpose.

Questions



Thank you for your engagement!